



Digital transformation

A guide to accelerating efficiencies, productivity and profitability within your law firm.

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Future-proof

In today's rapidly changing digital trends and technologies, law firms must stay on top of digital transformation to remain competitive.

While technology has been a positive force for the legal industry, law firms must continue to develop strategies to empower their business operations.

Advances in technology have enabled prospective clients to access increasingly large online resources – meaning legal professionals must rethink how they provide their services if they wish to be successful now and in the future.

- What does digital transformation mean in reality?
- How do you know if it's right for you?
- What do you need to consider to manage such projects?
- And how do you understand the likely return on investment?

This guide aims to provide clarity on these questions and act as a catalyst to help navigate digital transformation.



As client expectations evolve across all areas of professional services, it is essential that we remain relevant, agile and responsive. Customers are no longer content to commute across cities to keep appointments, they want to engage with their professional services provider digitally, sign documents remotely and get updates on the progress of their case at a time that suits them.

At Access Legal, we create the tools you need to track and manage flexible, reliable services for your customers, offering the right information at the right time, delivering results and creating loyalty.

Digital transformation is the key to meeting these evolving needs as clients seek out legal firms that offer a 21st Century service.

Marcus Dacombe
Head of Product Marketing
Access Legal



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Digital Transformation has been a process that has really accelerated for us over the last five years.

Since moving to DPS OneOffice in 2017 and then on to a Cloud hosted solution (Access Legal Case Management) in 2020.

Digital transformation has taken us from barely using a case management system to using it for every aspect of our work creating and storing almost 100% of our case files, running the entirety of our accounts functions through the accounts package and making use of lots of automations and enhancements to help the working lives of our employees and managers.

We have also started using additional elements such as digital dictation, payment gateways and biometric ID systems for AML checking.

Timothy Eagle
Finance Manager, Josiah Hinks Solicitor



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What does digital transformation really mean for the legal sector?

At the core, digital transformation is a strategic process that involves people, processes and technology to create a more efficient and productive firm. In particular, it can support you with the challenges you face from an agile working perspective, cyber security, client communication and employee retention.

From reputation management and employee and client onboarding to the financial health of the firm and general operational processes, digital transformation can help you and the team to do more of what matters – both day-to-day and at a strategic level.

As a result, this can significantly improve the quality of service delivery and create a more organised and efficient working environment to help your organisation fulfil its purpose.

We have set out a few of the wide-ranging benefits it can bring.



Digital transformation isn't about ripping up the rule book and starting again on your technology strategy.

Instead, it's about identifying the goals you are trying to achieve and exploring how technology can move the needle towards a successful outcome for those goals.

This can come in the form of new technology, or improved processes around use of existing solutions. The biggest impact technology can have in improving outcomes for your business, employees and clients will come from a combination of the technology you've selected and the adoption and application of that in your processes.

Solutions like Access Legal Case Management can be transformational for firms who are looking to automate repeatable processes to take the admin burden away from users, and provide a secure solution that allows employees to be effective in an increasingly hybrid working world.

Lauren Collbeck
Head of Product
Access Legal



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Eradicate the processes holding your firm back

Tired, ineffective – and often manual – processes impact everyone in the firm. This was a problem that **Stewart Matthews, Managing Partner of Neves Solicitors**, recognised. He identified that many of the team automatically printed large volumes of case notes and then posted these to clients. However, with the implementation of Access Legal Case Management they've seen a massive reduction in printing and posting costs and are now adopting a more paper-lite and digital-focused approach. In addition Neves Solicitors are working directly with developers at Access Legal to improve other processes within the firm.

A digital transformation project can provide the tools to help your fee earners carry out their roles more effectively and with greater productivity and overall satisfaction.

Neves
SOLICITORS
At your side



Action point

What processes impact how effectively your team can carry out their work?

You may be aware of many of them, but it's worth asking everyone within the firm who should include those non-fee earners.

Note down every process you can think of – there's usually a way that they can be automated or streamlined with software and technology. In some cases, you might be able to eliminate it.



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Rid the firm of end-of-life or out-of-date systems

Many firms are moving to cloud-based solutions. Whilst there are wide-ranging reasons behind this shift, ultimately digital transformation can help future-proof software investments and provide a competitive advantage.

Here's why:

- There's no need to invest in additional hardware, such as server rooms or connectivity within your office. The software itself and the servers on which it runs is all taken care of by the solution provider.
- They can protect against cybersecurity attacks and data breaches. Having the tools to support your GDPR processes, for example, help to avoid costly fines and a significant dent in your firm's reputation.
- Having a robust disaster recovery provides peace of mind. Law firms can ill-afford to lose access to their data for any length of time. A reputable cloud provider can ensure you're covered with robust disaster recovery procedures.
- Running newer tried-and-tested functionality usually leads to improved processes, more efficiency and less time wasted. That's more time to spend on client matters, increasing delivery time and, in turn, billing rates.
- The ability to scale the firm faster supports the objective of growing and possibly increasing areas of law served and attracting and retaining clients. A growing thriving firm with a future-proof tech stack is also attractive to attract and retain employees.

Read the **"Reasons to move"** blog



Action point

- List all the technology and software within your firm. How often is it updated?
- How secure is it? Is it GDPR compliant?
- What tangible impact is it having on service delivery?
- How are your systems (or lack of them) impeding long-term growth?

This will help you to prioritise and address the potential impact they're having on your firm now and in the future.



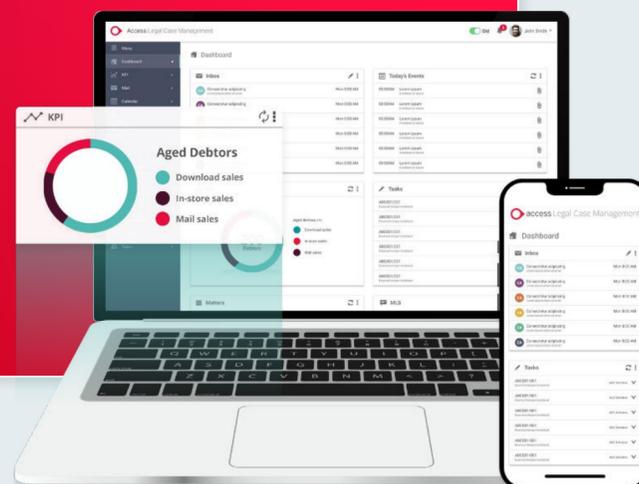
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Save time and money and gain access to accurate data for more innovative, real-time decisions

Fee earners spend far too much time searching for information, whether in paper files on a shelf, files on a desktop or server or even disparate software systems. For many, there's simply no integration linking all the data together. The purpose of the technology supporting a digital transformation project is to join up all the systems and make it easier to access your firm's information and report on it, saving time and money in the process.

This makes it easier for partners to see what's going on in the firm and provide the reporting and analysis they need to steer the firm in the right direction. Some of the benefits include:

- Access to live data: financial, payroll, time reporting, HR, training, compliance etc. Dashboards provide an instant snapshot of the KPIs that matter to you most.
- Accurate and timely reports: for example, the profitability of each fee earner, billing, or consolidated statements on WIP. A breakdown of actual and committed costs helps to provide a clear position on financials and ensure that resources are well-managed. Draw up reports at any time – no waiting until month end, by which time they're out-of-date.
- Smoother SRA inspections: with all information pulled from one central system, there's no need to collect compliance and training records manually. This saves precious time and resources that could be devoted to running the firm.



Action point

- What management information would you like to have access to?
- How much time (and resources) is wasted on creating reports every month?
- Every task you spend time on costs you money and removes resources from something else. Is that task worthy of attention? If so, could it be carried out more efficiently?

Digital technology can provide the tools you need to support decision-making, helping you to run and manage the firm.



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Digital transformation is the opportunity presented to business to refine working practices in a small or large way by reviewing and renewing often manual or paper-based process with technology.

This should result in faster outcomes, more efficient user of resources, more transparency and often lower costs.

For the customer experience it can be equally transformative.

In our rush to apply Digital transformation it's easy to concentrate on the digital and not the human. The success of any transformation is the positive impact on the person; any process whether manual or digital is merely a means towards a happier client.

Duncan Eadie

Technology transformation expert and tech leader for over 20 years in some of the worlds largest firms.



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Successful firms are redirecting spending away from physical office space. Most of the top 50 firms expecting to reduce their office footprint by around **11-20%** and move towards software solutions like case and practice management.

Legal Trends Report 2021





The 5 tell-tale signs you need to embark on a digital transformation project

Hopefully, you have a better understanding of what digital transformation could mean for your law firm, but how do you know that it's right for you? There are often tell-tale signs highlighting the cracks in your current processes and systems, which could be causing your firm to struggle and stomp your growth.

See how many of the following signs apply to you;



1. Lack of visibility and control

The management team don't have access to the information and reports they need when they need them, which makes it difficult to fully understand the proper health of the firm and report back to the board. This results in constant firefighting, moving from solving one problem to the next.



2. Poor staff retention

Employee churn remains one of your biggest – and rising costs, from recruitment and onboarding to ongoing training and retention. It's estimated that upwards of 70% of a law firm's costs are committed to staffing; not having adequate systems, processes and procedures in place can make the task hard to manage. You want to attract and retain the best solicitors, but your margins and profits are so thin that it's impossible to do so.



Lawyers are spending on average **13 days per month** in the office.

Legal Trends Report 2022



3. Too much time spent on manual processes

Fee earners complain that admin bogs them down. This is a constant frustration, not only for them but for clients too. You know that your practices mean the firm is not operating at maximum levels of efficiency and that this will have a knock-on effect on the quality of service delivery.



4. Your systems are out-of-date or end-of-life

You know this could be storing up trouble for the future and that any technical hitch could leave your organisation stranded without access to client cases which simply can't happen when they're due in court. With the rise of cybercrime and potential data breaches, you also realise this could mean your firm is open to fines – not to mention reputational damage.



5. Inadequate risk and reputation

Poor service delivery can have serious consequences, which is a constant concern. Protecting all employees and providing the best quality service is ok the utmost importance; alongside this, you're responsible for the overall reputation of the firm; you're never entirely sure that policy, process and procedure are being correctly followed - and you worry about how prepared the firm is for major incident management.

If any of these resonate with you, now could be the time to switch.

There's an old adage that insanity is doing the same thing over and over again but expecting a different result. This is particularly pertinent if you and your teams are faced with recurring issues.

That's often a sign that your systems and processes could be improved – and a good indication that a digital transformation project may be just what your firm needs.



Action point

Work with your team to obtain feedback, particularly in a support capacity.

What processes or tasks take the most time or distract them from delivering efficient services? From this, create a top 5 list of processes/tasks that put the biggest strain on the firm and contribute to poor employee morale. Could those tasks be eradicated or made much simpler with software? How much time are your staff spending on admin vs fee earning activity?

71% of law firms are prioritising remote interaction over in-person. Additionally **79%** of consumers see the ability to work remotely with a lawyer as an important factor in choosing who to work with.

Law firms must embrace **Digital Transformation** to meet the needs of clients who are being influenced by experiences in other sectors

Legal Trends Report 2021





How to manage a successful project

Once you've decided that a digital transformation project is suitable for your firm, you'll want to plan the steps you need to take and how the project will be managed.

There are several points to consider:



Create a business case

This will articulate why the digital transformation project is essential for your firm, what will be involved, how it will improve operations, what the costs are, the expected return on investment – and what the project will mean for the firm's future. At this point, you'll have a clear vision of what you're looking to achieve.

[Download the business case template](#)



Get stakeholder buy-in

Include the management team, investors and employees as soon as it's practicable to do so. When drafting the business case, view the digital transformation from their perspective. How can it make their lives easier? Help the partners achieve the business strategy. Meet the financial targets for longevity? Step into the shoes of every stakeholder with whom this project will impact a vision that makes the future brighter and removes the pain of where they are right now.



Choose the right partner

Review the options out there, including what other law firms are using, and talk to them. What was their experience? What other advice would they give?

Find a digital transformation partner you can trust.

[Take a look at the partner checklist](#)





Assign a project manager

A dedicated resource is a must. One person should have the overall responsibility for overseeing the day-to-day management of the project, working with internal stakeholders and the external provider. This makes keeping the project on track easier early if stakeholders understand that its success relies on their cooperation.



Define clear timelines

Don't do everything at once – and avoid the critical times when you know resources will be spread thin. Phasing gives the project time to settle in stages and enables you to refine any minor issues before moving on to the next aspect, helping with user acceptance and adoption. Remember, your case and practice management is at the firm's heart and shouldn't be rushed to install.



Allow time for training

The best legal software is intuitive, and most suppliers have training resources that provide step-by-step guidance. This is all many employees need – but remember that some of the team may not be entirely comfortable with technology. Take baby steps. Get those who are tech-savvy to support those who aren't so confident. This can make it less scary – once they get the hang of it, they'll never want to return to the old, manual way of working.



Realising ROI: The road to a more efficient firm

No digital transformation would be deemed successful without achieving the return on investment that was set out at the start of the projects. That's why it's important to be clear upfront on exactly what you want from the final outcome – and to set a baseline so you can measure success.

Of course, you could base it on the payback period, internal rate of return or break-even analysis, but that doesn't provide the full picture. It is also important to consider the wider benefits that a digital transformation project brings, such as a reduction in cost per case or increase in billing per case, improving efficiency and introduction of automation. These usually compound over time as new processes and functionality are introduced, and the firm continues to make incremental improvements.

Digital transformation is an ongoing journey. Benefits will be realised along the way and will provide a platform for continuous improvement.

Anecdotal evidence should be included in the benefits; ask all staff how much easier it is to manage their caseload and client. You could send out a survey to gauge improvements in working practices and efficiencies.

These will give a much broader picture of the true benefits that digital transformation will bring to your firm – something which isn't captured in the traditional ways of managing ROI. Once stakeholders experience the benefits themselves, it can have a long-term effect and one where your employees can be encouraged to provide feedback on how the firm can work more effectively.



Start your transformation journey

A digital transformation project is, in reality, a firm-wide project. It helps to deliver the best client service, speed up (or eradicate) admin processes, help all staff do their jobs better, improve retention rates, reduce overwhelm, control costs, manage risks and enable the firm to function much more smoothly.

It provides a solid foundation upon which to base future success. Whatever challenges or opportunities come your way, an integrated case management solution that's always being updated with the latest functionality will ensure the firm is more agile. Not only will this help you to survive, but most importantly, to thrive.

And that's probably the best legacy you could ever wish to leave



Action point

Talk to one of our legal technology advisers to find out more about how you could create your lasting legacy.

Talk to an expert





About Access Legal

Working in partnership with more than 3,800 UK law firms and underpinned by over 30 years of sector experience, Access Legal provide an unrivalled suite of complete software solutions.

From case and practice management, finance, accounting, property searches, services and business intelligence to learning, compliance, and HR – Access Legal helps firms take control of their time and improve efficiency and productivity.

By providing software to manage every aspect of a firm's operations, Access Legal enables ambitious firms to reach unlimited potential and have the freedom to focus on clients and people to drive profitability and growth.

The suite of Access Legal technology solutions work in connection with one another, creating one single view of people, data and systems within the new Access Workspace of Legal.

Talk to an expert

