# New priorities

**Accelerating the tech and culture transition**

## A PEEK INTO PORTALS
Are portals all they're cracked up to be?

## BULLYING SCANDALS
Can high-profile bullying serve as a catalyst for victims at firms?

## IS IT TIME TO STOP TALKING TO EVERYONE?
Capitalise on unique client services

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# Welcome

## The tech transition in full swing

The energy transition and energy security have dominated governments' agendas worldwide, especially in the light of Russia's war in Ukraine. Some countries are futher ahead in decarbonising their power grids, while others lag behind. Economically, politically and environmentally, it makes sense, in order to build a prosperous future. But what are SME firms doing and what can they do to ensure their security and future success?

Some are accelerating their tech transition by using portals to improve client communications (p 4), while others are onboarding digitally (p12). Overall, a holistic approach to legal tech is crucial to delivering a better client experience, says Legl CEO, Julia Salasky (p 8). Tech can be a knowledge vehicle, but the quality of your knowledge assets and how well they're organised matters (p9).

With tech bolstering client services, firms can hone in on their niche expertise. But they need to market themselves effectively to reach their target audience (p16).

Work culture is also becoming increasingly vital to a firm's success. Learn how a digital learning community can create an empowering culture and how firms can encourage employees to report bullying (p3). Additionally, we zoom in on the business case for gender partiy (p14).

Earlier, we mentioned that governments are upping their decarbonisation efforts, but so too are SME firms. Read about Higgs' bumpy road to net zero on (p14).

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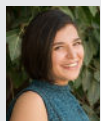
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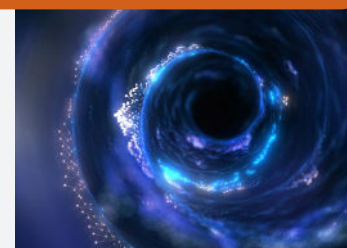Head of client services
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# Bullying scandals

Can high-profile bullying scandals encourage victims to speak out?  Suzy Blade, head of HR at Setfords, provides a breakdown.

The news agenda has sadly been dominated by workplace bullying scandals in recent times, from accusations of bullying against Dominic Raab being upheld, to reports of a culture of institutional racism, sexism and homophobia at the Metropolitan Police.

While these cases are clearly abhorrent and awful for the victims involved, is there a potentially positive impact from the high- profile media coverage of these cases? With so few people coming forward to report workplace bullying, which is unfortunately a common occurrence in the UK, we assess whether such scandals could encourage more employees to do so.

**WHAT IS WORKPLACE BULLYING?**
Firstly though, let's define exactly what workplace bullying is. Some common instances of it include:
• Setting up someone to fail, like giving them unachievable tasks or unrealistic deadlines
• Inappropriate monitoring of work
• Demotion without justification
• Giving no credit where credit is due
• Sabotaging someone's work
• Making inappropriate threats about job security.

**WHAT DOES THE LAW SAY?**
Bullying itself isn't actually against the law, however, harassment is prohibited under the Equality Act. This is when unwanted behaviour is related to one of the characteristics outlined below:
• Age
• Sex
• Disability
• Gender reassignment
• Marriage and civil partnership
• Pregnancy and maternity
• Race
• Religion or belief
• Sexual orientation
    As such, workplace bullying is unlawful if fits the above criteria.

**COULD PROMINENT WORKPLACE SCANDALS ENCOURAGE MORE PEOPLE TO REPORT  BULLYING?**
As a result of the high-profile workplace bullying cases discussed above, victims may feel they're not alone.  **LPM**

**Continue reading about how you can encourage employees to report workplace bullying on the LPM website**

# Software and culture

A digital learning community can create a culture for success, says Adam Bullion, marketing general manager at PracticeEvolve.

The shenanigans that took place at Twitter and dominated airtime under Elon Musk, culminated in Musk hiring a new CEO. If you've not been keeping track, here's a short recap: Elon Musk acquired Twitter and then fired quite a few people. He also sent an all-staff email, asking employees to commit to working "long hours at high intensity" and being "extremely hardcore" or else leave the company. Having removed the blue tick verification and tweeting various harmful tweets, he's now hired a CEO to essentially fix what he has broken.

The ongoing events at Twitter made me think about company culture and the role leaders and software play in evolving that culture. Twitter, one of the largest tech companies in the world, has always been highly regarded in terms of teamwork, culture, and appreciation for their staff. However, with abrupt changes in approach, it's no wonder that according to reports, up to 88% of staff were unhappy with the new team approach and had plans to resign.

For the record, I don't agree with Musk's approach, as I believe this creates a culture of fear within a business. While it could be argued Musk is attempting to be disruptive, I believe leaders must consider how to evolve a culture and understand what teams need and want within a working environment.

Our research into the market suggests people will find innovative ways to work if they are given the right tools, the pertinent knowledge, and the time to educate themselves. It's why PracticeEvolve have implemented EvolveCommunity, featuring EvolveLearning. By empowering users and helping them get more from the software, we are able to encourage our clients to implement a culture that helps retain brilliant people.

With the right software and service in place, firms can truly benefit in terms of productivity and efficiencies.  Our research shows that over 77% of law firms believe the digital literacy of their workforce needs to improve.  **LPM**

**Read more about how software is integral to culture and employee retention on the LPM website**

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# A peek into portals

As a form of client-lawyer communication and collaboration, portals are widely heralded as the new black. Lucy Trevelyan, founder of Blue Moon Media talks to SME firms that use them.

Client portals are online spaces where case information can be securely uploaded and shared with a client. Accessible through a secure entry point, they allow clients to review the progress of their case and communicate with their lawyers when they choose, thus helping to satisfy increasing demands for transparency.

PM Frontiers research reveals that a growing share of SME law firms are recognising the value of client portals, with respondents viewing them as by far the most important technology for boosting competitiveness in the SME legal space. But how do they work in practice? LPM has asked five law firms to share their experiences.

## STRATFORD SOLICITORS

Three-quarters of Stratford Solicitors' property-related communications are managed through a cloud-based platform called QMP, which enables bespoke client onboarding and collaborative conveyancing transactions between the firm, estate agents, mortgage brokers and the property purchaser.

It was clear that QMP would change the way the firm manages conveyancing transactions dramatically, says managing director, Nick Stratford. "The portal has been tailored to meet the precise needs of our team and the other parties who use it. We have quarterly meetings to discuss which elements could be tweaked or improved. I don't believe we would get that level of service from many portal providers."

The portal immediately sped up conveyancing transactions, enabling it to take on more work, thereby increasing its profits, he says.

"It's consolidated our relationship with our referral partners, our clients are happier because they can see what is going on regarding their transactions and don't have to waste time chasing us, and the buy-in from staff was immediate once they saw a demo of QMP.

"The portal also makes it simple to understand the different areas of responsibilities in the conveyancing process so there is complete visibility for all parties."

In addition, it makes the conveyancing process transparent to all involved, so those who are authorised can log on and check the progress of a transaction at any time. Stratford continues: "I can log in and see which transactions are progressing as expected, and identify any that need extra attention from my team. It has streamlined our workload and made us more efficient. Our peers love it too. Estate agents and their clients no longer need to wait for us to update them and it brings mortgage brokers into the loop so they can produce accurate quotations and better forecast when transactions are likely to be completed."

Ensuring the portal integrated with the firm's existing case management system (CMS) was an early challenge, he says — which the provider supported very well: "They went direct to the CMS provider and worked collaboratively to achieve what we needed. We were up and running within a couple of months, with the added benefit that both companies can now market their joint integration to more potential clients."

"If more portal companies invested time in working closely with the end user, we could have a lot more successful products

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on the market," he says. "But that does take commitment at both ends of the relationship – law firms have got to be open to talking to providers about the products they need and what could work for them. It's paid dividends for us working collaboratively with the service provider to bespoke QMP to our firm and they have done it all at their own cost."
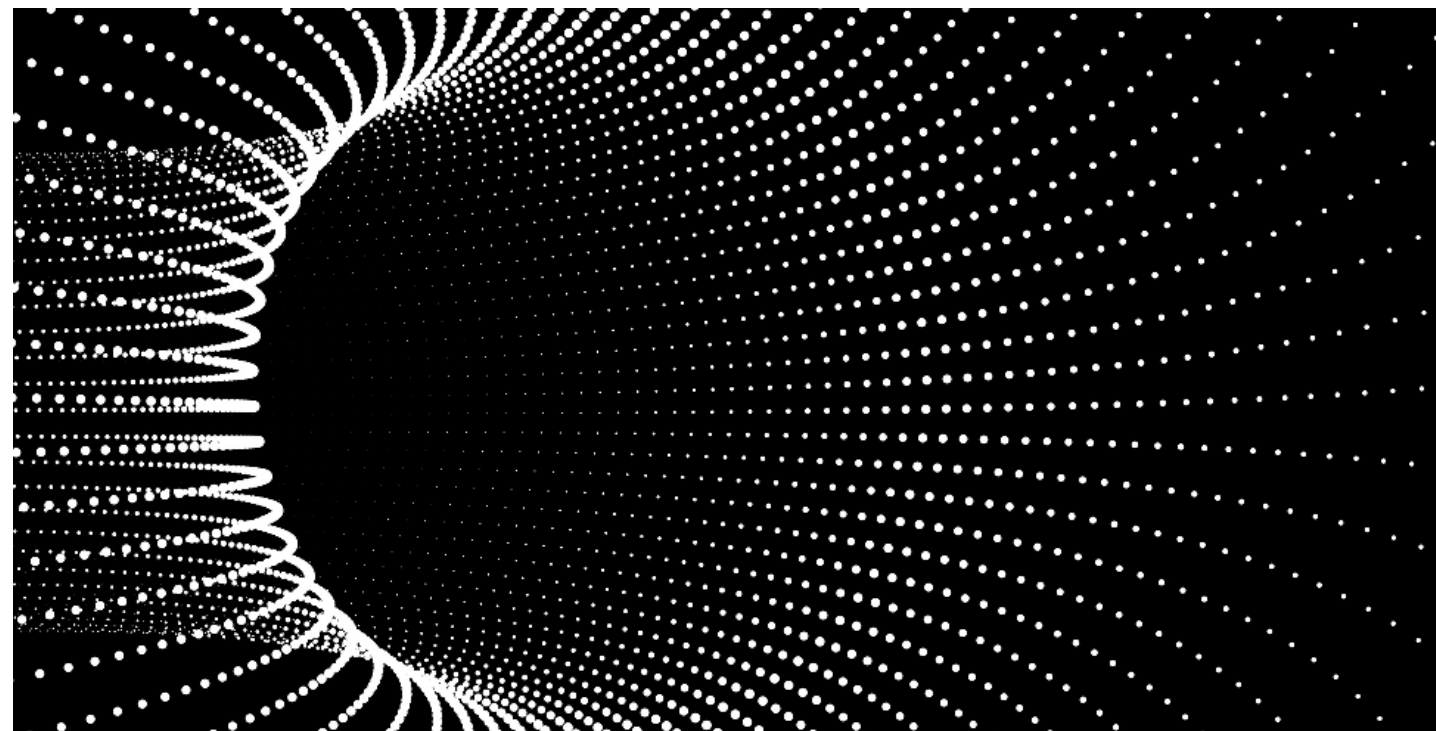
**JOHNSON LAW GROUP**
All of Johnson Law Group's (JLG's) clients have access to their own unique portal login to communicate with the firm, upload any documents and receive notifications. As at Stratford, it's fully integrated within the firm's CMS and there haven't been any obstacles, says managing director, Jamie Patton.

His firm is continually stress testing the security of its systems and embracing any new ways of protecting client data, he says — it is currently looking to enable access for clients through a bespoke app: "Through this they will be able to identify the progress of their case easily through infographic milestone plans, regularly updated through push notifications."

The portal has definitely helped client experience and the overall competitiveness of the firm, but it is not an absolute solution for achieving high levels of client engagement, he says. "It doesn't enable you to forget other, more traditional methods of communicating with clients such as by email and on the phone."

But there is definitely room for improvement in the products currently on offer, he suggests. "Products on the market are either not innovative enough, or the companies leading in this space are too expensive and lack transparency in their pricing. It's a developing area of the market that could explode in coming years — especially for those who offer a more cost-effective and transparent methodology."

**LEWIS DENLEY**
Lewis Denley is currently testing a portal that is part of its CMS, having tried third-party portals in the past with no success, says co-managing partner Colin Secomb. "We stopped using portals previously due to the lack of full integration with our CMS. Frustration was experienced by both staff and clients, where the portal did not operate effectively in passing and receiving information. Issues arose with security credentials and the look and feel of the portal didn't match the firm's branding."

Off-the-shelf portals often claim to integrate with the CMS, but there is often substantial time, effort and cost involved in building these integrations, he says. "Unless a third-party portal is specifically built to integrate with a particular business system, there is always an element of fragmentation. Any changes to the data and information structure in business systems can quickly interrupt the integration and hinder the use of the portal." The firm's real estate team has more use for documents being handled through a portal than other areas, but every department could use portals to reduce the flood of emails and enhance security when sending and receiving documents, he adds. "Both staff and clients can see the benefit of portals. It results in a quicker and more effective overall service. The convenience of being able to share and receive correspondence through digital means is appreciated by all but a rare minority of

> "If more portal companies invested time in working closely with the end user, we could have a lot more successful products on the market."

**NICK STRATFORD, MANAGING DIRECTOR, STRATFORD SOLICITORS**

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clients."

For a portal to provide optimal value, it must allow fluid transfer of data and correspondence, he says. "Bought-in/ third-party portals can't truly be developed for one particular software integration. Therefore the need for them to attempt to fit with multiple systems will inevitably leave some fragmentation in the depth of the integration.

Software systems such as CMSs that have their own portal offer a more fluid and effective means to share information. This allows a firm to be comfortable and confident about the effectiveness of that portal and software combination as the technology advances and the firm moves towards a more digital future." The CMS the firm now uses is developing an in-built portal which does not rely on third-party software. This will provide unfettered access to, and control of, all data within the system,

which can be effectively passed to and from the CMS through the portal, he says. "This eliminates the concern of interruption when the case management software is updated, automates all passing and sharing of data, and uses the CMS's security protocols, including two-factor authentication, through details securely stored within the CMS. These features have eliminated the potential issues with third-party portals, and have saved the firm considerable time and cost."

Portals have proved to be a more secure approach to client correspondence than emails, and a much quicker alternative to corresponding by post, says Secomb. "That said, security challenges must always be carefully considered, especially when using third-party software. Data may be more vulnerable to being hacked. GDPR must be carefully considered, as well as the potential for incorrect sharing of privileged information and documents."

He agrees there is, without a doubt, room for improvement in the products on offer in the market. "Better integration capabilities are required for third-party portals, along with more user-customisable functionality so law firms can use portals in a way tailored to their way of working. Basics like multi-factor authentication, mobile accessibility and user-friendliness can be improved in most portal products on the market. Any CMS which has its own built-in portal is likely to be the most effective solution, provided the product is innovative and determined in its drive to innovate and stay in front of digital evolution and security protocols."

## GLAISYERS ETL

A small share, around 10%, of Glaisyers ETL's communications are managed through portals, with all practice areas sharing their initial client onboarding documentation this way using a a portal solution.

The firm had explored a traditional portal — where clients would be able to log in and view a collection of documents across one or more matters — in a recent trial with its case management supplier. But the rollout wasn't successful, according to projects and business solutions manager, Sean Edwards.

"The pilot highlighted that with solutions like this, SMEs like ourselves are often left at the mercy of the supplier's active

development. As a result, our focus needs to be on a product in the legal market that we know is moving forward, and where the quality of the service reflects this innovative approach," he says.

There's a careful balance that must be found when imposing solutions like this on clients, he warns. "You have to ask, 'are clients asking us for this service? Has a client highlighted that they would choose another law firm because we don't offer this service?' The answer to those questions currently has been 'no'. However, that doesn't mean the offering isn't explored in greater detail."

Sometimes it's a hard-sell if the matter isn't document-heavy, he adds. "For the one-off document review, it's hard to beat the single email. For matters that are larger in scope — for example, a document-heavy corporate data room or a set of property plot sales — we must always ask how we could provide a better service to our client. Is the client someone who would engage with a data-room service? If so, the offering is one that's sought after from both sides, and that's the key to success with these products."

Integration with other business systems is where you face a double-edged sword with the solutions on the market available to SMEs, he says. "With some larger solutions, there isn't direct integration with our CMS and we have to upload items to make them available to the client. This can

sometimes lead to a disconnect between what's displayed on the matter internally and in the data room externally. For systems that do integrate with our CMS, they often don't have the usability or functionality of a product such as HighQ. In most instances, they are just a log-on to click and view or download documents.

If the volume isn't there, it doesn't really provide a better use case to either side." By onboarding such a solution, he says, a firm can also open up a host of vulnerabilities. "You are at the mercy of how your clients interact with the service, where it's hosted, and with the data in terms of timelines and GDPR considerations. It becomes something else you must monitor."

But for clients that are instructing more than 100 matters a year, it's a solution that is sought after, he says. "If you're not supplying this for those clients, someone else will. It's at this stage that you need

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"Portals have proved to be a more secure approach to client correspondence than emails. That said, security challenges must always be carefully considered, especially when using third-party software.

**COLIN SECOMB, CO-MANAGING PARTNER, LEWIS DENLEY**
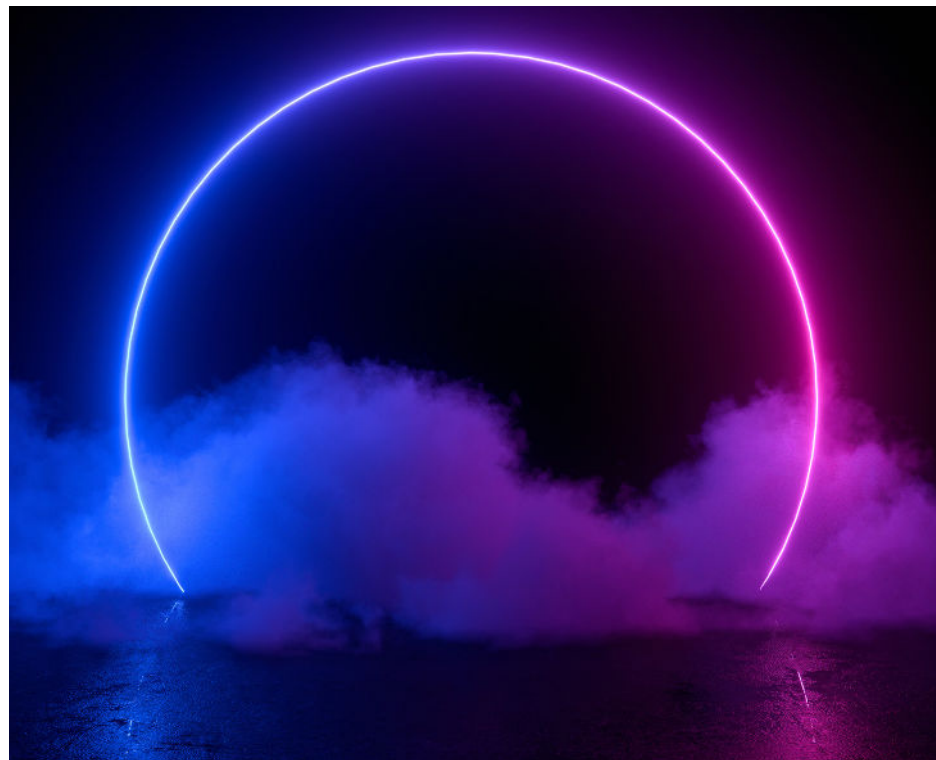
to be providing a tool which helps clients understand their return on investment using your product. Portals that naturally integrate with and enhance the Microsoft 365 offerings are the ones that will stand the test of time. Standalones already have a shelf-life that has been met."

**FIRST4INJURYCLAIMS**
First4InjuryClaims uses a secure online tool called Touchpoint, which is part of the firm's CMS. Clients can choose to use a portal for certain aspects of their claim, such as to approve and sign documents, or upload evidence such as photographs of an accident scene or receipts for their losses.

"We've found it a very accessible and

efficient process," says head of legal Andrew Wild. "We use the same CMS for all our operational and financial needs, so there have been no issues with integration. We recruited a new team, which was trained in the technology we use from day one. Clients nowadays are much happier using technology — and they see the benefits it brings, namely enabling us to progress their claims more quickly, which makes the buy-in quite straightforward."

The firm is now looking at adding two-way messaging to its system, although this isn't an area where he sees big demand with the work the firm does: "We update clients via SMS and email when there is a development with their claim, and that meets our client's expectations. The nature

of road traffic accidents means clients usually haven't been through the process before, they are vulnerable, and often want to speak to someone on a call, as opposed to online. Most still value the human touch."

As the experiences outlined by these firms illustrate, a client portal can be a veritable boon for a law firm if you find one that can be integrated seamlessly with your current business systems, is intuitive and easily accessible,  is understood by clients and staff, and where you can be confident your data is secure.

But it seems they aren't a complete panacea. If you bring in the wrong one, they could cause more problems than they solve. Care must therefore be taken in choosing a system that works for your firm. Key issues to consider are:
• Before you buy, decide what you want to use it for and then make sure it has all the features you need.
• Double check that the portal will work with your existing systems and that any integration will not be too disruptive for your business.
• Ensure your data will be held securely, that you know where it will be stored, and that communications are encrypted in compliance with rules.
• Give clients and employees plenty of notice of the launch. Explain all the benefits the portal will bring and provide early and regular training on its use.
• Make sure you have someone ready to step in if things go wrong. **LPM**

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# Bigger picture

A holistic perspective on law firm technology is crucial for delivering a better client experience, says Legl's CEO, Julia Salasky.

With generative AI demonstrating that some basic legal tasks can be done by a computer, it is even more urgent for law firms to think about leaning into their main competitive moat — the relationships with their clients. As technology is beginning to commoditise some of the underlying work, it is those relationships, and the care and value that firms are able to deliver to their clients, that will continue to drive demand and give some firms a true competitive advantage.

And yet this trend converges with one driven by client demands even before large language models became front of mind for professional services: LPM Frontiers research in 2023 has revealed that 'improving the client experience' is the top strategic priority on the boardroom agenda for 57% of SME law firms.

The same research from 2022 revealed 'client-facing technology' was the most popular area of focus in tech for SME law firms.

As demands on firms intensify, Legl's CEO, Julia Salasky, says a more holistic approach to tech is the need of the hour.

"Firms traditionally view the client-facing side of their operations as isolated from internal business processes, when the reality is that complex business related tasks – like onboarding, payments and compliance — are both client-facing, but also integral to the internal operations of the firm," she says.

"As new technologies like AI become part and parcel of a law firm's tech stack, client demands — for better service, for lower prices — will intensify. There's a basic starting point for firms to reduce operational friction by consolidating their internal tech stack."

"What we find is that, today, the tech stack of many firms is a confusing jumble of point solutions and manual processes. Not only does that increase expense for firms, and add to the operational overhead of running a law firm business, but it also means that clients feel the effects of inefficiency – whether through a clunky onboarding process or delays due to internal complexity.

"Regulation is a major differentiator for law firms, as opposed to, say, a company drafting a legal letter using ChatGPT.

Doing regulatory processes well can be a competitive advantage. Having streamlined processes can increase visibility, create efficiencies and reduce cost.

Full visibility has other benefits too. Businesses can benefit from real-time performance data at a firm, department and individual level, which has tremendous benefits for resource planning.

## PINPOINT THE PAIN POINT

But while a holistic tech stack has the potential to create a well-oiled machine that keeps clients and employees happy, it's hard for firms to know where to start building –— especially if they have traditionally been sporadic in their approach to transformation.

"Adopting new technology doesn't need to be complex or dramatic. We recommend starting with what is causing the most frustration or inefficiency, which differs from one firm to the next. Some firms will approach us with cashflow problems and want to speed up their payment collection, others are frustrated with the time it takes to prepare for an SRA audit, and some want

to make their onboarding process more efficient and compliant. It's important to start with the most pressing challenge."

The key is to keep going once the initial problem is solved, to join those efficiencies up with other business processes. This is where the selection of tech provider becomes critical — it's important to partner with software that has the capacity to meet your needs, but equally one that will support an ongoing journey of transformation rather than solving one problem and moving on to the next client.

"Capabilities are objective, but the culture of a provider will determine whether it is able and willing to evolve quickly to the needs of its customers." Salasky

> "As new technologies like AI become part and parcel of a law firm's tech stack, client demands – for better service and lower prices – will intensify."
>
> **JULIA SALASKY, CEO, LEGL**

**LPM**

explains that Legl is also working on AI-based products that enable firms to create better workflows, and to better understand their client risks, as one example of the way the company is constantly innovating its software, in commitment to better solving law firms' operational problems.

**FLEXIBILITY IS KING**

This is Legl's arena — the company's entire approach is designed to be completely adaptive to a firm's processes. According to Salasky, the first port of call is to really get to know a firm, which means understanding each and every step and person involved from the initial point of contact with a new client to the conclusion of their matter. "We're not just a software provider – the goal is to find where we can add value.

"Firms typically have one or two pieces of core technology such as a practice management or document management system — focused on specific functions. This creates a rigid structure that needs layers of integration to accommodate any kind of flexibility.

"We work to that, and to replicate firms' existing processes, to provide no-code workflows that form building blocks of any business process — whether that's client-facing, internal or both. The idea is to view a law firm as a holistic business that hinges on its clients' and people's interaction with its processes — so technology should bend to their requirements rather than the other way around."

An example is the dichotomy between client onboarding and payment collections. "Most firms see these as distinct processes, but they can easily be linked up using our workflows. Firms could collect money into their client accounts during the onboarding process, which has significant cashflow benefits, but also provides the client with a streamlined and beautiful experience."

Salasky reports that while firms use Legl's workflows for a clearly defined set of use cases such as onboarding, payments or compliance, many will also want to create other processes — such as collecting net promoter scores from clients upon matter completion, or due diligence and compliance checks of third parties, for instance – which can all be done by anyone with the click of a button.

This malleability of digital tools, which will only increase as artificial intelligence and other new technologies evolve, is the future, according to Salasky.

The ultimate objective is to give clients a better experience, while also freeing up lawyers from easily streamlined administrative tasks so they can deliver more value in their legal work. **LPM**

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# Tech as a knowledge vehicle

Knowledge management doesn't start with a demo. Building high-quality knowledge assets is crucial, says Jack Shepherd, legal practice lead at iManage.

Lots of conversations around a new knowledge management system start with the question, "Can we get a demo?" I get it. The problem is that knowledge management isn't an area driven purely by tech — it's also driven by the knowledge you have. The tech is a vehicle to exposing that knowledge. It's the same with document automation and contract lifecycle management —you can buy all the tools you want, but unless they are exposing well-organised, clean content, you won't get much success.

I often use the "garden centre" analogy to explain this. Last weekend, I went to the garden centre to buy an amazing ornamental pineapple plant, only to stick it on the windowsill at home and watch it die in a matter of days. It looked great in the garden centre, but at home I simply didn't have the right soil, environment or willpower to sustain it.

The success of knowledge management systems is wider than just turning on a system (or demo). It's about the resource you have, how better knowledge management can improve your business, and what people's cultural attitudes to it are. As far as knowledge management systems go, you will only get much value out of them if you are prepared to invest the time in building a base

of high-quality and well-labelled knowledge assets.

Don't get me wrong — it is vital for you to see how a knowledge management system works in action. But you must do so as part of a wider discussion around what knowledge you actually have and how it is shared and stored.

**SEE NO TECH, HEAR NO TECH**
In a recent study released by Thomson Reuters , more than three-quarters of respondents who were clients of law firms said they "were not aware of any firm with whom they work actually adding value by using technology." **LPM**

**Read more about gaining the most value out of your knowledge management system on the LPM**

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# One source of truth

UK law firm Maurice Turnor Gardner keeps documents safe with NetDocuments.



**ABOUT MAURICE TURNOR GARDNER**

Maurice Turnor Gardner is a boutique private client law firm of 45 top-tier lawyers based in London.

The firm has been offering its services since 1 May 2009 following the demerger of Allen & Overy LLP's highly-rated Private Client Department.

With a global client base of ultra-high-net-worth families, the firm seeks to understand all the legal, commercial and tax issues affecting its clients to provide them with principled and practical legal solutions, working in partnership with them as their trusted advisers. It also covers tax disputes, particularly investigations and follow on litigation with the HMRC.

Real Estate, Philanthropy and Charities and Immigration practices complement the firm's traditional strengths in tax and estate planning and disputes relating to wealth.

**A FUTURE-PROOF PLATFORM TO IMPROVE DAY-TO-DAY LEGAL PROCESSES**

Documents are at the heart of how Maurice Turnor Gardner operates. Therefore, enabling its lawyers to easily and securely access and share important files is business critical.

Like many organisations, Maurice Turnor Gardner had to quickly transition to remote working due to the pandemic. When it came to document management, the firm was using its existing practice management system (P4W) to store and manage documents. However, this made searching for and collaborating on documents difficult, especially for users who spend their working day inside of Outlook, as it took time to switch between the different applications.

In addition, the only way the firm's lawyers could access documents remotely was via a virtual desktop. While this provided security, it also required a reliable internet connection, which wasn't always possible on home WiFi. If a lawyer's connection dropped, it meant they would then need to reauthenticate each time, impacting the user experience. Maurice Turnor Gardner therefore wanted to move to a true cloud platform that would provide both the security that its high-net-worth clients demand and the flexibility to support its lawyers' remote working needs.

"We required a solution that would enable our lawyers to work from anywhere with minimal disruption," said Richard Price, Finance and IT Manager at Maurice Turnor Gardner. "At the same time, our new DMS needed to seamlessly integrate with our existing practice management solution, which underpins our business. By moving our document management to the cloud, we would be able to benefit from enhanced levels of flexibility and security."

**STRONG APIS MAKE FOR A QUICK AND SEAMLESS IMPLEMENTATION**

NetDocuments stood out as the DMS of choice as it is built on the cloud, intuitive and enables lawyers to work seamlessly and securely within their day-to-day applications.

"From attending a number of industry events over the years, NetDocuments has always been on my radar. So, when it came to choosing a DMS, NetDocuments was top of the list as it was a true cloud platform with strong APIs," continued Price.

NetDocuments' implementation partner, Accesspoint Legal Services, was able to quickly build an integration with the firm's practice management system using NetDocuments' APIs, which meant Maurice Turnor Gardner was able to go live in only three months.

In addition, onboarding sessions were delivered to ensure all users were up and running successfully and could realise the benefits almost immediately.

"As with any IT rollout, it was crucial to ensure our lawyers were fully on board with the new systems," said Price. **LPM**

# Best of both worlds

Unlock powerful features by leveraging your systems, says Kaden Smith, director at NetDocuments.

Small to midsize law firms utilise case management systems (CMSs) to help manage their business, but as demand grows for cloud-based solutions that enable secure, collaborative remote work, many are finding their CMS doesn't provide the robust features needed to support the entire document lifecycle.

Are your case documents and emails organised and easy to find, revise, bundle, share, have signed and filed — all from a single platform you can access anytime, anywhere?

This is where firms are differentiating themselves: by taking advantage of the benefits of a powerful cloud-based DMS while continuing to maintain their CM for backend functionalities.

**WHY FIRMS ARE TURNING TO DMS**
With robust search capabilities, metadata tagging, access controls and advanced security features, a document management system (DMS) can bring significant benefits to your workflow and productivity.

Some key features of a DMS include creating and editing documents, organising them by matter or project, securely sharing and collaborating on documents, tracking version history, accessing workspaces and documents remotely, controlling user access permissions, applying custom metadata, finding content efficiently, integrating with preferred software solutions, and maintaining advanced security and governance.

With a cloud-based DMS, with open APIs, firms can seamlessly connect their DMS to case management technology or any other solutions your teams use for their workflows.

**CLOUD VS ON-PREM**
When it comes to choosing a DMS, there are two options: cloud-based and on-premises (plus many variations in between). **LPM**

> **Read more about leveraging your CMS and DMS on the LPM website**

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# Decoding IT risk

What are the key components to risk-proofing a law firm's digital systems? Nick Hayne, head of professional services at Quiss, reveals strategies to mitigate risks.

Though digitalisation is vital for today's law firms, it undoubtedly comes with its fair share of risk challenges, increasing the pressure on law firms to protect sensitive client information and maintain the confidentiality, integrity, and availability of their data. To effectively mitigate these risks, law firms must conduct thorough IT risk assessments — a set of systematic evaluations that identify potential vulnerabilities and threats to a firm's information technology infrastructure.

A thorough risk assessment specifically tailored for law firms consists of:

**1. ASSET INVENTORY**
The first step in an IT risk assessment is to conduct a comprehensive inventory of the firm's IT assets. This includes hardware (servers, workstations, mobile devices), software applications, network devices and data repositories. An accurate asset inventory forms the foundation for assessing the potential risks associated with each asset.

**2. RISK IDENTIFICATION**
Once the assets are identified, it is crucial to assess the risks they face. This involves identifying potential threats, such as unauthorised access, data breaches, malware attacks, and natural disasters. Law firms should also consider specific risks associated with their industry, like confidentiality breaches, client data mishandling, or regulatory non-compliance.

**3. VULNERABILITY ASSESSMENT**
A vulnerability assessment involves evaluating the weaknesses and security gaps within the firm's IT infrastructure. This includes assessing network configurations, software patch levels, user access controls, and physical security measures. Vulnerability scanning tools can be utilised to identify potential vulnerabilities. **LPM**

> **Continue reading tips by Quiss about risk-proofing your IT systems on the LPM website**

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# Too important to be ignored

Digital onboarding is vital as it can boost productivity, enhance the client experience, improve compliance, and serve as a powerful risk management tool, says Sam Jordan, chief operating officer at InfoTrack.

Client-facing legal technology has been in the spotlight in recent years. Shifting client expectations and business needs, catapulted forwards by the effect of the pandemic, forced firms to find better ways of getting the crucial onboarding information they need. Since then, the demand for digital solutions has continued to rise.

Demand for more convenient, more secure and faster onboarding tools for both law firms and their clients is a tempting carrot — while the growing risk of fraud, cost of professional indemnity insurance, and the increasing legislation and compliance burden is a very convincing stick. Between the two, the case for digitising onboarding processes is irresistible.

**TRANSFORMING THE CUSTOMER EXPERIENCE IS WHERE IT ALL STARTS**
The thing most digital law firms have in common is that they prioritise the client experience — it's why they've digitised their processes. And getting it right from the start matters, how you begin a transaction sets the tone for the rest of the conveyancing process. So using technology that is efficient, intuitive, and secure is essential.

Anita Gillam, licensed conveyancer at Oliver & Co Solicitors, echoes the need for trusted client-facing technology in conveyancing. "Our clients want to know that the data they are providing is safe and will not be intercepted. Using an app or uploading their information through a secure portal is important. Nowadays, many clients do not like providing personal information by email, so being able to onboard them digitally and securely is key," she says.

First-time buyers made up 53% of purchases in the UK in 2022, according to data from Yorkshire Building Society, with millennials being the largest generation in the cohort. A generation of digital natives, most of these purchasers expect a certain level of technology when undergoing the home moving process.

Firms such as Bell Lamb & Joynson say that digital onboarding is now used for 98% of the matters they open. As a firm that has digitised the conveyancing process from end-to-end, managing partner Mike Leeman shares: "Using technology as an enabler, we are helping our conveyancing clients to have a better experience when buying a property."

But it's not only about improving the client experience. The experience within your firm matters too.

"Digital onboarding delivers better customer service and higher productivity. As the team spends less time doing administrative tasks, the client has a better experience with us, which leads to happier clients and more satisfied staff," adds Leeman .

**A BETTER WAY TO MANAGE KYC COMPLIANCE**
Technology has helped firms looking to improve their productivity to take significant steps forward. It's also helping firms to manage the ever-changing fraud landscape — technology is enabling

fraudsters to become more sophisticated in their schemes, but it also provides law firms with their own arsenal of tools to fight back.

Gillam says: "Digital onboarding technology makes us more compliant and it cuts down risk during the due-diligence process."

Consider the two identity checking options at the airport — customs officers trained to spot counterfeit or falsified documents and assess a person's face to see if they match the grainy image in their passport, and the ePassport machines that do the same thing. Digital ID checks are a version of those machines, because your receptionist isn't trained the way that a customs agent is — and to be honest, it's not fair to put them in that position.

Digital audit trails are the belt and braces of your compliance processes – they're helpful because compliance is a three-step process:
• You need a process
• You need to follow the process (with appropriately trained individuals)
• You need to be able to prove that you did.

This last point is where digital makes light work of providing evidence to regulators and insurers that you've done what you were supposed to do. The benefits of digital audit trails become even greater when the entire onboarding process is digital.

It's not just more convenient and efficient, you can see what data and documents you have, where they came from, and how they were checked — from client questionnaires to ID and anti-money laundering (AML) checks to Source of Funds and Wealth analysis.

## KEEPING PACE WITH REGULATORY CHANGE

The recent announcement of a 'failure to prevent fraud' offence is a signal that the government is trying to tackle the growing issue of fraud — one that conveyancing is at high risk of. With fraud accounting for 41% of recorded crime in the UK as of September 2022, law firms must ensure they are taking all reasonable steps to mitigate the risk.

Using trusted digital onboarding technology that keeps pace with regulatory changes can help keep your firm on top of your risk management. You need AML checks that are up to date with the Sanctions lists and databases of Politically Exposed Persons (PEPs). Source of Funds should not just help you gather data but ensure its provenance and provide useful analysis to help you understand the client's financial circumstances and flag risks.

## THE TIME FOR ADOPTION IS NOW

Digital onboarding has long been seen as an efficiency tool – a time saver, and it certainly is. And while there are some clients who may not like it, more will insist on it. Faster, more productive teams and happier clients, which means happier teams too, that's the carrot.

But law firms should insist on it for another reason too. They are the tools that help you do your job better. From gathering accurate data on the client and property, to verifying IDs, the ongoing monitoring of PEPs and sanctions, and the verification of banking information, the technology will do the hard work for you. It helps ensure you are taking reasonable steps to remain compliant — protecting your clients, your firm, and your employees from regulators' wielding sticks. **LPM**

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# The road to net zero

Nyree Applegarth, partner at Higgs, heads up the Green Committee. Here she looks at the firm's wins and challenges faced on the road to net zero.

Like many law firms across the country, Higgs has significantly increased its focus on sustainability and the environment in recent years — but it's not been without its challenges.

As a responsible business, we're committed to playing our part in protecting our impact on the planet, the environment, conserving resources and the local community. SMEs such as Higgs contribute half of all business-driven carbon emissions in the UK, according to the British Business Bank, so it's important that we take our responsibility seriously.

We are committed to ensuring, wherever possible, that our operations have a positive impact on our people, our clients, our business partners and our community.

Our primary goals as a firm are to manage our business in a manner consistent with the transition to net zero and to achieve net zero as soon as possible, to recycle 100% of our office waste, to reduce waste, eliminate single use plastics from the business and to achieve local and sustainable sourcing wherever possible.

We also frequently raise awareness of environmental issues with our people and encourage employees and our business partners to also live more sustainably.

These are all very noble and important goals but the first hurdle we encountered was answering a simple question: what was the firm's carbon footprint?

The truth is we had no idea — and we needed outside help. If you don't know what your carbon footprint is, how can you improve it or set meaningful goals? We enlisted carbon specialists, who were able to tell us that we used a moderate 150,000 kgco2e each year and that our largest usage was electricity.

Armed with some tangible data, we are now able to plan for the future.

Using a verified renewable energy provider is a sizeable commitment from a business, particularly at the moment when prices are so high, as it typically means paying more for electricity.

The rising problem of greenwashing is something we are also learning to be guarded against. Too many companies are offering services and products which claim environmental benefits that simply don't exist. **LPM**

**Continue reading about Higgs' journey to net zero and operating sustainably on the LPM website**

# Mind the (gender) gap!

Creating better gender pairity makes financial sense, says Lisa McKenna, founder of McKenna & Co Solicitors.

It's been a century for women in law. In 1922, Helena Normanton became the first practising female barrister in the UK, according to the Oxford Dictionary of National Biography — after a bit of a slog — really. Women weren't allowed to practice law until 1919, with the removal of the Sex Disqualification Act.

Today, more than half of practising solicitors are women, and 60% make up new entrants. They work across the industry: in government, business, charity, human rights, family law, academia. Their influence in shaping the direction of the law is clear.

And yet, the imbalance in senior roles for women is prevalent. Just 35% of partners in law firms are women, according to the UK's Law Society. Ultimately, it's women who are forced to choose between career and family, leaving the professional ladder well before the top.

The pandemic created a workplace shift however, as digital transformation offered the same — or greater — efficiency, with more flexibility. Supporting all demographics, it allows the family load to be shared where possible.

**THE ISSUE IS MORE THAN JUST PRACTICAL**

Of course, the practical factors of childcare and maternity have affected women's ability to climb into senior positions, but that's just one aspect of gender bias.

In an FT article on the subject, one contributor argues that the issue is more nuanced than just the obvious logistics. "I have noticed that a climate of machismo has more to do with putting women off going for senior leadership positions," argues Ann Benzimra, a Dispute Resolution Partner at Fieldfisher, recognised in the 2023 edition of Best Lawyers in the United Kingdom. "While there has been progress, I don't think it is happening quickly enough, and there is still a level of regressive behaviour going on."

Sexism in the legal profession is rife according to media reports, but there are also factors such as race and class that are causing inequality. The Solicitors Regulation Authority released diversity research in 2022, which showed that there is a "significant difference in the proportion of lawyers in the UK from a comparatively 'privileged' background... and attendance aindependent fee-paying schools." **LPM**

**Read more about how gender pairity makes business sense on the LPM website**

According to the most recent LPM survey, half of SME law firms say "building an agile, digital-first culture" is a strategic priority.

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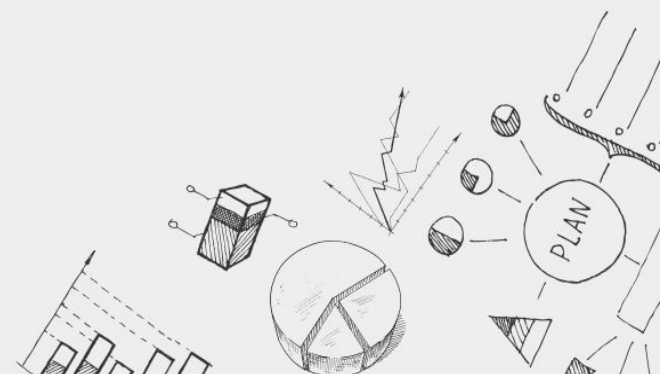
# Is it time to stop talking to everyone?

Learn how you can capitalise on an area of expertise by building a sub-brand, according to Martin Whincup, associate director at Berwins Solicitors.

"So, who's your target client?" "Well, everyone. Anyone could need what we can do at some point in their life."

It's a conversation that, at some point in their careers, most marketers have had. In many ways — especially for full-service law firms — it's an understandable response. Everyone should be making a Will, any company should be looking at their employment contracts and most people, at some point in their life, will need a conveyancer. In many ways it doesn't matter what demographic a prospective client falls into, or the sector in which a business operates. Everyone needs that advice.

Except any decent marketer knows that it does matter. Because, while you could act for anyone, it doesn't follow that you would want to. Even if you did, it's an impossible task to try and appeal to them all. That's why the right response is — "let's dig a little deeper".

**DIGGING DEEPER**
Whether they realise it or not, most of those in the "everyone" camp, are already engaged in some form of segmentation, perhaps derived from their geographical location or the area of law they practise. There is, however, more digging to be done and for a law firm, that usually comes down to one of two headline factors: business sector or individual demographic.

When considering sectors, it's important to ask where your target clients are based, what size company you would like to work with, how many employees they have, what level of turnover are you comfortable with and where they are in their business lifecycle.

For individuals, again ask where people are based but also think about wealth, age, employment status, interests and concerns.

In both categories though, consider:
• Are there enough of these targets out there?
• Is there sufficient demand for legal work?
• Can I win and do the work profitably?
• Do I, or my team, have the expertise necessary to do this effectively?

If you have a satisfactory answer to each of these questions, then ask yourself one more:

Will my targets want to work with me?

**SPEAKING CLIENTS' LANGUAGE**
You may have created an exciting product offering that meets your clients' needs, but it's of little value if you can't persuade those you want to work with that you can deliver for them. That is where effective marketing and, at the heart of it, brand is invaluable.

As a full-service law firm, at Berwins we work with a range of clients. There's nothing unusual about that. What is unusual, however, is the deep expertise we have in the tech and digital space. Through strong relationships, networking, and business development, we had built a solid reputation in the tech community, but a recurring comment — often after a visit to the firm's website — was "but I don't want a Will."

In short, the main brand was not entirely helping to position us as specialist lawyers for digital businesses. Here, we considered our options and came to the decision that a digital sub-brand was an important step to overcome that issue, build the sector and convince prospective clients that they very much did want to work with us.

**THE BASICS**
A sub-brand is a secondary identity which a business can utilise to position a specific product or service. It will usually have its own personality, identity, and a distinct tone of voice, all of which will align closely with client needs and expectations.

The sub-brand can tie closely to the parent brand — in the case of Berwins Digital, logo elements are similar, but colour and context are key points of difference – or the brand can be a free-standing entity, linked, but different.

**REAPING THE REWARDS**
Stepping outside the confines of your main brand can offer flexibility and the ability to better hone in on demands of clients and prospects. In short, a sub brand can help you to:

Engage directly. When acting for a client, a good lawyer will seek to understand their needs, act accordingly and speak in a way the client understands. Marketing the same product should be no different — that's why you can never market to everyone. A focused sub brand can give you the ability

to speak in a way which may be alien to the rest of the firm but is highly relevant for your targets.

Explore new markets. One of the standout benefits of a sub brand is that it allows you to promote your business in markets which may not, traditionally, be your natural environment. Imagine inviting a lawyer to a networking event. They arrive in a twin set and pearls — perfect for entertaining the high-net-worth private clients they usually deal with. Except the event is for tech startups. In a world of trainers and t-shirts, you have to adapt and when you can't adapt, there's no use in pretending you can.

Build trust, loyalty, and credibility. Aligning with your clients' goals is far more than simply having great content or relationships. Wording can be forgotten and the lawyers who hold the relationships can depart. Setting a standalone identity allows you to build an asset which transcends this and, if carefully nurtured, becomes the trusted source your clients come back to.

**GETTING YOUR FINGERS BURNT**
As with any new initiative, there's a chance of failure. You must be prepared for that and the possible negative impacts, including:

Harm to your existing business. Reputations matter — especially for law firms. So, if the new initiative, perhaps launched with great fanfare, flounders, there will naturally be a risk of reputational damage.

Spiralling costs. One of the surest ways

to avoid failure is to have a realistically resourced strategy, but make no mistake, brand building can be expensive. That cost goes far beyond simply setting up and launching a brand and must extend to maintaining and developing what you have created. It's important to be realistic about this, especially as it could mean diverting resources from other more established areas of the business.

Structural changes. Just as budget may need to be carefully managed, so must internal structure and communication. That could mean change, perhaps in deployment or reporting, but it's important to ensure that the change is carefully managed to avoid the risk of creating a silo which starts to compete with the rest of the business.

**GETTING THINGS OFF THE GROUND**
So, you've decided that you're not in the business of working with everyone. You've defined who your targets are and designed an outstanding product they'll love. You've created a business plan, secured buy in from the firm and the budget to make it happen. What next? Ask yourself again — will my targets want to work with me?

For all the excitement something new can bring, it's important to be clear that you're not just innovating for the sake of it. If you're convinced that isn't the case and can see a clear business benefit to building a sub-brand, then there are a few steps to consider.

Position your brand. Clearly set out where you're trying to be and where this

sits in relation to both your current brand and competitors operating in this space. Remember also that you are creating a sub-brand — a part of your existing organisation — so there should be a very definite point of connection here. The chances are that you have a different legal (or perhaps other professional) service in mind, so keep that strong. If, however, you're thinking of opening a doughnut division, it may be time to re-think your strategy.

Get creative. Use the position you are seeking to own and combine it with the understanding you have built of your target market. Work with creatives to build an identity — likely including a logo, imagery, and associated assets — to bring your vision to life visually.

Make sure the experience matches the hype. If you're going to build a sub-brand which is all about deep expertise, make sure you've got some experts. If you're all about service, train your people and get them to buy into the vision. In short, if you're going to make something exciting and new, it's essential that you live up to it in everything you do. It's the only way to effectively build that trust, loyalty, and credibility.

Talk to the market. We all get things wrong, get caught up in the excitement of a new venture, lose sight of what matters. So, before you launch — perhaps even before you create your offering — speak to some trusted voices in your market. Get their take on what you're producing and take it on board.
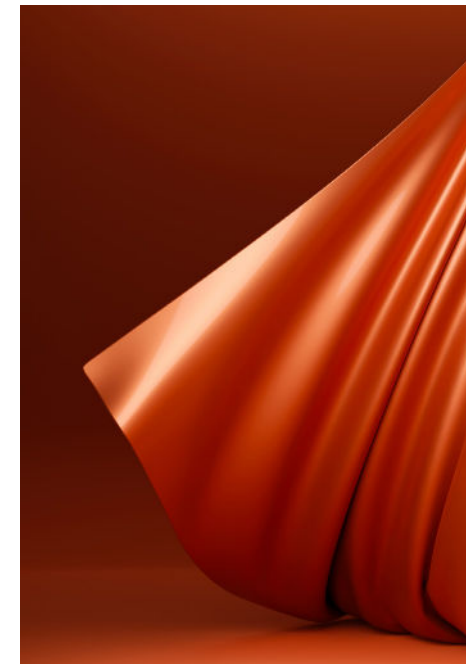
Launch and maintain. Once you're ready to go, take your sub-brand to market. Use a predefined marketing plan to enable you to do this effectively and within any time or resource constraints you have. Once it's out there, focus on maintaining both your new creation and the established brand — that cannot suffer simply because you have something new to look at.

Sub-brands can offer a valuable tool to penetrate new markets and strategically grow your business. Though, they do take time, resource, and careful planning, which must be matched by effective execution.

If this is a development which will work for your firm, be very clear about what is needed to succeed — and remember, sub-brands aren't for everyone. But then again, neither are you. **LPM**
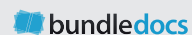
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