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LPM people



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Research into how UK law firm leaders truly experience their transformation efforts is timely. They are under more pressure to invest in it than ever — from clients wanting it to lower their bills, to people wanting to work differently, particularly if they can do so at the firm down the road. Perhaps in some cases also investors with a keen eye on the exit sign already. As a result, even tricky partners might be less likely to apply the brakes to anything moving the business forward or obviously future-focused as an apparent matter of principle (that they don't want to pay for it of course; well, what's already in place has always worked just fine). The charge that lawyers are preternaturally resistant to change doesn't resonate as it once did. The increased pace that's challenging approaches, processes and assumptions almost everywhere else is catching. Nobody wants to be left behind.

At the same time, the stakes are incredibly high. Firms face a higher price tag for confidently choosing to change, and there is less time to decide which way to go. And a poor decision today could cost them even more tomorrow. It's now a question of which change projects to prioritise above others, and ensuring the chosen ones deliver a return; as one respondent to this research neatly puts it, that “what's sold, implemented and used are deliverable and the same thing”.

The good news is that the vast majority of 60 senior firm leaders — from practice and strategy directors to chief finance and operating officers — who shared detail of their experiences with us in an online poll in April/May 2026 were very positive about changes they've managed to put in place. Emerging advantages range from genAI efficiencies to system resilience, stronger risk management to smoother client experience, smarter working with fewer frustrations, and a pattern of iterative improvements to business process at just the right times on the growth journey. For those less happy few, their problems range from a lack of support for the change process at different levels, to disjointed implementation or integration. Rightly pleased or peeved, however, all must be realistic about the risk in getting over any perilous gaps to deliver a lasting difference.

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LAW FIRM GROWTH DEPENDS ON OPERATIONAL MATURITY

MIKE HINCHLIFFE, MANAGING DIRECTOR, EMEA, TESSARACT



The research paints a clear picture of a mid-market legal sector that is ambitious, but increasingly aware that growth cannot be separated from operational maturity and commercial awareness.

Most firms are not pursuing growth at all costs. While over half have some ambitious plans, including strategic expansion, international growth, or M&A, leaders are most likely to say they are taking a more pragmatic route. Even so, moderate growth still places pressure on the systems, processes and people firms already have in place. The larger point is that growth is no longer just a commercial challenge. It is also an operational one.

“The appetite for change is there, and the main challenge is not resistance, but finding the right solution(s) that flex to support each firm’s strategy.”

One of the most interesting findings is that firms appear increasingly open to business transformation. The appetite for change is there, and the main challenge is not resistance, but finding the right solution(s) that flex to support each firm’s strategy, ways of working, and the constant change taking place in the market. Over half of firms identify this as the biggest blocker to system change. They want technology that fits their business, supports their people, and helps them to grow without adding unnecessary complexity.

It is also positive to see recent transformation projects being described more favourably than negatively. This suggests that the market is becoming more confident and experienced in delivering change, and that the perceived disruption of implementation may

be starting to reduce as both firms and technology providers mature.

The findings on management information are particularly important. On the surface, many business leaders feel they have information available. But the challenge is not just one of whether the data exists, it’s whether the right information reaches the right people at the right time.

If firms want fee earners to make better commercial decisions earlier, they need to democratise insight around budgets, WIP, profitability, fee earner performance and matter outcomes. The MI should not only sit with leadership or finance teams. It needs to become part of everyday legal work. The next stage of evolution is not producing more reports. It is making commercial insight more accessible across the firm.

The findings on digital matter management, system integration and user experience show where the problems still live. Half of firms

are not fully confident in how matters are managed digitally, nearly all see improved connectivity as at least somewhat important, and around 70% believe users have mixed or frustrating experiences with core software.

We can conclude therefore that mid-size firms are trying to build modern, scalable practices on operational foundations that often remain fragmented. The opportunity now is to connect systems, improve visibility on performance, reduce obstacles in common processes, and give firms the confidence to embrace opportunities when they come along so they can grow without adding complexity.

Next-generation legal practice management software for mid-market law firms held back by legacy technology. To learn more, visit: tesseract.io



YOUR ABILITY TO CHANGE

A poll of 60 UK law firm leaders sees most feeling well prepared for whatever the future throws. They have plans to grow, and only good things to report about recent investments introducing change. But is confidence in the internal conditions needed to power progress positively well placed, or is there more to do than they realise to capitalise effectively?

PLANS FOR THE FUTURE

The majority of leaders at UK law firms managing up to 300 people that we've surveyed are in the market for building on growth to date — although they're just as clearly navigating a persistently challenging economic climate for SME business. There are big questions needing future management bandwidth, such as surround the resourcing of changing or unconfirmed compliance requirements, smart succession planning, when to invest in new technology, and effective operating model optimisation from a commercial perspective. The question is often when to act as much as what to do, plus how far to pull specific levers, in the drive to make more progress while staying agile.

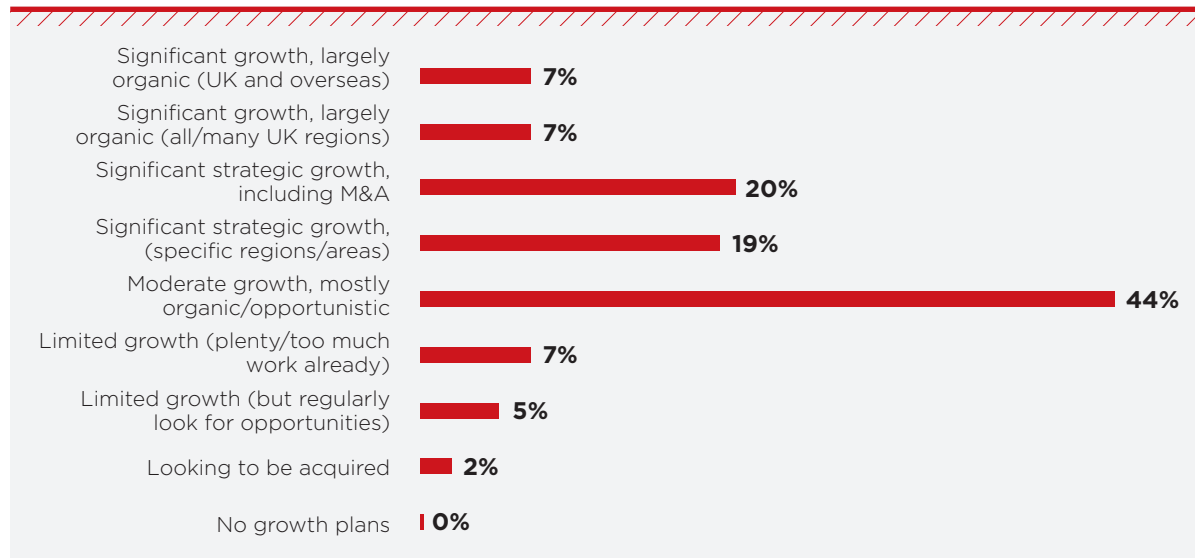
Is the preference to independently plough a path while trying to incentivise

people and streamline their processes, perhaps merging or joining a larger group for some synergies and safety in numbers, or shifting structurally to move the dial on business decision-making around how best to invest?

Only just over one in 10 leaders say they have 'limited growth' in their sights, with 7% claiming client work is in no short supply for their teams (p6) — indeed, perhaps there's more than they could realistically process at the moment. But most would describe the mission as one of growth, either organically (44%) — effectively developing their own people to be bigger contributors (perhaps with some lateral hires where the opportunity arises to add complementary expertise in a space, region or significant sector) — or by placing some bigger bets such as staffing

Market players place either strategic or organic growth first

What is the best description of your firm's growth intentions over the next 12 months?



“It isn’t necessarily true that younger professionals aren’t interested in career progression and eventually owning part of a successful business.”

SUE MURPHY, PRACTICE AND BD DIRECTOR, PARIS SMITH

up new offices, among other options for expansion (19%). Another fifth identify as seeking growth that could mean a merger or number of acquisitions — which may, of course, start either from a position of relative strength but provide a platform for more scale and efficiencies along the way; or awareness of a certain weakness, amid intense competition, more demanding clients, increased costs and a pressing need to do something different.

Joanne Druce, practice manager at F Barnes Solicitors, says her firm is

“conscious of managing risk by not growing too quickly”. She explains: “We want to bring people on in a measured and controlled way, in line with the firm’s culture and model for treating clients.”

Sue Murphy, practice and business development director at Paris Smith, echoes: “We prefer to stay masters of our own strategic future and believe that an independent partnership still has a place in building something of value for future lawyers. It isn’t necessarily true that younger professionals aren’t interested in career progression and eventually owning part of a successful business.”

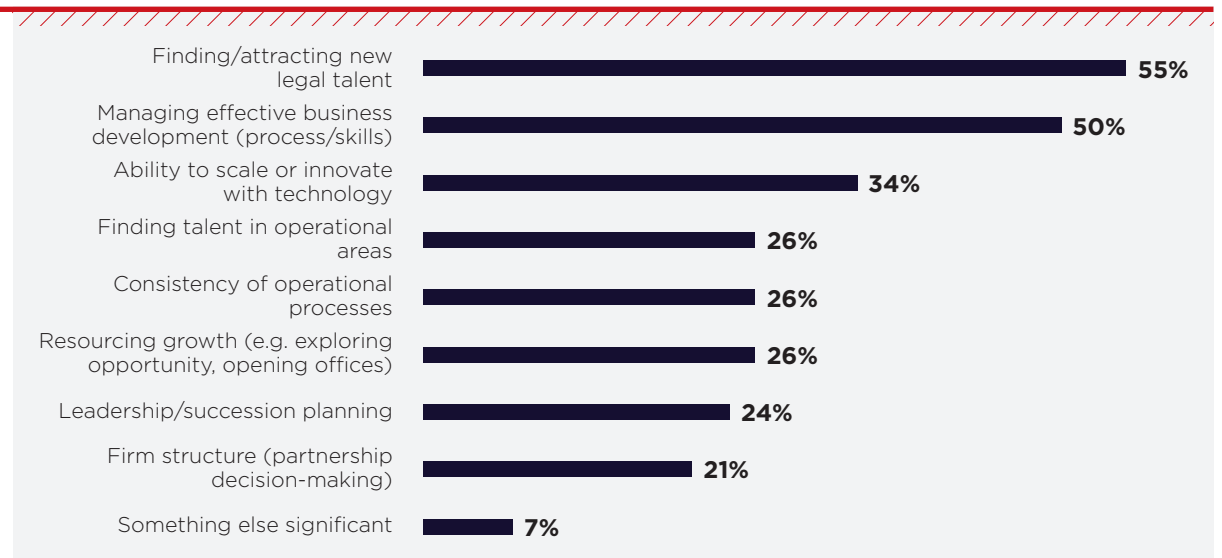
But however they grow, there are three significant business challenges that leaders are more likely to report facing than a whole host of others (p7). They are finding those people best equipped to create the conditions for growth, when competition for capable and dedicated legal talent itself remains high (55%) — while almost a quarter (24%) cite the development pipeline leading up to future business leadership. Meanwhile, half identify a need for more from their business development machine, whether that requires better connections with current or potential clients, coaching to make the most of the opportunities they present, or more effective processes (creative, consistent,

Other forces at work?

- Capital constraints on investment
- Growth in competition and concern about the political climate
- Managing introduction/evaluation of legal technology
- Managing a growing compliance burden.

Talent, BD and scaling with technology top growing pain points

What are the three most persistent challenges you see/experience with growth at your firm?



targeted, or data-driven). Then, in third place, follows the challenge of business transformation by implementing a technology platform or programme that enables a leader’s vision of their firm’s future (34%). On paper that is a choice which should lead to simultaneous progress on some of these adjacent fronts, while supporting a confident growth path that is more scalable, stable, secure, and ultimately profitable for the partners or others who give it their backing.

Julian Burrows, chief operating and strategy officer at litigation-only offshore firm Baker & Partners, says: “The firm’s growth strategy is built on all three fronts: targeted business development, strong leadership capability and investment in systems that support scalability. This includes focusing BD efforts intentionally and consistently on events and

engagements, and priority client relationships that are most likely to generate meaningful opportunities. We have introduced a new client relationship management (CRM) system that provides improved visibility of activity across the business, enabling more coordinated planning and effective prioritisation.

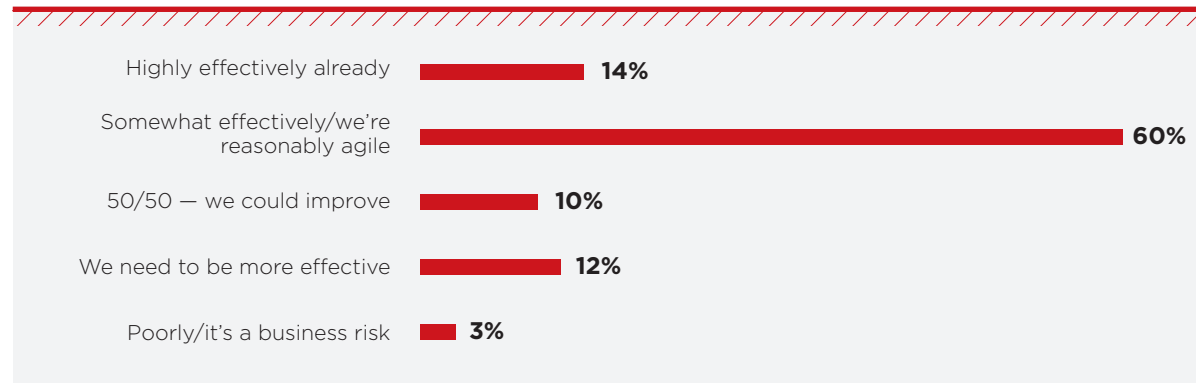
“Alongside that, we are focused on building the leadership capacity needed to sustain our approach to growth and our strategy over the long term, while remaining agile to organisational structure

and needs. Succession planning and leadership development therefore require a more structured and proactive approach than in the past.”

In an age of improving — and embedding — AI, Jonathan Lea of the Jonathan Lea Network says he plans to recruit more junior lawyers rather than fewer because of technology’s advances: “With a strong culture and enough supervision, we much prefer to have a really good pool of paralegals who may then go on to qualify with us.” If those in these entry roles

Three-quarters feel confident to face future pressures on the firm

How effectively do you believe the firm currently plans/invests for the future?



achieve a billing target, he says, they are very likely to be promoted to a trainee solicitor with an offer of SQE sponsorship: “Lateral hires can be more challenging, although we do invest in finding the good ones. We also have a lot more marketing activity to ensure a stream of improving leads and the right clients.”

It’s striking that most responding leaders don’t appear to see other capabilities a law firm inevitably calls on — to run an effective modern business day to day and deliver a strategic transformation agenda — as a similarly tough challenge to tackle. Only just over a quarter (26%) cite the quest for talent in operational areas (p7). This could be because such areas aren’t prioritised for as much investment in the

first place. At the same time, however, only just over a fifth consider the way their firm is set up to make investment decisions — boardroom dynamics, stakeholder engagement, the process of building partnership consensus, and perhaps some more ‘cultural’ characteristics — to be one of their most persistent challenges.

But Julian Ganley, IT manager at Parker Bullen, makes the point that a lack of alignment at this level is precisely why SME firms may need more operational expertise: “The risk is that partners choose products they think they need for their department, without enough consideration for the rest of the firm.” He says one of his first challenges, a decade ago, was to identify a single case management system

(CMS) that could accommodate all its practices: “In terms of managing organic growth it also makes introducing new people to processes much easier,” he explains. Parker Bullen has doubled in size in three years, by headcount and number of offices. That said, another new CMS will be needed soon: “Under the user-per-month model that will be a big change financially, as well as for training needs — quite the shock to the system,” he says.

Lea continues: “Particularly with the pace of changing technology, you need to be able to make the right decisions quickly. I see a lot of law firms seeming to put off the issue of AI adoption, for example, because they can’t make those decisions.” As sole shareholder director, his firm is perhaps freer to do so. “But we still need others to have decision-making responsibilities at different levels, a solid operational structure and the right processes for good discussion. You can’t make them in isolation,” he says.

Burrows adds: “We have streamlined platforms and processes, for example applying APIs to improve information connectivity. Getting this right requires investment not only in legal expertise, but also in the operational capabilities that enable effective business performance.

Firms also need to identify and introduce specialist expertise to support an increasingly broad operational remit.”

Given the extent of some of these challenges facing smaller firms — coming during a prolonged period of macroeconomic uncertainty that has coincided with significant pressure to keep pace with tech-driven competitors or follow in larger firms’ footsteps — it’s perhaps surprising three-quarters are confident they’re already investing for the future effectively. It may stem from a belief they’ve already moved, or upgraded, to new systems with the flexibility to fit different business needs, risk profiles or client bases — or reflect the introduction or remodelling of roles it’s believed will be able to make the right calls when the time comes. But there can be little doubt that many of these leaders typically have their work cut out, often with a lean management team to support major projects that might be tough to prioritise among competing calls on tight purse strings and intense pressures of the day job. A mere 3% think their readiness to meet a future of even faster flowing change constitutes a business risk at this point; but 25% agree they could certainly be doing some more to mitigate it.

Jake Newman, finance director at Sharpe Pritchard, says: “Firms should be looking to future-proof for huge change that’s coming — not just from an AI perspective but also within their foundations.” For his firm this means a move towards cloud-based systems — and away from a one-size-fits all solution. “It gives us more flexibility to adapt as quickly as we may need to as the market changes,” he says.

Fox Williams has already invested in a number of Enterprise best-in-class cloud options, says director of technology and innovation Guy Treloar. Although the team is lean, with outsourced support, he finds day to day operations “relatively manageable” as a result. Therefore, the top focus now is how best to harness very considerable enthusiasm for AI, he says.

“We have more capacity to explore the art of possible. We’re investing significantly to ensure people build AI into their everyday. With strong guardrails in place we’ve let people adopt ChatGPT Enterprise organically. Almost all have, so we’re now thinking departmentally and championing use where it’s most relevant. With that level of organisational knowledge we’ll then be in a good place to move forward and have clarity as to why we might need other tools.” **LPM**

“With the pace of changing technology, you need to be able to make the right decisions quickly. I see a lot of law firms seeming to put off the issue of AI adoption, for example, because they can’t make those decisions.”

**JONATHAN LEA, PRINCIPAL,
THE JONATHAN LEA NETWORK**

TRANSFORMATION BANDWIDTHS AND BARRIERS

In their own words, some of the biggest obstacles to transformation implementation that leaders have encountered range from familiar “time and financial constraints” to “the knock-on effect of world politics leading to economic uncertainty, as investors seek more certainty”. In a particularly striking finding, however, there is an almost even split between a group who converge on just one key barrier and those that pick any one of a plethora (p11). In the latter cohort come concerns about the business profitability (16%) — something a technology project would argue it arrives to protect. There’s also the disruption/frustration it could

cause people, including clients (12%), change-averse attitudes in the firm for any reason (12%) or a concerning skills scarcity (8%). But far more prevalent than any of these objections is the perception that a solution must be a better match for the way the firm wishes to grow and the processes it uses to do so. This is precisely the rationale for Sharpe Pritchard choosing the path of assembling a “best in class” stack, says Newman.

As a result, it’s not surprising to find over two-fifths (42%) believe there’s at least some gap between the vision of growth for their firm and the pragmatic reality of delivering it within current parameters (p13). Meanwhile, the same proportion are roundly confident in the overall integrity of their organisational structure/infrastructure. Indeed, three-quarters of all leaders report a very positive recent transformation experience (p12). Whether availability of equipped talent or investment in appropriate technology is the main limiting factor, the group that sees a gap must stand at a strategic disadvantage.

One leader points to the emergence of a

“wait and see culture” over time — but it’s felt that this stems from a “skills gap” that first needed closing. Another, independently, appears to expand on this idea: “The main gap is the capacity of legal team leaders to adapt quickly, while still carrying heavy caseloads as the most experienced people in their teams. They need more protected time for learning, leadership, supervision and team development, but current workload pressures make that difficult.” It’s clearly a common experience. Leaders have difficulty bringing in ‘the right’ resources, both lawyers and into business services or transformation teams, and say there’s too little time to commit to making a success of the correct priorities. There is the “number of investments and projects attempted at once, compared to depth of resource to deliver”, concludes another — although other responses rather suggest a perception of unwillingness, and not just at the more junior end of the workforce. There are “various views and ideas of what our systems and processes should appear to be like”, outlines one leader — as already

“The team holds very healthy conversations about plans and time horizons, and we work back from there, both to mitigate risk and avoid waste.”

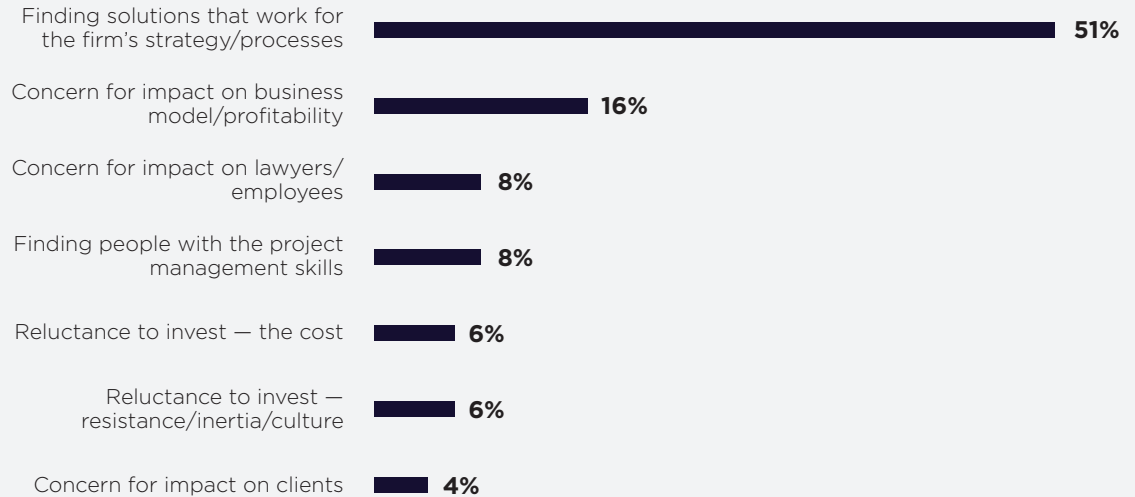
**GUN JUDGE, CHIEF OPERATING OFFICER,
MERALI BEEDLE**

Bigger blocks to business change?

- Increasing cost — both finding time and the financial constraints
- The knock-on effect of world politics, leading to economic uncertainty, with investors looking for greater certainty.
- Locked in to preexisting contracts.

Half of leaders struggle to identify right technology for their strategy

What is the ONE most significant obstacle to unlocking more investment in business transformation for your firm?



highlighted, consensus can be hard to come by. Another draws a less forgiving conclusion: “We have too many people unwilling to change and too few who would seriously want to buy into such a project.”

Gun Judge, chief operating officer at Merali Beedle, says it’s particularly important to be both pragmatic and inclusive when having conversations about how growth changes what’s needed for the firm to manage itself for success. Hers consists of freelance consultant fee earners with different work patterns, and it’s a model that has clearly increased in popularity. She explains: “The team holds very healthy conversations about plans and time horizons, and we work back from there, both to mitigate risk and avoid waste. There are also some things that work in a smaller firm’s culture that no longer work over time, so it’s important to recognise the indicators and map out when you need to

change. Everybody can contribute to the conversations, while nobody should feel that their role is threatened.”

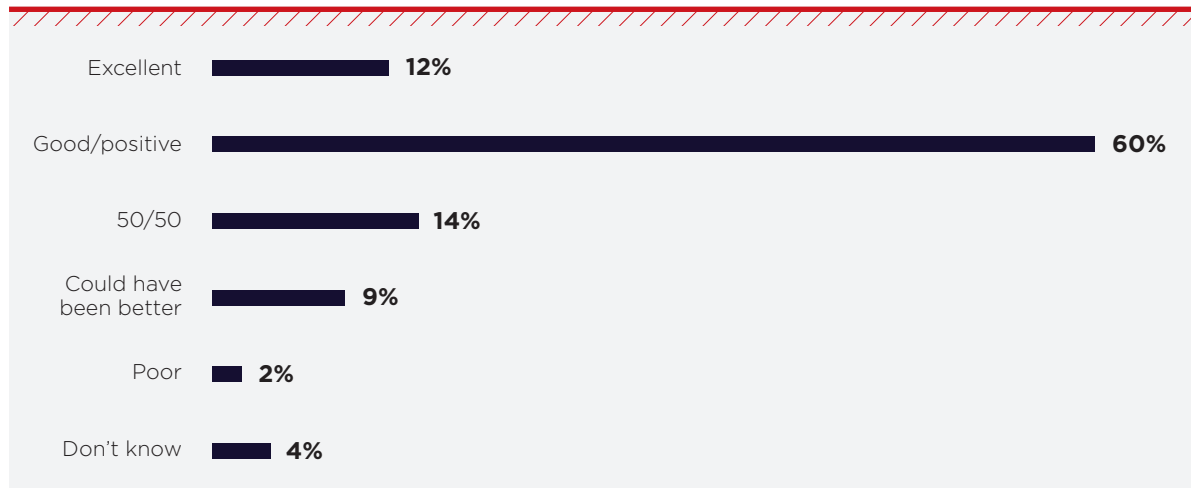
An example of such evolution concerns the firm’s risk appetite. Initially erring firmly on the side of caution with new consultants, today it has resourced a compliance ‘centre of excellence’: “From being extremely risk-averse about something like client-opening as a matter of course, the firm has moved to a risk matrix and laying on some automation. It has made a significant difference to how quickly consultants can

open matters,” Judge explains.

Druce continues: “We’re very willing to consider requests and to invest to make the firm more efficient, but adoption can sometimes be slow, or the enthusiasm to start is low, even where there are clear time savings on a weekly basis after some initial time and effort.” She gives the examples of compliance reporting and AI-generated summaries of matters at the click of a button. “We understand that people become fatigued with change and new procedures but also need to exploit

Almost three-quarters report a positive recent time with transformation

How would you rate the success of your last major system/digital transformation project?



GOOD VIBRATIONS: WHAT WENT SO WELL?

- Smooth transformation/ little impact in terms of downtime
- Process improvement in the client journey
- More modern APIs/ linking systems together
- Moved the firm to more digital working
- Empowering fee earners (with access to data, e.g. financial reporting)
- More firm-wide acceptance of change flowing from a positive training process
- Leveraging AI
- Timeliness of the project delivery
- Data-transfer process
- Internal and external teams come together in effective communication and planning
- Lives become easier, with workarounds not required
- Focus on iterative improvements over time rather than big visions
- Improved compliance (e.g. tax, regulation)
- A more coherent, future-proofed roadmap for scaling the firm.

technology the firm already has to the fullest — rather than use 60-70% — both to optimise our management and help them to maximise their individual profitability in a safe way,” she explains.

Treloar at Fox Williams expands: “By educating the whole firm upwards we can become more efficient, which opens more capacity. Admin assistants may become super users of AI, for example, and develop skills that mean they can deliver for another department. We may even get an edge on some peers in the process.”

However, Murphy says: “Some smaller firms could be worried about buying something too quickly and struggling to roll it out effectively, either because it’s too difficult to use or the market moves on and the lawyers want something else. It needs to be the right time and to suit what you’re doing at the time.”

Judge adds: “Firms risk getting distracted and then derailed by the newest big thing, rather than sticking to what has been agreed because it will make most material difference to people. It can sound counterintuitive, but sometimes you need to say no to stay moving forwards.

“Training, upskilling and listening don’t always get enough credit for change success,” she adds. “For example, feedback about individual pain points has identified some areas of data duplication that can be removed with systems and when people

have built up more experience.”

Ganley also stresses a strategic approach to training, and carefully planning its delivery, particularly as rapid advances in AI introduce ever more features for increased productivity. With a new phone system, for example, people at Parker Bullen will now be working with AI-generated call summaries and extracted action points for the first time. “The training covers both how to use it effectively and our positioning with respect to clients,” he says.

Jonathan Lea is clearly an AI enthusiast. He says: “We’ve adopted enterprise-level subscriptions for various tools — ChatGPT, Perplexity and Claude. There are just so many ways you can benefit, and you learn every day. We’re building knowhow for handling both litigation and corporate matters, and collaborating across the team using shared spaces, as well as streamlining on other tasks like enquiries and emails.” The firm is mindful about recruiting people who already want to embrace this for their work. He explains: “It makes them more useful, and in fact you can accelerate the development of juniors and might even need fewer high performers entering at a more senior level.”

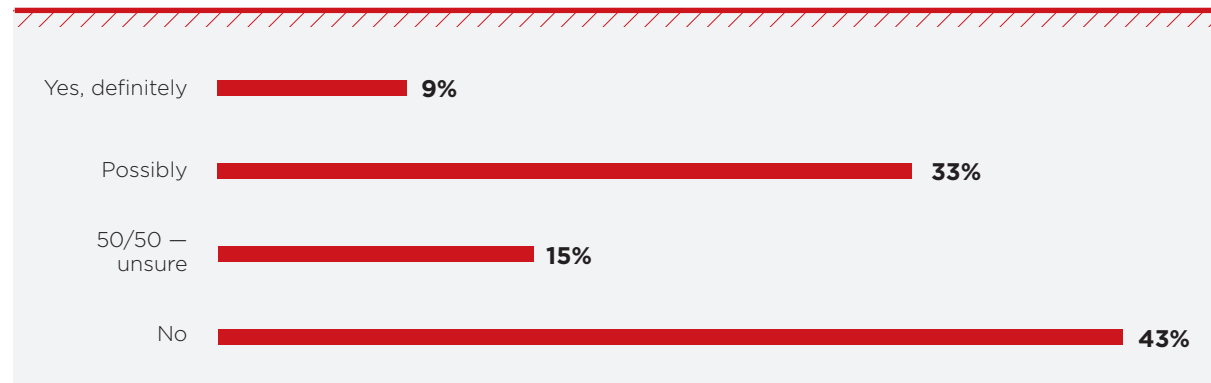
However, even this ambitious firm needs more time than it currently has to explore any workflow-building at the next level — agentic AI opportunities, such as first-draft responses to emails with information pulled

from documents, or chatbots that direct users for different scenarios.

When expanding on their views, relatively few leaders suggest that the problem is fundamentally one of poor systems first and foremost — although if change to more consistently applied technology can’t even make it off the ground clearly firms fall back on more manual methods of work. There is a “dependency on headcount to fill gaps in systems”, laments one leader. Another hints at unmet expectations, where the crux of any improvement should be “ensuring what’s sold, implemented and used are deliverable and the same thing”. Left disillusioned — whether it’s with features themselves or their wholehearted adoption — inertia on this journey is only likely to deepen.

Leaders split on perception of a possible gap impeding firm growth

Is there a gap between what the firm hopes to achieve and your overall ability to execute that vision with your current operations infrastructure and resource?



MIND THE GAP — IF YOU CAN SEE IT CLEARLY?

- Need for ‘the right’ people/lawyers
- Leadership time, with ability to adapt/time to plan alongside workload pressure
- Skill gaps — leading to a cultural ‘inertia’
- Headcount is filling some system gaps
- Identifying the right growth — opportunities that also protect the culture
- Technology resilience/integration
- Firm-wide commitment — an unwillingness to change, a lack of alignment
- Prioritisation problem — the resource isn’t there to meet the level of demand.

GET THE PICTURE OF PROGRESS

And what would constitute the end of a positive firm transformation journey, as experienced by almost three-quarters of our leaders? What do SME firms most need in place to realise their growth potential, whether that's a gear change, entering brand new markets or some other piece of business?

One area they might focus on is management information (MI) — the displays that best focus hearts and minds on personal or team-based contributions, timely alerts about areas of weakness and top opportunities, or indeed the strength of the underlying data itself. Over three-quarters (79%) of leaders believe MI is handled effectively to direct decision-

“In order to move systems successfully it's critical to pull management information together across them. We need the ability to access and report on data as one source of truth.”

**JAKE NEWMAN, FINANCE DIRECTOR,
SHARPE PRITCHARD**

making where it's needed, with just 14% indicating it depends on the purpose or role requirements (p15).

However, only 14% can agree that “the needed information is always available”. Moreover, a very clear majority believe provision of MI to fee earners needs to be a firm priority over the next 12 months — almost a third (29%) indicating it's an ‘essential’ area into which to channel more investment (p16). This contrasts with 80% suggesting leaders themselves have the amount of the right forms of information needed to assess performance in line with goals across the firm (p15).

Murphy at Paris Smith says: “Our lawyers all have access to individual data for strong visibility of progress, using simple dashboards. The firm's information is not being hidden away. Leaders can also assess work and team profitability, and we create reports and explore trends in areas such as sources of work and referrer reciprocity for business development.” But the transformation journey is a continuous one. “You can always seek another level of maturity and granularity,” she adds.

Katherine Carroll, managing partner at

Peacock & Co Solicitors, says: “As part of reviewing our bonus scheme we'll now be providing more firm-based turnover figures, so fee earners are more aware of how the firm is performing as a whole, not just their part as a fee earner.”

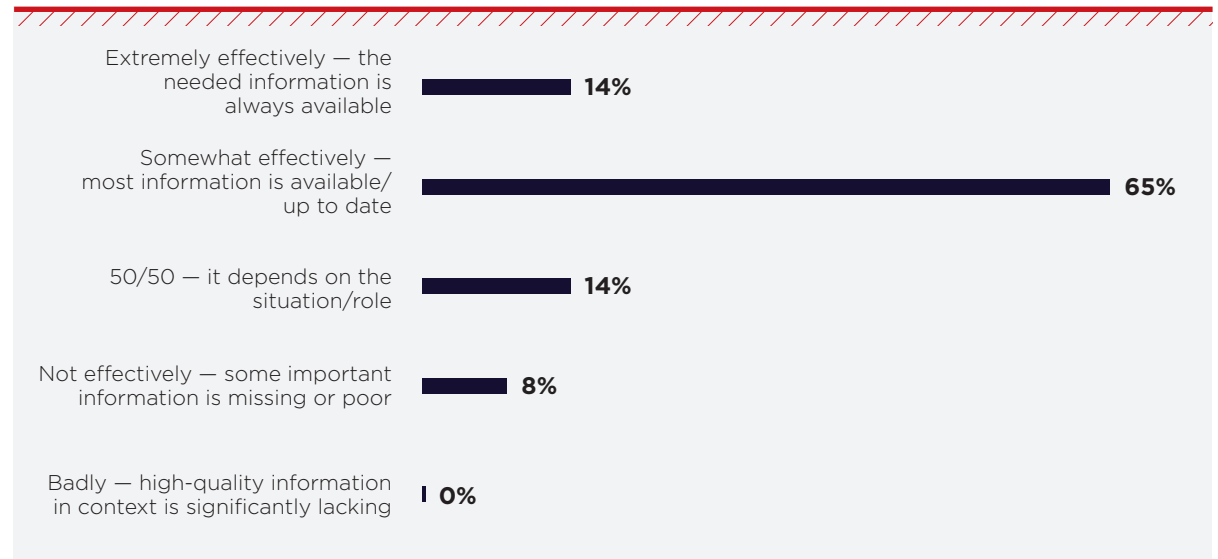
Druce adds: “We've managed to move away from the traditional monthly fee earner meeting. We present them with the data, but in doing so it's also much easier to be sure of having a good handle on how they're doing — rather than leave it to the point of having a problem.”

Leaders are more divided as to the strength of information for making the best commercial decisions (such as pricing work competitively or picking the right areas for expansion). This has a very clear link to the firm's growth goals, but almost two-fifths (38%) are not confident it happens accurately, which of course also raises questions about profitable delivery on individual pieces of work (p17).

Burrows at Baker & Partners says: “Decision-makers need information to make informed choices. That information isn't always as visible as it should be to the right people, and then it can fall to another

Staying informed — most leaders believe they’re enabling decisions with data

How effectively is the firm’s management information surfaced to support people to work smarter and make the best decisions?

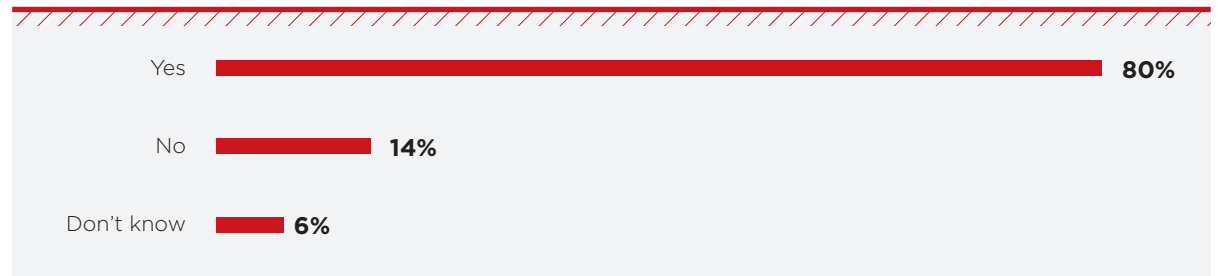


team, such as finance, to gather and share it.” It’s why the firm has a unifying data warehouse project underway. “We want any senior leader to be able to view business performance from a time, profit or recovery basis, for example, while also having a more forward-looking perspective. At the same time, it should provide useful insights that help to shape behaviours — for example, encouraging individuals to take a more active role in managing client relationships and understanding the wider commercial context of their work.”

Newman at Sharpe Pritchard adds: “In order to move systems successfully it’s critical to pull management information together across them. We need the ability to access and report on data as one source of truth — and that will help to track profitability by matter, fee earner or client framework, where we’ve already implemented some new processes. It will also support work to develop pricing in line with advancements in AI.”

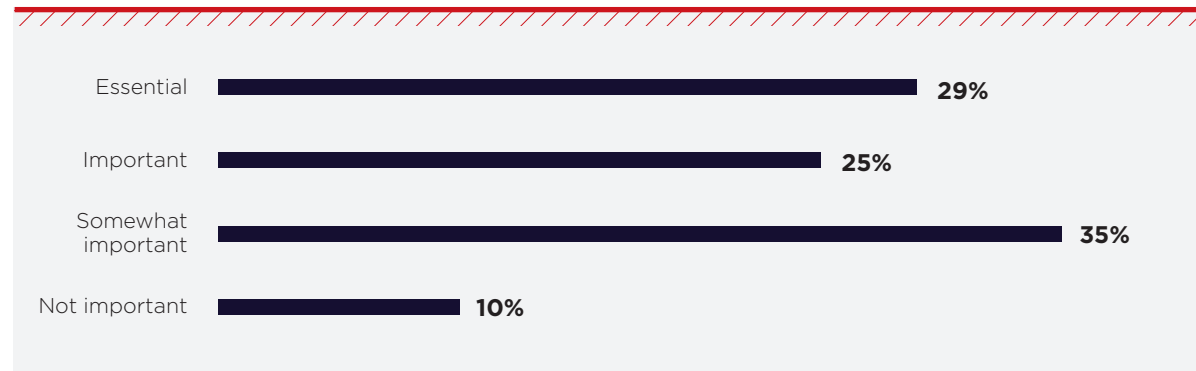
Murphy says Paris Smith has used a pricing tool that plugs in data for some time — “about matter types, levels of

Do leaders have the range/depth/quality of information needed to properly assess fee-earner performance?



Clear majority of leaders can see a need for better business information

How important is it that your firm invests more in improving the provision of MI to fee earners in 2026-2027?



“We need to be delivering the service that clients pay for. Consistent customer focus is key ... which includes client contact regardless of what has happened with the work.”

**JULIAN GANLEY, IT MANAGER,
PARKER BULLEN**

lawyers and time taken historically”. She agrees that the next step is deciding how to factor in such fast-changing AI use and the resulting efficiencies, and the firm’s AI strategy group is busy gathering intelligence and multiple perspectives to feed that work.

Treloar at Fox Williams adds: “You need detail to be sure that you’re pricing and billing work consistently — rather than gut feel or educated guesses — when the information is all there to be unearthed. There’s also a potential role, again with the right guardrails in place, for AI to have access and interrogate the data across different systems when a user asks for it.”

Burrows also highlights the potential impact of more accurate management

information in helping to challenge assumptions and support more informed decision-making. This might include providing greater clarity around patterns of work, demand and resource allocation, as well as enabling teams to make decisions based on evidence, rather than perception and that of which the data is not representative.

And Jonathan Lea gives the example of client billing queries that could be avoided if “money on account” were managed more effectively — sought for the correct amount of an estimate, and at every stage, rather than invoicing later. “If the data shows this dropping we start to investigate and tackle it — it both saves management time across the firm and improves financial performance,” he says.

Leaders also express some quite serious misgivings with management of client matters in the digital ways many may now expect — from app-based compliance checks at onboarding, for example, to appropriate document sharing, ‘out of hours’ updates, or transparent pricing in line with agreed scope and work progress (p18).

The views could even reflect a level of concern with document or data security as the capability of AI simultaneously sees a shift in the threat landscape. In any case,

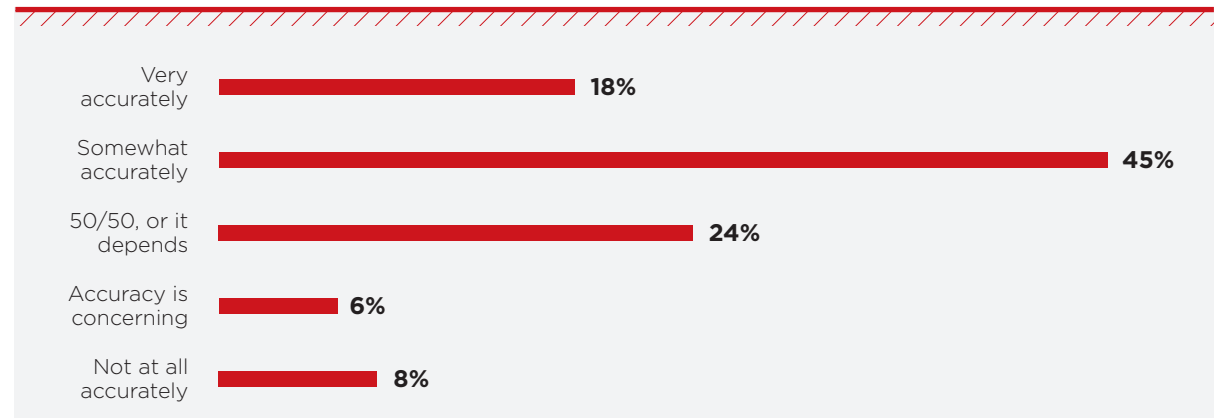
almost half (49%) of leaders lack confidence here for some reason.

“We need to be delivering the service that clients pay for,” says Ganley. “Consistent customer focus is key. There is a Parker Bullen Promise, which includes client contact regardless of what has happened with the work.” However, he points out that clients can have different attitudes to using technology in support of that service, including along generational lines.

Murphy adds: “It can be a challenge communicating with clients around onboarding — why the regulation — but firms do need to invest in making it easier where possible. Clients shouldn’t always need to attend an office with a passport between nine and five. CMS changes can also update in a client app to keep them informed at any time.”

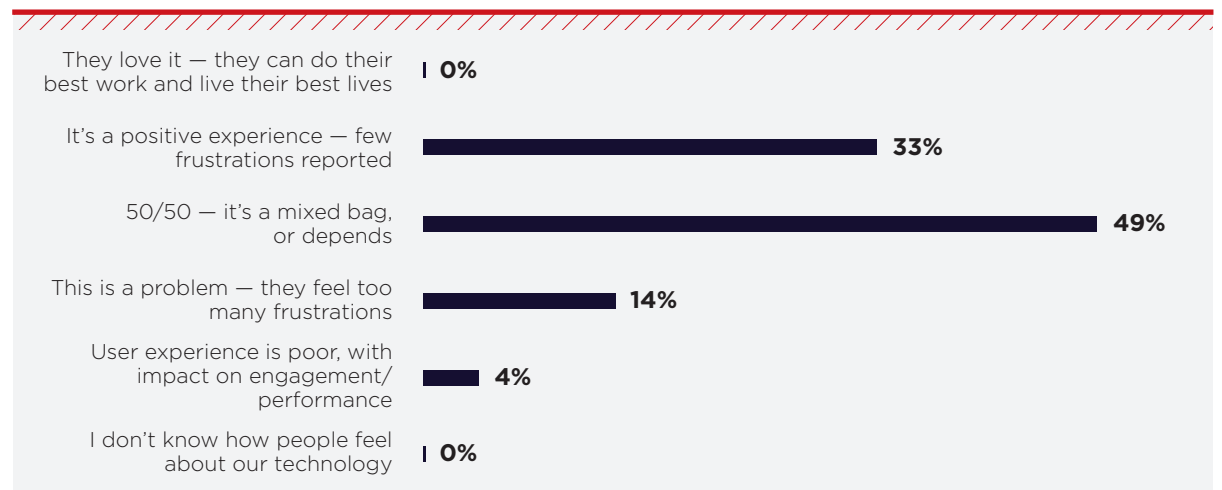
A similar proportion (48%) also question the effective integration of all these systems to deliver in a consistently and measurably accurate way, including right at the core of operations such as connections to the practice management system (p18). A mere 4% say they are ‘very satisfied’ in this respect, with 24% decidedly dissatisfied. Almost everybody surveyed for the research considers this an important weakness to address as a

How accurately do you think the firm can assess matter/work profitability (to design more commercial pricing models, for example, or weigh up potential investments)?

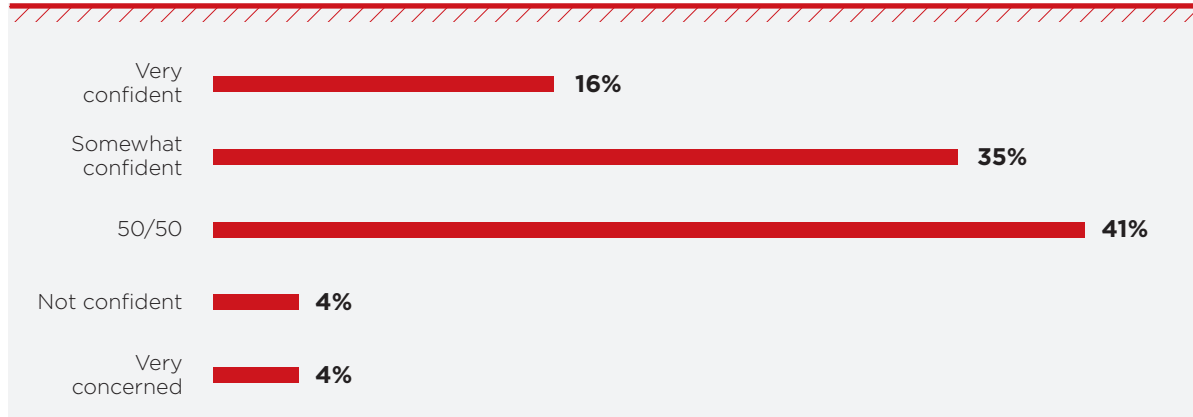


Two-thirds of leaders encounter people feeling too many technology frustrations

How do you think users currently experience working with your core systems/solutions?

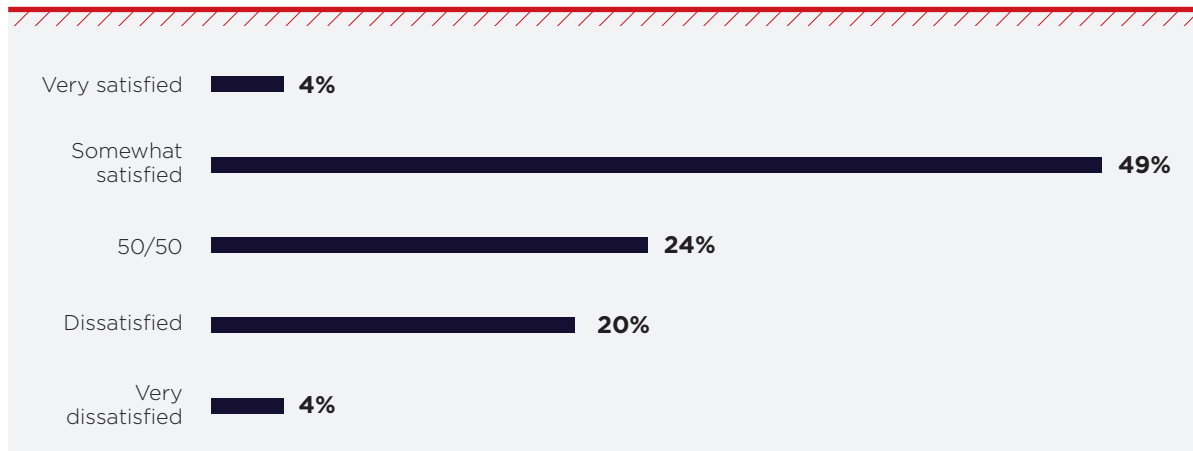


How confident are you in ways that the firm manages matters digitally to deliver services as clients expect?



Well connected? Just 4% of leaders are ‘very satisfied’ with existing levels of integration

How satisfied are you overall with the levels of integration between your core systems/ systems and third-party legal tools?



priority, with a quarter deeming it ‘extremely important’.

Burrows says: “Without integration, processes can pause unnecessarily and require manual intervention to be moved forward. By improving connectivity across key systems and workflows, firms can reduce delays, improve visibility and support more timely decision-making.

“An example is creating connections between key workflows to reduce manual intervention and enable faster decision-making at client onboarding, which will then auto-complete a number of the follow-on processes such as matter opening in the PMS. This helps to create a more efficient operating environment, and enables people to spend more time focused on delivering value to clients.”

However, Newman anticipates a quicker shift now as tools make more progress on this particular front. “One thing that has already proved fantastic is a tool to generate nominal codes and transaction descriptions for accounts payable automatically,” he says.

Judge at Merali Beedle says: “You can only meet the pressure to be ever more efficient if your points of integration are working — and where they’re improving firms will now see more pressure on the precise blend of resourcing in the business

that follows.” Which roles could become surplus to requirement as a result?

Treloar adds: “The presentation of certain information for clients, and attitudes towards offering that, could also change very quickly.”

Returning to the significant high-level challenge in attracting and motivating talent at any level to support the firm to transform, there could be something of a vicious circle in operation. Only a third believe the people they employ ultimately see the set of solutions available to them as creating a net positive working experience, with 18% admitting they witness too many frustrations affecting productivity or other examples of positive progress in the day job. Almost half say it’s more of a mixed bag (p17).

Treloar explains: “We want to remove the pressure of manual overhead wherever we can — for example, reducing multiple steps in an onboarding process to minimise friction for the client and the partner. That’s the power of automation, but the revolutionary step is one-to-many integrations with understanding of the context in other locations.”

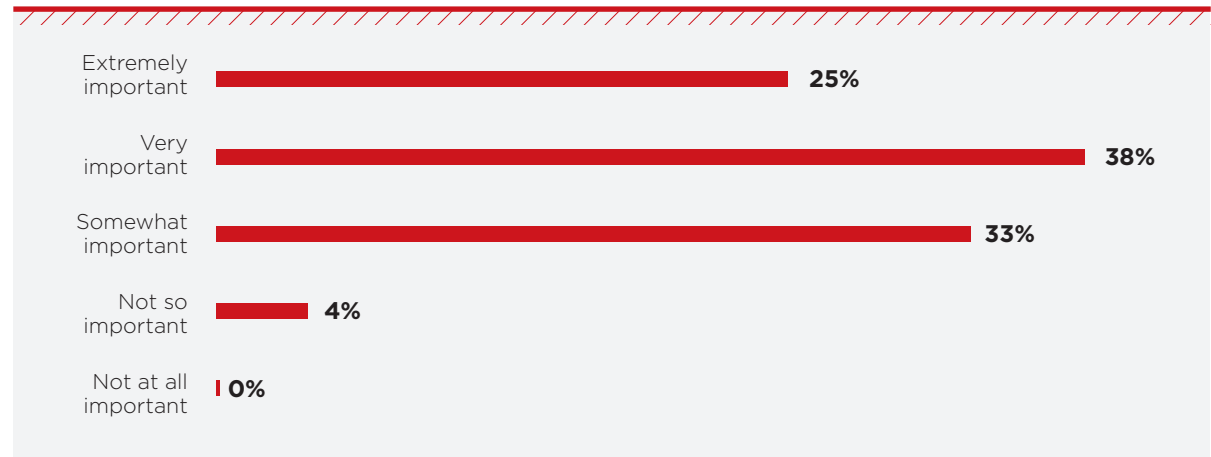
Murphy at Paris Smith adds: “For many years the firm’s IT strategy was primarily focused on safety, such as the security of client data. And of course that remains

really important. However, we now also talk to each of the legal teams to improve awareness of struggles and frustrations — for example, fighting the admin involved in saving and moving documents, ensuring correct versions — whatever feels difficult or that they feel wastes time that could be spent focused on clients. It’s also key that anything introduced can talk to the firm’s other systems.”

Carroll at Peacock & Co concludes: “Investing in technology does attract new talent, as does embracing AI certainly, but it can be expensive so there is always a balance to reach between the two.” **LPM**

One quarter view move to more joined-up systems as a vital change

How important is it for the firm to improve system integration/connectivity as a priority?



“ Investing in technology does attract new talent, as does embracing AI, but it can be expensive so there is always a balance to reach between the two.”

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