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LEGAL TECHNOLOGY

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Interview

Jan Durant, Lewis Silkin

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Technology is one of those areas that you feel you need a ready reckoner just to read about, sometimes. But not, however, in Briefing.

We've tried to turn words like business intelligence and ERP into meaningful things in this issue, which covers the near future of legal technology. Why? Because technology affects and enables, if it's good, everyone in the firm. And tomorrow's

law firms will need really great technology to compete with the top legal businesses and a host of consumer-facing new entrants itching to get into the game.

That's why we've interviewed Jan Durant at Lewis Silkin about making your own firm-wide IT, and spoken to a range of law firm top management in our feature about everything from iPads to BI.

We've also worked with

issue sponsors Elite, Linetime, Iris Legal Solutions and Pilgrim Systems – and others – to get the industry's view of what law firms will need to do, think about and implement to be competitive in the next few years.

This has been a great issue to curate – I hope you enjoy it as much as I have.

Rupert White, head of content and community at LSN, and editor of Briefing

Interview: Jan Durant

Rupert White talks to Lewis Silkin's director of IT and operations about making better firm-wide IT, and why SharePoint will take over the world



Welcome to the future...

Are law firms embracing enterprise wide IT ideas? What IT will tomorrow's law firm be using? Joanna Goodman gazes into her crystal ball to find out



Next steps

Briefing interviews Patrick Hurley of Elite on why Elite is updating its products, and what IT needs to do to give law firms a competitive edge



Unity and purpose

Tony Klejnow, MD of Linetime, outlines what has to change in practice management IT to make law firms more competitive



From PMS to ERP

Firm-wide enterprise resource planning IT will be indispensable for firms of the future, says Tim Cheadle of LexisNexis Enterprise Solutions



Game plans

Firms need IT to be competitive and efficient – but they also need a strategy, says Jitendra Valera of Iris Legal Solutions



Self analysis

Colin Kennedy, chief operating officer of Pilgrim Systems, on why law firms must be deeply connected to their goals to get the most from a PMS



Matches made in heaven

Chris Giglio, CEO of Aderant, on why it's vital to use standards-based IT like Microsoft and pick the right long-term IT partners



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INTERVIEW

How to reformat the law firm

Rupert White talks to Jan Durant, director of IT and operations for Lewis Silkin about making a better firm-wide IT system, why SharePoint will take over the world, workflows that can save a fortune, and the role of the law firm IT director

What's the shape of tomorrow's law firm? In technology terms, it almost certainly involves tightly integrated IT systems that allow any part of the business to get a deep understanding of what's going on inside the firm – and that can turn laborious manual behaviour into lithe, process-led workflows. Lewis Silkin is well on the way to being that kind of firm – which is why we asked the firm's IT director, Jan Durant, to be our practice management special interviewee.

Durant ditched Open Text to build a SharePoint document management (DM) system, and made Lewis Silkin one of the first UK firms to adopt Elite's latest firm-wide practice management system (PMS), 3E. So she 'gets' integration.

Integration is a Big Deal for tomorrow's successful law firms. Slowly but surely, the idea that a firm's IT needs to do a lot more than run the finances and, perhaps,

the matters – and often not necessarily in a very joined-up way – has percolated from the very top of the tree all the way down into the top 200 and beyond.

Now the top law firms are thinking about or actually building large-scale, integrated IT systems that have more than a whiff of what other business sectors would call enterprise resource planning (ERP) – systems that plug every part of the business together, creating management information and allowing for real, firm-wide process management and workflow creation.

Durant is creating an Elite 3E/Microsoft SharePoint environment that will provide firm-wide process workflow creation and management information – as well as access to all (allowed) information, whoever needs it.

"All the systems have to talk to each other – that's what we're doing – but law firms are still left with a lot of other

[legacy] stuff that we have to make work. We can't just buy a practice management system off the shelf, because lawyers need different things out of them. We can't use standard ERP systems – we're [generally] confined to the Pilgrim or Aderant or 3E route. Linklaters didn't buy standard SAP – they had to get it customised, and it cost lots of money."

Elite 3E is enabling a huge amount of capability in Lewis Silkin, but it's because Durant felt there wasn't a ready option out there for a truly integrated set-up beyond Elite that she decided to reformat her law firm a different way.

Opening up legal technology

In terms of the future of legal IT, Durant says she'd "love to see a total cloud offering for firms of my size. I would really like to let somebody else manage it –

“I’m not emotional about software. I’m not here to like or dislike stuff. I’m here to deliver my law firm the applications they need at as low a cost as possible. And Microsoft ticks that box.”



because IT is not our core business. Our core business is being a law firm”.

“I think people want to move to the cloud,” she says. “There are lots of issues, but they’re all around integration as well as our fears about confidentiality and jurisdictional issues, where the information is held.”

Law firms have to integrate PMSs to their own shapes, and everything flows in and out of that PMS – “that’s why almost none of them are cloud-based”, she says. This is one of the reasons Durant moved Lewis Silkin away from Open Text DM and onto SharePoint – lots of providers can provide managed services around SharePoint, because it has huge penetration across a lot of sectors.

And, she says, “once you’ve bought those licences, you can get it supported anywhere”. Durant’s key argument is that the cost of the system isn’t as important as the total cost of ownership (TCO) – and a future of competition among managed service providers offering SharePoint, and a host of SharePoint developers turning out law firm PMS modules, is one Durant likes the sound of – because the TCO will be lower.

Maintenance costs, she says, on a created SharePoint set-up like that at Lewis Silkin are also lower than paying a yearly fee to a large, established vendor.

Surely co-developing a SharePoint set-up like Lewis Silkin’s still costs money to maintain? Sure it does, she says, “but we’re not making profits on ourselves are we? The software houses are – they’re not ploughing all that money back into development of the product”.

So, despite the in-house SharePoint build at Lewis Silkin being an adventure that left Durant saying she’d “never, ever build something myself again”, she’s very happy with where it’s ended up.

“There just wasn’t anything available for me to buy at the time. I would always say ‘buy not build’, but there just wasn’t anything. All our systems seamlessly talk to each other now.” Lewis Silkin has its extranet and DM system on SharePoint, and Durant isn’t stopping there – the next job, she says, is to roll out a new SharePoint HR system, “so that everything will join up together – all the appraisals and the [staff] self-service, everything. There will be one place for everything, and that’s in our SharePoint document centre”.

Headlong into the mainstream

One of the big advantages to SharePoint (and to an extent Elite, she adds later) is that it’s widely used, which means there’s more developer choice than legal IT lead-

ers are used to.

“We wanted an extranet with granular security for our clients – and we needed it for a very important client, within a month. I heard this just before Christmas. But you can go to any SharePoint house – and I got three very competitive quotes, because they can’t pull the wool over your eyes any more.”

Durant says she’s convinced SharePoint has a huge future in legal business, because of this mix of capability, cost-efficiency and competition in supply... and because it’s Microsoft.

Microsoft owns the legal desktop and email – the number of mid-size or larger law firms that use other systems, such as Google Apps, can likely be counted on one hand. It’s this ubiquity that Durant says will carry SharePoint through into being one of the dominant ways future law firms will operate firm-wide IT.

“We’re all going to be using [MS] Office forever aren’t we? We’re selling documents, we’re selling advice, so emails and documents are key; and we’re all going to be using Outlook.

“I’m not emotional about software. I’m not here to like or dislike stuff. I’m here to deliver my law firm the applications they need at as low a cost as possible. And Microsoft technology ticks that box.”

Far more interestingly, Durant says

INTERVIEW JAN DURANT



she thinks Microsoft will push other DM systems out of the picture by leveraging that desktop ubiquity. "I believe Microsoft is going to make it far more difficult to integrate future versions of Office with any DM system that isn't sitting on SharePoint," she says.

Another advantage to SharePoint is that it's browser-based, she says. "What I'm striving for is for everything to be available in a browser, because that cuts down a hell of a lot on training. We can't take a lawyer out of their office for two days when they join and train them now – we need software that's instinctive to use. Everybody can use a web browser."

And this is the crux of Durant's argument – law firms should relentlessly move towards mainstream solutions. This is why, she says, she chose Elite 3E for Lewis Silkin's PMS. "I don't want to change my practice management system too often. We had to do something that was more mainstream – and that helps a lot with development costs. Lewis Silkin is 300 people – Thomson Reuters aren't going to do something that Lewis Silkin needs; but if there are enough law firm users out there who need something, they will develop it."

"I love it when I hear one of the products I use has been bought by another firm. The more successful they are, the less likely they are to be bought out, and the more likely my support is going to be good."

How to use the legal IT press

This is one of the things Durant is, I suspect, all about. She appears a lot in the legal IT press and she does a lot of

conference speaking and attending, and I can't help wonder if part of her strategy isn't a one-person mission to embed her choices still firmer into the legal IT world, because that helps deliver value to her and the firm – and getting the legal IT press to promulgate her choices helps, in a reflexive way, to prove those choices were right. It's a kind of legal IT self-fulfilling prophecy. It's also good PR thinking.

Durant has been at Lewis Silkin for 13 years, so she's obviously patient and/or committed enough to play the long game. The PR also appears to work, to an extent – I'm writing about her decisions, after all. Some people in legal might say that Durant is a bit over-exposed; she even asked me if **Briefing** readers really

Street). They quoted her a large number – so Durant looked at the cost of an off-the-shelf HR system and told Charles Street that if they made the SharePoint version for Lewis Silkin for that money, she'd buy it – and they in return would learn how to do it for law firms, from her and her HR director, and that law firms across the land would want something like it. And because she's been quoted in many articles talking about the wonders of SharePoint, she's spearheading the PR drive to make that happen; she'll help make her promise come true.

"I think that we've been pretty ground-breaking in terms of SharePoint implementation and, as time goes on, it will be in everybody's best interest to integrate with SharePoint," she says. She would say that – and she may turn out to be right – but, whatever happens, it's a very joined-up way of seeing the role of the IT director.

A workflowed future

As to the near future of legal IT, what does Durant think will be important to law firms next year?

Lewis Silkin's use of Elite 3E is a big part of the future vision, she says, because it and SharePoint

are built for creating process workflows. She calls 3E "a fabulous toolkit", and says the firm is working on moving to automated billing internally and composite billing for clients. This is an example of a wider move at Lewis Silkin to a more automated, workflowed platform, which will be a major part of pretty much every successful firm.

Workflow is, she says, the way to find agility, which is a vital goal as the legal market becomes more competitive.

"Workflows are where it's at. A lot of

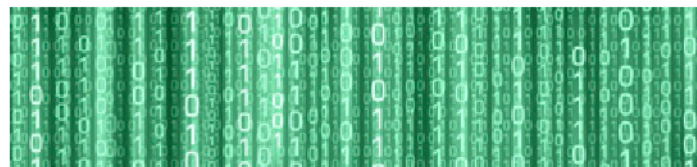
"What I'm striving for is for everything to be available in a browser. We need software that's instinctive to use, and everybody can use a web browser."

Jan Durant, director of IT and operations, Lewis Silkin

needed to hear more from Jan Durant when I approached her for an interview. But I think she gets the PR side of gaining as much exposure for your ideas as possible more than some people think – because it can be turned into purchasing power; it has realisable commercial value.

Here's an example of what I mean: Durant says that, when she went to market for a company to create that SharePoint-based HR system for Lewis Silkin mentioned earlier, she went to a developer she'd used before (Charles

INTERVIEW JAN DURANT



stuff we do is repetitive, 'samey' – so let's workflow what we can. Client and matter inception, leavers, joiners and so on – with decision points in the middle, because people do need to be involved – but I think workflows, as far as some commoditised legal services are concerned, are the future," she says.

Lewis Silkin is turning client and matter inception into a workflow process because, after doing some research, Durant discovered that "the one task everybody was spending lots of time on, which is also a risk factor, was client [and] matter inception". This was, she says, "a no-brainer". The next workflows she's going to build will be the other bane of the back office: leavers and joiners.

Business services departments spend hours sorting out leavers and joiners, she explains, because they touch every part of the firm, from comms and facilities to HR and finance and beyond. If you can create 'global' workflows to make this a more automated task, the benefits could be huge and firm-wide. "Will we know exactly how much we saved? No we won't.

Will it be good for the business? Yes it will," she says. Leavers and joiners will be built on the SharePoint HR system, but it needs the whole IT set-up to play nicely to make it all work.

But, with an HR system in place, Durant has almost finished making a best-of-breed ERP system.

Back to the future

Something that might still need a lot of development in law firm IT departments in

2012 is the role of the IT director.

Earlier in 2011, Legal Support Network conducted a survey of legal IT people, and we published a report on the findings called 'Legal IT Landscapes 2011' (download it at bit.ly/LegalITlandscapes). One question was on how IT leaders are perceived in law firms – and the results, while generally positive, still showed that IT chiefs in law firms often aren't at the same level as their peers in other sectors.

The survey showed that just 22% of respondents had their CIO on the firm's

– and some can deliver a lot of value to clients, too. Durant, however, takes more of a back seat when it comes to that idea.

"Our job as IT directors in law firms is to deliver everything the lawyers need to do their job easily, seamlessly and better. The most we can really give to a client, unless I'm not being very imaginative, is a great website that they will use instinctively, and to give them a great extranet where all the information they need is collected easily and seamlessly.

"Do they care what practice management system we have?

They just care that their bills are accurate. Do they care which DM system we have? They just want to know that they're going to get the documents delivered as cost-effectively as possible – if my lawyers can't find a precedent because they've got a rubbish system, and they have to reinvent the wheel, it's going to cost the client more."

And that's the two sides of the 'big IT' debate firmly pegged – the drivers are simple, but the solution is large and complex. Lewis Silkin appears to be creating it as we speak,

or at least a version of it – single-system suppliers are also moving into the ERP space, so there'll be a lot to look out for in 2012.

For now, Durant's vision looks perceptive – if your law firm can't find the firm-wide technology it wants, you may just have to help build it, but now she and some others have broken the trail, it might be slightly cheaper and easier to find. ●

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"Clients don't care which DM system we have – they just want the documents as cost-effectively as possible. If my lawyers can't find a precedent because they've got a rubbish system, it's going to cost the client more."

Jan Durant, director of IT and operations, Lewis Silkin

management board. Durant told me at the time that in law firms that didn't operate like this "there is something badly wrong".

Will this change in 2012, I ask her for this interview? "Wouldn't it be great if that would miraculously change next year?," she replies. "But I don't see how these firms will suddenly have a 'Eureka moment'. I have no idea what [IT people] could do about it, apart from illustrating the value they can add to the business."

Bringing a lot of value to the business is something IT leaders can do, of course



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FEATURE

Welcome to the *future...*

Are law firms falling for enterprise-wide IT systems? Are iPads changing how lawyers work? And what IT will tomorrow's firm be using? Joanna Goodman gazes into her crystal ball to track 2012's legal IT trends

The legal world is only going to get more interesting, and competitive, in 2012 – and technology will play a deciding role in whether law firms succeed or fail to capitalise on the opportunities that presents.

On top of regulatory changes that have knocked down the barriers to entry to the UK legal market, wider influences will be in play, such as globalisation – the European crisis has led law firms and clients to focus on Asia-Pacific, where there is money and opportunity.

Firms will have to change if they are to survive in tomorrow's business environment and grasp the opportunities it offers – and technology is at the heart of this change, both as a driver and an enabler.

The internal drivers are more familiar. The global downturn has made clients more demanding, whatever their stripe. Consumers want to feel valued, not just part of conveyor belt commoditised services, but they are also looking for value for money. Corporate clients want value, value, value – and much lower fees.

As Prof Susskind said in 'The End of Lawyers?', firms are being squeezed into delivering more for less. It's pretty much universally accepted that the right technology is crucial in helping law firms deliver on those demands while maintain profits, but the extent to which this is understood is more patchy.

'Legal IT Landscapes', a Legal Support Network report based on research on legal IT staff carried out in 2011, revealed that half of respondents agreed that partners were waking up to the importance of IT, and were open to its involvement in the firm's strategy. But what about the other half?

Technology trends

In terms of the technology being considered or deployed in legal, the current trends fall broadly into three categories:

- User-centricity – with consumerisation driving the adoption of iPads, and mobile apps and social media in the picture, firms need to think more about how clients use their services, and how

law firm people use their systems;

- Business intelligence (BI) – using management and client data to drive better business development (BD), pricing and financial overwatch; and,

- Integrated practice management systems (PMSs) – with SharePoint an increasingly popular part in that picture.

While client and matter centrality have long been legal IT buzzwords, and now form part of the strategic norm, this year's theme is user centrality.

Businesses, including law firms, are investing in intuitive systems and processes that give more control over their tools and technologies to boost productivity, efficiency and client service at individual, team and firm level.

Consumerisation is a striking phenomenon in legal. Users want cool gadgets – and to use them at work. This relates to another driver: mobility. Law firm workers expect to do much more than check their emails now; they want the ability to access systems, and collaborate securely with clients and colleagues, from multiple platforms and locations. This combines with the mobility

model to create the growth of a new way of working in legal.

What would users do?

Gareth Ash, CIO at Allen & Overy, says he's made this last a central element of his firm's IT strategy. "Rather than focusing on functions or processes, we aim to deliver what end users need," he says. And collaboration with colleagues and clients is a key consideration. "As deals increasingly involve multiple offices, we are looking to move from centralised filing systems to collaborative spaces that include calendars, tasks and documents."

Ash also wants to drive more mobility at A&O, but to do that he has to make more of internal systems and processes accessible from multiple devices, and deploy more mobile devices.

Janet Day, director of IT at Berwin Leighton Paisner, shares Ash's vision. "We are adopting an increasingly flexible approach to working practices, so that users, rather than technology, dictate how they work." As a result, Day and her team are finding ways of delivering information that can be accessed from any platform. "It's not just about consuming information," she explains. "We are looking at giving users the ability, within reason, to do any task from anywhere."

At A&O, this is driving a range of projects, including A&O Connect, a guide to the firm's lawyers, offices and expertise, and Investment Perspectives, an app charting investment flows around the world and available in 15 languages – A&O is, after all, a global firm.

Easier routes to analysis

Many successful firms are following the example of arguably more dynamic, competitive sectors and crunching their numbers more to maintain and drive profitability. To compete with the prospect of more dynamic organisations entering the

market now that the regulatory gloves are off, firms must closely analyse how effectively and efficiently they get tasks done.

This is generally done by identifying which elements of the firm – industry sectors, clients, practice groups and even individual partners – are bringing in the business. And, as firms increasingly become organised by sector group as well as practice area, it's important to make sure all kinds of personnel group-

to deliver it. "Business intelligence is not a quick fix. It depends on the information you are looking for and what you intend to do with it. For most firms, information resides in multiple systems, so you need either a master data strategy or a product which consolidates data sets from different resources."

Firms are now deploying systems that are specifically designed to pull together information from different resources and

"Business intelligence is not a quick fix. It depends on the information you're looking for and what you intend to do with it."

Janet Day, director of IT, Berwin Leighton Paisner



ings have access to relevant and timely information that supports their work.

This includes legal precedents, know-how, expertise and experience within the firm, as well as sector and industry knowledge. But it's really about the BI.

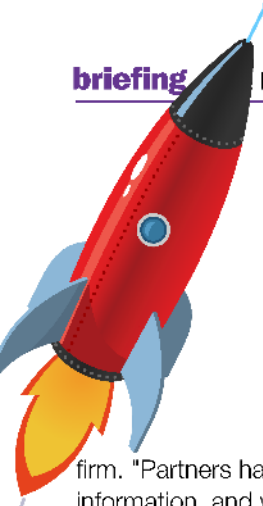
Business intelligence is in BLP's sights. Day and her team are looking at 'just-in-time' information to try to manage the enormous volume of information a law firm now handles.

Day says BLP is exploring various consolidation tools to see how IT can deliver the right information at the right time. BI, she says, isn't a very clear market space, and BLP uses a combination of out-of-the-box and bespoke tools

present them in different ways – it's part of this overarching move towards proper firm-wide IT.

According to Day, partners crave this information – and they also need it, because they're stakeholders in the business. BLP has invested in QlikView, which provides real time business intelligence across all systems and data – currently focused on BLP's PMS to deliver a lawyer dashboard, which measures business performance against key performance indicators, Day explains.

Rather than expecting lawyers to undertake business analysis, QlikView helps them understand what their actions mean to the profitability of the



firm. "Partners have been craving this information, and we have found a way of making it clear and accessible," Day says. The QlikView dashboard allows partners to view the figures that are relevant to them from different perspectives. They can drill down from a 'helicopter view' of the entire firm to sectors, practice areas, clients, teams and individual lawyers. QlikView can be applied to any set of data, and Day now plans to apply it to the firm's customer relationship management (CRM) system, with a view to analysing trends and supporting the firm's work with key clients and prospects. This is BI taken

business," explains Ash.

The challenge is, of course, making sure that people's experience is up to date and accessible, a need that harks back to user centricity – PAs and administrators are involved in updating the system, so the interface has to be understandable to, and usable by, everyone, no matter what their role is.

Hard business analysis is also becoming more prevalent in law firms – though right now, only at the top of the tree. Those firms are employing business analysts to produce detailed financial reports and client and BD analysis, and BI

many processes as we can so lawyers can work quicker, more efficiently and with less input at a senior technical level."

The Morgan Cole eggheads use SQL Server Reporting Services BI tools to mine information from the firm's IT systems – FWBS MatterCentre (recently bought out by Elite) and a Miles 33 PMS.

"It's about dipping into the data for specific information and presenting in a way that enables meaningful analysis," explains Wright. "And it's important to recognise that, ultimately, the information is going to lawyers, not statisticians." Finance directors, in particular, will recognise that challenge.

"Aggregating information from different sources lets us understand our knowledge capital better, and use it to win business."

Gareth Ash, CIO, Allen & Overy



to another level – beyond cube analysis and crossing into customer relationship financial analysis.

A hard pitch

BI is also a key element in BD – the right information can make the difference between winning and losing a pitch.

A&O uses a pitch builder add-on to its Hubbard One CRM system to do this. "Aggregating information from different sources lets us understand our knowledge capital better, and use it to win

tools are an essential part of their lives.

Jeff Wright, facilities and IT director at Morgan Cole, has implemented BI as a way of improving processes and driving efficiency. This has been particularly valuable because the firm expanded through merger. Morgan Cole employs business analysts to examine data and processes and suggest improvements.

"Other businesses have these skills and techniques, but law firms are only just getting around to using them," says Wright. "Our business analysts are former lawyers, so they're well placed to challenge the status quo. We automate as

Integrated systems

Many savvy law firm leaders realise that technology underpins competitive advantage, and legal IT budgets have remained fairly stable while the world has rocked around like a paper boat. Though the downturn led to some firms postponing projects, A&O, for example, has continued to overhaul its IT infrastructure, implementing Elite 3E and developing a Hubbard One CRM system.

Any international firm needs the right technology to support a cohesive, streamlined service. Ash says A&O is increasingly handling work that requires teams from several jurisdictions.

This is particularly relevant for larger international firms, which, as the sector group reorganisation spreads through legal, now need integrated systems that facilitate collaboration and the application of BI across different functions and locations.

Ash's opinion is that SharePoint is the only system that currently offers a fresh and innovative approach, particularly with its affinity to the cloud.

Stuart Whittle, IS and operations director at Weightmans, recently invested in LexisNexis's dna PMS – which incor-

porates case management, document management, workflow and resource planning.

Whittle, a former professional indemnity lawyer, explains that a comprehensive PMS drives operational efficiency, and, importantly, supports risk management.

"Fundamentally, a lawyer's work involves about 10 things: letters, documents, pro formas, time recording, research, meetings, phone calls, emails and court appearances," he says. "Our PMS allows us to do these electronically. All our work is handled through our case management system (CMS). In our key practice areas, insurance and public sector work, having an effective CMS is almost a condition of doing business."

Streamlined and flexible services

Whittle says LexisNexis dna allows lawyers the flexibility to work between the system's different functions, which helps when legal work can differ significantly – litigation involves more workflow than document management, while M&A tends to be document heavy, for example.

As well as improving efficiency and promoting knowledge sharing within the firm, Weightmans' clients can access all their information on the case management system. Other benefits relate to risk management: "All our insurance litigation is run through a single workflow which includes risk management and knowledge management," Whittle says. "It's designed to put our Lexcel manual into practice, so when we're audited for Lexcel accreditation, we can demonstrate that the entire process is managed through our case management system."

Morgan Cole has achieved similar capability with a different set-up. The firm, says Wright, invested in integrating its financial and practice management

Simmons does Microsoft

As interest in business intelligence grows, many are wondering whether law firms need full enterprise resource planning (ERP).

Just as **Briefing** was going to press, the news broke that Simmons & Simmons had invested in a Microsoft Dynamics AX 2012 solution, with legal-specific bolt-ons, from Avanade – a new player in the field. The set-up focuses on conflict checking, compliance, client and resource management, partnership accounting, and reporting, and it replaces the firm's practice management and human resources (HR) systems.

Simmons' FD David McLaughlin explains that the strategy was to bring together the firm's HR and financial data so that users can access a 'single version of the truth' from different perspectives.

Previously, McLaughlin says, Simmons had a data warehouse that aggregated information from the firm's separate finance and HR systems to produce management reports. This was a complex way of producing and analysing management information, and involved correcting data deficiencies in the underlying systems.

With a Microsoft Dynamics ERP, all the firm's information will reside in a single system, and there's no need for a data warehouse – which makes it much easier to generate data for

business analysis. Everyone can see the same numbers and, because it's a visible single version of the business 'truth', it supports decision-making and massively speeds up business reporting across Simmons' international offices. Better yet, each international office will also be able to report locally for local fiscal and regulatory purposes – for example, if they are required to work to a different year end or accounting policies.

A big advantage of Microsoft Dynamics is that there should be no data discrepancies – as soon as data is entered into the system it is updated and available in real time. There is no risk of duplicating information, because it's held in a single repository, so there's no reconciliation.

Simmons' HR director Dan Flint explains how the system, because it's essentially an enterprise resources tool, allows the firm to have a more holistic view of the lawyers. "When someone joins the firm they bring skill-sets, contacts and clients. They work with clients and matters. They get paid and they require resources. An ERP system includes all the various elements of the business affecting that person – you don't have to go to HR to find out when they joined, look at the payroll to find their earnings or the CRM system to discover their clients and contacts."

systems and de-duplicating data. Wright implemented FWBS MatterCentre specifically to streamline processes such as matter inception, billing and cash collection, and identify potential issues.

"Previously, matter inception involved entering data into two systems," he says. "Now, we automate as much as we can so that lawyers can start working on matters as quickly as possible."

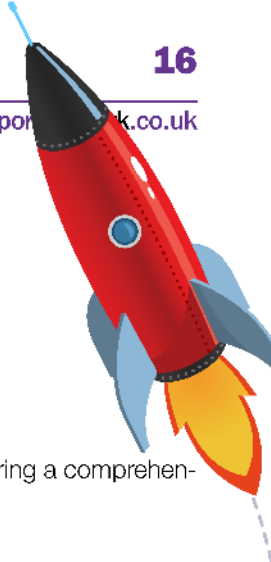
The rise and rise of SharePoint

'Legal IT Landscapes' confirmed Share-

Point as the platform de jour for 2011, and the market is keeping a close watch on Clifford Chance's work to deploy SharePoint as a DMS, and Lewis Silkin's expansion of SharePoint across its business. BLP's SharePoint development is its intranet, which provides knowledge, precedents, client information and generally day-to-day news.

Over at Thomas Eggar, head of know-how and training Ann Hemming also says SharePoint is the show to watch.

"Everyone is looking to see whether SharePoint will become the de facto DMS, but, for medium-sized firms, the



most exciting SharePoint developments are around content aggregation – the ability to pull all the information together about a client or matter from different systems, and aggregate the content and produce something that's greater than the sum of its parts. The really valuable thing about SharePoint is that it offers a one-stop shop."

Hemming wants to create a SharePoint portal at Thomas Eggar that will transform access to management information. The plan is to integrate financial and sector information to produce real-time views around a client or mandate that will include information from internal and external sources, including all relevant documentation, financials and market trends and activities, Hemming says.

Compliance-driven IT investment – and development

Regulation is a very important driver of IT investment in legal, and in recent years firms have started deploying HR and learning management systems (LMSs) to manage compliance and competency training.

LMSs are another corporate tool that's become more accessible and affordable, and is increasingly used by law firms of all sizes to manage an exponentially growing regulatory burden.

Thomas Eggar introduced an LMS to manage mandatory training, but it's increasingly directed at competency management – monitoring the firm's

investment in training and education and creating individual online learning plans that are linked to the firm's appraisal systems.

The introduction of outcomes-focused regulation (OFR) in October 2011 places the onus on firms to ensure mandatory training is up to date, and to have evidence of providing a comprehensive, compliant training programme, says Hemming – and an LMS can deliver that.

"A key element [of OFR] is ensuring that training is not only delivered, but understood. Our LMS ensures everyone is included, and it enables the firm to

identified a supplier offering a comprehensive solution.

Interesting times?

So, there's still plenty of room for development in tomorrow's practice and case management technology.

We'll no doubt see more exciting new mobile devices in 2012, and firms will have to create the applications to support them. There will be more pressure towards business efficiency, with BI and analysis used by the clever firms

to boost competitive advantage.

And tomorrow's law firms will need innovative, integrated products to help them deal with the challenges of increased compliance and competition. SharePoint is clearly becoming an important platform, and may yet become the dominant DMS – but many firms are looking for more in terms of end-to-end matter management and risk and compliance support, and are still developing bespoke solutions.

Will more firms follow Simmons & Simmons (see box out, p13) and choose a comprehensive ERP

solution? Or will they take the Lewis Silkin route and make their own mix of solutions (see our interview with Jan Durant on p4)? Or are they waiting for a legal-specific SharePoint system, perhaps based on what Clifford Chance has created?

The answer is: it's anyone's guess – but, whatever happens, the future will be integrated. ●

"Everyone is looking to see whether SharePoint will become the de facto DMS, but, for medium-sized firms, the most exciting SharePoint developments are around content aggregation."

Ann Hemming, head of know-how and training, Thomas Eggar

develop online tests and quizzes to reinforce the training."

As well as driving the development of software, compliance requirements have also highlighted gaps in provision, most notably around end-to-end integrated solutions. Both Ash at A&O and Day at BLP are looking for end-to-end matter management systems, but neither has

“The software system of choice for the ABS era.”

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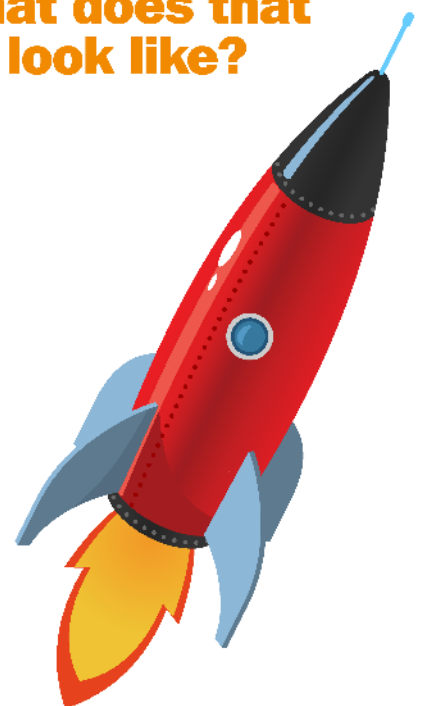
**Matches made in heaven**

Chris Giglio, CEO of **Aderant**, on why it's vital to use standards-based IT like Microsoft and pick the right long-term IT partners



Over the next few years, business services people and lawyers alike will have to rely ever more on the IT systems law firms use to manage and steer their businesses to gain a competitive edge.

But what does that future look like?



INDUSTRY INTERVIEW PATRICK HURLEY, ELITE

Next steps

Briefing speaks to Patrick Hurley of Elite about why the software house is updating its products in 2012, and what more legal IT needs to deliver to give law firms the best competitive edge

Elite is the premier name in legal IT. Apart from Microsoft, no other software company is more closely associated with the legal industry, and Microsoft only owns the desktop – Elite pretty much owns the practice management space in the world of top-flight law.

Patrick Hurley, Elite's global senior director for professional services, has been in the legal industry for 20 years. He's seen his fair share of change – and the future is no different. When he spoke to **Briefing**, he outlined how Elite is changing to deliver a new world of integration, mobility and flexibility to law firms – and why firms need to update their software and their business thinking.

"The practice management systems (PMSs) many law firms use now were designed over 20 years ago," he explains. "There is no other technology in a law firm that's based on a foundation that old. People sort of expect

we can keep adding ever more enhancements to older systems and getting them to run stuff they see on the iPad or websites they visit – and it's just not feasible."

Lots of businesses in and outside of law run on similarly old software but, Hurley says, there's a big problem with this approach – it simply can't deliver the capability that 21st century lawyers need.

Take business intelligence (BI), for example. The data structures in law firms just weren't there when these older software systems were designed, so it's much harder to get the most out of older systems with BI. The same problem exists in creating workflows and with serving information to mobile technology – you can do it, but these new techniques aren't inherent to the design of older systems.

The future, says Hurley, lies in pure service oriented architecture (SOA) systems, which are ready for mobile technology and deliver far

better integration with other IT.

"Service oriented structure architecture allows you to very easily, quickly, cheaply and consistently integrate with any other system that you have.

"It's also a modern information technology, so reading from and writing to an open service oriented architecture product is quick and easy to do. SOA systems allow for much easier integration, and they're much more extensible – in other words, it's much easier to extend the software to areas you don't have, such as CRM [customer relationship management] or BI, for example, if it's built on SOA."

The other big advantage is that, with SOA-based software, you're not necessarily bound to one supplier, because it's so much easier to integrate different systems – as long they're SOA-based.

"That's not necessarily a great thing for software houses that want to deliver all the solutions in a law firm," says Hurley with a laugh, "but

it's a great future for law firms, and in the end that's what's important. They get better products and more flexibility, and it's fundamentally a better technology base for our solutions."

One thing this allows law firms to do is to choose between a firm-wide IT set-up from one vendor, or to make their own – and if they're based on SOA, either will work better than in the past. Jan Durant, this issue's interview, is an example of this – she's building a firm-wide enterprise resource planning set-up for Lewis Silkin based on Elite 3E and Microsoft SharePoint.

Strategy comes first

But at a more coalface level, there are things law firms should be doing in 2012, says Hurley, to be really competitive that perhaps they're not getting right enough of the time at the moment.

BI is one of those things.

There's a number of business areas that need more and better information from law firm IT, such as business analysis and business development (BD) – and they could make great use of BI tools. But their IT – and business strategy – is holding them back.

"Firms often have a tool like this, but a lot of them don't use it. There are very few firms that really embrace business intelligence as a way to drive their business proactively. They can do it, because we give them the tools, but often they're not using it as intelligence to improve their business – and that's where the legal market is still in its infancy in understanding the power of that technology."

BI is the kind of technology that true firm-wide systems can really enable – because really useful BI requires insight across the whole business.

"It's about using a balanced scorecard approach – to use an old term – that very few law firms embrace," Hurley explains. "You need to understand what works and what doesn't work across your BD efforts and across different practice areas. I think you can count the number of firms on two hands that really track, report and change their business behaviour based on the results of BD efforts."

But you can't change this just with technology – sadly. Firms have to change the way they think as well, Hurley says.

Global firms, he says, are good examples of legal businesses making strides in both the thinking and the action. "Being able to look at

how all of those silos link to each other, and what the big picture is, means those firms are much better able to think in a coherent, firm-wide way – and good, current systems like ours can provide that data very easily."

Improving the interface

At some point in this chain, though, real lawyers and business services people have to get hold of this information –

in front of them, in the space that they already work in. It's about making all our information available to the front office in a workspace area."

This approach should also create more consistent visions of information that can be served to mobile devices, for example. But it's really about being closer to the next piece of information you need.

"We're trying to come up with solutions that put you one click away from whatever other information you might

oriented architecture enables all this capability, he says, as well as the high-level integration mentioned earlier.

What 3E doesn't have right now is a really friendly front-office lawyer interface, and that's what Elite is working on – it's why the company bought FWBS, for example, Hurley says, because FWBS always pushed the need for a really usable interface.

Fundamentally the Elite people are trying, through SOA, to 'de-silo' Elite, to make

"There are very few firms that really embrace business intelligence... The legal market is still in its infancy in understanding the power of that technology."



and that's the big next step for Elite, says Hurley.

"For years, we've been trying to come up with tools for lawyers to understand their businesses, but always end up making them go somewhere else to look at this information. Now we're working on features and functionality that don't require the lawyer to go somewhere else.

"They spend 90% of their day in Office, in Word and Outlook, and we need to have the management information

need in the context of what it is you are already looking at – and that goes for mobile devices too.

"So, if you're looking at client information, you might want to see their address, their phone number, or you might want to see their financial information or what marketing events they have been invited to. But whatever it is, you want to only be around one click away from it."

The fact that Elite 3E is already built on a service

it easier to integrate with other systems but make it a better enterprise-wide solution at the same time – and to hide what goes on behind the scenes beneath law firm users' daily programs, like Office.

It's a big ask but, Hurley says, it's achievable – and it's just around the corner.

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Law firms and tablets

What do legal IT leaders think of tablet computers? What do they want to do with them? And who in legal is most resistant to change? Find out in our first independent video interviews

In our 'Legal IT Landscapes 2011' report, we analysed whether law firms were ready to accept tablet computing. The answer was 'yes' – from IT people. But now there are more devices in play, what are firms actually doing with tablets, and what do they want from the IT industry to make them work?

We at LSN intend to make independent video content a big part of our future. To start that journey, we interviewed two UK legal IT chiefs – Vlad Botic of Norton Rose and Neil Davison of Farrer & Co – about what their firms are really doing with tablets, what they want to do with them, who's most resistant to tablet change, and what they want the tablet makers to do for law firms.

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INDUSTRY ANALYSIS FIRM-WIDE INTEGRATED IT

Unity and purpose

Tony Klejnow, MD of Linetime, outlines what has to change in practice management IT to make law firms more competitive

Significant changes lie ahead for law firms, if they want to stay competitive. The technological transformation required is to move away from passive back-office behaviours to active business management – and it's only through firm-wide integrated systems that this will be possible.

Active business management means monitoring and forecasting financials, turning manual processes into automated ones, really using customer relationship management systems (rather than just toying with them) and engaging in better client interaction, and using integrated, firm-wide IT systems to enforce compliance and reduce risk.

Though the 'best of breed vs single system' debate will no doubt run on, there's no doubt in my mind that a single system is the best way to deliver on those new PMS goals and create efficiency – there's no re-keying or synchronisation, you get simplified systems support, and there's no need to manage interfaces between disparate systems.

Never has the need to monitor work streams been so great, but you can only do this if you can 'see into' every

part of the business. This can be readily achieved through business intelligence (BI) tools within a good, firm-wide PMS, delivering 'live' information.

BI can deliver the metrics the firm's management needs and it can completely transform how agile a firm can be.

I think BI is also essential to implementing a key performance indicator-based performance measurement system in law firms (see our [case study on Wilkin Chapman Grange for more on that](#)). BI can also be used to monitor risk and compliance, so it can be of use far beyond finance.

Moving to global workflows

A well-designed PMS must provide the tools and systems to monitor and guide users through the compliance process, forcing them to adhere to the firm's (and the regulator's) standards – this is a lot easier with a firm-wide system.

This compliance workflow is an example of techniques previously used only in case management. But 'global' workflows create standardisation across the whole firm, which in turn creates efficiency, because processes are much easier to control

from a risk and compliance perspective than people. Workflow engines can also drive functions such as file inception and closure processes (read [our case study on workflow at DWF to see how this works](#)).

Getting closer to clients

Client expectations are changing, and firms need to change their service delivery models to meet these expectations.

A PMS needs to not only service the practice – it can and should present clients with an external view of providing additional information, when they want it. An effective way to do this is to provide a client service portal, allowing clients access to their own case information. This portal should also, ideally, support communication and collaboration between firm and client.

These techniques are already used by firms supporting referrers and commercial clients, and they can slash the number of day-to-day queries received – and, therefore, the time lawyers spend feeding information back to clients (read our [case study on how](#)

[Hay & Kilner is delivering matter transparency](#), below, to see that in action).

This kind of client-focused thinking is the future of PMSs, and it will, I think, become a basic, tick-box element.

It's also representative of the PMS's transition from a passive back office system into an active business management tool, a CRM repository, a client service portal, a compliance and risk monitor – and, of course, a finance and time-recording system.

Case studies

- DWF using workflow to cut costs, drive value

<http://bit.ly/LinetimeDWF>

- Hay & Kilner delivering matter transparency and lower costs with an extranet

<http://bit.ly/LinetimeHK>

- Wilkin Chapman Grange using BI to manage KPIs

<http://bit.ly/LinetimeWCG>

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INDUSTRY ANALYSIS ENTERPRISE RESOURCE PLANNING

From practice management to ERP

Firm-wide enterprise resource planning IT will be indispensable for the successful firms of the future, says Tim Cheadle, general manager for LexisNexis Enterprise Solutions

These are challenging times for law firms. New regulation, increased M&A activity, new business structures and the shift to the alternative fee arrangement model are all unleashing rapid changes in the legal sector.

Against this backdrop, demonstrating good financial management, business practice and compliance is paramount. To make life even more complicated, the tough economic climate is leading to a number of law firm mergers with overseas partners, which means strong multi-lingual, multi-jurisdictional and multi-currency support is essential.

As a result, law firms need systems that will help them operate as profitable, commercial entities – not just legal businesses.

Practice management systems are inadequate

Technology will continue to play a vital part in law firm

operations, but traditional practice and case management systems will become inadequate as the industry develops. Being ‘good at law’ is a given – firms must also become good at collaboration, project and risk management, and financial planning.

Practice management systems (PMSs) are currently designed to manage case, client and time records, billing, schedules, appointments, case deadlines and client files. They also facilitate and help enforce legal sector-related compliance, such as with document retention policies and courts’ electronic filing systems. But this isn’t enough.

Enterprise resource planning (ERP) systems integrate internal and external management information across all business functions, facilitating a seamless flow of information within the boundaries of the firm while managing connections to outside stakeholders – in a single integrated environment.

It’s my view that law firms

must transition to ERP systems – because they are much wider in scope, encompassing business, financial and practice management functionality, underpinned by workflow.

Creating resource efficiency

Law firms should be properly managing their resources to a fairly granular level to reduce costs, maximise expertise, deliver client satisfaction and cost-effectively comply with the raft of legislations across geographies.

ERP systems automate resource management by combining time, billing, financial and human resource management into a single solution. This ensures that, for every type of legal work, the right level of skills and people are assigned to the job, resulting in cost-effective delivery of a superior service.

Crucially, with ERP, firms

are also able to undertake skills analysis for their entire workforce to forecast the need for new skills or development of existing ones in preparation for new business, or growth and expansion plans. Such information can also be very useful for firms looking to expand their current offering, as it helps to mine the knowledge that already exists in a firm that might not be apparent.

The need for skills analysis is heightened even more during merger and acquisitions, because the newly merged entity doesn’t necessarily know the skill set the respective organisations contain. This level of analysis will also help deliver compliance with the new outcome-focused regulation, because a greater understanding of the business can be had, and greater level of detail.

PMSs may help with all the above, but they will fall short of delivering on both the detail and scope required to make

the systems all encompassing, transparent and effective.

Pricing and AFAs

In austere times, the hourly billing model is giving way to alternative fee arrangements, such as fixed and capped fees, success fees and tiered discounts.

This shift towards value-based pricing poses a huge challenge to law firms – they must predict costs and determine the correct level and type of staffing to create profitable outcomes for themselves while they deliver high-quality legal services to clients.

To estimate pricing, firms need to be able to take into account disparate factors from across the business. And, increasingly, in-house counsel are expecting law firms to take a project management-led approach to legal matter management.

PMSs can't fully offer these capabilities, because the provision to draw out business intelligence and provide analytics is limited. ERP systems, however, provide the ability to pull up various types of work/task/phase codes, look at the corresponding hours, fix a price to that type of work and, with a large enough population, prepare a probability curve, which, over time, will be valuable to organisations.

Operational efficiency and profitability

With such stringent pricing in play, operational efficiency

and a tight grip on firms' financial position will become supremely important. But law firms often don't have visibility of their liabilities beyond the kernel of legal work, because they lack streamlined processes for expense and overall financial management.

PMSs are primarily focused on client- and matter-related expenses, but ERP systems automate both matter and non-matter related expenses.

pressure to reduce costs. Both of those drivers mean clients now expect law firms to be completely transparent with regard to the investments or costs incurred on their behalf.

Managing processes outside the firm

ERP systems provide the ability to manage and communicate with all external

firms using ERP systems will confidently be able to adapt their organisations to deal with the changes taking place in the sector, secure in the knowledge that these systems can scale to meet future requirements too.

LexisNexis will launch an ERP-based law firm management system in 2012 – and I've outlined above why we believe ERP is the way forward. ERP systems facilitate

"To estimate pricing, firms need to be able to take into account disparate factors from across the business. PMSs can't fully offer this – ERP systems can."



For example, a purchase order can be raised, forwarded to the head of department for authorisation, ordered, matched, receipted and paid – without the need for paper-based processes. This also provides increased visibility of cashflow compared to the traditional approach of logging a liability only when an invoice is received.

There's also growing pressure to outsource work to external legal service business, partly due to a growing

stakeholders, including suppliers and clients, as a matter of course – it's what the concept was designed for: manage the supply chain of a business.

An ERP approach ultimately gives law firms the power to determine the exact cost of doing business, which in turn highlights areas where costs could be lowered to maximise profitability. International firms can also gain through ERP systems' support for local currencies and legal requirements. Fundamentally,

resource efficiency, creative pricing options, end-to-end expense and financial management, integrated business environment, and supply chain management – all of which deliver business efficiency, greater client satisfaction, competitive advantage and, ultimately, higher profits.

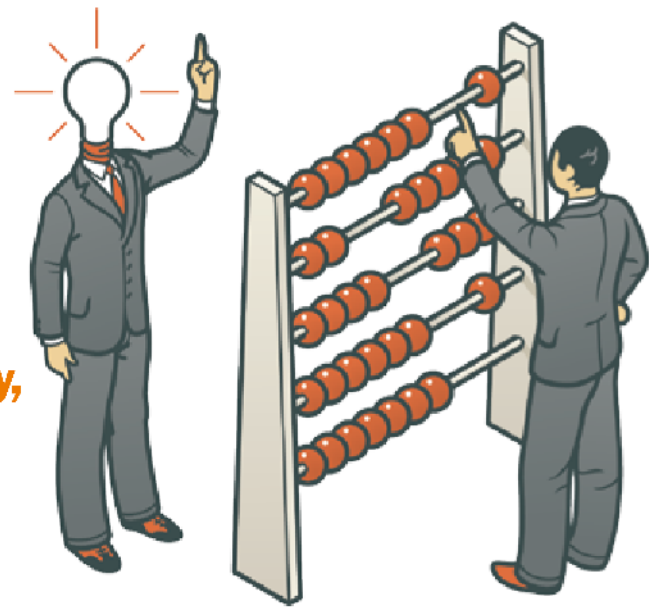
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INDUSTRY ANALYSIS IT AND STRATEGY

Game plans

Firms need IT to be competitive and efficient – but they also need a strategy, says Jitendra Valera, chief marketing officer for Iris Legal Solutions



The UK legal services industry is a £4bn turnover market – which makes it attractive to low-operating-cost new entrants with large loyal customer bases. One of the primary ways in which law firms – or rather, legal service providers – are going to compete with new entrants is with technology. But to do that, they will also need to strategically plan what they want to do.

According to Professor Steven Mayson, the impact of these new entrants on existing providers of legal services could be catastrophic, with a shift of over £1.5bn revenue to them. This would primarily impact the provision of retail legal services, and could bring about the potential demise of over 3,000 law firms.

The market is also likely to see an over-supply of law graduates, who may well go and work for the new entrants, offering a more commoditised version of law. We're also going to see an increase of legal process outsourcing, so that firms can maintain a low cost base.

Many firms believed that the big bang for legal services would have been in October 2011, but few have realised that the threat has been

around for many months. New entrants are already competing for unreserved work. Commoditised legal services, such as conveyancing, personal injury and employment law, have already seen a rapid rise in new companies offering these services.

Disruptive technologies are driving a lot of change within firms, and will deliver a vital competitive edge to the firms far-sighted enough to implement or use them. The advent of social media is changing the way we do business, for example, and firms need to be much more reactive to the needs and desires of clients. Technology can help deliver that capability.

How do these clients want to be communicated with and, more importantly, when? What technologies do fee-earners need? Do they need to be truly mobile?

It is inevitable that there will be other technologies that will require firms to re-think the way they work, the services they provide to their staff and their engagement with their clients.

However, to overcome these barriers, one thing is clear – law firms need a strategy to enable them to survive and thrive.

Changes, impacts, solutions

We are now witnessing structural change in this industry. But changes in governance are not in themselves a strategy, or even perhaps a route to survival in the new world of legal services. Rather than select a structure, firms and chambers need to identify a sustainable strategy and consider an appropriate structure after they have this part right.

Firms need to understand the likely direction of the market and be prepared to differentiate based on their real strengths. They need a definite idea of the direction in which they are heading and how they are going to get there. What market are they in? What do they want to be in? What is their competitive advantage? What do their clients want?

Legal businesses must be clear about their real strengths and be prepared to build a strategy around them in order to survive. They must fully consider what they need to provide for clients who are prepared to pay for their services.

Availability of online legal

services – though also not a strategy in itself – is a challenging area. The legal industry is now at a tipping point, where the numbers of clients conversant with technology exceed the traditional, less tech-savvy client.

This challenge should be seen as an opportunity for firms to match client desire with great service, and to provide cheaper online services. It is an example of the need to place clients at the centre of a law firm's strategy, and to appreciate how technology is an enabler to this strategy.

In the law firms of the future, there will be no one-size-fits-all approach. What is clear is that the established and traditional method of providing legal services must change – it must change because new lower-cost entrants will cause it to, it must change because clients demand it, and a big part of that change will be driven by technology.

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INDUSTRY ANALYSIS FUTURE PMS CAPABILITY

Self analysis

Colin Kennedy, COO of Pilgrim Systems, on why law firms must be deeply connected to their goals to get the most from practice management systems – and what the benefits of that can be

Just what is a practice management system? Which segment of the UK legal profession you talk to will dictate, to a large extent, the response you get to that question.

To a top-50 firm, PMS is likely to mean a finance system that supports day-to-day accounting, time and billing, management information and business intelligence. To a mid-tier firm, it will mean all of these things and matter, case and probably document management and, possibly, client relationship management as well.

To me, the clue is in the title – 'practice management'. A firm needs a combination of functionality to manage its practice. The mid-size UK legal business generally expects to get the vast majority of its legal technology needs fulfilled by a single, consolidated PMS. A modern PMS should therefore support the needs of finance, marketing, IT, support workers, fee-earners, partners and the firm's management team.

The benefits of a single solution strategy include: low cost of ownership, a single key supplier relationship,

a single annual support agreement and a single database store for all the business-critical data – ie, the information fee-earners use to process cases is the same information used by marketing to retain clients and help win new ones.

What a practice management system should do, and why

We all know the challenges the profession faces. Law firms cannot charge all the time on the clock and expect to recover the number on the bill that's spat out at the end.

Firms need to offer predictable fee levels in advance of doing the work. If the firm cannot price its work properly, how can it have any confidence that it can deliver the work at an acceptable profit? Matter estimation and monitoring tools are therefore essential weapons in a modern PMS's armoury – and any supplier that doesn't already offer such functionality is simply not up to speed with the step change the profession faces.

To really understand what a PMS needs to be able to do for a firm isn't a tough

task – follow the job from client capture to attaining profit targets through to fee collection.

In essence: help win the client, support the efficient uptake of the client into the firm, quote the client based on a number that ensures the firm will make a decent profit from the job, deliver efficient ways of processing the case using workflow, deliver document management, client extranet interaction and mobile device interfaces, produce the bill in line with the original quote, send the bill out in a timely manner, and then chase the money should it fail to come in within 30 to 45 days. That is what a PMS should do.

Over and above that, the system will produce real-time management information in a number of different formats to suit the needs of a varied management team – standard reports, on-screen searches, graphical dashboards, drill-down multi-dimensional cube-orientated reports...

It's straightforward to say, but it's not necessarily simple to do. A firm cannot just drop a PMS into its business and expect to reap all the

benefits expressed during the sales process. It needs to work at it – there is no magic wand. It's the firm's system, and the firm needs to own it and 'sweat' the asset as much as it can. This level of commitment will undoubtedly support the reduction in back-end costs. A 'new' way to gain even more from this asset is to deploy the PMS 'in the cloud', along with other key applications – which will support cost reduction strategies for the long-term.

Mid-tier firms investing in a PMS today expect a lot, and their expectations can be met by a few suppliers. But those firms must realise that it's down to them, to a large extent, to make sure they get everything they expect from its investment.

What's the moral to this story? Be clear about what the desired outcomes are when you buy a PMS, and continually refer back to them to ensure success is continually achieved.

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INDUSTRY ANALYSIS FORWARD WITH MICROSOFT

Matches made in heaven

Chris Giglio, CEO of Aderant, on why it's vital to use standards-based IT, like Microsoft, and pick the right long-term IT partners

New technology can be exciting, but the rate at which it changes can often outpace most firms' ability to react. Many IT departments may have been surprised not only by how quickly lawyers adopted iPhones and iPads, but also their demands that their firms support them in the normal course of business.

In the face of this change, law firms often look to peer firms, trusted vendors, industry experts and others before adopting the latest innovations – they don't want to go through timely and expensive technology changes that may affect everyone in the firm without proof that it's going to be worth the effort.

But, once a firm decides a change is needed, it's critical the technology investments and upgrades deliver new capabilities that will give the firm distinct and measurable gains, alongside being an investment that will deliver value well into the future.

That's where the right technology partner or consultant comes in. As well as finding the right technology partner, firms should also seek innovative business tools that give them a lower total cost of ownership while reducing investment risk.

Lowering total cost of ownership with industry standards

We at Aderant have built a Microsoft framework upon which all our products are developed. By using Microsoft-based, industry-standard technology, firms using the technology benefit from solutions that are easy to install, use, maintain and customise. As a result, they experience higher levels of user adoption and increases in productivity and efficiency, and they gain ready access to skilled resources, at reasonable rates.

One example of the benefits of using Microsoft technology is the ability to workflow-enable processes to automate and streamline repeated activities. These processes can be quite complex, such as matter and client intake, or relatively simple, such as leave requests. But, using a set of tools and templates developed from Microsoft's Windows Workflow Foundation, firms can quite easily tailor their processes to meet the exact way they do business.

When our client Ulmer & Berne implemented this file-opening workflow, it reduced the average file-opening time from four days to under 24 hours – and managed a marked increase in the

enforcement of firm accounting standards and policies.

With a digital system in place, it's impossible for file opening to be completed without adherence to the requisite policies, which are written directly into the file opening formula. Ulmer & Berne also significantly reduced the amount of paper used during the file intake process, which lowers office supply costs and makes file opening more eco-friendly.

Accelerated product development delivers a competitive edge

Technology providers that start with a Microsoft-based framework and work closely with clients to understand their business challenges can release new or updated products every three to six months.

This rapid product development cycle gives firms access to key capabilities much more quickly, and therefore they're better able to meet client demands. Recently released products on our platform include applications for matter planning and alternative fee arrangements, role-based dashboards and performance analysis, workflow for streamlining processes, and innovative time capture – all

driven by client demand and developed with extensive client input.

Drive growth with fewer long-term partnerships

Companies — law firms included — are consolidating the number of outside vendors with whom they do business, because simplicity is vital in increasingly complex markets.

The benefits of selecting a few key partners include reduced costs and stronger, deeper relationships. Both parties have vested interest in each other's success, and will work hard to maintain and grow the relationship.

The most valuable technology partners are those that have demonstrated innovation, leadership and reliability, and that also offer a broad suite of applications.

Through them, firms benefit from increased bargaining power, more tightly integrated products and better customer support – and our clients gain access to product management teams and the ability to influence development and enhancements.

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