

Briefing

BUSINESS PROCESS MANAGEMENT

OCTOBER 2012

Interview

**Thereza
Snyman**

Kingsley Napley's head of IT on why firms like hers must change the way they work, forever

Feature

**Productivity,
and beyond**

We find out how firms are creating profitability and compliance with business process management

Industry views

**Calm down,
it's only a
workflow**

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**Workflows, automation and business
process management. Think it's for
volume firms? Think again**

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Budgeted Costs \$112,575

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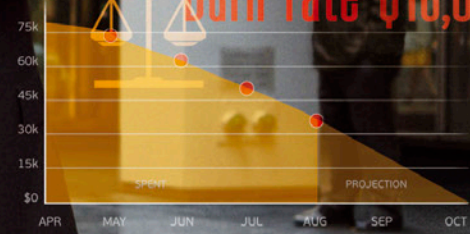
\$199,649.32

FEE BUDGET \$147,649
SCOPE CHANGE \$1
TOTAL FEE BUDGET \$147,650
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PHOENIX NEW YORK SAN FRANCISCO KANSAS CITY



Burn rate \$15,000/MO



Hours	Amount
216.65	\$108,325
66.65	\$33,325
23.30	\$11,650
	\$149.95
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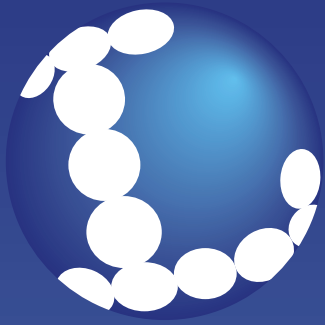
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Why is workflow a dirty word?



Why don't law firms do more in the way of process automation and workflows?

I don't have an answer for that, but I do know that savvy firms, volume or not,

are increasingly using workflows and process management to deliver legal work more efficiently and more profitably. Are you?

In this issue we interview **Thereza Snyman, head of IT at Kingsley Napley**, about how she's reformatting her firm with matter management on page 6. On page 13, Joanna Goodman talks to leaders at firms such as **Eversheds, Wragge & Co, Lewis Silkin, Morgan Cole** and more about how they are using BPM to change the way they work. And from page 22 we have case studies, interviews and industry insight from issue sponsors **Thomson Reuters Elite** and **Linetime** and many more. It's everything you need to know about how law firms of the future will work. Well, nearly everything...

Also, **Briefing** is now a print magazine every month. You can get it for free – [sign up today](#).

Rupert White, editor of Briefing

Interview: Thereza Snyman IT chief, Kingsley Napley



Can process management help smaller but ambitious firms become tomorrow's successes? Rupert White talks to Kingsley Napley's head of IT about how she's reformatting her firm

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Feature: To productivity, and beyond...



If you think business process management and workflow automation sounds like something volume firms do, think again. Joanna Goodman finds out who's ahead of the process game...

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Briefing jobs



Finance, IT and client liaison roles on the **Briefing jobs** page – pass it along (or perhaps not...)

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TURN OVER TO FIND OUT WHAT
ELSE IS IN THIS MONTH'S ISSUE

Industry analysis index

In **Briefing** we bring you industry analysis from the legal sector's leading voices.

This month: Issue sponsors **Thomson Reuters Elite** and **Linetime** provide a case study on Nabarro's use of matter management and deep insight into how workflows and process automation can increase efficiency and profitability.

We also have expert views from **LexisNexis**, **OpenText** and **IRIS Legal** on why BPM is the future of delivering some, if not all, future legal services. And we have process management case studies from **Winscribe** on Field Fisher Waterhouse and **Total** on Sidley Austin. That's a lot of workflow knowledge.

This month's interview with **Thereza Snyman of Kingsley Napley** was transcribed by:



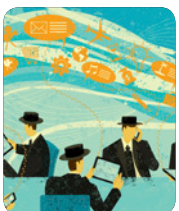
Analysis is good for you



FFW's Maurice Tunney on how he's creating consistency and compliance with BPM from **Winscribe**

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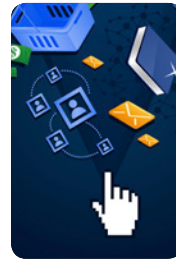
Controlling the cost of mobility



Greg Lawrence, IT director – Europe at Sidley Austin, on controlling the business costs of mobile comms with **Total**

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Managing matters



Andrew Powell, Nabarro's IT chief, talks about how he's using **MatterSphere** to get the benefits of process automation in a non-volume business

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Everything flows



Briefing talks to **Tony Klejnow of Linetime** about how workflows and automation can be beneficial to all sizes of firms

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Can workflow work for you?



Briefing talks to **Jitendra Valera of IRIS Legal** about why workflows are important to being a better legal business

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Your firm, only better



Andy Sparkes, director of strategy at LexisNexis, on why firms need to push the boundaries of improvement


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Why BPM, and why now?



Jon Summers of OpenText on how to reduce waste and generate revenue with business process management

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A close-up portrait of a woman with short, wavy, reddish-brown hair. She has light green eyes and is wearing a light pink button-down shirt with a white collar. She is also wearing a multi-strand pearl necklace and pearl earrings. The background is dark and out of focus.

Can workflows, automation and process management help the UK's smaller but ambitious firms become tomorrow's successes? Rupert White talks to Kingsley Napley's head of IT, Thereza Snyman, about how she's reformatting her firm

The Briefing Interview

Analyse this

Kingsley Napley isn't a flashy top 10 name. It's not famous for doing massive corporate mining deals, and it doesn't operate in 15 countries. It's a sub-300-person, £25m-revenue firm that's been in the news recently for defending Rebekah Brooks in the phone hacking debacle. But, for Briefing, it's also an example of how the world of workflow is changing the way law firms do work – learning lessons from volume legal businesses and corporate new entrants like the Co-op.

A myth we're out to destroy in this issue of **Briefing** is that workflows and business process management (BPM) are just for factory firms, bulk conveyancers and the like. As you can see from our feature article and case studies, that's not the case – law firms large and small, high-volume and high-value alike are turning to workflows and BPM to make the way they work more efficient and, more fundamentally, more profitable and attractive to clients.

We picked Kingsley Napley for this issue of **Briefing** because it represents a class of law firm that, when it turns on more automation and workflows, can make huge efficiency gains – and can build a springboard to compete in a highly competitive period.

"We cannot predict what the market is going to be like in the next three to five years," says Snyman, "because, for example, of the impact of regulatory changes, ABSs and the pressures on costs resulting from a flatlining economy which will become manifest in that time.

"So we need to become more agile, more flexible, and have an increased ability to proactively anticipate our clients' requirements – without determining what those requirements are going to be."

But how can today's law firms know the unknowable? How do you guess needs you can't see? The answer lies, partly, in mining

the information a law firm already has, says Snyman, and in creating an IT environment that can cope with uncertainty.

"We have to create a stable IT platform and employ the best tools for the job, which are hopefully going to be future-proof. Then, starting from the really commoditised work, you learn how to do that work, how to gather information, and how to mine all the data you hold in your databases."

Firms can plan for the unexpected, she says, by "selecting software and applications that demonstrate the ability to be flexible, where the developers demonstrate a vision – a vision of giving you a platform rather than confining you within strict parameters".

What this should allow you to do is better connect all of a firm's IT systems together to deliver the power to create firm-wide processes. Some firms, and not just big ones, already see the benefit of this – read about Jan Durant's efforts with SharePoint in **Briefing on: Legal IT in 2012**, December 2011, for example – but to do it a firm has to take a holistic view of what needs to change, to analyse what all departments do and need, and start jettisoning fragmented legacy systems, says Snyman.

Workflowing client/matter inception

But you have to start somewhere. Kingsley Napley has started with workflowing client/matter inception (similarly to FFW – see the case study on p31) using Thomson Reuters MatterSphere linked to Kingsley Napley's practice management system, Aderant.

The automation behind client/matter inception isn't perfect yet, Snyman admits – though there's basic conflict search incorporated, it's not perfect and the firm still has to carry out manual checks. But she's aiming at making it much better – "more

integrated and searching across more fields and more databases”.

Advances like this can deliver real efficiency gains, mainly in terms of time saved and reduction in human error, she says. This has obvious efficiency and risk benefits.

“Time is money. Sometimes a document sent in the internal mail from one department to the next can take up to 48 hours to be attended to,” she says, and turning manual processes into automated ones and engaging workflows can chop these delays to hours. They also mitigate risk, she says.

The current projects for workflows and BPM in the firm, says Snyman, are in immigration and regulatory. Fairly standard and routine work like this can be mapped to a matter type and a fairly accurate cost estimate can be produced – if you’ve got the data from previous work to map it to. More complex work is much harder to map to an estimate, she says. Kingsley Napley’s MatterSphere and Aderant databases of work costs are “fairly rudimentary” right now, but they’re there, says Snyman, and the firm will continue to expand their use.

It’s this kind of financial information that firms will find invaluable in understanding what work costs to do and thereby determining truly profitable and unprofitable work (see [Briefing on: Financial management information](#), March 2012, featuring an interview with Simmons & Simmons’ FD David McLaughlin). Many firms do this already, but the ideas behind it have much greater possibilities, with much more legal work.

One reason for this is that law firms are having to offer more work as fixed fee or other

kinds of alternative fee arrangement, and these all benefit from a greater understanding of advance profitability, as well as the efficiency that process management and automation can bring. Kingsley Napley, says Snyman, will try to apply lessons from fixed-fee work like immigration to other work types, but it’s “quite a way down the line”.

“Time is money. Sometimes a document sent in the internal mail from one department to the next can take up to 48 hours to be attended to.”

Integrating systems for strategic value

Where can Snyman go next with process?

There’s a lot of other information in a law firm that can be brought to bear to make a legal business more profitable, more efficient, and more competitive. Marketing and contact information, combined with some knowledge of financials, can create this vital understanding of where to point a firm’s always valuable and finite resources.

Snyman’s team and marketing are now working on integrating MatterSphere, Aderant and the firm’s new customer relationship management system – Hubbard One – to analyse contact and referrer information. This

should allow Kingsley Napley to “analyse who knows whom, and what value of work has been referred by a particular referrer”, says Snyman. This has direct strategic value, she says – it lets you answer the question: “Where should you target your marketing and business development campaign?”

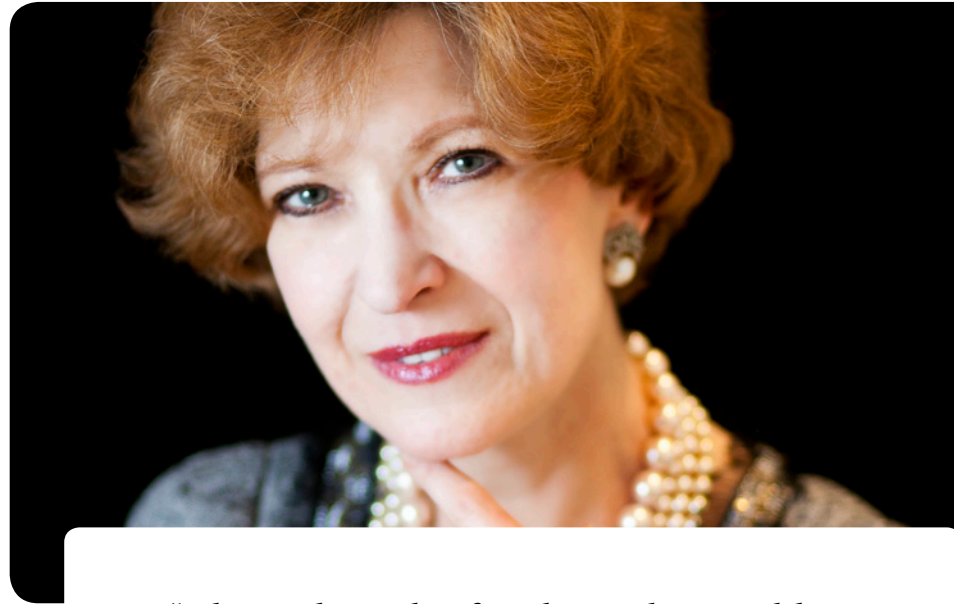
“It is not only about measuring financials and profitability, which I think is going to be becoming increasingly important – it’s also analysing the identity of your potential clients and the market that you service, and relating that to financial information.”

For example, unless you can join up and analyse the identity of referrers, and relate that information to financial information, you can’t assess whether it is a growth market on which you should be concentrating efforts, developing more expertise and perhaps even sending people to conferences overseas to develop that market, says Snyman.

This integration is not as easy as one might hope. Kingsley Napley’s had Mattersphere and Aderant in place for around two years, and it started implementing Thomson Reuters’ Hubbard One contact management product at the turn of 2012. Having three systems that needed to be joined up meant having a hard look at what data all the systems wanted – and, as usual, they were all slightly different.

“What we find is that some of the information which we require in Hubbard One is not yet captured by MatterSphere or Aderant. That really requires a lot of analysis.

So part of the work in implementing Hubbard One is not only implementing that system but also extending the databases and the tables in MatterSphere and Aderant to allow us to capture all that information in all three systems. It’s a challenge.”



“The end result of agility is being able to implement change rapidly and without major disruption – to me, that is how you identify agility, and what it takes to get there is a joined up machine.”

Thereza Snyman, head of IT at Kingsley Napley

Analysing the business

This process of understanding the data is the IT edge of a far greater need – to understand the business processes involved in producing legal work and creating workflows from those processes.

This is where business analysis comes in. If the two-year run of **Briefing** can tell us anything it probably shows that business

analysis is one of the most useful but under-used areas in legal. Why? Because it's one of the skill sets and/or roles that allows a firm to become tomorrow's legal business.

Those involved with business analysis, says Snyman, must couple a thorough understanding of the delivery of business process automation, then "sit down with somebody with a formal business analyst qualification, and with the relevant department, and analyse where the bottlenecks are and where technology can assist in overcoming those bottlenecks". This seems obvious – or rather, it should – but it's too easy to impose processes from on high, which doesn't work well.

Kingsley Napley doesn't have any in-house business analysts, but Snyman now wants to identify a few suitable candidates – from finance, fee earning and possibly training – and send them for business analysis training, creating an internal team. This is important, she says, because analysts need an "understanding of existing processes and of current inefficiencies for a firm our size".

Snyman has been in legal IT for 13 years, so she's well placed to identify some of the key areas ripe for BPM and workflow – areas that are relatively easy to turn into automation and that deliver valuable benefits. Beyond client/matter inception, she says, are examples of the 'low-hanging fruit' in legal process are "billing processes, anti-money-laundering processes, efficient room booking systems, and new joiners/leavers". (Jan Durant at Lewis Silkin, in [Briefing on: Legal IT in 2012](#), December 2011, identified leavers/joiners as an area of potentially great benefit to a law firm.)

"Quite apart from the money-saving aspect

of it," explains Snyman, "it would save an enormous amount of aggravation, irritation, frustration and bad relationships between support teams – because if you don't automate it, something always slips 'between two chairs,' and it's a cause of unending friction."

Snyman has a good idea of what's going wrong in leavers/joiners, and how to fix it. "HR may not capture the particular details IT needs for joiners until the last moment, and IT will partially set up a new joiner lacking that

"Quite apart from saving money, [automating leavers and joiners] would save an enormous amount of aggravation, irritation, frustration and bad relationships between support teams."

information. So a trainee or new fee earner starts on Monday, and they can't time record because they haven't been completely set up in the financial systems. "If one can design a process whereby as soon as HR captures joiner information [for example] it is sent through immediately to IT, with workflows and alerts sitting behind it, that will enable IT to set up a new joiner in Aderant in a timely fashion." Problem solved.

Get competitive

Areas such as leavers and joiners might not

directly make a firm more competitive – though efficiency has many client-facing benefits – but process management and workflows definitely have direct competitiveness and strategic upsides, says Snyman.

“Once we are able to capture and analyse client requirements, and relate that to financial information, we will be able to be more competitive [and strategic].

“Say we survey a particular sector – such as ‘Do you or would you be interested in having access via an online portal to your information’ – and we have an overwhelming positive response, but we analyse the financial information relating to that sector and find that it contributes 0.1% of your turnover, is it worth the effort going down that route? The answer is clearly no.

“But if the results of a client survey in another work area only give a 35% positive response rate, but that business sector contributes 40% to profitability, then you’re going to go for a client portal for that area.” And you can only make those decisions if you can join information together.

You can also only really give clients access to information if you can join up a firm’s information, and clients increasingly want this access. “Clients are becoming more accustomed to online access to their accounts, whether it’s their bank accounts or their telephone account. It is standard – they want online access to information relating to them.

“Generally it speeds up any kind of process. If your information is stored online and you have secure access to it, that is the preferred route – certainly on the consumer side – and I

think that is going to become de rigeur on the business side as well.” Kingsley Napley can use MatterSphere to deliver client portals, she says, “as far as process driven work is concerned, but I can certainly foresee that corporate clients will over time want to have secure access to their information online”. And Snyman says the firm might test the market using Hubbard One functionality.

Finding out about these client needs is not

“Once we are able to capture and analyse client requirements, and relate that to financial information, we will be able to be more competitive.”

information the firm can currently capture systematically or easily, she says, “but I think it’s very important for us to be able to do so”.

Drivers for change

Fortunately, law firm owners are now listening harder to their managers – realising that firms must change their ways, becoming more businesslike and agile.

“I think there is now an increasing awareness of the fact that we have to turn the practice of law into a business, a service, rather than the

ivory tower practitioner,” she says.

But there’s another driver behind the changes in the legal market and how it sees itself, she says. “Up to the 1990s, professionals such as lawyers and doctors enjoyed [automatic] authority. To a very large extent, the relationship of the client was based on personal relationships. But I think with the advent of the internet and the availability of information, everybody to a certain extent has become or has access to expertise, and professionals are starting to lose their authority.”

This is, in essence, the Tim Berners-Lee effect on legal: expertise wants to be free. What this has created is a more consumer-oriented world – one of which Clementi would no doubt be proud – that’s pushing law firms to become more like other service businesses.

But to really be like those other businesses (such as Co-operative Legal Services – read about that in [Briefing on: Agility and business management](#), September 2012, featuring an interview with CLS director Christina Blacklaws), law firms must become agile. Workflows and process management are key to this agility, says Snyman, but it won’t be an easy journey.

“You cannot get from where we are now to being agile in a blink of an eye. We can only achieve agility by putting the building blocks in place and demonstrating that what we do is solid, reliable and capable of responsiveness.

“Many law firms have found and will find in the near future that the secret is ditching the old, disjointed legacy IT systems and putting in place a platform with shared technology.

“The end result of agility is being able to implement change rapidly and without major disruption. To me, that is how you identify agility, and what it takes to get there is a joined-up, integrated machine.”

And this has to happen fast, she says. Within the next three to five years, firms will either embrace the upgrades outlined in this interview or they’ll suffer.

“You cannot get from where we are now to being agile in a blink of an eye. We can only achieve agility by demonstrating that what we do is solid, reliable and capable of responsiveness.”

“Logic dictates that is what will happen. We are going through a period in which we will experience tectonic change, because there are so many drivers coinciding at the same time which will force us down that route, whether we like it or not.

“I happen to enjoy it, but if you don’t like it you will simply have to adapt or you will be phased out of the market.”

So it’s time to learn to love change if you don’t enjoy it, to embrace the kinds of systemic upgrades a law firm needs to become more efficient and agile.

Because there’s no other option. ●

If you think embedding business process management and workflow automation into law firm operations sounds like something volume firms do, think again. Today's fastest-thinking legal businesses are using BPM and workflows to make themselves leaner, meaner and more profitable. Joanna Goodman finds out who's ahead of the process game...

Feature

To productivity, and beyond



Workflow is one of the hottest topics in law, but it gets a bad rap in the legal press because it wrests control from fee earners – and it has the scent of ‘volume’ about it. But this is all changing, fast. Firms all over the world are embracing process re-engineering and waking up to the fact that workflows and process-driven working can make law firms more efficient, more profitable and more capable. So what’s it all about?

Business process management (BPM), including workflow automation, has long been part of law firms operations. But a combination of economic factors, market deregulation and changing client requirements has refocused the industry on the business basics: the processes and priorities that benefit firms and clients by driving efficiency, protecting profit margins and creating opportunities.

There are, however, two caveats to BPM. It’s vital to recognise that gaining the knowledge to capture all the elements of a process, mapping it and potentially even redesigning it to produce efficient systems, is more expensive than building or acquiring the IT you need to deliver it. It means a major investment of lawyer and manager time, and can even require the use or creation of business analysis people.

On top of that, the significant benefits BPM can deliver can only be realised if the new processes are designed to fit the firm’s culture, and if everyone involved is committed to making them work for the firm and its clients.

Flexibility and risk management

It’s a myth that law firms are not doing BPM. According to one leading consultant most firms have at least one process improvement under way. These more usually relate to business support – but BPM, also known as business process re-engineering (though that

can also describe something more invasive) is increasingly being applied to transactions, with workflow automation now a common feature of commoditised legal services.

Jeff Wright, facilities and IT director (and partner) at Morgan Cole, established a team of business analysts at the firm 10 years ago with the aim of addressing issues that he faced as a full-time fee earner.

The goals have not changed in that time:

- **Compliance:** Ensuring procedures are completed;
- **Productivity:** Driven by the prevalence of fixed fees and capped rates and the need to monitor management and other information;
- **Delivering on client expectations:** Though most firms don’t charge for back-end processes, the efficiencies these deliver increase profitability.

Morgan Cole applies BPM and workflow automation to both volume and complex work using Thomson Reuters MatterSphere (FWBS’s MatterCentre, as was), but workflowing is done differently according to the work type.

“Our defendant personal injury workflow is a framework to help lawyers handle routine tasks efficiently and check correct procedures are followed,” explains Wright. “It allows for a lot of flexibility, in contrast to the tightly controlled processes we apply to volume work.”

There’s a big risk management benefit in workflows, too. Business support workflows including matter opening, file reviews and money laundering and conflict checks all support Morgan Cole’s Lexcel accreditation. These act as a risk ‘framework’, making sure all required checks are completed. Beyond this, Wright’s team has been working on a new feature to help identify high-risk matters in litigation and conditional fee agreements, replacing the current paper-based system.

Automating this process will reduce the risks associated with self-reporting and increase

visibility across matters, he says, giving management the power to “see how many CFAs we have at any one time”, explains Wright. “It’s part of our strategy to de-risk the business and ensure regulatory compliance.”

Working up workflows

Wragge & Co only recently introduced workflow automation, and leadership team programme manager Adrienne Mansfield identified clear divisions between volume and complex work. Like Morgan Cole, Wragges uses one case management system – Linetime Liberate – to create workflows for volume and complex work alike.

A key challenge in BPM lies in mapping processes to create workflows that fit the role, function and seniority of the lawyers involved. Mansfield worked closely with representatives of each practice group to map document processes, streamlining and redesigning them to deliver proactively on changing client demands. Automated workflow addressed issues around producing ad hoc client reports, for example. Continual process improvement is a big strategic focus now at Wragges, she says.

While volume transactions involve a series of rigid workflows, more complex transactions require flexibility and lawyers’ ability to choose between different options. The same applies to billing, where complex cases can combine fixed fees and hourly rates. To facilitate the transition to a new way of doing things at Wragges and to minimise training requirements, Mansfield, her team and the IT supplier tailored the new time recording application to resemble the firm’s previous system. And though training lawyers can be



“[Automation] is part of our strategy to de-risk the business and ensure regulatory compliance.”

Jeff Wright, facilities and IT director, Morgan Cole

a challenge this ended up being relatively straightforward because representatives of each team had been involved in the project from the outset.

Finessing the fee earners

Lewis Silkin’s director of IT and operations Jan Durant pointed at a lot of process creation when she was interviewed in [Briefing’s IT special in December 2011](#). She’s re-designing routine business processes to boost productivity and compliance at Lewis Silkin, and the firm is about to roll out workflow for matter inception, including anti-money laundering and conflict checking.

Durant emphasises the importance

of establishing a clear business case for introducing new working practices. “Our hosted, automated [software from IntApp] will save lawyers’ time and address risks around regulatory compliance,” she explains. This kind of thing necessitates wresting some degree of control from the fee earners, of course – the system will not allow the inception process to be completed until the required checks have been made, she says. But matter inception workflow can be then synchronised with client data across the firm. “IntApp’s data integration product, Integration Builder, flows the information into our other systems, and Wall Builder manages access and confidentiality.”

Durant and her team are now gathering requirements with a view to automating more processes within the firm. The big challenges are establishing whether it’s worthwhile to write new programmes – and managing lawyer expectations around what can be achieved.

BPM facilitates Lewis Silkin’s business support functions, notably HR, where the firm’s Cascade software has an built-in workflow creation feature – Durant and her team will use this to automate processes for joining and leaving the firm, as well as annual appraisals. And the Lewis Silkin team is also looking at automating routine elements of transactional work, and concentrating on designing processes that fit the way lawyers already work. The firm introduced KnowledgeMill for email filing based on these premises, because it ‘hides’ inside Outlook.

“We moved away from filing emails in our document management system,” says Durant. “Lawyers work in Outlook, and the DMS interface doesn’t look like Outlook. So they tended to delegate email filing to their secretaries.” Retaining emails in Outlook challenges findability and collaboration because individual users can’t search each others’ Outlook folders. KnowledgeMill

BPM: Where do you start?

Four strategic criteria to help you out

Clients

Are your clients suggesting improvements? If they are, the starting point is obvious. Wragge & Co’s clients wanted more ad hoc reporting, which can be delivered following the implementation of automated workflows. But even if clients aren’t lobbying, be proactive and ask them where they think you can improve. As Jeff Wright at Morgan Cole says, although public sector organisations are becoming more transparent, and forward-thinking organisations discuss their requirements with panel firms, many don’t consider this level of engagement necessary until something goes wrong.

Economics

Fixed and capped fees drive efficiency. The longer lawyers spend on a fixed-fee case, the less money they earn for the firm. Some fixed and capped fees are offered as a loss leader to gain or retain a client. But there is also the invisible cap of client expectation – in the current economic climate it is simply not acceptable to produce a bill that is twice or three times the initial estimate.

Opportunity

Can you use process efficiency to price more competitively, provide additional services and win new clients? More efficient processes could involve unbundling services into different elements, for example – some of which have fixed and capped fees, and some of which are billed hourly. And new platforms offer new opportunities: online automated services with a self-service element allow businesses to ‘make money while they sleep’.

Engagement

Look for volunteers and evangelists who are enthusiastic about change inside the firm – then find out which of them is most influential and involve them in the process. Many firms have established specific non-lawyer roles for BPM.

appears as a window in Outlook and has proved significantly more successful in the firm – lawyers are filing their own emails now in a system that allows complete visibility across matters and practice areas.

In the end, change management is critical when moving to a more process-driven way of working. “All new technology is disruptive when you first introduce it,” says Durant.

Flexibility is your friend

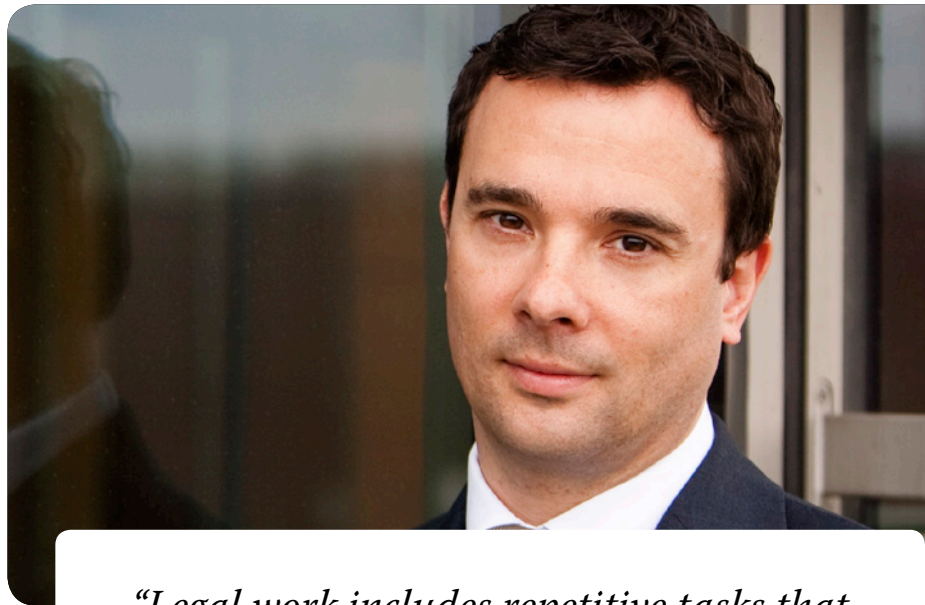
Paul Caris, CIO at Eversheds, adopts a similar strategic vision, applying BPM across the firm while ensuring that it reflects the dynamics of different groups.

“Legal work includes repetitive tasks that have unique characteristics,” he says, “so applying rigorous workflow is a big task – though you often don’t need to apply processes sequentially or in a strict order. Another issue is that lawyers don’t like being told what to do.” No, really?

The solution is flexibility. Eversheds has invested in separate technologies for case management and BPM, and while workflow around matter inception and verification involves tightly controlled processes, transactional work is project managed. Teams get to decide which processes to apply, creating checklists and milestones that appear on the system. A dashboard application then lets fee earners check progress, and a drag-and-drop component facilitates the sharing of templates and documents. This approach has been particularly successful in Eversheds’ real estate practice, enhancing

collaboration between teams in different locations, he says.

The project management side of things allows teams to report back to clients, as well as reducing costs and boosting collaboration, using project management methods helps Eversheds promote its project management credentials to multinational clients.



“Legal work includes repetitive tasks that have unique characteristics, so applying rigorous workflow is a big task. Another issue is that lawyers don’t like being told what to do.”

Paul Caris, CIO, Eversheds

Caris identifies user experience as a critical factor in making this all work. “We will boost productivity further if we can give our workforce a consumer-based experience, so that they enjoy using our technology,” he says. He and his team are developing ‘gamification’ apps for users to collect stars and badges as they complete various work processes. And, on a more basic level, just making it quicker for users to log into systems and simplifying

processes can improve efficiency.

Towards project management?

Taken even further, BPM and project management thinking can boost a firm's revenue, reputation and client relationships.

US firm Seyfarth Shaw has created what it calls the 'SeyfarthLean' client service model, blending the principals of the Lean Six Sigma DMAIC framework (define, measure, analyse, improve, control) with project management and process mapping tools. This has been a strong competitive advantage to the firm since 2006, according to those inside, underpinning legal services delivery, problem solving and continuous improvement.

The legal project management programme includes lawyer training, an approach that reflects the operations of many of the firm's Fortune 100 clients, who in turn appreciate the firm's planning and project management capabilities.

Kim Craig, director of the legal project management office and Andrew Baker, director of the legal technology innovations office, lead a team at Seyfarth of 15 project managers who facilitate process mapping exercises for lawyers handling major transactions. The work they do in process mapping has now evolved into joint process mapping with clients.

"'Voice of client' is a key element of SeyfarthLean, so when we meet the client at the start of an engagement we use process mapping as a scoping tool, deciding which elements of the project should be handled

in-house," says Craig. "We then customise the processes and the documents and save them to our extranet where the client can access them too," she says.

And, she adds, BPM is a great relationship builder for the firm. Seyfarth brings BPM to pitches and can "plug in attorney rates, so we can produce an accurate budget estimate at

Seyfarth brings BPM to pitches and can "plug in attorney rates, so we can produce an accurate budget estimate at the start, as well as 'decomposing' the work to allocate appropriate resources".

Kim Craig, director, legal project management, Seyfarth Shaw

the start, as well as 'decomposing' the work to allocate appropriate resources".

Project managers' client-facing role has led to the development of a consultancy arm at the firm, which advises in-house clients on process mapping and project management, as well as organising regular client training workshops. And the consultancy work is billable, says Baker, so Seyfarth is achieving more return on its considerable BPM investment.

Simple, but significant impact

Back in the UK, project management thinking is bleeding into the legal market.

Peter Blackwell, head of IT at ASB Law, has successfully engaged people across his firm to deliver process changes and workflows that improve working practices. Communication is an intrinsic part of ASB Law's business improvement strategy – each department has a Lean representative, and everyone is encouraged to suggest potential areas of improvement. All suggestions are evaluated by a committee of practice area representatives and the firm's Lean business analyst.

The obvious starting point for it all at ASB was matter opening, where procedures are dictated by compliance, says Blackwell. ASB Law has partially automated matter closing, with links to the billing system. "Although the workflows are simple, they have produced significant time savings, reducing matter inception from 30 minutes to just five."

His department recently took responsibility for the firm's library function, where the introduction of LexisCheck for precedent checking has saved time and reduced subscription costs.

But behind almost all workflow and process management is the 'unbundling' of the legal process, breaking apart legal work into its component parts – and it's this that might point the way to a future that's much more workflowed than almost anyone in the past might have foreseen.

In the here and now, this has started to allow legal service providers to use workflow automation to offer routine legal services with a self-service element.

A customer can be interviewed online, and the system can then use her responses to

populate a draft document. If the responses identify a more complex matter, the case can be referred up. Firms handling large volumes of routine matters can develop their own automated workflow technology, or just outsource self-serve volume operations to



"Although the workflows are simple, they have produced significant time savings, reducing matter inception from 30 minutes to just five."

Peter Blackwell, head of IT, ASB Law

a white label online provider like Epoq. The challenge of this route is to enhance client service without depersonalising it.

However it's done, workflow and process management is changing the way legal work is being delivered, and it's affecting a much wider range of work than the volume business it's known for. And binding it to client-facing goals and project management creates client value and better management information and control – which should be at the heart of every firm. ●

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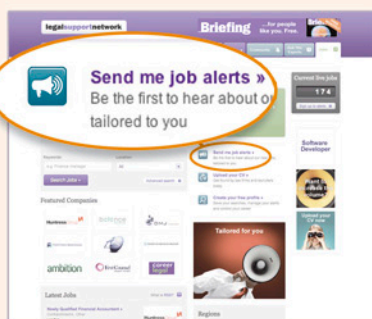
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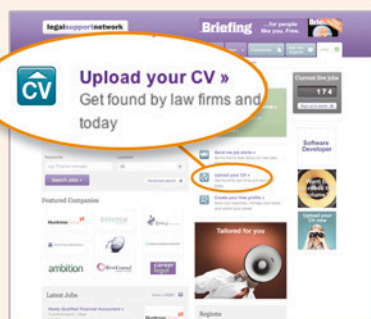
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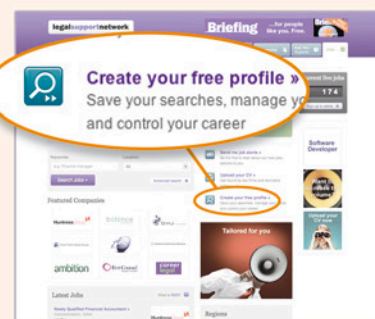
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Case study

Managing matters

Process automation delivers benefits to commercial as well as high-volume firms. **Andrew Powell** at Nabarro talks about how his firm is using MatterSphere to do just that



Case management and automation is a done deal for high-volume, low-value process-orientated work – but can it benefit corporate law firms? The answer to this is ‘yes’, and Nabarro is proving it.

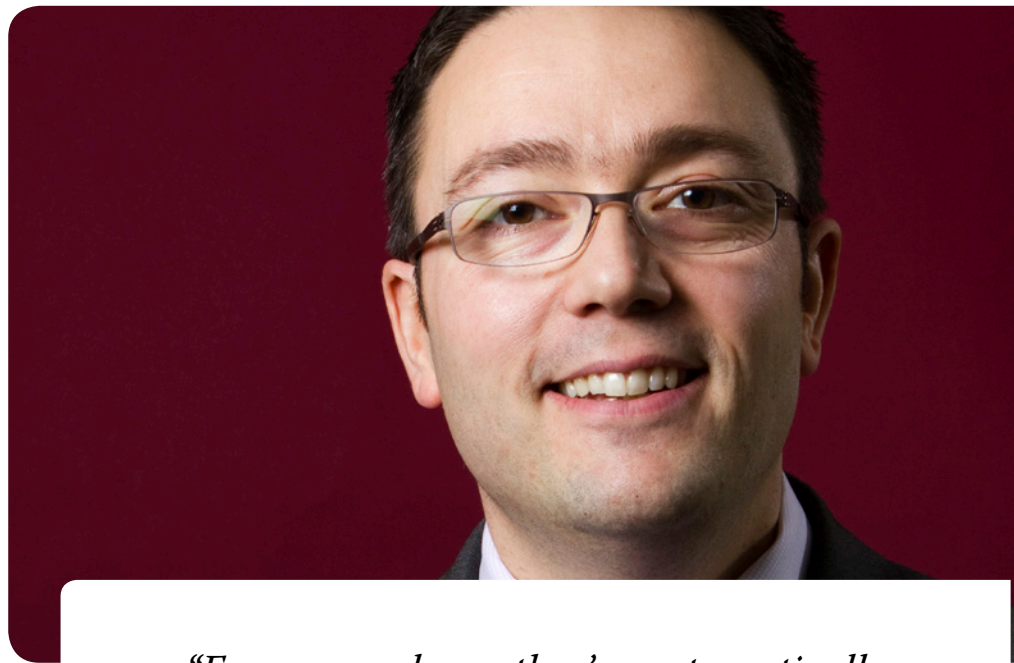
But the answer doesn't lie in 'case management', says Andrew Powell, IT director at Nabarro – it's all about matter management. "There are negative connotations for case management. In my view, historically they've been far too rigid for lawyers and for the type of work a firm like Nabarro takes on." Nabarro's work is generally high-value, and only some areas have repetitive elements – areas such as defendant litigation and debt recovery. For those, though, Nabarro is now using matter management "to help our lawyers be more efficient", says Powell.

Powell and the Nabarro team chose MatterSphere, Thomson Reuters' matter management solution, because it integrates with the IT the firm already has. Even more importantly, it allowed Powell to use it more as an 'overlay'. "It feels like you're still in Outlook," he explains. The team set up MatterSphere so that lawyers don't 'flit' between applications, he says – "so it does have elements of case management" – but it hasn't changed the way they work.

"They know they're automatically time recording, which they like," he says, but "they know they're not being forced prescriptively – that wouldn't be appropriate for the work or

people, and it's just not satisfying."

It was client demand that triggered the move – a trend every high-end firm can identify with now. "We were looking at matter management anyway, but client demand helped us along," says Powell. Nabarro has government clients, for example, that could be better served using more process management. "Government



"Fee earners know they're automatically time recording, which they like, but they know they're not being forced prescriptively – that wouldn't be appropriate, and it's just not satisfying."

Andrew Powell, IT director, at Nabarro

departments have specific reporting requirements, 'on a whim' figures, and tend to require demonstrable evidence which shows that all the correct steps in a process have been covered."

The risk management and accreditation document set (RMADS) is also a growing requirement for law firms, he says. "Such

accreditation is highly valued, and having matter management in place helped us get it. It's unfeasible with manual working. That, alongside our recent ISO27001 certification, means we have removed big barriers to winning government and institutional business."

Business analysis is the secret to successful matter management, says Powell. The Nabarro team studied current work processes and considered how changes could make life easier and as efficient as possible, alongside covering specific client reporting and milestones requirements. "Only then did we start building it all into the system," he says.

Around 200 people in Nabarro's litigation department use MatterSphere, and real estate is next on the list, followed by two or three smaller teams within the next six months, says Powell. "We've been measuring in a very qualitative way," he explains. "We are a lot more efficient, but we're not timing people."

Key efficiencies from matter management, he says, come from having one single interface, reducing process steps, having the system know what someone's been working on, finding folders, and automatic time recording – "basically, taking the 'faff' elements out of the work". Powell says there's also now a "generally better view of the business", with "greater visibility of peaks and troughs in capacity".

Workloads are achieved more quickly and "clients say we are getting through workloads faster, and less time is spent on work like dictation – lawyers now use time-saving templates". Supervision is also easy, instant and done anywhere, because information is all on the desktop. "This frees time for fee earning,

clients are better informed, and work allocation across the firm is easier," says Powell.

Clients want greater speed of response, and matter management delivers that – in fact, it's the biggest benefit, says Powell, "not just for reporting but actually doing the work. If we need something produced quickly, it can be done immediately, from anywhere".

But it's because Nabarro could implement

"Clients say we are getting through workloads faster, and less time is spent on work like dictation – lawyers now use time-saving templates."

Andrew Powell, IT director, at Nabarro

MatterSphere 'behind the scenes' and tailor the amount of process management that has made it a success. "Forcing IT on our lawyers is usually a good indication it won't go down well – so if the request comes from a client group, it's a gift," says Powell. And though Nabarro isn't focusing on measuring efficiencies in a quantitative way, "if the system wasn't delivering benefits, it would have been switched off – that's how law firms work".

Nabarro teams are now queuing up to get the system – which, as Powell says, "is a nice problem to have".

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A hand-drawn flowchart on a green chalkboard. The flowchart consists of several rectangular boxes connected by lines, representing a process flow. A hand is visible on the right side, holding a piece of white chalk, positioned as if it has just finished drawing or is about to draw a line. The background is a solid green color, typical of a chalkboard.

E *Briefing industry interview* **verything flows**

Briefing talks to Tony Klejnow of Linetime about how workflows and automation can be good for just the kinds of firms who think it's not for them

Workflows and process automation are only really useful for firms doing bulk work, conveyancers, PI factories and the like, right? Wrong, says Tony Klejnow, managing director at Linetime. Every kind of firm can benefit – in fact, firms doing the ‘unique’ work might benefit most of all.

Using workflows and process automation – fundamentally, using case management in the way it should be used – generates fantastically useful management information. This information can be used to both analyse what work you should be doing ie what’s profitable and what isn’t and to better price work – even occasional work.

“One of the major benefits to using one IT system to drive all your workflows is that you actually understand what was needed to accomplish the work,” Klejnow explains.

“This is particularly important now that clients are pushing more and more for fixed fees. If you under-price work, you lose money; if you over-price it, you don’t win the business. And unless you know what it costs to deliver the work, how can you price for it?”

And using workflows and automation lets you create benchmarks to judge future similar work by in the future. “When you come to quote for a piece of work later, you can look back at, say, five sample cases and look at the process behind it. You can look at how effective you were, how profitable you were, and use those facts as a model.” This works for ‘one-off’ work almost as well, says Klejnow, because “even though someone might say it’s a unique piece of work, you will get another similar piece of work to that one day. And you can only have an open and informed conversation with

your client about that future piece of work if it’s based on real prior experience.”

The key to making workflows function at their most efficient, Klejnow says, is holding all of a firm’s data in one place. This delivers one view of the truth around a firm’s work, he says: “If you’re keeping all your data inside the same IT system, you have all time recorded, and you have all the costs to hand because you have

“If you under-price work, you lose money; if you over-price it, you don’t win the business. And unless you know what it costs to deliver the work, how can you price for it?”

Tony Klejnow, managing director, Linetime

all your data in one place. You’re basing your decisions on real facts.”

Embedding workflows and turning manual work into processes also has an enormous potential effect on profitability, he says, because it can powerfully demonstrate whether you should do a piece of work, or even keep a client. “Measuring profitability comes from using your IT system to manage all your work flow, record all your activity, telephone notes, documents in and out, all your disbursements, to give you the true figure of what it costs to deliver a piece of work.

“If you look at the process and think you have fine-tuned it and you’re still losing money, you have to question why you’re doing it.”

Though the world of workflows and

automation belongs in some people's minds to the personal injury and residential property businesses, firms that don't conform to this model might in fact benefit more from process automation and workflows, says Klejnow.

"A bulk conveyancer knows his process better than anyone because he knows the steps involved. But if you are doing irregular work there is almost more need to monitor what is going on. When you're about to do a non-standard piece of work, how do you know what it will cost you to deliver?"

Driving consistency

Almost every work area in a firm can benefit from workflows, he says, "even if you can't drive it from start to finish through workflow". Areas such as PI, conveyancing and debt recovery, for example, will deliver more benefit as they're more repetitive, but adopting process automation and workflows delivers consistency to all kinds of work, which has two big upsides: compliance and quality control.

"If you don't standardise, you don't really give your client the consistent service they would expect," Klejnow explains. "If you standardise everything, the client will get the same standard from you, whatever work you're doing." This doesn't mean turning the firm into some robotic environment – generating consistency can be a background effect.

Just going through the process of analysing how a firm works in preparation for workflows can be hugely helpful before any automation is done, Klejnow says.

"It is about what the business needs and what it wants to do. IT is there to support and implement that, with its understanding of how systems work. Process re-engineering gets people to question what they're doing, and ask 'How can I do this better?' Just because you do

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something a certain way and it works, doesn't necessarily mean it's the best way of doing it."

Linetime has done a lot of work with growing, ambitious firms in the second hundred as well as a handful of top 100 firms, and law firms of all sizes, are wising up to the advantages of automation, he says.

"They know they have to go that way. Online case tracking for clients, for example, is enabled by the ability to manage case processes. At least one of our clients has gone on record to say that this has been instrumental to them in winning business. And a firm we've been talking to recently said when they're tendering for blue-chip client work, if you can't tick the box that says you can do online case tracking, you don't get the work. And you need a case system behind online case tracking to have something to track.

"There's a powerful, growing need to have automation and the need also to expose the information behind it and allow the client to interact with that information."

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Briefing Industry Interview

Can workflow work for you?

Briefing talks to Jitendra Valera of IRIS Legal about why creating workflows should be so simple, almost anyone can do them – and why it's so important that they do.

What can law firms do to be more business-like? Become more predictable, consistent, process-minded and integrated, says Jitendra Valera, chief marketing officer for IRIS Legal. This will deliver efficiency and reduce risk, he says – as well as increase their profitability.

“With all the changes in legal services, firms are now having to be run more like businesses,” Valera explains. “Therefore they need to be far more efficient and cognisant of the fact that they need not only to manage their processes but also their resources.

“Workflows have been seen in the past as belonging in repetitive legal work, where you’re looking for more efficiencies and ensuring that prescribed steps are followed. But the fact remains that you also need efficiencies in the broader business processes and to integrate these with the way legal work is done.”

Client/matter inception is a perfect example

of something firms throughout this issue of Briefing have realised is perfect for workflow and process automation – delivering efficiency and risk management gains. Ideally, though, workflows should span far more than case management. It’s the way many businesses work, but not necessarily how most law firms work – yet.

But some law firms are looking at how they can use workflow in other business processes, says Valera. An area ripe for process management is bill to cash collection: “A workflow process, for example, which integrates the end-to-end bill to cash process, from the creation of draft bills through approval of a final bill to automated debt chasing, really starts to drive that process more efficiently and deliver cash generation faster.”

And the more a law firm turns to processes and workflows, says Valera, the more compliant it can be with the relatively more

difficult regulatory framework the industry now has to comply with. “This is particularly useful for smaller firms that don’t have the bandwidth or the knowledge to readily do that themselves,” he says. “having automation around compliance really helps them make sure that they don’t fall foul of the rules.”

But turning legal work into a more process-driven business can have many client-side value benefits. As an example, by integrating workflows with web services that clients can use through a web browser, and client self-service portals, you can expose some information to the client. This means they can not only provide input into a process but also track their cases – and this is something clients really want.

To do any of the above, it’s really important to have an IT platform that can connect every part of a legal business to be able to go beyond just matters, Valera says. Firm-wide systems will be the only way to get the most integration.

“People are looking for a fully integrated system, but many don’t today include that firm-wide application integration. It’s an end-to-end process that you’re trying to implement, and it touches lots of different parts of the business, such as marketing, HR and resource management. Workflow is starting to become the glue that provides that integration.”

IRIS Legal’s vision for law firms, says Valera, is to deliver a workflow tool set that’s very easy to use and doesn’t require anybody to be too technically minded – and one that handles more complex processes and calculations that can be easily automated. “You could then have a competent practice manager or administrator build their own workflows,” explains Valera. “We want to empower people to not only build

case applications but also create their own workflows that automate numerous business processes and drive efficiencies across the firm.”

Other important features for any workflow, he says, are the ability to create custom user-defined data and the ability to report across various aspects of the workflow processes. Firm-wide reporting, he says, enables key performance indicators and better

“We want to empower people to not only build case applications but also create their own workflows that automate numerous business processes and drive efficiencies.”

management information: “Workflow data is collected in a format that can be easily reported upon using various reporting tools. That’s where having a fully integrated system is really important.” And, of course, this has big compliance knock-ons – the more information you can track and produce, the better you can be under audit.

Workflows have a lot to offer any size or type of firm because, says Valera, business process management is fundamentally about “trying to make the whole business more efficient, rather than just the practices”.

Find out more about
IRIS Law Business
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*Case study***analysis is good for you**

Field Fisher Waterhouse's Maurice Tunney on how he's creating efficiency and compliance with business process management with Winscribe

After touting the benefits of business process management to partners for several years, Maurice Tunney, Field Fisher Waterhouse's head of IT solutions, realised that he needed proof to move forward – and an ally.

With the advent of outcomes-focused regulation as a driver for change, and two entirely different processes for client and matter inception now “close to reaching their sell-by date”, Tunney knew the time had come for change. So, he brought FFW's risk partner on board and set about making work processes more consistent – gaining efficiencies, eradicating duplication and rationalising data while building better OFR compliance.

Business analysis was the key to making this happen. Workshops got everyone together, from partners to secretaries – which Tunney says was an iterative process. “It was huge business analysis, pulling two processes

together and removing obsolete activities.”

FFW used an internal business analyst and an outside consultancy to make sure the project maintained momentum and credibility, that it gave a really fresh view and that it gained “loads of insight” from market experience. The analysts didn't disappoint – they created a 140-page specification for the BPM tender. “You can't have too much detail,” says Tunney.

FFW uses IntApp's Integration Builder, which helped shape Tunney's BPM tool buying decision. Integration Builder acts like a ‘glue,’ giving direct and consistent interaction of data between systems. The firm needed something that would allow automation to be created in-house, without specialist coding – and chose Winscribe's BPM tool.

“Winscribe is very graphical, which makes form design easier,” Tunney says. “It's often a case of drag and drop to make changes. In large projects of this nature it's easy to fall foul

of ‘feature creep’, which we’ve tried to avoid. We’ve made small nudges, but only embraced changes that make a significant difference.”

Tunney and the team created annotated mock-up screens as part of the process – which worked well “if people don’t have to conceptualise as much they consider strengths and weaknesses much more carefully”.

Raising compliance with BPM

The new automated process form of taking on new business/clients will build better compliance in many ways, says Tunney. From being able to show the action taken when dealing with a conflict to coping with new, pointed questions around regulatory issues, FFW will be surer of its compliance.

“OFR is subjective in many respects,” explains Tunney. “You have to show you’re doing it, rather than just covering a prescriptive check list. You need to automate where possible – it’s not simple, but the BPM tool will create consistency and bring us efficiency benefits.” One area of improvement with the new process is that users can see, on-screen, the last three matters and outstanding bills for current clients, and this says Tunney, “means we can make a more informed business decision on whether to take on further work”.

Users will now be forced to review money laundering issues before a matter is even created, removing the current delay for qualifying. And, as the ‘country sanctions’ check is also automatic, a decision to proceed can be taken promptly. Tunney hopes BPM will encourage FFW on its journey towards being a cohesive international law firm, and ensure compliance across territories. The

ability to make tweaks allows for jurisdictional compliance differences, but everyone is still following fundamentally the same process.

BPM also delivers huge consistency and speed gains in areas like taking on new partners. “It makes it easier to check, ahead of recruitment, that a potential partner’s clients aren’t already conflicted out,” says Tunney.

The plan now is to build many more workflows, he says, covering diverse areas

“Clients want more for less, so processes need to be efficient and flexible. Winscribe’s easy BPM tool, used alongside business analysis will help us meet the ongoing challenges.”

Maurice Tunney, head of IT, Field Fisher Waterhouse

from matter management to recruitment. This will populate HR, IT, finance management systems simultaneously, he says – “which will mean far more consistent data entry and data authenticity at the back end”.

But for now he’s just pleased the firm’s been able to drive up efficiency, ditch duplication and exceed new compliance needs. “Clients want more for less, so processes need to be efficient and flexible. Winscribe’s easy BPM tool, used alongside thorough business analysis, will help us meet the ongoing challenge.”

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Industry analysis

Your firm, only better

Andy Sparkes, director of strategy at LexisNexis, talks about the need for firms to push boundaries in business process improvement to navigate the biggest market shake-up in legal sector history

Business process improvement, automation and workflow are not new to legal. But their importance has grown, especially in high-volume practices, and proficiency in them is now an imperative for all firms. This creates a need for firms to push the boundaries of BPM as they navigate the biggest market shake-up in its history. But how?

Optimising resource allocation inside the firm is key to increasing profitability, and technology plays a vital role in providing the necessary management information to underpin decision-making and to streamline work. Evidence suggests that the real value from process automation and workflow comes from a joined-up approach across a business, but this can only be achieved by having a clear, detailed understanding of the underlying legal work and business processes. This is anathema for most law firms, especially those who practise in the 'value lines'.

Practice and case management systems are ubiquitous in law firms serving high-volume markets, but all firms are facing increased pressure to streamline processes further, to respond to changing working patterns and to deliver more insightful reporting to underpin decision-making. Our clients are continually seeking to refine and optimise processes and deploy new functionality to meet user and customer needs.

We're seeing enterprise management systems, encompassing business, financial and practice management functionality (underpinned by workflow), becoming more important as a result. Such systems let organisations work seamlessly across business environments, and facilitate communication and continuous information flow both inside the firm and with clients. Forward-thinking firms are now exploring how to gain competitive advantage through the deployment

of industry leading solutions and greater alignment in their underlying technology, particularly around Microsoft technologies.

With alternative fee arrangements becoming commonplace, all firms need to understand their cost of delivery. This is leading to the deployment of analytic tools and legal project management techniques to ensure profitability and customer satisfaction.

But what about the non-volume law firms? In-house counsel face an increasing regulatory burden and the challenge of doing more with less, which is reflected in their interaction with law firms – fixed pricing, risk sharing and price-point caps for certain work are now routine. In response, automated document drafting tools, including client self-service, are becoming extensively deployed to drive efficiency.

Progressive firms are also automating routine administrative tasks such as conflict checking, audit record generation, client and matter inception. And some have been vocal about their deployment of low cost offshore execution models to help achieve efficiency.

Many firms are also looking to interact with customers differently. Customer relationship management (CRM) systems have helped through retention, cross-selling, focused marketing and impactful communication with customers and prospects. But CRM is now also being integrated with e-marketing, workflow and collaboration tools to give clients more visibility of their information.

Evidence from volume businesses, other industries and our research shows that without three fundamental elements, any drive to improve efficiency will be partial or temporary:

- A clear and detailed understanding of processes (and what they should be) – without

this, it's virtually impossible to make any reliably informed decisions;

- The deployment of automation, tools and enhanced processes – low-cost resource solutions offer only a temporary fix;
- A joined-up approach – taking an end-to-end view of how practitioners work and integrating as many of the necessary elements as possible within the workflow is the only way to succeed.

“Workflow and process automation are adopted in a piecemeal manner by law firms today. The true value of these technologies lies in a joined-up approach – and one that must be driven by the highest levels.”

Workflow and process automation are adopted in a piecemeal manner by law firms today. The true value of these technologies lies in a joined-up approach that spans technologies, functions and geographies – and one that must be driven by the highest executive management levels.

A process-centric and joined-up approach to legal business, underpinned by the right technology, tools and content, is perhaps the next challenge – and that's an approach that we, as providers of these technologies, are embracing.

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Case study

Controlling the cost of mobility

Greg Lawrence, IT director - Europe at Sidley Austin on reconciling and controlling the business costs of mobile comms through automated processing with Total Ltd

Sidley Austin is a global US firm providing a broad range of services across a wide customer base. It's well inside the US top 10 and can count on around 1,700 lawyers based in 18 offices worldwide. But, with thousands of people spread across the globe, the firm has a mighty big phone bill.

So, says Greg Lawrence, IT director – Europe, at Sidley Austin, the firm needed to find a better way to process- and cost-manage UK calls and data in a way that was more efficient and easier to understand. Total was the answer, and now provides and manages the firm's UK BlackBerrys.

"Total takes the admin out of the voice and data cost management of our BlackBerry fleet by providing automated bill processing," he says, "and it gives us control over our costs."

Total's unique online billing system, YourView, gives Sidley the ability to split billing between data and voice costs. This is vital

data, because the business covers all data costs regardless of cost centre but the onus is on the lawyer to recover voice call costs. Being able to analyse each monthly bill and split it between voice and data allows Sidley to efficiently manage what it spends on calls and reconcile the business costs of mobility.

"Flexibility and customisation is where Total's system really comes into its own," explains Lawrence. When processing monthly mobile comms bills, his team can now link mobile user names to individual phone numbers – which kicks off a process for call costs to be allocated to specific lawyers, who can then allocate them to clients, improving cost recovery – all through YourView.

"If we weren't using Total," he says, "my team would have a lot more admin – we would need to analyse each monthly bill, split out data and voice costs and then allocate them correctly."

Total's managed provision is also helping to

give Lawrence and the folk at Sidley live costs information on mobile comms. Each Sidley lawyer has a set monthly data limit, and Total's Helpdesk module provides a 'spend alert' back to people like Lawrence when that limit has been reached. This delivers live mobility costs analysis, and allows those responsible for costs to get hold of the lawyer if they're travelling on business, for example, and determine whether to increase the data quota or continue to accept billing on a per-megabyte basis.

Spend alerts are automated processes on Total's side – prompting a member of the account team to phone or email Lawrence or a member of his team. But this moves the management onus 'upstream' in the supply chain, away from Sidley Austin. Each decision can be discussed individually, which delivers real flexibility to Lawrence in managing the BlackBerry fleet and greater ability to control what's spent on mobile devices.

Web-based cost management

The YourView web-based cost management system also allows Lawrence to drill down into the usage of each device, and provides a summary of all devices. But Lawrence can do more than that – he can view voice calls and data information separately, look at a daily usage summary, analyse the 25 largest users, find out the top 25 destinations called and get an hourly usage summary.

"From that, I have real-time information to answer any queries related to a device, or analyse why there might have been a large variance in the monthly bills of a device."

There's also some process management on the information and pricing side to the

deal Sidley has with Total – YourView has a messaging feature to flag up the latest mobile technology news, and a quarterly team meeting gives the firm the opportunity to discuss their account. This ensures the team is taking best advantage of any changes in the mobile market.

"Total really adds value by telling us about changes in the market," says Lawrence. "Recently, they alerted us to new mobile pricing in Europe and we were able to discuss

"Having an automated system to manage the costs of BlackBerrys means we can be much more efficient at controlling costs."

Greg Lawrence, IT director, Sidley Austin

how we could best benefit from the changes."

Leavers and joiners processes are also eased, because the firm can retain and re-allocate a departing partner's number to another partner, reducing the amount of admin required when processing a new device. And if this can't be done, Total can credit Sidley for unwanted handset upgrades and let the firm use these credits to explore new devices.

"Having an automated system that we can easily customise to manage the process of tracking and analysing the costs of our BlackBerry devices reduces our admin," says Lawrence, "and it means we can be much more efficient at controlling our costs."

Get better mobile management with
Total Ltd
www.total-ps.net



Industry analysis

Why BPM, and why now?

Jon Summers, OpenText's business process solutions expert, lays out his top tips for how to reduce waste and generate revenue with business process management

Lawyers are often burdened by administrative paperwork, overhead and inefficient processes that limit the time they can actually spend on billable client work. So, if you were given the opportunity to cut out some of this waste and focus more time on generating revenue, would you jump on it? Many law firms are doing just that.

Law firms such as Allen & Overy, DLA, Duane Morris, Foley & Lardner, Freshfields, Hogan Lovells, and Jones Day have tuned to business process management (BPM), using the latest BPM technology to eliminate paper forms, reduce lawyer overhead, automate processes and reduce risk.

What is BPM software? It's a set of capabilities that allow you to model, automate, integrate, analyse, simulate, and improve human and system-intense processes. BPM differs from the workflow capabilities in your existing records and case management systems

because it is architected to allow modelling and automation of unique processes, and it delivers the flexibility to make real-time changes to many different processes across your firm.

Integrating BPM software

BPM software integrates with your existing document and case management systems to make them more valuable.

For example, BPM lets you use data and records across multiple processes, ensures that records management and case management systems are updated immediately, and enables multiple people to collaborate on cases simultaneously. All actions taken in the process, along with the associated content, are logged for auditing and process statistics and data can be analysed and displayed in a graphical format for presentations and reports.

The increased visibility that BPM provides into what is happening across critical business processes can be leveraged to model changes and apply improvements to the process.

As any business trend grows in popularity there will always be advocates and sceptics, and BPM is no exception. But even the sceptics have to take notice that ever more law firms are proving that BPM software not only solves critical process problems, but also delivers a fast return on investment and helps them get more out of the assets they already have – including their lawyers.

So how can you do the same for your firm? The first step is to choose a BPM solution – but since BPM can be applied to many different industries, be sure to find one that has established and proven itself in the legal sector. Then identify those core processes that are critical to the firm but are paper-intensive and inefficient, or are a source of increased administrative overhead for lawyers, and use the software to model and automate them.

Applying BPM to new business

The new client matter intake process is usually the first critical process that most firms tackle, as reviewing and processing new business is one of the most important but challenging and time-consuming activities within a law firm. A variety of manual procedures and paperwork are required to check for potential conflicts of interest, validate the business value of the matter, establish credit worthiness of the client, gather marketing data for cross-selling, and ensure that the firm's accounting systems are updated with the information required to generate accurate monthly billing statements.

Using a BPM solution to automate new business intake can make a dramatic difference to the time required to move a new matter

from the initial request to a billable client matter.

By applying BPM to new business intake and conflicts management processes, firms can quickly achieve measurable results in many areas. These include faster intake of new clients and matters, elimination of duplicate data entry errors and omissions, reduced administrative overhead, process compliance across global operations and centralised reuse of existing data, systems and technologies through seamless integration. Creating greater efficiency in this process frees up lawyer time for billable work, while at the same time lowering the risk to the firm by ensuring a thorough review and capturing an online audit trail.

Other opportunities for applying BPM are anti-money laundering precautions, audit letter response, collections, accounts receivable write-off, file closing, prospective search records management, travel and expense, and check requisition.

BPM technology helps law firms achieve competitive advantage by increasing efficiency and reducing costs without sacrificing the superior client service that is so critical to success. And firms are finding that they can leverage BPM software to achieve compliance and reduce risk, ultimately saving hundreds of thousands of pounds on annual professional indemnity insurance premiums.

And if that's not enough value, think about the hundreds of extra billable hours your lawyers will generate each year when you free them up from all of the administrative overhead that currently plagues them.

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