Briefing

LEGAL TECHNOLOGY IN 2013

DECEMBER 2012

Future perfect

How legal technology is reshaping the way law firms do business, from mobile apps to matter management

Where does legal IT go next?

What kind of technologies will the big firms be turning to in the years ahead? What's on the cards for legal IT in 2013, with all its threats and opportunities? And do the UK's top IT chiefs think tablet computing will change the way we interact with legal IT? The answers to these questions (to some extent, at least) lie within, dear reader.

This month: an interview with the CIO of one of the world's biggest and best firms, and noted IT writer Joanna Goodman gazes into her crystal ball to find out what 2013's hottest IT topics will be. Plus we have the outcome of our survey of the top 100 IT directors on whether iPads and the like will transform legal IT. (Answer in a nutshell: probably.) And we have insight from **LexisNexis, IRIS Legal, Testing Solutions Group, Flosuite Legal and DPS Software**. Anyone would think it was Christmas...

If you received the print edition of this issue, you'd also have the full list of the top 100 IT directors. In 2013, we're going to run a top 100 directors list in almost every issue – but you will have to sign up as a subscriber to get them.

From February, we'll only be sending print issues to registered subscribers. So sign up today to receive **Briefing** in print from February – or email me on **rupertw@lsn.co.uk** and we'll do the rest.

Rupert White, editor of Briefing

Industry analysis index

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

This month: **LexisNexis** and **Testing Solutions Group** talk to **Briefing** about how better IT systems can help law firms become more efficient. We also have industry insight from **IRIS Legal** and **FloSuite Legal** on the benefits of more sophisticated electronic forms, and why BPM and case management systems are enhanced when used together. And the managing director of **DPS Software** shares his views on how IT can help law firms be more competitive in a market that is set to become ever more challenging in the next five years.

This month's interview with
Gareth Ash of Allen & Overy
was transcribed by:

voicepath®

Photography of Gareth Ash: Jonathan Goldberg
Image on page 30 © Pavel Ignatov - Fotolia.com

The future starts now

Rupert White talks to Gareth Ash, CIO for Allen & Overy, about the technologies that the world's biggest law firms are using to make their strategies happen – and why legal IT has to change from the ground up to make everyone love and use it

Gareth Ash, A&O's chief information officer, represents one of the very few firms to be running firm-wide enterprise-grade legal IT.

He's building his own apps, driving ahead with user experience and usability, and the IT he's in charge of is directly affecting his firm's strategic direction and tactical behaviour. He's also now the European vice president of the International Legal Technology Association (ILTA), taking over from the illustrious Janet Day. And he's flown a Spitfire. I mention this only because I'm considering requesting this be mandatory for all future ILTA appointees. You have been warned.

A&O is a big firm that does things its own way, but that way is, by most accounts, quietly innovative. It's not necessarily truly innovative – something he'd readily agree with – but it's much closer to the IT capabilities (and outputs) of big business in other sectors, which is why it is innovative for the legal sector.

"I don't think innovation has to be new in terms of the universe at large – it only has to be new in the area that you are," he explains. "It could be an innovative way to use old technology. It's a bit like cloud – you can come up with any interpretation for it that you want."

As one of the first full Elite 3E users, A&O is at the forefront of a groundswell that's happening in legal IT towards firm-wide, enterprise systems. In the world of practice management systems (PMSs) and the like, says Ash, "all sorts of firms are now implementing enterprise-class PMSs to run themselves as businesses rather than, perhaps, professions. It's certainly made a huge difference to us".

The benefits of doing so are only just really coming to fruition, but they're significant. "When you've got systems that can really help drive efficiencies in your working capital management, when you can start looking at the profitability and anatomies of deals, that's where there are huge strides to be made." The big PMS vendors are finally, he says, bringing out products that are "more than just glorified spreadsheets, that really cut it in the global corporate world".

Understanding profitability with technology

Behind a lot of the developments in legal IT has been the need to make much better use of the huge amount of management information in a law firm.

"In the past, law firms never had the tools to get a real handle on their business. These new systems allow you to understand your core data and the workings of your business. We're now able to understand our deals, the costs, the resourcing mix [or leverage], the time we are spending and so on, on a global scale," says Ash. "We can understand what is profitable and what is not so profitable. These systems provide you with a deep, rich source of

Technology made easy

econocom
MOBILITY ON DEMAND

Our aim is to make new technology child's play for our customers.
We work closely with them to recommend, implement and finance their ICT solutions.

www.econocom.com/uk

information to make decisions on. It's the old adage: what's not measured isn't managed."

The big global firms will use these new enterprise technologies to decide what their best business models will be over the next eight years or so, he says. Why eight years? Well, 2020 is a date everyone's talking about he says – last year's ILTA conference was even themed 'Law2020' – and that tallies well to other statistics that might suggest that the UK won't see a significant economic uptick until 2017 or so.

The new enterprise-wide legal IT that's being ushered into the market, as well as greater use of business intelligence and related technologies in the top 200, is creating a shift in how decisions can be made in law firms, and makes hard decisions easier to make. "The most important thing is that it gives you hard facts," Ash explains. "In the end, if you've got difficult choices to make and you don't have hard facts, people find it very easy to back you away."

Being able to properly analyse cost and profitability is, he says, "the biggest revelation" brought up by the new legal IT systems. "That's where it's able to turn up something that you would never have found," he says, "because previously it's been very difficult to crunch that kind of information."

Ash says the new IT is having a demonstrable effect on his law firm's strategy (though he can't talk about exactly how or why). "It's definitely driving the strategy. It's delivering empirical information that you can now base business decisions on. It is definitely highly influential on what decisions we make and what paths we go down."

Ash says he's not pulling a sales job for Thomson Reuters Elite – "I'm sure Aderant users could see similar benefits" – but the key is to aim at enterprise-grade, firm-wide IT that allows you to gather data from the whole business.

Does he think there's a future for the new wave of Microsoft Dynamics-based solutions

The new firm-wide legal IT systems are "delivering empirical information that you can now base business decisions on. They're highly influential on what decisions we make and what paths we go down."

Gareth Ash, CIO, Allen & Overy

for law firms, coming from companies such as Avanade and now LexisNexis ()? After all, MS owns the desktop and email, and now SharePoint is making serious inroads in DM, content management and collaboration.

Possibly, he says. "It will be a long time before they can compete with the Aderants and the Thompson Reuters of this world, because between the two of them they seem to be

buying up almost every piece of software in the legal market."

He doesn't rule it out in the big firms, he says, but MS has other issues with big firms around licensing (such as cost hikes over client access licensing), and the Dynamics-based systems simply haven't matured yet.

Platforms for project management

One of the large-scale outcomes of using more IT and management information (MI) to analyse the cost of doing legal work has been an increase in moving work to lower-cost centres. For A&O this has in part meant near-shoring in Northern Ireland, for example. This has put law firm IT strategy firmly to the fore – it's got to support this more distributed model.

"To create the workflows, the MI, the checkpoints of processes, to aggregate different sources of inputs – whether it's an outsourcer, a BPO or whatever – we're going to have to have a platform that allows all those resources to be able to collaborate and create the end product, to deliver it to the client.

"You're going from a world where this was easy, because everyone was in the same firm, to having platforms that bring together multiple resources and sourcing, to create the same output."

This is a discussion that naturally seems to end up with the growth of project management methodology in law firms – something that's nascent, still, but whose time is, arguably, coming and coming fast. Ash agrees that project management has great potential in legal, but says there are hurdles on the way.

"On big deals, we and many other firms have project management, but to be honest, a wider adoption of project management on all sizes of deals would be a big leap forward and we, and I know other firms, are looking at this. You wouldn't think of doing a project in most other industries without project management, but it's just not been the first thing lawyers think about. This has often been because of

> *"Both parties have to come to the table, and the client also has to realise that if they want efficiencies and things to be project managed, they can't just ask for things on a whim."*
>
> Gareth Ash, CIO, Allen & Overy

an attitude that law was different to other industries, but this is changing."

The problem law firm people have with project management, he says, is expectation management and fear of reprisals. "They don't realise that the plan is just a guide to help drive you forward, and to make sure you can see when you have gone off-piste."

And project management thinking could have great benefits for law firms in controlling the client relationship, too, he says.

"Both parties have to come to the table, and the client also has to realise that if they want efficiencies and things to be project managed, they can't just ask for things on a whim – they've got to accept that there's a process to follow, and they've got to commit to that as well."

Navigating a world of new rules and new opportunities.

There is a certain way.

In a fast-evolving marketplace which demands leadership that brings results, there exists a way of certainty: Tata Consultancy Services (TCS). With TCS as your strategic advisor and partner, the ever-changing new landscapes of business become new vistas of opportunity, from digitally connected consumers to big data to emerging markets to end-to-end solutions for transforming your organization. TCS offers you market-proven, world-class experience, expertise and guidance to show the way for your business to evolve. **Visit tcs.com and you're certain to learn more.**

IT Services
Business Solutions
Outsourcing

TATA CONSULTANCY SERVICES
Experience certainty.

Mobility, tablets and apps: the new normal

In our updated research into the top 100 law firms' IT directors (see the full updated list on our website), we asked legal IT leaders one market research question – whether tablet computing would 'revolutionise' legal IT. Revolutionise is a big word, but 43% of top 100 IT directors questioned agreed with that statement to some extent. Over 37% of IT directors inside the top 25 agreed, so it's not just a smaller firm thing.

So mobility and tablet computing is going to have some kind of large-scale effect on legal, a projection backed up by announcements this year by Thomson Reuters Elite and Aderant, both of which used their user conferences to show and tell future apps and mobile-delivered information from their PMSs.

Ash says tablets won't change legal business models, but they do represent a way forward for much better presentation of information. "My biggest gripe at the moment with a lot of software providers is that their systems are just awful to use for the standard occasional user. They're not intuitive. Something I want to drive home in future here at A&O is that any

product selection has to be based on usability. The greatest success of all would be a product that doesn't need any training."

This has also led Ash and his team to write their own apps to present information from the core systems in a more user-friendly format.

"The biggest complaint I get from the partners is: 'I just don't understand this stuff, I can't necessarily tap into the information easily'. So we want to do that, to show it in a way that they can easily understand."

Tablets represent a trend that's washing through every business, says Ash. "When I bought my iPad a couple of months after they first came out in 2010, I wasn't even sure why I was buying it. Now I can't do without it. It's so useful that it's now defining what information we want to deliver and how. We're looking at how we can present information using the immersive, imaginative and innovative ways of a tablet."

Ash has created a programme dubbed Project Merlin (are you getting the Spitfire reference there?) which is driven by consumerisation, mobility and, "if you like, user frustration", he says, looking at how the bring-your-own-device trend can be linked to the usefulness of apps for clients and apps for

internal use.

"We're seeing an increasing trend of multi-office, multi-jurisdictional deals, so people are on the go all the time. People want to use tablets where they used to have dead time. That's not going to be for every task, but what does a lawyer do, mostly? They're on email and they need to create or review documents and get things back to the mother ship to have them drafted, redlined or whatever. This is what we're working on with Merlin.

"We're looking to re-engineer our remote and our mobile working solutions, which are not iPad-based, to make them simple, easy and consistent globally."

Viva la user experience revolution!

The A&O team is currently looking at developing an app to create more innovative ways to do a new business pitch, using the Metro newspaper's app as inspiration. "You have a different experience in that app," Ash says. "The way that you drill into information, you can decide where you want to go, you can embed video, present information in an imaginative way and so on. It's quite cool what they've done, and that's why we've been talking to our BD people to see what we could do for legal in an app."

The key, he says, is to empower the user. "All of a sudden, people who've been blinded by technologists and people like myself in the past now feel almost empowered, and they understand what they want. And I guess that's the great thing Steve Jobs did – he was able to say to people: 'Here's something you can use

easily, and you can understand'.

To me, the user experience revolution (and this is why I think tablets will, in many ways, revolutionise legal IT) will change how usable legal IT is to the average user, which will in turn change how they use it, and what they can do with it – which will influence what they want it to be able to do.

The current state of affairs, what Ash is tired

"All of a sudden, people who've been blinded by technologists and people like myself in the past now feel almost empowered, and they understand what they want."

Gareth Ash, CIO, Allen & Overy

of, reminds me of the most famous line from the film Network: users are now mad as hell with unusable technology – and they're not going to take it any more. Ash agrees – he's a "massive advocate of that", he says. "That's what I'm trying to get across to my own department, and I'm pleased to say it's taking off."

A&O might be quietly innovative, but it's at the bleeding edge of legal IT on that front. And long may the legal IT user revolution continue. As Ash is now in a position of double influence, with his seats in A&O and on ILTA, perhaps he can help drive these changes into reality. Here's hoping… ●

Feature

Bring your own strategy

A tale of liberalisation and leverage: Joanna Goodman finds out what's hot in legal IT, and what to look forward to in 2013

The coming year is going to be a big one in legal IT, because it's going to be an important year in the UK legal sector – and technology will help law firms grasp the opportunities coming their way, and deflect the threats that face them.

Two key near-future themes in legal IT are liberalisation and leverage – and both are leading firms to focus on technology that enhances mobility and supports business agility. One of this year's hotter topics was BYOD – bring (or buy) your own device. It was the year that lawyers fell in love with iPads, and replaced their BlackBerrys with the latest iPhone. For IT departments, this meant providing remote access to internal systems and resources while protecting confidential data. This has been done for years, but a tipping point of sorts seems to have been reached. There's now a continuing focus in law firms on mobility, business agility and leveraging and streamlining technology investments to make them cost-effective and user-friendly. IT departments are getting closer to the business.

Is the iPad already the tablet winner?

Lawyers now need anytime, anywhere access to their resources. Thomson Reuters Sweet & Maxwell, for example, publish their legal reference books as e-books for iPads and smartphones. Core law firm internal systems, notably iManage document management, can also be accessed via mobile and remote connections.

Most firms' BYOD policy focuses on iPads, because it's the only device that's stuck – so far. While some consider the Microsoft Surface as a (too) late entry into the tablet market, some think it's still in the game because, for example, the professional version offers integration with

Active directory, giving it a security advantage over the iPad. Whether this influences take-up in law firms remains to be seen, but Janet Day, director of IT at Berwin Leighton Paisner (BLP) says she's interested in the fact that the Surface deploys Microsoft Office. But other IT directors mention (anonymously) that the Surface has turned out not just to be little pricey, but also not sufficiently different to the iPad which everyone already knows. They say, quietly, that It doesn't create a big enough catalyst for change either as a personal or corporate device, even when you throw Windows 8 into the mix.

Are they right? We await the sight of enormous law firm orders in 2013...

Steve Whitwham, head of IT at Burges Salmon, is sticking with his strategy to support one device – the iPad – and Burges Salmon has developed a specific set of applications for the firm's lawyers to work with it. "We conducted in-depth analysis of activities that people carried out on their iPads. Our mobile stack is quite compact, so it will be easy to upgrade it to whatever device eventually replaces the iPad," he says.

Lawyers use tablets mainly for email, browsing and consuming, so Burges Salmon has an iManage link so that they can also access documents. "Lawyers use the iPad like the BlackBerry – but you can read the screen," observes Whitwham, somewhat wryly.

To mobility... and beyond

As Ben Weinberger, CIO at Bond Pearce, points out, mobility is not just about iPads – it's about enabling people to work anytime, anywhere, using the same toolkit. Bond Pearce can offer follow-me printing, for example, says: "If I know I am going to be in the London office, I can print something from home and

pick it up from the printer when I arrive."

For many regional firms, fully mobile working isn't as big a deal – but remote access is. Iain Hepburn, IT director at Clarke Wilmott, gives his users access to the firm's systems using Citrix, which is device agnostic, he says. This gives the full experience, wherever lawyers are and whatever they're using, and doesn't

> *"Multiple systems increase complexity. Without getting rid of anything important, I'm looking to simplify our systems to make the business more agile."*
>
> Stuart Walters, IT director, Taylor Wessing

focus overly on the device.

But BYOD has highlighted another topic that's likely to be sharply in focus throughout 2013 – security. This is driven partly by increased risk awareness in the wider corporate and public world, which leads clients in turn to ask questions about data security in law firms.

Compliance is also a driver of security, but, as Stuart Walters, IT director at Taylor Wessing, observes, the security issues affecting

iPads and other devices are no different from the ones that previously affected laptops.

Law firm IT departments are responding to perceived and actual threats. Walters' firm addresses this with ISO 27001 security certification, and by introducing tracking devices that analyse patterns of traffic on the peripheries of the network.

Over at at BLP, Day has implemented a straightforward solution: a full-scale return to the much safer and more controllable world of client-server. "The move from fixed to virtual desktops addresses most information security issues, and supports the concept of lawyers being flexibly available on the move because no data resides on any hardware device, which becomes a simple connection tool," she says.

Virtual services simplify mobile and remote working, because a lawyer working on a document can connect to her desktop from a personal PC at home, and continue working on the document she left on her screen in the office. It's an attempt to create a seamless, 'anywhere desktop', and it's becoming ever more attractive. BLP built its own virtualised desktop, supported internally, to be entirely secure.

Doing more with existing resources

This year saw continued mergers and expansion in the legal sector, which has led most firms to be focused on streamlining and leveraging their IT resources as clients expect demonstrable value for money.
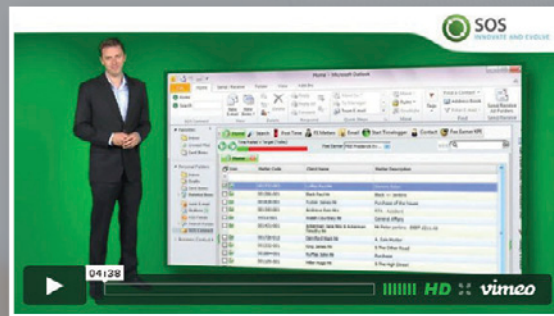
Price pressures in the City have also brought work to regional firms, where lower overheads support cost-effective services. Foot Anstey, for example, opened two new offices in the south-west to service regional and national clients, and renewed its entire IT infrastructure. This brings challenges, but also opportunities to make better legal IT.

As Foot Anstey IT and business services director Duncan Eadie observes, law firms are focusing on making the most of their technology investments and making them easy for lawyers to use. "It is particularly difficult to get lawyers into training sessions, because consumerisation has led them to expect intuitive systems."

Gareth Ash, CIO at A&O, is also very determined to raise the usability of all firm's systems, telling Briefing in this month's interview: "I want to drive home in future here at A&O that any product selection has to be based on usability. The greatest success of all would be a product that doesn't need any training." (see page 6 for our interview with Ash)

John Craske, head of business IT at Dundas & Wilson (and a qualified lawyer), observes that price pressure and reduced margins have limited IT investment. "Most firms have reached the point where they don't need more platform. Resourcing work effectively requires a creative partnership between IT and the lawyers and management of the firm."

The key priority now is to ensure that IT resources meet the firm's business needs, and engage lawyers with using technology and becoming more service-minded. Eadie sums this up thus: "The challenge is to maintain quality, while embracing commoditisation."

Weinberger is constantly seeking ways of reducing complexity and rationalising systems, he says. "Our strategy is to maximise the value of our existing technology investments while reducing costs. For example, leveraging the firm's Microsoft enterprise agreement reduces reliance on third-party vendors."

He's consolidating the Bond Pearce internal

"It is particularly difficult to get lawyers into training sessions, because consumerisation has led them to expect intuitive systems."

Duncan Eadie, IT and business services director, Foot Anstie

telephone system into Microsoft Lync, MS's collaboration platform. "This meets our strategy of dispensing with unnecessary systems and allows lawyers anytime, anywhere access to IP telephony without having to log into a VPN or Citrix," explains Weinberger. It's in effect a step on the road towards that long-heralded comms goal – presence.

Walters too is looking at business agility to support expansion into new jurisdictions and post-merger integration. "Multiple systems increase complexity. Without getting rid of anything important, I'm looking to simplify our systems to make the business more agile," he says.

Lync's desk-to-desk video conferencing increases flexibility, and it can replace face-

to-face meetings. But there's a generational divide on collaboration/new communication technologies like Lync, with younger lawyers taking a greater interest in them.

Conscious of these cultural hurdles, Whitwham has introduced a concierge service to organise video conferences. He's spent most of his career in financial services, and says IT is a strategic business function that can generate business value – "but to achieve the right to have these strategic conversations, the operational elements of the IT department must be impeccable". Therefore he's focusing on process discipline around service desk management, change management and supplier management to Burges Salmon, as well as rolling out an IT up-skilling programme across the firm. If lawyers know how to use the technology, they will make better use of it, he says.

Streamlining and leveraging existing technology supports the continuing consolidation of legal services through national and international mergers, as well as organic expansion. Day at BLP says she's concentrating on looking at her firm's expanding global footprint in an 'intelligent' way, and is adapting technology and processes to different cultures and ways of working.

Streamlining processes, creating workflows

Legal market liberalisation has brought competition from commercial entities, including online legal services, and an awareness of existing and potential market entrants has produced more interest in case and matter management.

"Price sensitivity and fixed price work make

us look at how we deliver services and seek ways of being more efficient and productive," says Hepburn.

There is now also more serious focus on BPM, automation and project management – online legal services, for example, are very good at this, and law firms are playing catch-up. Firms are also dealing with the fact that corporate clients are handling more work in-

Law firms have been talking about project management for years, but changes in legislation in 2013, notably the Jackson reforms around litigation costs, are likely to make this a more strategic focus.

house, which is driving a need to demonstrate added value.

There's a general recognition that processes need to be defined and streamlined before they can be automated, which means building a closer relationship between IT and the business. Walters, for example, has created a relationship management team within IT department to bridge the gap between IT and the business.

"It's essentially an internal sales team, but we've found a significant appetite for process analysis and recognition of the need to streamline transactional processes. Lawyers say that they don't follow processes, but they have lists of tasks and documents that can be incorporated into flowcharts to create workflows." This isn't just for big City firms –

LINETIME

IT Solutions for the legal profession

Practice Management

Case Management

Matter Management

Compliance

Client Relationship Management

Debt Recovery

Want to join one of the many fee-earners who are already using Linetime's highly acclaimed software contact...

Your search for the ultimate in legal software has just ended...

"Without this technology, we wouldn't be the practice we are today. We wouldn't be the size we are without the technology, we wouldn't be as efficient as we are and we'd not be able to offer as many services as we do."

Tim Bennett, Hay & Kilner

0113 250 0020   info@linetime.co.uk   www.linetime.co.uk

Eadie and his team at Foot Anstey have created over 80 workflows.

Lawyers, sadly, still often equate IT with fixing problems rather than introducing improvements – but that culture is slowly changing and IT is gradually being recognised as working in partnership with the business. Walters is taking this much further – beyond the firm's walls – by advising some of the firm's clients on IT systems and strategy.

Various products that support business process automation allow a large degree of autonomy to fee earners and business services people. Dundas & Wilson uses Flosuite, which facilitates ad hoc workflow creation. Craske says this type of tool enables lawyers and business support professionals who understand the tasks and processes to develop bespoke workflows, supported by the IT team. This simplifies workflow automation, and reduces it from an IT project to a process in itself.

Over at Bond Pearce, Weinberger is rolling out MatterSphere, which gives lawyers and business services people like BD a much better insight into resourcing matters, which helps meet client expectations. "A single interface means they don't have to launch multiple systems, and they can see exactly which stage a matter has reached," he says. "This management information is useful when they are talking to clients."

Outsourcing IT

Outsourcing remains an important element in legal IT. Clarke Wilmott was the first UK law firm to outsource all its IT, and it recently re-tendered its outsourcing contract to Tikit (recently bought by BT), which manage systems installation, integration and support.

IT director Iain Hepburn and his small team handle development and training and

MICROSOFT SHAREPOINT
Tomorrow's legal DMS?

As Ben Weinberger, CIO at Bond Pearce explains, SharePoint doesn't offer comparable functionality to purpose-built systems like iManage, which includes the ability to file email into the DMS from an Outlook interface. Moving from iManage to SharePoint would mean losing functionality.

He acknowledges the value of products such as Microsoft-based Sword, but couldn't use it. "If we didn't already have a DMS, it would be worth considering Sword because it would enable us to leverage our Microsoft enterprise agreement. But we already have a purpose-built solution."

iManage and other purpose-built DMSs also add a lot of value by storing documents and email in a central repository. "Even if your presentation is in a single pane of glass via a web browser," says Weinberger, "so long as you have a good search engine, which iManage does, there is great value in maintaining all the information in one place."

Janet Day, director of IT at Berwin Leighton Paisner, agrees. "Although there's every reason to consider replacing your DMS with a SharePoint environment, in practice it is not a no brainer. First, it's been a long while reaching maturity, and secondly our lawyers are used to a functionally rich DMS environment – and with SharePoint you have to work harder to achieve that."

But SharePoint may yet become the de facto solution, as price becomes a larger factor – if lawyers are prepared to trade some elements of functionality for cost effectiveness.

manage the tender process and outsourcing arrangements. Outsourcing lights-on support lets the Clarke Wilmott team focus on strategic initiatives, delivering direct business benefits to lawyers and clients. Like Walters and Craske, Hepburn and his team are, effectively, selling technology into the business.

Outsourcing to the cloud is popular among the smaller firms. Although medium to large firms invest in standalone applications, they tend not to outsource their entire infrastructure – it's not necessarily advantageous or cost-effective for a larger firm to buy IT as a subscription.

Weinberger underlines the importance of cost-benefit analysis: "Buying software on a subscription basis adds a big chunk to op-ex, and you have to look at the break-even point, particularly over several years. Sometimes it makes more sense to put in the cap-ex investment, particularly for a larger firm that requires a certain level of IT infrastructure."

At Taylor Wessing, which has a centralised infrastructure, Walters has also gained experience of wholesale outsourcing to the cloud. "We recently demerged our New Street Solutions business [now a separate business that conducts due diligence and contract reviews], and this gave us the opportunity to experience first-hand cloud and SaaS-based technology. New Street Solutions uses cloud based Microsoft technology – Office 365 and Lync. It's cost-effective, and it works."

New Street uses a set-up involving capturing management information and presenting it in a dashboard. Information is captured in a portal, together with the relevant documentation. It is then re-presented as a management dashboard offering the ability to cut the information by factors such as geography, high earners or lease agreements. Business information analysis supports both process and project

"Buying software on a subscription basis adds a big chunk to op-ex, and you have to look at the break-even point, particularly over several years."

Ben Weinberger, CIO, Bond Pearce

management by defining KPIs and measuring achievements against them.

Lync provides cloud telephony for internal desktop-to-desktop telephony, video conferencing and messaging. People can work remotely from their laptops, and the login process is similar to that of Skype. Because it is hosted, there is no need to buy any technology. "You simply purchase the licences, so it's cost-effective and easy to deploy," says Walters, who is considering introducing hosted Lync across

Taylor Wessing at large.

Walters says he thinks market consolidation will drive law firms to reassess their IT infrastructure, and Lync and other cloud-based tools and resources make integration and establishing new offices much easier – the only requirement is a good internet connection.

Projecting costs and outcomes

Law firms have been talking about project management for years, though this has usually driven by client demand. But changes in legislation in 2013, notably the Jackson reforms around litigation costs in force from April, are likely to make this a more strategic focus.

The Jackson reforms include a requirement to fully cost all phases of litigation. "Whether that change in behaviour will also influence other parts of the business only time will tell – but it probably will," says Walters.

This is even more likely as slack case management and high costs have affected cases outcomes in recent times, particularly the ability to claim costs; the fact that poorly case-managed work may not get paid in full (or at all) is likely to focus minds.

There are plenty of case and matter management tools, and some project management solutions, notably from Thomson Reuters and Aderant, and compliance is likely to drive their adoption considerably in 2013.

Craske says he believes legal project management has stalled because firms need to invest in relevant skills and training. "There is clever technology, but it's also important to teach people to use simple tools such as spreadsheets to support pricing models."

Sharing best practice is also important. Craske is looking at introducing social media tools within his firm to engender communities of practice, though he recognises that this

requires cultural change.

Managing expectations

Although technology consumerisation has not changed how people work, it has changed their expectations of technology. "When people can go into an Apple store and receive fantastic service, they expect a similar service from their IT departments," says Walters.

Developments in online and real-time resources in legal are also likely to be driven by the consumerisation of legal services, with commercial suppliers such as Cooperative Legal Services and Riverview Law offering sophisticated online consumer services.

When someone buys a house, they pay a fixed fee and (in the best cases) have access to an online dashboard that gives them real-time updates on the transaction. Could this lead GCs to expect a similar service from corporate law firms? Walters believes that it will – and this will put pressure on firms to change. Corporate firms can deliver similar services via extranets built on SharePoint, or with cloud solutions such as those produced by HighQ – it's all a matter of demand and take-up.

Law firms are also learning another lesson from consumerisation – the development of creative, user-friendly legal websites, which move the firm's image away from the traditional stereotypes and offer an opportunity to create seemingly separate brands. As Eadie at Foot Anstey has discovered, for example, an imaginative website attracts clients and talent by differentiating a firm. It's a marketing basic – but it's also very much in IT's world.

In the round, 2013 is going to be full of change in the legal world. The tools to help law firms be more agile and more competitive are there, or nearly there. But it's the IT strategy that they need to make the difference. ●

Taking the tablets

Rachel Davies analyses what IT directors think about tablet computers, based on LSN's new Top 100 Director research

Will tablets revolutionise legal IT? Or are they just another tool in the box? As ever, it's a little from column A, and a little from column B...

Top 100 legal IT directors think tablets will be very important in the near future, according to our latest research. But can they really make legal IT better?

When we quizzed IT heads for our top 100 IT directors research, sponsored by **Thomson Reuters Elite**, in November, far more IT chiefs agreed with the statement that tablets will "revolutionise" legal IT (43%) than those who disagreed (27%). The 'don't know/ it depends' came in a far second, at 30% of respondents.

Among those in strong agreement that tablets will change legal IT is Crawford Hawley-Groat of Maclay Murray & Spens. His firm has to "examine all aspects of our IT service provision and security to allow our services to be consumed on a wide variety of different platforms".

Tablets to revolutionise legal IT (all 100)

- 43% Agree
- 30% Don't know
- 27% Disagree

Though many IT leaders creased their noses at the word 'revolutionise', many say tablets will have a huge effect. Haig Tyler at Herbert Smith Freehills says "revolutionise may be too strong a word, but transform is certainly appropriate".

Recognition that tablets will have a big impact is more prevalent in the top 50 than the rest of the top 100. Just under half (48%) of top 50 IT heads agreed with the "revolutionary" statement, compared to only 37% from the bottom 50. But perhaps the most striking differences lie in how many IT heads disagreed. Less than a fifth (19%) of the respondents from top 50 firms disagreed, compared to almost a third (31%) in the second 50. Chris Simmons at Birketts represents the 'no' camp aptly: "Tablet computing will not revolutionise legal IT any more than laptops or smart phones did. It's a tool amongst many and
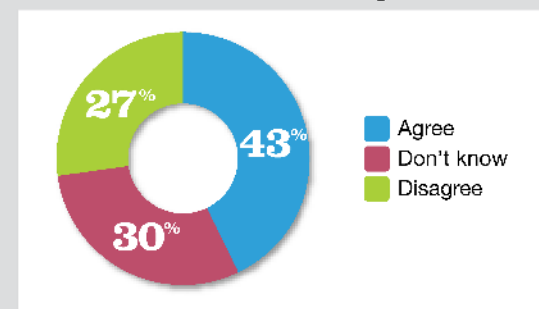
will suit some uses and users, but is not a silver bullet."

Our research also highlighted some general issues in legal IT. Mobility is at the heart of business transformation, and firms are facing continued pressure to make information accessible from any type of device. But this driver for change is mitigated by the fact that mobile devices will never suit everyone.

Mobility is at the heart of business transformation

Uncertainty over tablets is itself a significant result. Almost a third of top 100 IT directors are unsure whether tablets will make great changes to legal IT, with those in the top 25 firms most cautious – precisely the same number of top 25 respondents (37.5%) agree as are unsure about tablets.

Tablets to revolutionise legal IT (top 50)

19%
48%
32%

- Agree
- Don't know
- Disagree

But tablet computing is already transforming the way some law firms work – Herbert Smith Freehills' revenue chief, Nick Murphy-Whymark, told **Briefing** in November that revenue 'patrollers' at Herbies now use iPads to capture and analyse WIP, billing and collection data in real time. (see **Briefing**: the People issue, November 2012).

Suppliers certainly appear to see tablet computing in legal as an area of growing potential and demand. Both Thomson Reuters Elite and Aderant announced plans at their 2012 user conferences to make more information available to users of their systems working on tablets, and big law firms are already producing their own apps.

Perhaps the best legal IT tablet is yet to arrive – several IT heads said the recently launched Microsoft Surface tablet will be a game changer.

Mike West at Ashfords says: "I've been under pressure for some time to provide tablets, but Windows 8 is going to be the turning point where (in my opinion) we start to see them actually replace laptops and potentially desktops as well, given the right accessories to enable a lawyer to sit down at their desk and easily plug into a standard keyboard etc."

Security risks have created doubt for some, for example. James Mead of Stewarts Law says: "Security needs to be improved generally, but without compromising the end user experience; no easy task. I suspect we'll see a slow burn as law firms gradually reduce reliance upon the BlackBerry and laptop."

Neil Davison at Farrer & Co says tablet technology needs to be adapted substantially to prove revolutionary in legal: "It depends on being able to deploy and manage apps, and also quality apps being available from the legal IT vendors. Expectations are different on a tablet compared to using a PC."

So, it's very early days for tablet computing in law firms, and it's hard to fully anticipate its future impact. As our survey shows, even legal IT experts are very divided about it. It's likely to be evolution rather than revolution – but users want tablets, and there are many people in legal IT who are firmly resolved to make them a big part of law firms' future.

Watch this space... ●
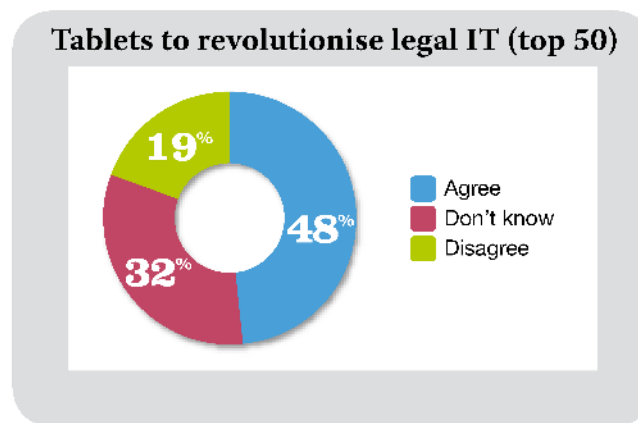
Jobs with Briefing

Reveal your next career move

Manager of sourcing & procurement - Europe & Middle East, Latham & Watkins

London You will collaborate with personnel throughout the region to coordinate sourcing efforts for a wide range of spend initiatives. At least five years' experience in strategic procurement with proven expertise in multiple and varied categories.

Go to **http://bit.ly/SourcingProcurementMgr** to learn more about this role

LATHAM&WATKINS

Business development manager, Field Fisher Waterhouse

London Opportunity for a highly motivated BD manager to join this ambitious and growing law firm to cover maternity leave. You will be capable of managing the full sell cycle as well as managing a team of two. Proven track record required.

bit.ly/BizDevMgrFFW

Field Fisher Waterhouse

Senior project manager

London A global leader in Billing Software is going through a period of high demand and growth and has an opportunity for a Senior Project Manager. Great benefits package on offer and a genuine opportunity to advance your career.

bit.ly/SeniorProjectMgr

TOWER connect

Assistant head of finance, Field Fisher Waterhouse

London Acting as the No. 2 in a finance team of 27, you will manage all aspects of the firm's accounts and finances including the Elite practice management system. You will be qualified with previous legal experience.

bit.ly/AsstHeadofFinanceFFW

Field Fisher Waterhouse

Systems & network analyst

London An urgent requirement for a System & Network Analyst to join a rapidly expanding law firm. You will deliver a first class service to the firm's staff and manage their server platforms and associated technologies, ensuring best practice.

bit.ly/SystemsNetworkAnalyst

Cogence Search

Click here for more legal business jobs: jobs.legalsupportnetwork.co.uk

Send me job alerts
Be the first to hear about our new jobs, tailored to you
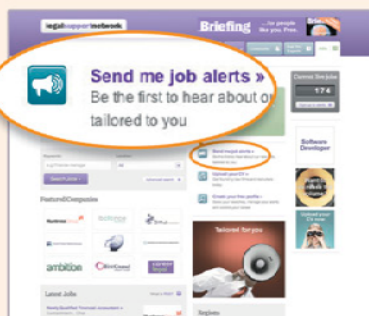
Upload your CV
Get found by law firms and recruiters today

Create your free profile
Save your searches, manage your alerts and control your career

LSN's **networkpartners** are

ABBYY · access · Aderant · Adess Recruitment · ambition · aps Accountable Technology · Ascertus · balance recruitment

bigHand · blueprint making here work for you. · BPP LAW SCHOOL · career legal · CHROMERIVER · Cogence Search · Compliance Check · COMXO Creating Exceptional Calls Since 1995

Concur · Document Direct · DPS Software · dsf consulting · e-know.net · ECLIPSE · econocom MOBILITY ON DEMAND · Field Fisher Waterhouse

FLOSUITE LEGAL · G3 comms Always in Front · HUBBARD ONE. · ICBI · International Legal Technology Association Peer Powered · Innovation Software · InsideLegal.com · ilfm INSTITUTE OF LEGAL FINANCE & MANAGEMENT

INTXAPP. · inTechnology · IRIS Legal · K-Cloud · KCOM · LawSoft · LFP LEGAL FINANCE PROFESSIONALS · LSSA LEGAL SOFTWARE SUPPLIERS ASSOCIATION

LexisNexis · LINETIME · Lloyds TSB Commercial · LOCKTON · LUCID SOLUTIONS · MPF Managing Partners' Forum · MatterSphere · MiniSoft EVOLUTION

MITIE · moneypenny · netdocuments · nexum REVENUETION · NiKec · nQUEUE Billback · OMNIA · omtool

OPENTEXT · Oyez professional services Documents, services and more · phoenix · RECOMMIND Out Predict Out Perform · rekoop · saturn 27 · seamless · SOS solicitors own software

TASKERS LAW MANAGEMENT CONSULTING · TATA CONSULTANCY SERVICES · thewealthworks · THOMSON REUTERS ELITE · tikit · TIME SLICE Quality Software, Peace of Mind · total mobile voice data united · TOTUM Talent for law firm management

TOWER connect · VennGroup · Virtual Practices · WESTERN UNION business solutions · winscribe Let's improve the process · winzest consulting · ZyLAB · zoemartin CONSULTING

INDUSTRY ANALYSIS INDEX

Listening to techno

Briefing Industry Interview

Changing the legal IT game

Briefing talks to Alan Fraser, new general manager for LexisNexis Enterprise Solutions, about how basing future solutions on Microsoft will be a game changer for legal

LexisNexis Enterprise Solutions is one of the best-known names in legal IT, and its new head, Alan Fraser, is a well-known name in technology. His aim? To give LexisNexis's legal IT arm a big step up as law firms face their biggest challenge yet: the future.

Fraser spent two years running document management business Workshare until 2010, then helped steer two mobile technology companies to success. Now his aim is to focus LexisNexis on what it knows best – what law firms need from technology.

"I've been in discussions with managing partners in a number of firms since starting here and, compared to five years ago, they are much more interested in where technology can take them," says Fraser. "There seems to be a much better appreciation of the role of technology and how it can help them manage their business."

To match this maturity, he says, LexisNexis – and all the other suppliers – also have to mature, and deliver enterprise-level software to legal. LexisNexis will do this, he says, by basing everything it does from now on

Microsoft technologies– which means a new business management system built on Microsoft Dynamics.

This will be a "game changer in legal IT", he says. "It will have all the usual elements such as practice and financial management, but also offer capabilities such as business analytics, strategic HR and performance management that law firms haven't needed before, but cannot do without in the future. It will enable the change in mindset that law firms need to make to transform themselves into modern enterprises."

The legal sector has lacked the really big businesses and the will to commoditise work that allows big IT companies like Microsoft et al to devote large R&D resources to making software for them, says Fraser – in other words, they were just too niche to spend a lot of money on. And companies like LexisNexis have tried to deliver the whole package in the past, which takes energy away from their core capability – tailoring software to law firms.

But underpinning everything that Enterprise Solutions does from now on with Microsoft

technologies means that Microsoft has, in essence, done all the work on the base of the technology – allowing LexisNexis to devote its efforts on tailoring the products for law firms. "That is our value-add," he says. It's also the best fit for law firms, because Microsoft rules the legal desktop, with Office and Exchange.

"We've made significant investment in our new business management system, with Microsoft Dynamics in the platform, but we want to make sure we can walk before we can run. We're taking a very methodical approach so that we get this absolutely right from every perspective."

Beyond a recreated PMS and its relationship to MS's ownership of the legal desktop, says Fraser, the Microsoft side of LexisNexis's new direction will link into the growth of products like Sharepoint, which "will start to have enough muscle to become a real document depository for the legal industry. That is something that's extremely important".

What will these firms be getting? A real legal enterprise resource planning solution, says Fraser – something that can deliver the whole legal back office including very new areas of legal IT such as project management and IM/presence/collaboration systems like Microsoft Lync.

Plus, says Fraser, as MS reformats the desktop world with Windows 8, it is 'baking in' support for Microsoft Dynamics 2012 – and because LexisNexis is basing its business management/PMS solution on Dynamics, there should be less hassle in keeping up with Microsoft changes for both law firms and LexisNexis.

"We are going to be able to invest a substantially higher percentage of our focus specifically on what our customers want us to do to leverage the power of Microsoft – not investing in core pieces of technology that Microsoft has already produced." LexisNexis's skills lie, he says, in understanding the unique technological needs of law firms, and that is where the company's energy should now be spent.

"That's the change I want to bring to LexisNexis," says Fraser. "But the change is not going to happen overnight. We are going to be one of the earliest adopters of Microsoft as a core architecture, and I think

it's extremely important that the power of high-level commercial software such as Microsoft is brought to bear on this market."

One of the most important outcomes from having a firm-wide, enterprise-level IT system for a law firm, no matter what kind of work mix it has, is to be able to properly manage legal work as a set of processes, says Fraser. This delivers management information about the cost and profitability of delivering the work and, perhaps more important still, it gives firms the ability to do business like their clients.

"It's an indication of the mindset changes that need to happen in how law firms operate," he says. "From the point of view of profitability and costs management and so on, change is going to be driven by firms' customers, whether they're large insurance companies using volume law firms, to larger corporations. The way they manage their business is based upon the profitability of each element in the process, and they expect their suppliers to be able to do exactly the same, because costs at every level make a huge difference."

Law firms are no longer the 'black box' businesses they were. Some are becoming more distributed in nature, and many are using more outside businesses in their legal services provision, such as business or legal process outsourcers. And it's this movement, says Fraser, that Microsoft technologies can help with.

"It's going to be important for law firms to know that the core technology they're building on is global, that it has longevity, and it's is built on Microsoft architecture from one end to the other," says Fraser. "So whatever happens to the desktop, it can be integrated with practice management and HR, project management, marketing and through the document repository, and that these can all be linked together out of the box.

"That's going to be a very powerful way to look at legal. It will allow firms to find new ways of going to market, on the back of an architecture that's flexible."

Industry Analysis
Perfectly formed

Paul Clyde, BD manager for IRIS Legal, explores the benefits of using the latest electronic forms to deliver efficiency and manage risk

When is a form not just a form? When it increases efficiency, improves risk management, aids regulatory compliance and reduces your IT footprint.

Electronic forms are one of the best ways to use technology to manage business processes that touch internal and external workflows in a law firm. Matters often require a large number of forms to be completed, and this is a great opportunity to improve workflows and process management, using an intelligent forms package can make that goal easier to achieve.

Outcomes-focused regulation (OFR) is challenging for all law firms, but workflows and process management can go a long way to meeting the assessment needs of OFR. Electronic forms play to this challenge well, making compliance easier and risk management less onerous.

Integral to case management is compliance and risk evaluation, and electronic forms can force this as part of the workflow, before a form can be processed. This minimises risk, encouraging good behaviour and allows reporting tools to highlight areas for review.

Even more useful for more commoditised work is what we call form bundles – data can be entered just once and the relevant forms are auto-populated. This saves time and reduces errors, touching on costs and compliance at the same time.

Improve data accuracy and efficiency

Beyond functional capability, our law firm customers, who include the majority of the top 100, now demand more efficiency for the firm and forms can be part of delivering this.

A good example of how forms can be used for this effect is around inheritance tax. The process has been an all-too-familiar annoyance for practitioners for years – the portfolio of 26 forms is so unwieldy that there is always the potential for mistakes and subsequent refusals by HMRC. But IRIS Laserform enhanced IHT400+ will carry data throughout the forms and

schedules and make all the necessary calculations. Practitioners report time savings from reduced data entry duplication, improved accuracy and reduced risk of calculation errors by using these forms.

Easier e-submission and compliance

Firms are not only being required to connect the dots internally – they're also increasingly required to connect to third parties and government portals. The forms and data used in these connections are vital.

The government's 'digital by default' policy, although having started with stamp duty (SDLT) for e-submission, will spread across the whole public sector, so it's in every firm's interest to ensure that they are ready for e-submission. This will mean that firms will not only be able to complete their processes more quickly and make compliance easier, but that they will also save on time and costs. SDLT forms, as an example, can be partially completed and saved, include built-in checks before a form is sent, and have the option of a supervisor review stage. Transmission of a completed return to HMRC is virtually instantaneous, leading to significant time savings in conveyancing. And as there's a 30-day deadline for SDLT, penalty avoidance becomes a lot easier when using the e-submissions system whilst at the same time, creating an electronic audit trail to ensure compliance.

There is also a growing need for law firm users to access their library of up-to-date and favourite forms via a web browser, anytime, anywhere. Whether it is simply within the firm via their intranet or externally via an extranet, it's much easier to deploy forms in this way. This applies particularly to large firms with a global office spread, where providing current forms by intranet reduces the firm's IT footprint.

A browser-based system also means users can work on many forms at the same time, anywhere,

and be confident they are using the latest versions. Our intranet solution is LFormInet, and firms using it tell us it's reducing support calls to IT teams and creating more thorough, simpler library updates. We are now enhancing this so firms can also integrate with Microsoft SharePoint.

Looking ahead, although forms are the 'workhorse' in most firms, we see a change ahead – forms will become more externalised, and be completed more often by clients. External forms completion requires

"Although forms are the 'workhorse' in most firms, we see change ahead – forms will become more externalised, and be completed more often by clients."

a web-based and client-centric approach, and we're working hard to enable web-based review and editing functionality for our customers, including the ability to use intelligent questionnaires that auto-populate forms within a legal process. This is a core part of our development roadmap, and we are already seeing a demand for this from both our customers and their clients. While automated and self-completed forms will become more normal, forms will continue to be central to most cases and are likely to increase both in volume and complexity. It's therefore critically important that firms continue to invest in the right infrastructure and have the latest forms to remain efficient, competitive and compliant.

Briefing Industry Interview

Testing your strategy

Briefing talks to Bernard Melson, managing director of **Testing Solutions Group**, about why independent input with testing can save money, help with compliance and reduce your firm's risk

Is testing a strategic activity in your law firm? For many firms, the answer is likely 'no'. But if that's the case, says Bernard Melson of Testing Solutions Group, your firm is planning for failure.

Testing, and the thinking behind it, is vital to successful IT delivery in law firms – and the potential return on investment from early advice about how and what to test can be significant, and it will mitigate risk.

"The misapprehension many people have is that testing is not a particularly important thing to do – it's something that gets squeezed at the end of the lifecycle," says Melson. "But this is risky, and why risk wasting time and money fixing things when they can be

right first time? A simple change in law firms' testing philosophy allows us to prove compliance, manage risk and provide the business with value and a return on its investment in IT solutions.

"Though law firms change or upgrade their systems less frequently than some sectors, they still have large-scale roll-outs and many now have to take on better practice and case management systems to maintain competitive advantage. But more thought needs to be given to testing the outcomes of growth and mitigating the risk of new systems or upgrades – before it goes wrong and costs a pile to correct."

Melson says that, over his experience, he's found that two thirds of failures in systems could have been

avoided right at the beginning of the requirements testing phase – if only they'd been properly tested. "It's incumbent upon the firm to really think about how new systems will underpin the business and how testing can meet that need – not just when things are in the planning stage, but all the way through the development and deployment cycle."

One example he gives of when things go awry would be uncomfortably close to home for any firm upgrading its PMS to enable global expansion. "When a business we worked with came to implement an online service system, someone wanted to pay in a different currency – but the system hadn't been built to do it. The business knew beforehand that they'd need something multi-currency, but it just wasn't communicated or tested as a requirement. It was a fundamental flaw that rendered the system unusable for many and led to business being lost". This had happened, says Melson, because the requirements weren't checked – tested – fully, not because the system didn't work as specified.

Possibly more painful and certainly more topical, many law firms face the uncomfortably near-term prospect of upgrading Microsoft Office and Windows XP. Come April 2014, says Melson, "Microsoft will remove support for these products – leaving firms vulnerable and without an immediate upgrade path".

Planning with a tester's mindset, as well as building better testing into a future Office roll-out, will ease minds and wallets in the end when it comes to upgrading and rolling out to the business, says Melson. But, he adds, law firms that are affected by this probably need to start the process as soon as possible, as it can take up to a year to properly change over.

Melson knows this, because a magic circle client of TSG has already dealt with it. The underlying challenges to an Office upgrade this significant are myriad, he says, ranging from ensuring multiple language support, standard legal template functionality to whether printer drivers are available and training

people to use the new products. "The list of items affected by this upgrade is substantial, and contains things you generally wouldn't think of. If you just upgrade without any plan for testing then you plan to fail," says Melson. "In addition to cogent planning, one of the biggest challenges law firms face in upgrading Windows 7 and Office is in performance – something that should not be overlooked, as it's vital to working continuity and timeliness – without which the upgrade poses substantial risk."

> *"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."*

As we've covered in **Briefing** over 2012, many firms are now looking at firm-wide IT. They will increasingly face the same challenges as some of TSG's clients: how to ensure that a firm-wide system is 100% usable every time a part of it is upgraded or updated.

"If you want to manage risk and reduce costs in programme changes, and ensure business continues as normal, testing is essential," Melson sums up.

"It returns the greatest benefit when conducted by an independent testing specialist, as opposed to vendors or development teams, and helps ensure that firms get what they pay for: systems that de-risk and meet the needs of their business."

Learn more about
Testing Solutions Group
www.testing-solutions.com

Industry Analysis

Better together

Samantha Steer, product manager for FloSuite Legal, outlines the benefits of using business process and case management together to drive up efficiency and profitability

Case management isn't truly effective until it's connected to business process management (BPM) – and BPM can be extended and made far more flexible when it's connected to case management. Why should firms use either of these efficiency-creating technologies? Because they will be vital in the battle for success in the future legal market.

Law firms that want to drive up efficiency, risk management and their ability to compete are increasingly using a combination of case and process management to deliver legal work. Together, case management systems (CMS) and BPM can deliver efficiency gains and cost savings alongside risk management and resource management benefits.

Case management and workflows have in the past been seen as a solution suitable for only certain areas of work, such as probate, conveyancing and personal injury. But this

is no longer the case, and firms that want to understand more about how work is being done, what it costs to deliver and whether it is profitable are now applying this case management to all kinds of work.

And combining case/matter management and BPM can deliver a wide range of business benefits, even in work areas traditionally seen as 'unique', complex work. As process management and creating workflows is made easier and more flexible, they become more likely to be applied to more complex, less frequently done work – because it becomes cost-effective to do so.

FloSuite Legal customer, Maclay Murray & Spens, is doing just this by extending process management into case management. The firm started using FloSuite Legal BPM for client matter inception, billing and subsequently created their own workflow for probate matters. They also recently invested in FloCase

(FloSuite Legal's case management) for debt recovery. Maclay Murray & Spens' IT director, Crawford Hawley-Groat, says the firm has seen significant finance area benefits from BPM, and process management benefits from marrying BPM with case management.

"We're able to close off the year end at least three to five working days earlier than we used to, and we don't need the billing team in one weekend in four to achieve it," he says. "BPM needs to evolve to be more flexible, and we needed to be able to develop processes but not have a rigid framework that bound us to box-ticking. You want to be able to give almost a library of routine appropriate tasks that can be used depending on what the case requires."

This is what moving from just BPM to CMS-BPM from FloSuite Legal has done for Hawley-Groat's firm. And he agrees that BPM and CMS will play a vital role in helping top firms deliver more value to clients who are now much more demanding.

"The new entrants will come in with a different value proposition – and you have to structure how you do legal work differently. Clients are not going to continue to pay for legal work in the way that law firms have traditionally delivered it. BPM with case management is an acknowledged route to meeting the costs challenges firms are facing."

Clients want lower costs, more predictability and more innovative pricing models, and for law firms to be more on top of their work. Firms can only profitably deliver on those goals by more efficient processes and a keen eye to margin. By embedding case/matter and business process management, firms can offer more cost efficiency and more predictability. This means the firm can much better understand its profitability from future work, rather than working reactively, and experiment with even more innovative pricing models/ alternative fee arrangements.

Building BPM onto case management can also deliver significant risk management benefits. A key risk-related process to bring inside workflow is client matter Inception – making this a regularised, consistent process creates not only more consistent data, but more consistent and controlled approaches to risk and compliance, both of which are vital in the new OFR environment.

But just examining the current workflows and working out which aspects could be rendered more efficient via software can achieve efficiencies and safeguard against risk in any practice department – such as chopping out duplication of data entry and process-managed client matter inception.

Law firms should seek out a supplier that can meet both their CMS and BPM needs, with significant experience in the legal sector. The supplier they choose also needs to be truly system agnostic, to ensure the best integration between all the systems the firm has in place. Using a common workflow solution across multiple departments brings a common way of working to those who use more than one automated workflow process.

In the end, law firms may want to have a wider mix of using BPM and case management than full integration – but whatever they do, these technologies deliver some core business capabilities: they ensure more consistent compliance across the business; they deliver a deeper understanding of what work costs to do; they give people the power to be more efficient without imposing rigid workflows; and firms get better prediction of the profitability of work. All these will mean a more efficient, more competitive firm.

Learn more about
FloSuite Legal
Flosuitelegal.com

INDUSTRY OPINION

Next-generation legal IT

Osman Ismail, managing director of DPS Software, on the technology needed to face the challenges of the next five years

There have been many changes in legal business over the last five years, but this is nothing compared to the changes coming in the next five to 10 years. There is no more room in the market for the 'practice' – the time for practice is over.

So, what can you do? The most successful legal businesses are run, marketed and focused on their core work: providing the legal services that their clients need. The ultimate aim has to be exceptional client service. This one factor will separate the firms that fail from those that succeed, and if law firm staff are given all the tools to deliver this, there is no excuse if they fall short. A legal business can no longer function on a transaction-by-transaction basis – the simple commercial concept of the 'lifetime value' of a client must now be a primary concern of law firm managers, and the only way of really tapping into this is through improving service levels.

Opportunity abounds in the management software used by firms, and the way software is delivered to users. The way to think about it is to ask which tools do those working in firms need to best manage their work, and how are you going to deliver those tools?

New generation software for the legal practice is not just 'integrated', it's genuinely together. Accounts, case management, document management, digital dictation should be one system, using one database and sharing information to the benefit and efficiency of the overall system.

Software should serve a firm's fee earners as well as its secretarial and accounts staff, delivering what each need in the way that they need it. The development of this new generation of software is what we at DPS have invested in significantly over the past six years to deliver higher functionality to the law firm as a whole.

How software capability is delivered to the user is part of the reason that hosting and outsourced services will become increasingly widely used at legal businesses. Plus, disaster recovery and business continuity have become essential, and the mechanisms for providing these are more often than not more robust when based at off-premises locations.

This is why, I think, we've seen our DPSCloud business grow hugely year on year since we began to offer it nearly a decade ago – firms want to fix their costs and delegate the responsibilities of running their software and servers, and they want to reduce downtime and increase productivity.

The idea that technology can make the difference between success and failure at a law firm is not new, but it has to be the right technology. At a time of seismic change in the market, the businesses operating within it should recognise that, with regards to investment in their IT systems, it could be a case of now or never.

Find out more about
DPS Software
www.dpssoftware.co.uk

Advertise in Briefing

Briefing gives you brand visibility and an authentic voice in the legal sector.

We don't just place advertorial in **Briefing** – we work with sponsors to edit, refine and reinvent their stories to make them relevant and useful to **Briefing** readers. Otherwise, why should they read them? Find out why many others have come back to **Briefing** time and again by contacting LSN.

Contact Briefing on 0870 112 5058 or at lsn@lsn.co.uk

Get connected to your community

Linked in.

LSN's main LinkedIn group
linkd.in/LSNonLinkedIn

Legal Practice Management – for SME firms' practice managers
linkd.in/LegalPracticeManagement

Law Firm Outsourcing – for those interested in LPO/BPO
linkd.in/lawfirmoutsourcing

Tablet Legal Users – for the world of legal IT, tablets and apps
bit.ly/tabletlegalusers

Legal HR – for discussion of all the hot topics in legal HR
bit.ly/legalHR

Legal BD – a platform for those interested in legal BD
bit.ly/legalBD

twitter @lsn_team

Who we are...

Briefing is published by Legal Support Network, the only media and events business focused on every legal business services role

Rupert White is editor of **Briefing**, and head of content and community for LSN.
rupertw@lsn.co.uk

Rachel Davies is **Briefing**'s editorial assistant. She also helps write our newsletters and maintain our site.
racheld@lsn.co.uk

James Callard is LSN's head of corporate partnerships – contact him about recruitment advertising.
jamesc@lsn.co.uk

Stella Paterakis is LSN's client services guru – contact her for **Briefing** commercial enquiries.
stellap@lsn.co.uk

RETURN TO THE INDEX