

# Briefing

PROCESS AND PROJECTS

OCTOBER 2014

*Interview*

## Nick West

Axiom's UK managing director on the delivery model that could have them chatting to some of your key clients in the not too distant future

*Feature*

## Project passion

Process and project management is becoming the core of some of the most innovative work at legal businesses today

*Essay*

## Service 2.0

How process can transform delivery

*Industry views*

## Parts of a process

Industry knowledge from suppliers of automation and managed services

# Mapping the process future

*How process improvement is helping legal businesses build better relationships*





# Business Intake

(But Much Better)



Efficiently taking on matters is critical to the practice of law. Today, several trends are putting new pressures on law firms to transform the way they evaluate and engage new business:

- **Clients** expect greater service (and want to pay less for it)
- **Lawyers** want to start work immediately (sometimes before conflicts are cleared or matter numbers are issued)
- **Firms** want to more carefully evaluate the clients and matters they accept (to avoid surprises or unpaid bills)
- **IT and Conflicts Teams** are eager to provide lawyers with easier tools, faster service and a pain-free experience

Thriving in this environment requires an innovative approach to intake and conflicts — one that allows firms to act quickly (while still rigorously evaluating matters), to delight lawyers (especially on mobile devices) and to easily change processes (without outrageous delays). In short, intake must evolve.

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# Your firm, improved



This issue of Briefing is a lead-in, in more ways than one. First, following on from last month's issue on pricing and profitability, it was natural

to do something on process and projects. Law firms need to think much more widely about profitability and driving process improvement and project management is a perfect way to do that.

Everything legal businesses do will relate to this new way of working – eventually. That's why in this issue we bagged a great interview with a legal business that's determined not to be called a 'law firm' – Axiom. Its business model is based on projects and client-led service creation, and it doesn't have the governance structure of a traditional firm. To me, that makes it potentially highly disruptive.

We also delve into how firms and clients alike are adopting process thinking in our feature, including interviews with leaders at **Addleshaw Goddard, Bird & Bird, BLP, Carbon Law, DWF and Withers**, and **AIG's** in-house legal process head.

And last, this issue is a lead-in for new editor Richard Brent. I'll still be overseeing **Briefing** and our sister title, Legal Practice Management, and Richard will be ably assisted by LPM's main man, Declan Tan. It's a new era for **Briefing**, and you are in safe hands. Should you or your firm be in **Briefing**? Write to me or Richard – he's at [richardb@lsn.co.uk](mailto:richardb@lsn.co.uk).

**Rupert White**, editor of Briefing  
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## Interview: Nick West, Axiom

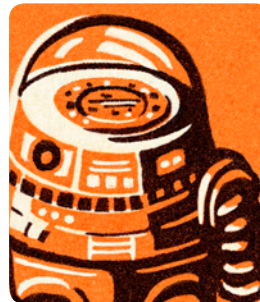


Axiom is the epitome of alternative legal. Richard Brent interviews its UK managing director about the mission to build a more process-oriented professional service

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## Feature: Process makes perfect

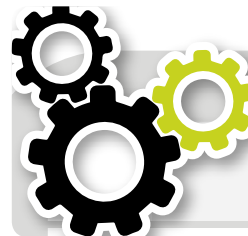


Legal businesses are learning that project management can be a differentiator for clients when talking value. And collaboration is critical to the process

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## Essay: Method without madness



FD at Higgs & Sons Glyn Morris outlines a model to drive process improvement and service redesign

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# Industry analysis index

*Briefing Issue Sponsor Industry Analysis*

## If anyone Kanban, you can



**Jitendra Valera, chief marketing officer at Advanced Legal**, outlines how adopting a continuous improvement programme can set you on the road to client satisfaction from the outset

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**Mark Bilson at Intapp** on how automation can create you more work if it won't adapt to change

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*The Briefing Interview*

# Legal's light bulb moment?

*Richard Brent talks to Axiom Law's UK managing director Nick West about why his business isn't a law firm – and doesn't want to be. Are you sitting comfortably? You won't be for long, if Axiom gets its way...*

*Photography: Jonathan Goldberg*

**There aren't many names that conjure the disruptive spirit of the 'alternative' legal services provider as immediately as Axiom. The business's website proudly and colourfully – perhaps even defiantly – outlines what it is by saying 'What we're not', and goes on to list a string of reasons why it just can't be as neatly pigeonholed as people may like. It's not a legal process outsourcer, one text bubble argues, because LPOs "master the art of delivering a single task". But it also clearly isn't a law firm, as it doesn't have "armies of associates subsidising overhead and maximising partner profit".**

And Axiom says it certainly isn't a 'high-end temp firm' either – as temps wouldn't have the career path and professional development opportunities afforded to Axiom's lawyers, who are all full-time employees. Plus, it works with clients over the long term, unlike a temp firm. Some two-dozen of its engagements have been running for over five years, the website continues – and one, indeed, has stretched on for nigh on a decade.

Axiom would rather have you believe that it shatters the current legal services mould – increasingly a force to be reckoned with (if not outright feared), as it breathes new life into the age-old question of how to make clients really happy.

That's the mission anyway (their word, not mine). "I believe Axiom is doing great, groundbreaking and important work," said founder and CEO Mark Harris, accepting his Financial Times Innovative Lawyers 'Special Achievement' award late last year. "But relative to our mission, we have a long way to go."

The thing is, Axiom's clients already seem to be buying into this idea. Axiom, it seems, is onto something.

## Parts and parcel

Harris's quest boils down to offering greater choice (to clients and the people Axiom hires) based on detailed analysis of how work needs to be done.

Liaising closely with in-house teams, the company questions how legal tasks are currently being carried out and identifies opportunities to streamline, restructure or realign processes to deliver greater value. It's something top 100 law firms may well argue they do, too – dedicating time to understanding a client's business and offering bespoke solutions. So why is Axiom taking a slice of star clients along the lines of Unilever, HP, Vodafone and BT?

"As a first principle we say that if work could be done in-house then it should be done in-house," says Nick West, Axiom's managing director in the UK. "The first big idea was really just to say that this was possible at all – there's just no need for the majority of legal work to be given to external counsel. Complicated M&A, or a large piece of litigation perhaps, but most legal work should stay in the enterprise, where people will inevitably better appreciate the issues and appetite for risk."

"But I think everyone also understands that an in-house department can't just keep hiring and hiring, particularly if they may only need intense help with an issue for six months. So we built a business that recruits great lawyers, but strips away the other apparatus of a big law firm. There's no big fancy real estate, no mahogany panels – and no partners."

In place of these trappings is a system of sending employees to work at businesses for flexible periods of time – 'seconding' is Axiom's word for it – as well as a newer managed services division that sees them take responsibility for and reengineer entire portions of a particular area by combining



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legal expertise with process and technology. They can also take on complete projects, from due diligence in M&A transactions to contract negotiations across all the offices of a multinational company.

“Whatever business you’re in, legal work is just part and parcel of getting your business done,” West argues. “We look at some of the elements that make up that business, the various processes, and say we can help you to do it better or faster, and possibly cheaper – and it’s by doing something, somewhere, differently.”

Process is the key word here – and one that is, of course, music to **Briefing’s** collective editorial ears. With Axiom’s non-firm flexibility, resources can be regularly and continually scaled up and down according to clients’ inevitably fluctuating demand – and are paid for accordingly. Delivery options may be short term or longer term but critically, they can be altered. It is not even so much that there is a ‘menu’ of options, as per alternative fee arrangements, as there are myriad possibilities owing to a multitude of factors. Axiom partners up with its clients to identify the combination that presents best value in the specific circumstances.

## Rewriting history

West digresses with a “short history lesson” about how Axiom has diversified to become the player we have our eyes on today.

It stands to reason that a pay-as-you-use approach would be more attractive to clients in the midst of the investment-halting recession. But as the economic turmoil gradually eased and reality sank in, businesses really didn’t want to go back. Their legal departments reduced, the banks’ own spooked clients wanted to stay as lean as possible. Hefty spikes

of work, however, continued to surface. Once weighted toward the more commoditised work in financial services, Axiom now appeared to be a viable alternative to a law firm for a wider range of businesses seeking efficiencies.

“One client said they needed to find further cost savings, so our founder asked whether we could try to save them more upstream instead of handing out a simple discount,” West says. They found that there were large projects where teams of in-house lawyers “would simply be swept away from day-to-day work”, dealing with big issues that dragged them away from the bread and butter work of a legal department – a regulatory intervention, say, or a client deciding all contracts need a big revision. This galvanised Axiom’s project management approach.

## New people power

Just as Axiom says Big Law’s structure and overheads are incompatible with driving out maximum efficiency, West says the normal skills mix in legal could also stand some serious interrogation.

“If you were building a law firm from scratch today, just as I think you’d want a flexible resource base, the expertise you’d have on payroll as a priority wouldn’t just be in legal. It would be in areas like technology, process and project management.”

Axiom’s staff therefore includes solution designers (ex-consultants, West says) who can analyse processes and calculate “more rigorous” ways of doing things.

A survey undertaken at **Briefing’s** Operational Leaders in Legal (OLIL) conference in November 2013 found top 100 law firms, by contrast, were still at a very early stage of adopting project management approaches in their work (68% of the sample



said they were only in the first third of their journey toward it). Wary of being early adopters perhaps, it comes as no surprise therefore that more than half of firms also said less than a third of their work was for a fixed fee – in spite of clients pushing for this.

Project management working, with more precise resourcing and decision-making based on real-time information is the reason work can be costed with more predictably. And in the world according to Axiom, it's that predictability, grounded in granular business insight, clients really want.

## Data with destiny

But is this really true? Well, when **Briefing** interviewed BT GC Dan Fitz (June 2014) he specifically singled out such systems integration and the resulting management information as a reason for sending more work Axiom's way. But is that level of sharing something everyone wants? Few clients wouldn't be happy with a better deal on price, but does that necessarily mean they also want to know all the nuts and bolts that make it possible? Do you want a law firm that essentially also becomes a business process consultant? Don't you really just want someone who will prevent you being sued?

West doesn't think so. "If you do a high volume of work for a particular client, you will end up with a lot of information – and there is

an awful lot you can do to mine that data and provide some really useful analytics," he says.

And he knows the in-house lawyer feels that something is missing in their lives. He describes a recent meeting with a senior counsel, who says she was sat around a management table with peers, who were



*"If you were building a law firm from scratch today, just as I think you'd want a flexible resource base, the expertise you'd have wouldn't just be in legal. It would be in areas like technology, process and project management."*

all contributing all manner of analytical arguments about what they were doing to improve things for the business – "but all she could do was tell her peers she'd managed to get 10% off the law firm bill", he says.

"It's slightly embarrassing. They're living in a world that is that much more professional.

If they have access to the kind of data we are talking about they can feel they are contributing to the business as they should be.

“In this day and age, general counsel are expected to be able to answer questions surrounding the nature and number of contracts the business has ongoing as readily as understand the risk posed by developing

*“If you want to change behaviours, you start by providing real data.”*

Nick West, UK managing director, Axiom Law

global crises. The GC has to see their role not only as an important guardian of the risk, but as someone who can contribute to the profitability of the business.” Another part of Axiom’s mission is to enable them to do that.

“If you want to change behaviours, you start by providing real data,” he continues. “You say business unit one does this, but business unit two does that. If you have this at your fingertips, you can start to use it to refute points. If somebody says that a counterparty won’t accept something, you can point to another business unit’s counterparty – in fact, the same one – who seemed to accept it just fine.”

## Contract points

Axiom’s managed services division provides business insight using its own proprietary technology (IRIS, it’s called), and ‘centres of excellence’ in the US, India and most recently Northern Ireland (Axiom launched in Belfast in 2012 with over £1m in financing from Invest Northern Ireland).

To explain why clients want data, transparency and agility over a more traditional ‘us vs them’ journey toward their legal goal, West offers the example of an IT business frustrated with how long it takes lawyers to turn its contracts around: constant wrangling is, he says, costing firms clients.

“For that particular legal team, we can see that contracting behaviour is key to success,” he says. “The quicker they can turn contracts around, maintaining high quality of course, the better, so we look at the data to see what is happening and what could be changed to deliver a better outcome.”

Any time Axiom works with a client in this way, the first stage is a period of “diagnostic work” with the general counsel to unpick and understand what the client is trying to achieve. The change is then delivered through highly applied knowledge management linked to process management and workflows. Historic data is interrogated for patterns of behaviour that may be holding parts of the business back, and which could be nudged in a different direction to create efficiencies.

“The bottom line is that all the work is done through a system – in this case a contract repository. We can use the database to tell the client how long it takes, on average, to complete an ‘X’ contract, but then we can compare and question things. Why does



France, perhaps, tend to get a document done in 20 days but Germany takes 40 days?

“Well, it’s because the German team seems to be getting stuck on clause 70. They just won’t let it go and keep going back to push harder. They get a slightly better outcome, but it takes 20 extra business days. You could then go and talk to Germany, explain the problem, and perhaps soften the contract language slightly. You get a little closer to the outcome earlier, cutting out that negotiating time.

“There are hundreds of things that you can do once you’ve got that data set. You can set up pre-alerts for things that look a little bit nerve-racking and get them escalated at the right time.

“The counterpoint is an organisation that hasn’t done any of that, where people are completing contracts all over the place, all with freedom to do it the way they want. That may sound like a utopia to some, but if you’re the one in charge of trying to speed up an outcome or control a key risk, you really can’t afford to be so devolved.”

## Levelling out

Once the data has been sliced and diced to identify legal process inefficiencies, the other piece of the value puzzle is ensuring work is being performed by the right person with the right skills – and therefore at the right price.

This is another way Axiom is pushing against an arguably outdated model – not just by dispensing with partner profits, but by staffing work strictly according to the experience needed to undertake it. What is effectively an administrative task doesn’t need to be performed by an eight-year-qualified lawyer, while a highly judgment-oriented task might well demand the most senior person available.

“It shouldn’t be surprising to learn that lawyers are not brilliant at every step of a process – able to be technically brilliant, but also to run a process and be a great communicator,” says West. “These are all individual skills, but we often expect lawyers to be able to do all of them.

“At Axiom we look at the process for obvious things, but also work out what needs to be done by a lawyer, what needs to be done by someone who understands the legal process, and ensure everything is being done by people with the most appropriate qualifications and competencies. If it’s highly complicated and there are multiple work streams and stakeholders to manage, and people need to be kept in line and on time, we use project managers. That’s their job because that’s the bit they’re good at.

“Once we’ve settled on a solution, everyone in the field plays their particular role. We don’t expect everybody to be an all-rounder. We expect the specialists to do what they need to do.”

## Mission of choice

And in emphasising required skills over status, not to mention flexibility, Axiom maintains its model is as good for the lawyers delivering it as for the clients being serviced by it.

Indeed, West admits that there can be a tendency to get a little “touchy” internally if it is suggested – in the media or elsewhere – anything about Axiom is akin to an ‘agency’. All the company’s lawyers are full-time employees, he counters – and indeed typically prefer to be working full-time. But here’s the important bit: they just don’t have the partnership carrot forever dangled as a distant prospect to incentivise them.

Instead, Axiom argues, they actually have a

wider range of career options open to them. At OLIL 2013 another striking finding was that almost nine out of 10 (86%) of firm operational leaders agreed one of the biggest challenges facing the more corporate law firm in 2020 would be ‘creating attractive career paths with less of a focus on partnership’.

Axiom is already on top of this, it says.

‘Secondees’ have a degree of choice over when and where they work – as well as the power to mould a career over time. Surely this is the Generation ‘Y’ dream. West says one corporate lawyer even recently went to work in an outsourcing team for a large investment bank full time – having previously done several stints of a year or two with the same company.

“He has now stepped into that role for the next sizable chunk of his career,” he explains. “Having the various facets to our business has given that employee a real choice over what they will do with their career.”

## Colouring the future

Is this the model that firms should be emulating – or are the forces of tradition and flexibility forever at odds? Don’t expect a consensus in the immediate future.

West describes an article that Harris co-authored with business adviser and author Geoffrey A Moore in the New York Times in September. It outlines the thinking that business architectures can effectively be divided into two contrasting camps.

First up is a ‘blue’ camp, characterised by

complexity and largely reliant on the likes of expert judgment and carefully nurtured relationships. That sounds awfully like a law firm.

The second is a ‘red’ model, a system of volume defined by what are largely repeatable processes and where efficient delivery is firmly in the driving seat – surely the lifeblood

*“If it’s highly complicated and there are multiple work streams and stakeholders to manage, we use project managers.”*

Nick West, UK managing director, Axiom Law

of Axiom.

Moore and Harris write that the nature of business life today is that in-house teams and law firms alike are faced with increasingly red challenges, but these are colliding with resolutely blue cultures, to produce something of a ‘purple problem’ – a multitude of transactions, perhaps legally excellent but loosely processed, and which are therefore both costlier and riskier than they need to be.

In the end, it’s perhaps not that there isn’t room for both primary colours on an innovative artist’s palette, rather that they can both be effective in the right circumstances. But firms mix them without great process at their peril. ●





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*Feature*

# Process makes perfect

*(but it doesn't make  
you a robot)*

Investment in process creates opportunities to collaborate – for law firms' people, the firm and their clients, and for competing legal businesses to the benefit of all. Declan Tan reports



**Progress has become synonymous with improved process in the legal game. Many legal leaders are now grasping the levers of process opportunity to crank up efficiency, build in collaboration and boost client engagement. Process is also bringing the recent past into the present, getting legal businesses closer to the real-time data it needs to make quicker, better decisions. And process is getting people working together systematically, while binding them closer to how clients want services delivered.**

But the challenges of business intelligence and project management working are also coming into focus – the processes underpinning them all are, in many cases, in need of revision or reinvention. The need for change is exacerbated by the process-lean threat of new entrants to the market. Law firms looking to grow their market share have their work cut out.

Firms can also see that pared-down processes add value as much to the client as they do the firm. Managing and optimising the relationship by seeing it through clients' eyes will be crucial to delivering the legal services that they want now and tomorrow. Investment in the relationship is the thing (as we've seen in several recent issues of Briefing) – and process can be the glue that binds them together.

Jeremy Rooth, director of business transformation and knowledge management at Withers, sees great opportunity for those ready to open up more and work as a business, not a collection of silos.

"If a new client comes to us and wants to set up a business – needing to structure the company and set up employment contracts across multiple geographies, for example – historically, firms would be so driven by their view of practice groups they'd be missing the bigger picture. Clients don't see their needs as partitioned as firms do internally."

Seeing more of the game by viewing process from a few rows back, firms can widen visibility on what their people are working on already, and what they could be working on if they become more embedded in the client's way of working through process improvement.

"Clients often want to do something that will involve multiple practice groups. Firms need to provide that seamlessly from the client's point of view. We've come up with a fixed-fee product on the whole range of services someone needs when setting up a company, with a couple of optional elements depending on the type of organisation. That means the client can have just one point of contact that can articulate the full service well, and that has been very successful."

Rooth says client feedback showed those with an initial enquiry appreciated being able to speak to someone there and then, rather than being passed to any partner in the team that happened to be available.

## Partnerships in process

Educating practice groups about what each one does has been another project. "In our entrepreneur's group we have representatives from all the practice groups, who disseminate information back to their teams. We also encourage practice groups to give briefing sessions on major developments in other practice group team meetings. That also involves the business hooks to look out for, so if a client mentions they're doing something they can bring another team into the conversation and hopefully create an opportunity for another practice group to join."

Better collaboration has raised efficiency and employee engagement levels to foster a sharing culture that can steal a march, in commercial terms, on both the newer legal businesses

entering the market and the established competition. One aspect of that is breaking down tensions between lawyer and non-lawyer – not a ‘typical’ process responsibility.

John Drake, COO at Bird & Bird, says that achieving a higher level of alignment between everyone is the vital ingredient, and he says that’s why there’s a lot of innovation at his firm.

“One example is working with, and refining, the cost management and estimation tool we put in a couple of years ago. That enables fee earners to put quotations together effectively, whether the client’s interested in a fixed fee or not. It provides project management at a fairly light level, adding structure to client conversations before and during the work.”

Two Birds’s approach to process improvement is sector-specific, recognising some measures apply more to some groups than others.

Visibility of activity from its cost management engine is helping to shape change.

Internally, the firm has identified which processes are more susceptible to the use of IT, search engines, checklists, workflow disciplines and other tools. Drake says that corporate is an area where there is a lot of that going on, for example. “There are times when the amount of work involved can be very dependent on the other side. Talking with the client about how to manage those information flows efficiently is extremely important. We try to put in place simple structures to manage that communication.”

## Transparent conversations

Giving people the tools for better visibility on all the overlapping conversations going on between your firm, your clients and your prospects, means leveraging technology in smarter ways.

According to DWF’s chief technology officer, Richard Hodgkinson, the power of tech at the

*“Talking with the client about how to manage those information flows efficiently is extremely important. We try to put in place simple structures to manage that communication.”*

John Drake, COO, Bird & Bird

expansion-hungry firm is supported by giving staff the flexibility and capability to do their job more efficiently by reducing the impact of geography. An agile working culture is the future, he says, especially in attracting the best talent.

But the fusion of many firms over a short period of time within DWF has also given the firm a unique opportunity to blend the best of all business process and people. “Billing is a case in point. We’ve looked at the different billing cycles from the businesses that have merged with DWF, and we’re now building a completely new billing engine. That has taken us up a notch when we offer e-billing to clients. Work complements what, internally, we’re



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calling the Darwin scheme, which is based around further digitalisation.”

Hodkinson says this ‘digitalisation’ idea boils down to a number of key components and methods of digital collaboration with clients. “One project is with our volume providers, particularly in insurance, bringing on business



*“We’ve looked at the different billing cycles from the businesses that have merged with DWF, and we’re now building a completely new billing engine.”*

Richard Hodkinson, CTO, DWF

instructions electronically. There will be direct feeds from the work provider, such as our major insurance clients – getting them to send instructions and all documentation to

us electronically. We can start the case very quickly and, hopefully – along with other aspects of digitalisation – also reduce the total duration of a case.”

Firm and client collaboration has, for some, broadened the scope for more closely intertwining their processes too. That integration has the benefit of increasing the value of the service to the client and simultaneously making it more efficient. “Another aim of [our project] is to give clients access to a portal,” says Hodkinson. “Though that isn’t particularly novel in itself, where we want to take it is for work providers and insurers to be part of the process – for it to be more than just a viewing pane. We want clients to be involved in the work, and to ask and answer questions, approve and sign documents – and for those activities to trigger the next phases of the case. The client then becomes part of the transaction itself, while the transaction becomes more efficient and more profitable.”

The people at BLP have interesting and telling job titles. Head of process improvement, Cathy Mattis, has seen progress at her firm through its integrated client service model, which launched this year. It combines Mattis’s function, the legal process improvement (LPI) service, virtual transaction teams from Lawyers On Demand, third-party providers and BLP’s new legal services delivery team in Manchester.

Mattis, a former-corporate finance fee earner and one-time project management lead at BLP, says the law firm of the future will “be powered by collaboration through process



innovation, combined with the strategic application of technology. If you get good at those two things, it creates a very exciting future”.

“Setting up BLP Manchester to work with BLP London and the international offices [is about] making sure everything’s done to meet clients’ needs and to be demonstrably cost effective. It’s not about disaggregation, but re-aggregation – it’s about pulling all the components back and delivering it to the client as they want.”

Mattis says Lawyers On Demand and its parent firm BLP share “the challenges, volumes, ways of working, and feedback all of the time – so that data is shared through the relationship”.

“We work very closely with LOD. When we have a spike, for example, in our requirement for real estate certificates of title, LOD help us resolve that spike. They manage the delivery of that to a project manager within BLP” Mattis says the aim is to design ways of working together “that make the service seamless and hassle-free for the client, and better than they could achieve through their own resources”.

## Part of the process

Behind the client’s doors, meanwhile, similar changes have been taking place. And as the legal market consolidates and fights for business, the legal department at insurance giant AIG has experienced its own kind of consolidation. AIG’s in-house process integration story saw it bring the two large and disparate functions of worldwide claims litigation management and non-claims legal operations under one central function two years ago to form the AIG legal operations centre.

The person who oversaw that change is head

of the LOC, Aaron Katzel. The philosophy since setting up the function, he says, has been to leverage skills from within AIG regardless of whether they are legal-specific or not.

“We don’t have a significant number of lawyers in our group given the size of our function,” he says. “The majority are in our panel management group, which does require a lawyer’s unique knowledge of the firms’ legal specialties. But our process and information group is staffed primarily by people with a background in statistics, systems, project management and process excellence. Our e-disclosure and vendor management group is made up of industry professionals with significant experience in the legal discovery process.”

The LOC is divided into four functions: panel management, e-discovery and non-firm vendor management, legal strategies, and process and information. The latter is its largest – the process and information department is the LOC’s core infrastructure, says Katzel. Responsible for all the data, analytics, IT systems, e-billing, workflow tools and fee processing, it also systematically manages the projects and initiatives of the legal function – the same skills that law firm business services are now building in.

“We have built up a team with skills from a variety of areas, which is very process focused. We take that process focus and apply it not only to our external processes, but also to our inward-facing processes.

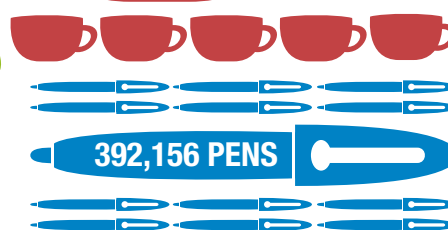
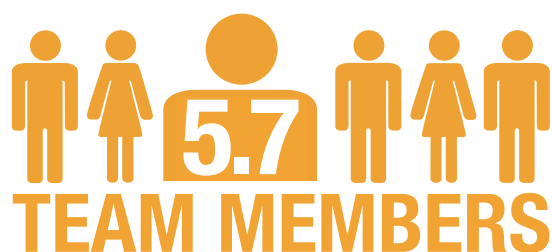
“A lot of the process optimisation we’ve undertaken has looked at core business processes that intersect with the legal function. This has been connected to a company-wide e-billing and legal matter management system, dictating how bills come in from law firms, get reviewed and are processed, as well as how assignments reach us and how workflow gets routed.”



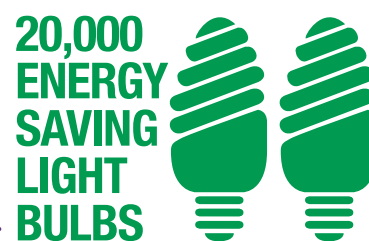
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For process optimisation, he says, the process excellence team sits down with the project management team associated with a particular initiative and business line, and talks to them about business processes and collaborates on designing future enhancements.

This is something law firms could copy – as some already are. For Richard Copley, head of change at Addleshaw Goddard, the approach is similar – identify and eliminate accumulated wasteful elements. “That analysis is simply a way of showing which bits add no value to the customer. Everything we do is designed to be driven backwards from the customer, rather than forwards from the lawyer.

“You start off with the questions: why does a client want this and what do clients want when we do this work for them? What’s the output and how do they value that output? Knowing the value and quality characteristics of our output that clients want starts to improve the process.”

Systematically managing process for consistency, predictability and tighter financial control has, for Copley, meant looking at efficiency to drive margin improvement. “If you want to change the delivery model, the way you start is by understanding the work you do and the service you deliver – a process approach is a good way of doing that.”

## Project on the client

Much like process improvement, legal project

management can be used to the benefit of both client and law firm, says Copley – but it seems there’s a misconception among some in business services roles that legal project management is the same as change project management.

“They’re not exactly comparable. And there’s a feeling among many lawyers that they’re doing legal project management anyway, so

*“My view almost as an outsider is that [lawyers] are not doing project management – what they’re doing is some after-the-fact reporting on matter management.”*

Richard Copley, head of change,  
Addleshaw Goddard

why do they need to do any more? My view almost as an outsider is that they’re not doing project management – what they’re doing is some after-the-fact reporting on matter management.

“The definition of project management for me is that it must be before the fact. We hear stories of lawyers dropping everything when the instruction comes in – and only when they’re a couple of weeks in do they lift their heads and ask what they’re trying to achieve and what the client actually asked for.

“There’s a connection between process management and project management that’s very strong for me. In the industry at large, I

think they are often confused. As an example, what you do as a project manager is build a process of how you're going to do a project. In the legal world, we've already built those maps and already know how we're going to do the work, so all we've got to do is add the 'how we're going to manage it' piece, including how we're going to resource it, which leads us onto things like alternative sourcing. Then, theoretically, we should be up and running."

Demand from clients is forcing firms into the project management space – and Copley says that collaboration among law firms is something clients are increasingly asking for.

"It has become a condition on some of the tenders we've seen," he says. "The process work helps, because if you take a large piece of work, you've already worked out how to do it. Dividing it between two or more parties becomes relatively simple. You are very clear about who is doing what and what the interface between the two parties is. But I think collaboration will get more complicated with three or four parties working on the same piece.

"That will bring process management and legal project management to the fore. You'll have to have the process to be able to divide up the work, but you'll also need the project management to coordinate the different parties to make certain things are synchronised, so that from the client's perspective they're dealing with a single overseer coordinating the delivery, rather than multiple parties."

Clients like Katzel at AIG want this. The LOC was set up to make sure the in-house legal function is delivering business operations in as effective a way as possible by leveraging IT, low-cost resources, and building scalable processes to support high-volume, low-complexity processes. "Now we've taken those same approaches and applied them to how we manage the panel for our external counsel as

well. How we do that has become our signature service in that area."

For law firms that want AIG's business, this has had a significant impact. Instead of engaging in individual negotiations with its 1,000-strong panel on rates and terms – "where AIG would lose a lot of negotiating leverage, in what isn't a scalable system given the number of jurisdictions and business areas our company is in", says Katzel – the LOC is optimising process through a web-based platform to conduct RFIs.

"When we get consistent information from the firms, we'll then conduct a pricing exercise based on that data and feedback from our business clients."

The LOC has conducted more than 100 reverse auctions over the last 18 months, he says, and has seen average rates come down between 2% to 20%. Katzel says legal spend since AIG established the LOC has been cut by £180m. "That's one of the things I'm most pleased about. That's a lot of value and benefit to our stockholders and insurers while maintaining the quality of the service."

## Client consulting in process

Firms are also beginning to process advise through their own external consulting services. Mattis at BLP says her growing LPI team, in addition to workshops internally, is now offering them to clients. As this issue went to press, BLP launched the next phase of its plan, Streamline. "We've used the Streamline approach internally and externally over 90 times, including projects for four FTSE 100 companies."

BLP offers either a half or full-day workshop, collaboratively process mapping with clients' various internal teams and other legal and professional advisers. "It could be around 15





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Featuring speakers from Top 100 UK and US professional service firms and senior in-house counsel, Briefing's OLIL 2014 event will showcase the leading firms who are reengineering legal services delivery and driving operational efficiency, innovation and change to secure the future success of their firms in such a dynamic market.

## Who Should Attend

Chief operating officers, business managers, chief executives, chief financial officers, business services directors, practice directors, general managers, directors of operations, commercial directors and US law firm directors of administration.

### 09.00 Registration and coffee

#### 09.20 Chair's opening remarks

*Keith Wood, former chief executive, SJ Berwin (now King & Wood Mallesons SJ Berwin)*

#### 09.30 Presentation

##### **The economic outlook and the impact on the legal market**

*Bill Robinson, chairman, economics and regulation, forensic, KPMG*

#### 10.10 Presentation

##### **The current and future legal landscape**

- Moderate growth, increasing competition, consolidation, excess supply
- How can firms grow market share and drive profitability in a relatively low growth environment
- Maintaining operational momentum and focus as firms move back into growth after a recession

*Julia Chain, JSC Associates*

#### 10.40 In-house counsel panel discussion

##### **Responding to the changing nature of in-house legal teams and their legal service requirements**

- Examining the changing nature of the buyer of legal services with in-house legal teams growing and requiring less of the full service delivery and more of the real expertise
- Examining the changing role of the in-house lawyers to entrepreneurial, legal-based business advisers who are better at pre-empting problems than private practice partners
- What are these new clients looking for from law firms and how can firms better support them?
- Client facing account managers and better management information
- Partnering with clients and collaborative working with other firms
- What will the private practice partner's value-add be in future?
- Examining the panel process and the restrictions imposed by legal procurement teams

*Jonathan Beak, chief counsel - legal, UK & Ireland, Thomson Reuters*

*Sarah Spooner, head of legal, Vodafone*

*David Symonds, VP, regional general counsel EMEA, Tyco International*

*Moderator: Julia Chain, JSC Associates*

### 11.30 Coffee

Delegates may choose to attend one of the following two sessions

#### 12.00 STREAM 1 - Presentations

##### **Achieving organisational integration and consistency across borders and implementing a globally consistent client service**

- As firms expand internationally through organic growth, merger or alliance, how can firms successfully integrate and consolidate to become a truly global consistent firm?
- Integrating and consolidating all your firm's internal processes, systems and platforms
- Aligning your firm's external communications and profile; achieving consistency from your website through to the letter heads you're sending out to ensure everything has the same look and feel and the same style and opinion
- Integrating effectively with other offices or member firms in terms of sharing information, cross-selling and growing major clients
- Ensuring clients experience the same level of service wherever they are in the world; achieving greater consistency of quality in multi-jurisdictional work
- Next steps forverein structures - moving towards a global single profit pool to survive?

*Amelia Kidd, director of practice operations, Baker & McKenzie*

*Jason Glover, Director of Administration - Europe, Sidley Austin*

#### STREAM 2 - Case studies

##### **Building project management capability in law firms**

- Understanding the value for the client and how you can differentiate your firm from your competitors
- Law firm case study examples on successfully introducing project managers within legal and non-legal groups and building project management capability
- What are the lessons learned?
- How successful have firms been in getting clients to pay for that service?
- Embedding LPM in your firm, ensuring it's maximised to its full potential and enforcing the change
- How can you make your firm stand out from the competition?
- What next for project managers in law firms?

*Antonia Adams, director - global programme group, Clifford Chance*

*Richard Copley, head of change, Addleshaw Goddard*

### 13.00 Lunch sponsored by

**14.00 STREAM 1 - Case studies****Law firm pricing and profitability; client and law firm perspectives**

- What is the client's position on pricing? What drives their decisions?
- How do clients monitor spend?
- How can firms defend and improve margins in light of inflationary pressures and the demand for lower prices?
- Law firm case study examples; how do firms scope and cost matters, price jobs and measure profitability?
- How can technology to best support what law firms do
- How can firms be more creative in how they price jobs and respond better to client needs?
- What is the value for the client and how are you differentiating your firm from your competitors?
- Calculating the upside and downside risk and sharing in the pain or the gain of the work your firm is doing
- Pricing structures for local vs international clients; how do you set and prove the value of those rates to the client?
- What next for pricing and the increasing numbers of pricing specialists in law firms?

*Richard Tapp, company secretary and director of legal services, Carillion*  
*Nigel Morland, consultant, Knights Company and former global finance director, Ashurst*  
*Ben Winstone, divisional business manager, Ashurst*

**STREAM 2 - Panel discussion****Creating enterprise value in legal partnerships and driving structural and business change**

- Examining the limitations of a traditional partnership structure in regards to sharing profits, decision making, acceptance of change
- Growing, adapting or changing business models while still maintaining a single partnership or business structure; addressing the dynamics and tensions that result from that
- Aligning partnership remuneration to new and changing business models
- Transitioning from a partnership structure to a more corporate model
- Revolutionising law firms, what does the future look like?
- Preparing for the future and seizing opportunities in an evolving market
- How did professional services manage the change from being traditional partnerships?
- Driving structural and business change in partnerships; specific approaches that make it easier for partners to accept change

*Barbara Mandler, managing director strategic projects and operations, CMS Cameron McKenna*  
*Kate Wolstenholme, UK business services sector leader, PwC*  
*Alistair Mitchell, chief operating officer, Holman Fenwick Willan*  
**Moderator:** *John Mullins, former chief operating officer and chief financial officer, Herbert Smith Freehills*

Delegates may choose to attend one of the following two sessions

**15.00 STREAM 1 - Case studies****Efficient matter delivery; taking a process view of matters**

- Law firm case study examples; how are firms leveraging their expensive lawyer time more effectively, how are they using certain methodologies or tool kits to make their processes more efficient?
- Using process mapping technology and KM systems such as document automation, document comparison and litigation tools to automate routine work and do it better
- Aligning people and finance systems to understand matter efficiency in real time
- Better resource management; examining different forms of resourcing and recruiting resource managers to manage this process
- Ways to more effectively enable resourcing – changing how lawyers operate to ensure fee earners utilise the most appropriate resource and securing maximum usage from your people
- Is that resourcing model of the future?
- Is there a risk that increasing standardisation and lack of autonomy will lead to disempowerment, demotivation or a lack of innovation and entrepreneurialism?

*Danielle Nagler, chief operating officer, real estate, Berwin Leighton Paisner*  
*Rupert Egerton-Smith, head of business management, Linklaters*

**STREAM 2 - Interactive debate****Attracting, growing and retaining the best business services talent in a rising market**

- Examining increasing professional manager movement in the market and bidding up of talent; is inflation looming in the salary pipeline?
- How do you compete with the corporate world for business services talent without simply matching salary, particularly when there isn't the same level of respect for support people in law
- How can you continue to improve the quality and performance of your business services people without raising salary?
- Is there a new organisational model for business services teams in law firms to improve the return on talent costs?
- How are firms finding different ways to incentivise talent based on some kind of performance or ability that allows them to track it
- Developing and retaining operational talent such as COOs and business managers when there isn't a clear career path in place
- Embedding the right culture within a firm to ensure you retain your best people

*Nick Salmon, chief operating officer, EMEA, White & Case*  
*Richard Singer, chief operating officer, Europe, Dentons*  
*Gary Jones, director, Totum*  
**Moderator:** *Clint Evans, director of brand & talent, RPC*

**16.00 Coffee**

Delegates may choose to attend one of the following two sessions

**16.30 STREAM 1 - Panel discussion****The internationalisation of law firms**

- How can firms be quick to react to international expansion and contraction? And what does international really mean?
- Following international markets and expanding in a manner that's managed, coherent and appropriate for your firm
- How will globalisation affect law firm differentiation?
- Increasing operating risks for international law firms in different jurisdictions
- Examining international legal trends such as the emergence of Chinese firms and the growth of US firms and the impact on the London legal market in terms of market share, talent etc.
- Why have US firms been far more successful in building profitable businesses in London than the UK firms have been in building profitable businesses in New York? How can UK firms exploit the US legal market more?
- Are transatlantic mergers the next big thing?

*James Philpott, director of strategy and corporate development, Bird & Bird*  
*Andrew Cheung, general counsel - UKMEA, Dentons*

**STREAM 2 - Panel discussion****Producing actionable and reliable management information (MI) for partners and clients**

- Incorporating the latest MI systems and data reporting tools
- Meeting client's expectations on MI; producing an analysis of what you do for the client
- Managing the MI requests from partners
- Providing regular actionable data to people so everyone knows what to do and when to do it
- Increasing collaboration between heads of support to produce the information and analysis required to drive firmwide change
- Changing lawyer mindset and behaviour to ensure action is taken beyond obtaining a report
- Aligning international metrics and data issues
- What are the metrics of the future for a changing legal practice? What should we be tracking, which metrics are the key measures?

*Craig Stoehr, group general counsel, Thomas Cook Group*  
*Rod Harrington, chief administrative officer, Europe, Latham & Watkins*  
*Natalie Griffin, chief operating officer, commercial services, DWF*  
*Neil Renfrew, director of product management, LexisNexis Enterprise Solutions*  
**Moderator:** *Daniel Pollick, Director of Business Infrastructure & CIO, DLA Piper*

**17.30 Chair's closing remarks****17.40 Networking drinks reception sponsored by**

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top executives who deliver a project, so we get them all in the same room – and often it's the first time they've ever actually sat together."

Those skills are becoming increasingly crucial to firms working within AFA scopes. For Drake at Two Birds, better client conversations have been enabled by the firm's cost management tool. This has meant more autonomy, backed by knowledge of costs and what drives them. "Increasingly that's live data, recording profitability throughout and at the end of a matter."

One of the biggest challenges to anyone in this position is incoming data. Katzel says that as a large company with a global footprint – and such a significant consumer of legal services – AIG generates vast amounts of data. Data for the LOC comes in primarily through its e-billing system. "That collects data in a structured way, not just on cost but also on what cost is attributable to other specific services, defined by a uniform code system that exists here and in the UK, as well to classify the services provided."

Unstructured data may be the big question mark for law firms as well as in-house people. Firms may not quite be at the AIG end of the big data spectrum, but the process to handle it as they scale up and while consolidation takes effect, means building a framework for that future.

Copley at Addleshaw Goddard says that after, in effect, gluing process management to project management to matter management, the next critical step is "collecting and crunching data to learn more".

"My experience with data is that every time you try to answer a question, three more come up – and what you've got to keep doing is answer those questions for yourself, constantly replacing guessing with data.

"I understand completely when a fee earner says he or she is looking forward to the death

of the billable hour. But when they say it's because they won't have to record time, I don't get it. You need to record your time better than you ever have. Most of the things we do are based on the time spent on a piece of work."

Owain Saunders-Jones, operations director at Carbon Law – one of the new breed of process-focused alt-law providers launched this year – says he has seen the effect of big data from his days in corporate banking. "You can have data coming out of your ears and spend all day on it, but you've got to be able to step back, analyse and decide what makes a real difference."

Hodkinson at DWF says its investment in dashboards has helped handle the flow. "Data from month end used to be published on a spreadsheet every month, usually about three weeks after the fact. They were well laid out, but it would take time to digest them. Now we've converted to dashboards, which are easier to navigate, data from month end is available overnight, and a lot of the metrics are available online live."

## Different vessels

Saunders-Jones at Carbon is of a similar mind. His firm has made "significant investment" in IT to give people "a host of key metrics that help influence and monitor the business, available in a live dashboard, accessible to people at different levels".

"We're not interested in the vanity of over-estimated WIP. We're interested in the values added to the customer and the actual receipts collected."

Carbon was set up from scratch, and as such it had a great opportunity. "When we set up, we had the goal of realigning the value chain between the firm, or the platform, and the client. That has been a product of about



12 months' research and testing." The second stage of the firm's growth will come in Q1 2015, "around redesigning the lawyer-client relationship". The third: redesigning the outputs driven by client requirements. But for now, the focus is people over process, which has meant a kind of overcoming of process.

"We're recruiting the right type of lawyers who do tailored work, and not process-driven legal work. Flexibility and scalability are very important," he says. "A traditional legal firm could be seen as a large ship. We are almost like a fleet of speedboats and can come together as one big firm when we need to, but have great agility to break off and operate differently, not confined by process."

"That's the challenge that traditional firms may have. When you've got legacy systems, processes, buildings, structures, and so on, it's more difficult."

But Mattis at BLP says there's opportunity for firms and spin-out innovations such as Lawyers On Demand to behave more like the alt-providers. "We've got a people-centric culture of continuous improvement, particularly with workshops, where teams question everything they do all of the time, building in those observations. Our approach is about empowering everybody to speak up about the things that don't work and allowing them to implement the improvement they've identified."

Process improvement is an opportunity for firms to embrace some of the ideas of alternative delivery. Mattis says they may find the difference in learning how to behave like

alternative providers, if not necessarily through competing directly with them. "We're always looking for opportunities to be innovative, adapt and to learn from our clients, listening to their needs."

And Hodgkinson at DWF agrees. "We live and breathe it. We're not knee-deep in history and politics. We can't have everything



*"Our approach is about empowering everybody to speak up about the things that don't work and allowing them to implement the improvement they've identified."*

Cathy Mattis, head of process improvement, BLP

tomorrow, but everyone's coming loaded with great ideas and energy. Not to have a 'can do' attitude is potentially dangerous in today's legal environment – if your firm isn't embracing change you can be assured others will be." ●



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The ILFM is an education and membership body for legal accounting professionals. We have over 35 years of serving the legal profession and assist over 2,000 members every year. Whilst our foundation remains solidly in legal accounting many of our members have more diverse roles which sees them taking responsibility for all areas of law firm practice management.

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- Good financial planning and financial control skills
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- Proven ability to work with an Executive Council or Committee environment (or similar)

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All applicants must submit their CV with covering letter by email to Kim Freeman ([kim.freeman@ilfm.org.uk](mailto:kim.freeman@ilfm.org.uk)).  
Closing date for applications is Friday 28th November 2014.



## *Briefing Essay*

# Method without madness

**Glyn Morris, finance director of Higgs & Sons, outlines a model for harnessing the input of employees at all levels to drive process improvement and service redesign. Are you ready for real process improvement?**

**Value and efficiency are taking centre stage in the delivery of legal services, an industry where professionalism has dominated commerciality for a long time. But how will traditional law firms develop the new set of competencies required to deliver efficient and higher-value services to clients?**

Many firms have reacted to external changes by resorting to inorganic growth strategies, such as mergers. At Higgs & Sons we've taken a different route by embarking on an innovative programme aimed at transforming its culture

and operations, through a knowledge transfer partnership (KTP) project jointly conducted with Aston Business School and partly funded by the European Regional Development Fund and the Technology Strategy Board.

## **Start with the state of play**

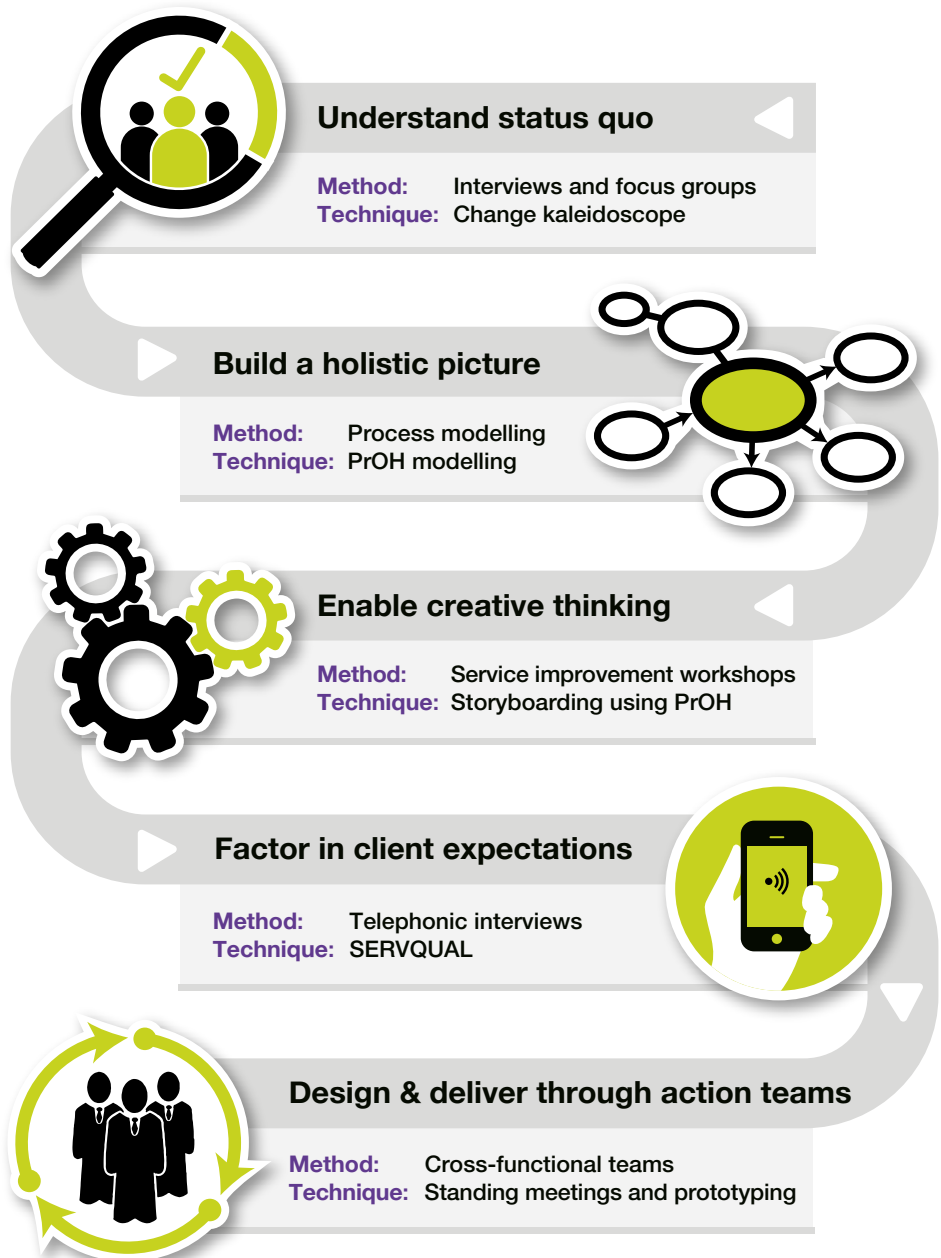
Understanding the status quo is essential at the outset of any change initiative, and it is the first step toward designing a successful transition.

At the start of the KTP project we undertook a thorough data collection exercise through focus groups and in-depth interviews with staff in different roles and departments, with people from all levels in the firm, from secretary to senior partner. This data was calibrated to an academic model called the 'change kaleidoscope', which enabled selection of the right levers and interventions to suit the firm's cultural context.

## Re-telling the story

To deal with the complexities involved in delivering legal services, we used 'systems thinking' as an intervention – in particular, a novel technique called process-oriented holonic (PrOH) modelling (developed by Professor Ben Clegg at Aston Business School), which we used to build high-level views of legal processes, depicting interactions between people, systems and other tangibles and intangibles involved in legal service delivery.

PrOH modelling is a powerful tool that can be used for various purposes such as conceptualising, visualising, and analysing service operations that are intangible and often difficult to articulate. The most unique feature, however, is that it can be used to 'storyboard' an end-to-end service process to help us conduct a structured enquiry by



gathering different stakeholders involved in the process together as a group and narrating the process back to them scene by scene. In doing so, we were able to invoke reflective practice and 'double loop learning' that not only allows you to correct actions, but which does so by questioning the underlying assumptions involved in performing that action.



## Involving everyone

Innovation involves drawing on the expertise of employees at all levels, creating ongoing initiation and implementation of new ideas, rather than concentrating them in the hands of high-level specialists.

By reflecting on legal processes through the structured brainstorming facilitated by this PrOH modelling, we identified several successes. These are small improvements, but they have the potential to create a significant impact on the way services are created and delivered for adding value to the client.

Making the improvements does not require capital investment, just access to ideas from staff and their time. To access this collective knowledge, we assembled cross-functional teams by recruiting members from relevant legal and business support departments. Each team was empowered to work autonomously with the right level of support from line management to solve long-standing problems. The motto: Change something within your control.

## Success stories

Noticeable changes delivered through KTP included:

### ● **Achieving full participation in change initiatives**

By bringing lawyers and support staff on to a common thinking platform, the project has provided a new way of engaging people at all levels in the firm, with wider organisational goals.

● **Understanding client needs and expectations comprehensively** A robust framework for understanding the needs of different types of clients has been

developed. After extensive client interviews and by presenting the findings to individual departments, we've increased focus on improving service quality.

### ● **Managing client expectations and effectively demonstrating the service value**

We developed a unique client engagement model to help align the perspectives of clients and lawyers around four key areas (price, value, responsiveness and legal knowledge). This model will help our lawyers to improve both clients' satisfaction levels and fee recovery.

● **Meeting demand for transparent and flexible pricing solutions** We have developed innovative ways of scoping, pricing and budgeting cases based on clients' perception of value and risk. Tools such as 'Case Assessment Radar' and 'Fee Seesaw' will help lawyers manage cases using a structured framework.

● **Modernising legacy processes** A number of routine processes and procedures have been streamlined and service lifecycles redesigned, with the help of techniques such as PrOH and value stream mapping.

### ● **Accelerating timescales for new initiatives**

The law firm is an environment unsuitable for the command and control mode of execution, requiring more subtle persuasion and guiding techniques, which are time-consuming. With the unique methodology developed through this project, we were able to create a huge impact on each department within eight to 10 weeks.

Attempts to transform the culture and operations are still nascent within legal services, but we believe this will become the norm in the future. Our example demonstrates the change that can be accomplished within a regional, medium-sized firm, but based on the commonalities (professional identity, service model and pricing model), we believe that most of this work could be extended to the wider legal services industry. ●

# Levers of power

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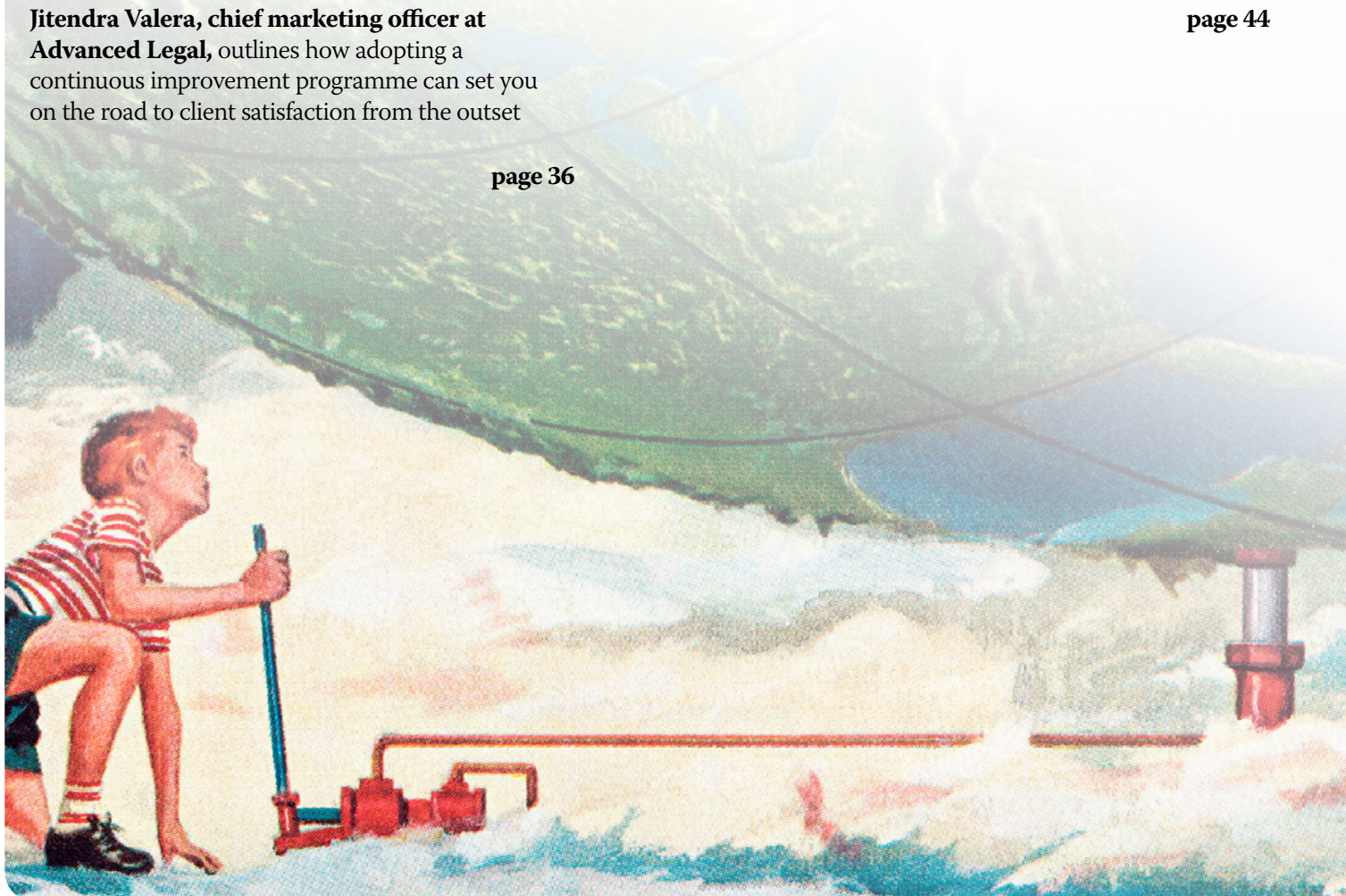
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*Briefing Industry Analysis*

# If anyone Kanban, you can

Providing great customer service starts at the prospecting stage – and thankfully automated processes can ensure you set the right expectations from the outset. Comparing legal workflow to the Japanese Kanban concept of continuous improvement Jitendra Valera of Advanced Legal, says it's about being more client-centred when it comes to creating journeys through legal work

**The use of workflow in business process management is often seen primarily as a means to gaining greater efficiency, higher productivity and more stringent compliance. However, there is a fourth key element – to build a great client experience.**

While the introduction of a workflow system can bring law firms impressive tangible gains, it can also create great customer experiences by elevating a law firm's reputation, brand and position in its particular marketplace. A focus on the client and their expectations begins with the client onboarding process and, done right, lays solid foundations for a long-term client-firm relationship. Now you just need to know what they want.

### **What does the client expect?**

Consumers of legal services in 2014 are driven by their experiences in other sectors. Car insurance documents are no longer printed and posted – rather, they're immediately accessible online. Online shopping can be tracked from purchase right through to when the product lands on your doormat. Repeat purchase is fast and easy as consumer details are stored and retrievable (shopping cart, delivery details, card details). Holidays can be booked from the comfort of your living room, verifying the cheapest flight and best route and comparing hotel prices and reviews.

Often, when it comes to choosing a solicitor, making the first contact and initial enquiries, the reality seems far removed from this experience in other sectors. But with clear business process management and a comprehensive workflow system this needn't be the case.

A client's journey through any legal matter can be made simpler with workflows, and retaining a focus on the business processes to

benefit the end consumer is certainly worth the investment for a firm in terms of customer experience, repeat business and word-of-mouth advertising.

### **How can you provide a great client onboarding experience?**

Workflows can be used right from the initial enquiry, ensuring that personal and contact details are captured there and then.

This information, once collected is, like your contact and delivery details stored on Amazon, always available for confirmation of purchase and delivery updates. No re-keying is required, so errors and inaccurate information are eradicated – all of which enhances the prospect or client's impression of your firm.

An indication of the source of business can be mandated at this point too, so that campaigns, as well as great customer experiences via word-of-mouth, can be monitored, and return on investment calculated.

The steps to capture the information required to quickly generate a quote and send confirmation to the prospect via email or SMS can be wholly automated, and this enables the firm to guarantee a quote within a short timeframe – essential if the client is looking around, often at a time when they are under pressure elsewhere in their lives and need to make fast decisions.

Once the client has been taken on board, they expect ease of access to regular updates. When they're on the end of a phone they expect their firm to be able to access all communications regarding their matter from one place. Storing all documentation and file notes automatically on an electronic file will clearly provide this facility. Alternatively, following the car insurance model, automated



processes can push client information and updates such as milestones reached out to a secure online portal to allow 24/7 access by the client – greatly valued by all of us in this digital age.

Clients also value being able to see what is happening on a case at a glance – opening an app on their smartphone to see what stage the case is at, or to check when they next need to be available or provide some information. Workflows can automatically post updates to a tracking system embedded in an app in the same way that delivery firms are able to show you each stage of the journey for a parcel.

But providing a great client onboarding experience doesn't only involve the client interaction aspect. It also incorporates the streamlining of your firm's business processes to ensure they are relevant to each area of work. It is important that time recording and billing defaults are correctly set up and referenced by workflows to seamlessly produce accurate and frequent bills to avoid nasty surprises at a matter's conclusion, or even to allow clients to view the current amount payable as they can with their bank account or credit card statement.

### Is that all?

Of course, that isn't the end of the story. The

ethos behind business process management is similar to the Kanban way of working that was created by the Japanese – continual small steps of improvement.

For a law firm, it's important to set up key performance indicators to analyse the client



*“Clients value being able to see what is happening at a glance – opening an app to see what stage the case is at, or to check when they next need to be available.”*

Jitendra Valera, chief marketing officer,  
Advanced Legal

journey. Regular reviews and updates ensure that your workflows remain relevant and efficient and continue to enhance the client's experience and their interaction with your firm. Workflows need to be supported by robust reporting systems capable of monitoring



the time between each stage of the customer journey to immediately flag cases which fall outside of the KPIs and to enable fee earners to analyse the root cause of any delays or problems in the defined process.

Firms should focus not only on their own systems, but also on interactions with others – for example, other side solicitors,

time commitment across the firm. Expertise is required from all levels of staff – from reception staff and secretaries to fee earners.

The questions that will need answering will include:

- What information is, or should be collected at each client touch point?
- How much information do your clients want to access 24/7?
  - What is the most efficient way to collect client identification documents?
  - How can we meet client expectations around billing?
  - What KPIs should we monitor to track our progress and build a great client journey?

*“The legal services sector is lagging behind many other sectors in its use of technology to give consumers both the access and, more importantly the service, they are now starting to demand.”*

courts, government agencies, and of course the client – to reduce any regular uncertainties in response rates by improving their system’s interactions. They can watch for responses that are outside the usual pattern and change the process accordingly.

## Define the process, not just the technology

To focus your firm’s business processes on the client journey requires buy-in and a

## The client is king

Creating workflows where the client is king, and at the forefront of your thinking, sounds like an obvious way to manage your business processes. But the legal services sector is lagging behind many other sectors in

its use of technology to give consumers both the access and, more importantly the service, they are now starting to demand.

The firms who buck this trend and take guidance from other industries to place the customer at the centre of the business are the ones that will ultimately reap the greatest rewards.

Find out more about  
**Advanced Legal**  
[www.advanced-legal.co.uk](http://www.advanced-legal.co.uk)



A man with short brown hair, wearing a light blue button-down shirt and a dark tie with thin diagonal stripes, stands in front of a dense background of green leaves and red flowers. He is looking directly at the camera with a slight smile.

*Briefing Industry Interview*

# Ripe for reengineering

**Marc Vollenweider, CEO and co-founder of Evalueserve, outlines how legal businesses could become more efficient by rethinking key components in the marketing and BD process**

**After many experiments with outsourcing during the recession, it's becoming very apparent that sustainable growth lies in an ongoing analysis and restructuring of law firm processes.**

Client expectations of greater transparency and value – and ultimately lower costs – are going nowhere. But by automating some tasks, reallocating resources and tackling ingrained mentalities with project management disciplines, some firms are adapting to the new world. This might involve outsourcing, but only as part of the bigger task of

improving processes.

Evalueserve's CEO Marc Vollenweider says that BD is an area that is especially ripe for reengineering of knowledge intensive processes such as analytics and research. "With the rise of AFAs, firms are increasingly under pressure to collide processes and respond faster – as well as to better target their BD activities," he says.

But firms are still often siloed in nature, with activity organised around the traditional practice group. One firm Evalueserve works with "realised they were largely decentralised, and every partner did a bit of their own BD,



perhaps with some help from assistants, but these had a whole range of different titles and backgrounds”. With Evalueserve’s help, the firm created a new central knowledge centre, delivering greater visibility across the marketing and BD function – from historic client interaction tracking to more efficient pitching. A change project also led to a ‘win/loss/learning’ reference repository, an awards submission database and more streamlined external comms.

The benefits of such projects are twofold, says Vollenweider: a joint workflow system that allows all players to connect, but also, from the COO’s perspective, tighter control of costs. “In terms of internal cost allocation it is clearer who has used how much of which resource.” Process-led change in legal, like this, is what companies like Evalueserve do – and firms increasingly need it.

Firms also need to learn to love process management because of client pressure, says Vollenweider. But advanced analytics will only help a firm do better pricing if they’re linked to a solid process foundation. “Firms are required to understand what the cost, and therefore price, of a transaction will be up front. All matters need to be understood in terms of costs.”

As well as creating a more joined-up business and greater insight, more process management capability can also mean more flexibility, not less. “There can be enough flexibility built into standardised templates to accommodate individual needs,” says Vollenweider. “If partners have more freedom, that’s mirrored in the resulting processes. If a COO has a mandate to get efficiencies, you standardise a little more.”

BD profiling processes can also be crafted to capture the latest developments, so that lawyers are always as briefed as they can be. “Some aspects of people and industry profiles

are refreshed on a quarterly basis as part of a development plan – but some are more trigger-based and tactical in nature. I can see that a GC has moved from company A to company B, for example, and ensure that lead is rapidly handed over to the partner covering that client.”

In Evalueserve’s experience, technology platforms like CRM and library management are only as good as the processes around them. “I see several ‘white elephants’ – large systems in place, but a lack of processes, which leads to downstream cost.” To beat this, Evalueserve provides ‘data stewards’ to ensure data consistency and quality.

Finally, investing in process management means freeing up more time for the talent firms employ to focus on what Vollenweider calls the “brain work” – invariably the most satisfying bit, for lawyers and BD pros alike. As an example, he describes a tool that uses artificial intelligence to generate a client newsletter by crawling potential story sources overnight. Some 50 of these will be auto-summarised in a newsletter, and the analyst selects 10 or so to turn into value for the client. The result? Less time crawling the web and more spent on creativity. Vollenweider estimates this element of automation cuts up to 60% of the time spent assembling the end document.

And it’s the brainwork – whether in pricing, client relationships or the legal work itself – that gives a firm a competitive edge. “Whether a law firm saves a few million pounds here or there isn’t necessarily going to make or break,” says Vollenweider. “More critical, lawyers and COOs tell us, is that they want to invest in becoming more competitive.”

Learn more about  
**Evalueserve**  
[www.evalueserve.com](http://www.evalueserve.com)







*Briefing Industry Interview*

# Better connected

**Andrew Try, managing director of ComXo, tells Briefing why a simple phone call can make a big difference to a law firm's brand, and why tomorrow's distributed firm needs a more connected communications strategy**

**Walking into most top 100 firms is a little like the experience you'd get in a five-star hotel, or at least it should be. But the front door isn't always the first contact clients have with a firm – and once they are a client, it's often the least used kind of contact.**

Making sure clients and prospects get great service via web portals or, more importantly, on the phone is a blend of technology and people processes – and no one knows those processes better than managed telephony services business ComXo.

From being left on hold for half an hour to an unhelpful person answering, or having to repeat yourself for the umpteenth time, what should be the simplest of transactions all too often ends up as one of the biggest customer service bugbears of all time.

"I'll give you an example," says Andrew Try, managing director of ComXo. "The phone rings eight or nine times, and somebody picks up but doesn't answer it very well, or doesn't hear your name right. Then they put you through to the wrong person. That's the worst possible start to

any business relationship.

“Now imagine this done well: the first person you speak to takes control, quickly and politely asks some key questions, and you’re put through to somebody who can help first time. Your experience of the organisation is exceptional. That’s when you decide whether this is the sort of firm that can handle your problem.”

Very few businesses – especially legal businesses – make a serious attempt to see the art of communicating with clients in terms of a process that can be finessed and refined nearly to perfection to create a five-star experience, says Try. For a typical firm, things are further complicated because both the stakes and the accompanying stress levels are likely to be that much higher, something Try and the ComXo team have learned over the 25 years they’ve been refining legal switchboard services.

Creating better communications isn’t just a matter of being uniformly polite – it also means proactively anticipating needs and managing expectations.

“At reception you can quite easily differentiate between a VIP and a salesman,” says Try. “But on the telephone it’s very difficult, because you can’t see who’s calling. It could be your next £10m client, or a total waste of time.” That’s when process, technology and staff training come into play. By integrating telephony with internal case management or BD systems, a switchboard operator can access additional business details to build up client confidence by being highly informed, instantly.

Well-trained switchboard teams can become versed in the idiosyncrasies of a firm to add value from the outset, says Try. “If we’re handling a law firm’s external and internal calls, for example, and we speak to a regular external caller, our experienced staff will recognise that and anticipate expectations, based on who they last spoke to. That means we can take more control, even adding a bit of familiarity,

if appropriate, which breaks down the sense of process and helps reinforce the value of the relationship.”

ComXo is also engaged in a larger, more radical change that the legal sector is experiencing: what Try describes as the more ‘distributed’ 21st-century workforce – multiple jurisdictions, time zones and languages, plus a host of potential competitors.

“The firm is no longer defined by its concrete – it’s defined by where people have access to the intellectual property for handling a client’s problems, and that could be anywhere,” says Try. “The distributed workforce follows the knowledge. For communications, that means being able to find a fee earner in a project team wherever they are – but also providing a go-to human for that fee earner, wherever they are in the world, be it to organise a conference call, book a room, transport, or catering, or just pass on a message.

“At one of our client companies, nobody has a desk. Everyone simply comes in with a laptop or other device to plug into any desk station.” ComXo has responded to this by developing a ‘cloud-based, five-star assistant’ model, using access to the firm’s knowledge and applications that enable people to get their job done. “That’s what the 21st-century switchboard looks like.”

This still comes down to developing great processes to ensure the best outcome is delivered every time, no matter the time or location. But firms now need to concentrate on delivering a much better communication experience for clients, he says – at any touch point, any time, around the business.

Learn more about

**ComXo**

[www.comxo.com](http://www.comxo.com)



*Industry Analysis*

# Is workflow really working?

**Too often – and for too long – workflow has been running firms, rather than the other way around, says Mark Bilson, vice president of the integration practice at Intapp. It's time for a change**

**Whether you've taken a best of breed approach to software selection – or made a conscious effort to consolidate – the reality is that no single system addresses all your firm's needs. And when it comes to processes and tasks that require coordination across multiple applications, too often it's the people who interact with those applications on a regular basis who are expected to bridge the gaps.**

From onboarding new employees to configuring workspaces upon new matter inception, it's taken for granted that IT, HR, finance and risk will connect the dots cross-functionally, and that a certain degree of manual input and administration is inevitable.

Where firms have tried to automate, they've turned to BPM and workflow tools that have often fallen short. What looks like automation isn't necessarily – if a system automatically sends forms and notifications, but is still relying heavily on users to manually collect, enter and re-enter information that already exists elsewhere, is the organisation making the best use of staff? If after a system 'finishes' a task it sends an email to an IT administrator to manually configure or update an application, has the process really been automated?

Another familiar scenario is undertaking a huge custom workflow project that typically

requires an outside vendor to spend months developing complicated, bespoke code for data management. These workflow systems are notoriously difficult and costly to implement, maintain and modify over time – even for seemingly simple amendments like changing forms.

For your users, these tools have an antiquated feel that frustrates them on the front end. Even worse, on the back end, many legacy workflow toolkits lack essentials such as a database to manage state, or real-time data integration to connect with other systems. The legacy approaches are slow, expensive and error-prone – and hard to manage in the long run.

Any business process that needs heavy manual intervention is a major inefficiency, which firms cannot afford in an increasingly competitive environment.

Enough is enough. Workflow should work for you – not the other way around. A workflow toolkit alone is not the answer. A truly modern approach must also deliver a modern experience for lawyers, analysts and IT. It needs to be accessible, intuitive, and efficient for users, and able to adapt to change to avoid the shortcomings of traditional BPM software.

Most important – and perhaps most



overlooked – is the fact a functioning workflow application must include a data integration platform. Integration is critical to achieving truly effective workflow.

We developed Intapp Flow, released this August, to do this and more. Built from the ground up to address modern firm environments, it takes a fresh approach to business process, legal process and workflow automation. It's not a 'blank slate' toolkit for building ugly forms using a complex, arcane back end. Finally, it's workflow that can be set up in minutes, not months – and it's designed for actual human beings.

On the front end, Intapp Flow offers an intuitive web-based interface – for defining processes and for end users. It also offers rapid success, with a library of more than 20 templates specifically designed for common law firm operational activities. Key processes can be created and managed – from form creation to assignment, notification and tracking – through an attractive consumer-grade user interface, optimised for speed and simplicity. And processes can be kicked off and managed from desktop computers and mobile devices running native apps.

Popular templates include processes for user provisioning – including coordination with IT and HR, as well as the marketing team, which can be set up to receive updates on new lawyer biographies, practice areas, languages and areas of expertise. Another process allows lawyers to inform the firm when they are planning to trade securities – allowing the firm to run an automated check for any conflicts or risks that should prevent the transaction from taking place.

At the back end, Intapp Flow provides unique data and application management capabilities through Intapp Integration Builder to connect key software systems and unify information presented to both lawyers and

business services people.

Unlike legacy workflow tools, Intapp Flow includes a database, and doesn't force organisations to write bespoke code. This allows firms to automate data entry, downstream configuration and process execution across environments – instead of forcing staff to carry out tasks manually. Firms that want to take data integration one step further can employ a master data architecture and add unique, intelligent data validation and auditing to cleanse data and eliminate inaccurate and duplicative information firm-wide.

Intapp Flow offers configurable role and user-specific dashboards that present key metrics, reporting and task assignment across multiple applications built on the system. It also leverages a relationship-specific search engine, tuned specifically for law firm environments, to provide concise results and relevant information intelligently.

Finally, Intapp Flow provides integrated communication capabilities that make it easy to interact and collaborate, including capturing email responses. The history, activities, conversations and decision points for each process iteration are automatically captured and available, streamlining immediate action and providing a clear record for future visibility.

The result is an application-quality experience for users, managed with a standard environment that delivers unique capabilities and benefits.

With so much pressure on firms today to streamline operations and maximise efficiency, can you afford not to take control of workflow?

Learn more about  
**Intapp**  
[www.intapp.com](http://www.intapp.com)



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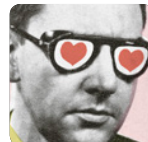
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