Briefing

LEGAL TECHNOLOGY IN 2015

DECEMBER 2014

Feature

Tech takes the stand

From big data to cloud migration, Legal IT leaders tell us what's important – and what they're doing about it

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Haig Tyler at Herbert Smith Freehills on how technology is sustaining a global merger of equals

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Tools of the trade

Letter from the editor

We write about technology in Briefing a lot – and so it seems appropriate we bid farewell to another busy year with a snapshot of the market. This issue of the magazine comes with an early Christmas present – a copy of our Legal IT Landscapes (LITL) 2015 report. We've already had some excellent feedback on this piece of research, and hope it provides you some food for thought over the festive period. Maybe mull over it with a mince pie.

But we are adamant that technology is only really interesting in so far as it meets firms' strategic needs – and you could scarcely put this to the test better than by getting an understanding of **Haig Tyler**'s role at **Herbert Smith Freehills**. Formerly in charge of IT at Bupa, he chats to Richard Brent about switching his hand to the technology that ensures UK and Australian teams work together, proving much more than the sum of their respective parts.

Elsewhere we talk to leaders at **DLA Piper, DWF, Farrer & Co, RPC, Keoghs** and Danish law firm **Kromann Reumert** about the results of our research, and whether it tallies with their own strategic goals.

And finally, our sponsored editorial includes a cracker of an interview with **Mike Walker**, chief software architect at **Thomson Reuters Elite**.

Other than that, happy holidays one and all – and see you on the other side!

Rupert White, editor-in-chief of Briefing

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Haig Tyler, Herbert Smith Freehills

The chief information officer talks communications, collaboration and how the marathon of synergising firms on opposite sides of the world is best handled in sprints

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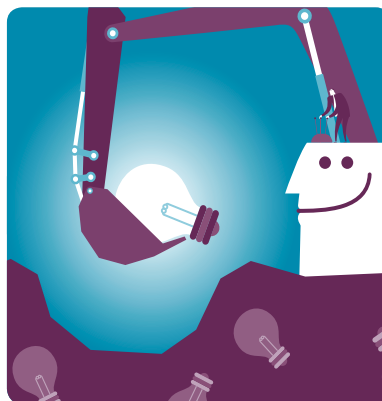
Management information, project management, desk-based videoconferencing and cloud – UK legal IT leaders identify the opportunities and threats to focus on in 2015

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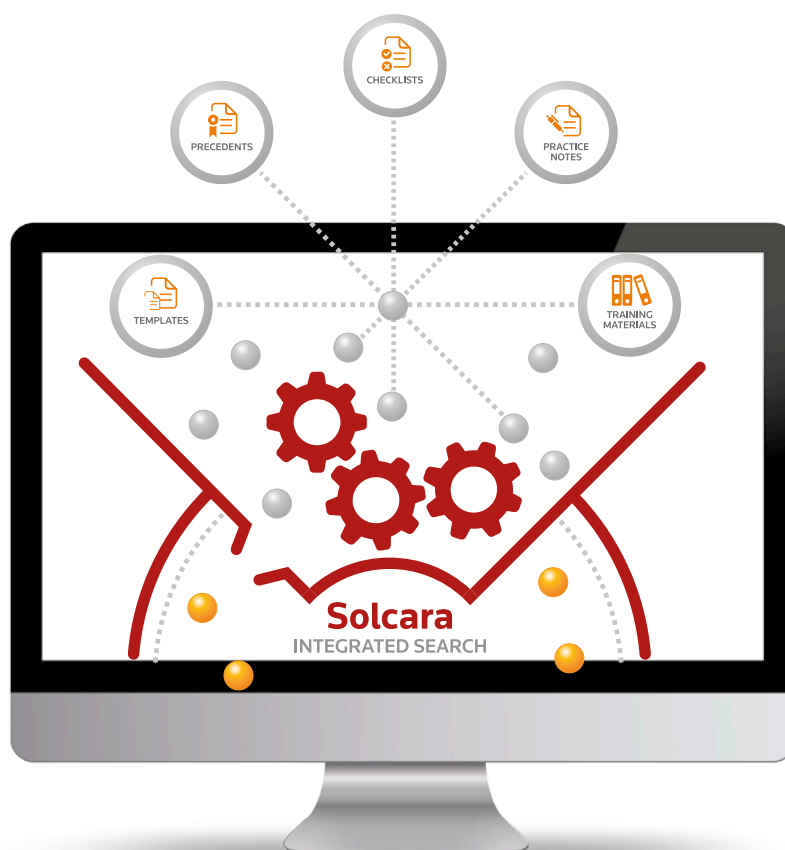
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Industry analysis index

The Briefing Interview

Window on the new world

Haig Tyler, chief information officer at freshly merged Herbert Smith Freehills, tells **Briefing** *how his technology choices promote collaboration across continents. Legal IT is ushering in a new world of opportunity*

Words: Richard Brent
Photography: Jonathan Goldberg

Briefing's recent research into legal IT investment plans, Legal IT Landscapes 2014, found more than half (57%) of legal technology heads, globally, feel the traditional partnership structure holds them back when it comes to taking on new systems. It's one of the largest potential areas of expenditure for any firm – yet the annual bumper profit draw (clearly) just doesn't incentivise partners to support the long-term view necessary when thinking strategically about how technology can enhance future competitiveness.

But one IT chief who is certainly able to compare your classic law firm environment with other business models afresh is Haig Tyler (though he is quick to point out he has secured funding for most of his initiatives and doesn't agree with our 57%). Arriving at Herbert Smith Freehills in 2012, the new global giant is his first. He was previously interim Group CIO at international healthcare group Bupa, before which there were stints as IT director at Cable & Wireless and consultancy for Deloitte. Earlier still Tyler was an engineering officer in the Royal Air Force.

"The technology at Bupa was diverse and complex," he says – choosing those adjectives carefully. "At the back end there was running the membership systems, and a pretty high-end transactional website – and then everything in between. That really is an incredibly complex collection. My initial view coming to legal was of a simpler technology estate.

"On the other hand, it's still thousands of people that fundamentally rely on technology to do their job, further their careers and keep clients happy," he laughs.

"However, in a typical corporate enterprise you have quite a well-structured stakeholder management environment – and coming into law that was more of a challenge."

That said, he says he "remains amazed" by the variety of ways firms can adapt

Outlook. "I've not seen the level of desktop complexity we have here at any previous organisation."

Night shifts

Of course, both these observations were intensified owing to the firm's unique circumstances when he joined – the merger of Herbert Smith with Australia's Freehills holding daunting pride of place on his to-do list. Within two weeks Tyler was over in Australia for the first time. The number of partners to shepherd rose from 250 to 450 – and the need to streamline lines of communication was thrust firmly to the fore.

"As with any merger, the fluidity and uncertainty of the unfolding organisational structure was a challenge," he explains. "But if you get the 24/7 thing working well, it's actually a real bonus to have two spreads of workforce on opposite sides of the world. We can do things in the UK during the day, transition to colleagues in Australia, and find we have actually moved on issues, and progressed matters, while half the team sleeps."

At Bupa, Tyler had the support of operations in India, but he says the time difference being a mere five and a half hours was inevitably less useful to him. "Of course it's not quite that crudely straightforward," he admits, "but I have definitely invested time trying to get people thinking about time zone less as an inhibiting factor and more as a potential advantage."

However, this does rely on technology underpinning what Tyler describes as "sustainable" project working that reflects the firm's overarching vision of a genuine "merger of equals" (profit pools have already been combined and remuneration realigned). As a "dual-headquartered" organisation, he says the precise timing of in-person catch-ups is critical to "living" the philosophy in practical terms.

"We have been sharing the pain of IT management calls and online project meetings by alternating the timing – but with Australia, of course, you also need to be sensitive to the seasons," he explains. As (you may have noticed) it's currently UK winter, teams here are now switching between a schedule of early morning calls (Tyler needs to be at the desk for half five tomorrow) and evening calls each fortnight. "What that means is the Australian guys will get their evenings back for half their summer – which is about work/life

balance tying into efficiency," he says. "It's important to do things in a way that doesn't actually burn people out." This policy began in IT – but the firm is now looking at expanding it to other business services as best practice.

Haig is keen on Citrix's GoToMeeting to facilitate these comms – "a corporate Skype that gets extensive use," he says. "With telepresence, the expense of investing means you're going to have to stay in the office, and I'd argue that's probably the same with high-definition video. We like GoToMeeting because it is internet-based. The team that isn't in the office can effectively connect from anywhere."

The firm has even used it for major meetings, beaming out of auditoria, in what Haig describes as a piece of 'micro innovation' – "taking something that exists but using it in a way that probably wasn't planned".

"We created a smart little chrome tripod, put a camera on top, stick it in the middle of the auditorium, fire up GoToMeeting, and suddenly we're presenting a general partner meeting to offices around the world."

Global gear change

Other projects have similarly been deployed with the firm's enhanced global perspective and ambitions in mind. "The biggest thing we're doing in IT is probably a single global Active Directory, incorporating Exchange, AirWatch [for mobile device management] and BlackBerry. That facilitates better collaboration messaging, directory management, calendar management, visibility of distribution and ability to roam. But probably even more important is that it provides a really solid global foundation for future systems.

"Obviously we need to be relatively careful in the transition period. There are obligations around keeping certain things separate – and when we do integrate clearly we need to integrate in the right way from a legal perspective. But fundamentally, what we will have is a very sound global platform to build a strong future global firm upon."

On top of this Tyler has already embarked on introducing a global practice management system – selecting the latest version of Aderant, which also happens to be the legacy PMS supplier at each of the

merging firms (although it was a competitive process). And he says this is one particularly good example of how the IT department has made use of time zones to accelerate delivery. Currently in a 'user experience' phase of engaging with partners and finance people for their feedback, the first elements of the new system are set to be delivered in the next financial year.

"The overall goal is a system that gives us full flexibility of resource use, such as global time recording to any matter. As you'd expect with any merged firm, at the moment we're running multiple systems, and there are a whole bunch of manual processes that enable us to effectively bill lawyer activity from one half of the prior firm to the other. We're looking to streamline that as much as possible.

"Over a longer time period we'll also be looking to exploit additional modules, such as matter management capabilities, which will help us become a little more proactive about how we plan resourcing."

Best of both worlds

Against this background, Tyler says he's "most excited" at the potential of the increased management information that will be available for data analysis – something the firm's cross-functional 'Innovation and Efficiency' stream is working on right now. "We want to think about business intelligence in new ways – combining not just finance data, but people data and client data too," he explains. "There's a whole set of what I would call metadata around all systems, and I think that's a rich seam of opportunity for us.

"It requires a degree of tangential thinking, but it's about combining deep domain business insight with technical skill, and I think some of the internal and client impacts could be very dramatic."

One thing the team in London has already done is partner with the revenue collection team to create an iPad app for time recording. "On the surface that was about helping lawyers ensure we are chasing and getting

bills processed, but throughout the process it means we can also continually refine and add to the data, and then use that to trigger some other activities. For example, we have been able to add value such as type of work, client and sector information.

"That has given us quite a rich source of information to start to understand how we might be able to deliver better, and we're seeing some almost reverse

"The overall goal is a system that gives us full flexibility of resource use, such as global time recording to any matter."

engineering of our legal project management. The collection process is driving some of the milestones and we're [starting to] deliver a legal project management framework by default."

Tyler envisages combining this with what he describes as a more "upfront" approach to project management in Australia to unlock the firm-wide benefits of both. "In Australia we have a small team established, with a good deal of structure and education, and I think the two methods are very complementary – the London method, which was almost delivered via

the different driver of chasing revenue and the more standardised Australian approach, establishing best practice."

Either way, Tyler is clear that such project management will come closer to the fore in law – but says firms must accept that it's a journey.

"It's not quite as simple as saying we'll just apply project management to what we do. There's a journey

> *"There is a real need to start embedding some differentiating client services within websites and client portals."*

> Haig Tyler, chief information officer,
> Herbert Smith Freehills

that is about recognising the importance of an operating model – structures, roles and processes.

"Are we going to parachute in more specific project managers, or is it about developing project management capability in our lawyers? I think that's an interesting debate, and probably matter-dependent. But following a more rigid structure [as I did in consulting for four years], you can definitely get a head start on pricing predictability. Alternative fee arrangements are very much with us, and technology that can help legal project management provide structure to them is something I see as very important."

Risks and rewards

The other issue HSF's innovation group is giving major thought to is everything that comes under the banner of what Tyler calls "the digital workplace" – including the

likelihood of harnessing social networking, as well as the latest technology for more mobile working in 2015.

"You think of our lives outside of work, and the way apps and workflow-driven websites like eBay and Amazon simplify them – but then you jump inside work, and the difference can be quite stark," he says. "We're thinking hard about how we can make our technology a lot easier to use.

"We have a very clear BYOD strategy already. We've retained Blackberry as the default offering, which we effectively offer funded by the firm. People are free to use other devices under BYOD, and we're satisfied that AirWatch gives us the right balance of functionality to enable people to work as they need with the right degree of security.

"I think with digital it's almost a case of it being limitless depending on one's imagination, but there is also a real need to start embedding some differentiating client services within websites and client portals, and then start to extend that to mobile applications, and even client systems in future. I'd stress it's an aspiration, but I was a client of various law firms in my time as IT director in various places, and I think there's a huge opportunity there. It's a really good example of some very specific system to system interaction, and can also potentially provide rich data about what people are billing and paying for."

But if people want the sort of experience they rely on at home at work, Tyler says his technology is similarly reliant on the people using it. Home and working life needs to be blurred when it comes to issues like security too. "I call it the human firewall," he says. "We need our people sat in front of their terminals with their home heads on. 'Would I click on this link if I were at home?' We need that mindset applied at work. We've always had information security awareness campaigns, but the complexity of the cyber threat we now see means our

people have become a key protection point. They can really help us in the battle.

"But the best way to communicate that isn't necessarily to fire off another email or hide a fact sheet on the intranet," he continues. "You need to think innovatively about how to get the message across. We have some poster campaigns planned, as well as other tools, and of course training."

In fact, Tyler is passionate about setting aside face time in general in a world where it's all too easy to be buried under your work, eyes glued to a solo screen. With his Bupa background, he espouses the way of agile working in 'sprint' cycles to demonstrate regular progress.

When the team was implementing the new Active Directory services, he would gather them together for what he calls a 'show and tell' every fortnight – ensuring everyone was up to (the same) speed. The same process will now happen during the Aderant delivery.

"Getting most of the IT team around a screen to demo something has been transformational," he says. It may only be then others can appreciate how a development is especially relevant – while sharing also identifies both problems as they emerge and the people who are working on fixing them. Anyone in technology can attend a session, and HSF has recently opened them up to other business services too.

"I did it for the first time years ago at Bupa - and it was a real breakthrough moment for me," he says. "Four weeks into a project we were projecting up some things we had built as per the written specification – and at the back there was a senior manager from the customer side of the business, who suddenly piped up to say it was wrong, and it wasn't going to work. That would have happened up to 10 months later with the old style of delivery."

Cloud judgment

Tyler also takes his enthusiasm for flexibility and speed of resourcing from project management into the topical issue of cloud uptake.

"It's interesting that legal is probably one of the industries that has been using cloud the longest [with extranets] – and that ought to give us quite a lot of comfort. Security is an important consideration, but it's just as important to consider speed of adoption of some cloud services. You can deploy them very, very quickly.

"It comes back to the evolving threat environment, processes, and how we choose to manage and accept risk. The fundamental question has to be whether the organisation can manage security better than the Ccoud provider."

Tyler himself has implemented cloud-based ServiceNow for IT service management – as well as kanban-based Trello for divvying IT project management into task lists and cards that can be progressed via drag-and-drop.

"It's a cloud service, incredibly quick to set up, globally shareable, and accessible by mobile app – and it's given a real focus to how we manage our infrastructure efforts," he explains of the latter.

"The other thing I would say is that the driver for cloud isn't always cost savings. If you're a global firm like us it might actually be cheaper to deploy and manage something yourself. There is an economy of scale tipping point.

"We've deployed our own Cisco unified computing system. We looked very carefully at potentially sending that to the cloud – but decided we could do it cheaper, and be more confident managing it ourselves. In two years' time we'd probably look at it again to see how the cloud market has evolved.

"But for our global intranet we went with cloud for the speed. We could probably have provided it cheaper to be honest, but the value equation said there was no point if that meant delivering four months later."

Document management will be the big test for the cloud market. Tyler sees people beginning to offer cloud services on the periphery to enhance the offering. But the challenge – and opportunity – comes back to data management again.

"How do we introduce a composite wrap around that to make sure we are using the information within all those systems in as coherent a way as possible?"

The newly merged Herbert Smith Freehills might have a simpler technology stack than a business like Bupa to look at – but the management information choices that will be differentiating its future success in an increasingly competitive legal market sound like something of a minefield. Tyler will aim to ensure it turns to be the metadata goldmine he suspects is just below the surface. ●

Feature

Technology
on trial

Phone-free offices chatting away on FaceTime? Documents and client data tucked away in the cloud? Service automation across the nation? Richard Brent asks legal IT leaders what they want and need for Christmas – and beyond

It's traditional to take stock at this time of year – but one thing we would certainly understand law firm leaders struggling to get their heads around with 2015 on the horizon is seemingly infinite sources of information at their disposal.

In the last edition of **Briefing** we outlined how the most innovative firms are using project management discipline and a continuous improvement ethos to link process to the twin goals of competitive pricing and profitability. Unless they can measure and analyse hard data to make evidence-based decisions about their workloads, however, they can't even begin.

This was one of the standout points to emerge from our Legal IT Landscape in 2015 (LITL) research, sent out with this issue of **Briefing**. We polled leaders in UK law firm IT departments for their biggest problems and priorities, and finished by asking them to single out the techs which had the potential to be truly transformational – first, for driving out internal efficiency, and second, to create sustainable competitive edge. By counting up the mentions, and then comparing the two lists for overlaps, we reasoned we ought to arrive at a pretty decent approximation of what an IT director would have on their Christmas wishlist.

Trouble integrating

'Business intelligence' was firmly at the top of the stocking – the aforementioned information, gathered from as many corners of a firm's operations as possible, and integrated to provide real-time pictures of progress and internal connections on all work performed.

Overall, 57% of LITL survey respondents said their firms used a dedicated business intelligence tool (although granted, this meant different things to different people). However, an overwhelming 90% agreed they needed to collect and analyse more management information than at present – with 86% expressing a need to more fully integrate their existing systems to extract the value of the information they do have.

For Richard Hodkinson, chief technology officer at DWF, the drivers for a new approach (and tool) for business intelligence have been twofold – key clients have called for more management information and the firm wants data that is indeed more up to date. "In the past partners would have received figures about performance a number of weeks after month end, but now we can see it in real time every day," he says.

While largely financial performance data at present, he's looking at integrating a range of sources into dashboard views – standard HR performance measures, business development measurements such as the conversions from sales campaigns and operational data, such as "how many cases are washing through the system, how quickly we are expediting them and where the issues are".

"A manager in one of our volume litigation areas should be able to look at the dashboards and identify the pinch points," Hodkinson says.

Farrer & Co, meanwhile, has written its own reporting system, currently entering a second phase of taking in marketing and other client information to add to financials, but simultaneously aiming for a simpler user experience, says IT director Neil Davison. "People will still have the financial and business overview, but they also need to be able to drill down into what is most important to them," he explains.

Julie Berry, director of infrastructure and IT at RPC, has a similar outlook. She has a data warehouse that runs both a dashboard for tracking team-based matter progress against budget and a traditional reporting infrastructure.

"The main change in our focus is beyond financial management information to tie into business development and key account management," she says. "The idea is to identify something as a particular target area, and then to build the management information environment around that."

One for all?

But Berry thinks the top challenge law firms face with MI is not so much the quality and connectedness of data as the way people behave with it. "One reason for putting in the data warehouse was we didn't want people dragging data out of the underlying operational systems into a spreadsheet, where the truth can vary with the formula you are using," she explains.

She also identifies a lack of analysis skills at a time when the quantity to analyse is growing exponentially. "Until quite recently you were likely to have teams of people doing that [analysis] for you, but now it is suddenly an everyday requirement."

Daniel Pollick, director of business infrastructure and chief information officer at DLA Piper, agrees it's not ultimately the data that's the problem. "Historically law firms haven't been great at integrating all their data – which has contributed to a bias toward financial data – but I'm not sure it's true they need more of it," he says. "Firms have proliferated management information to such an extent they have sometimes lost sight of what they are trying to do with it. There needs to be greater clarity about what information is needed, and which actions we expect people to take off the back of it."

Firms we questioned were split on whether what they really need is an enterprise resource planning (ERP) system to join all the MI dots together (49% said yes, definitely – 36% apparently had no view either way).

Dene Rowe, director of product development at Keoghs, certainly sees things moving in this direction though. "It used to be a case of trying to glue various best-of-breed systems together, but it's very hard to differentiate that way. I think there has now been a mindset shift that says it's a lot easier to opt for a single solution that inherently integrates better."

A more seamless information experience is also certainly behind Davison at Farrer & Co's really big news – turning to cloud-based Netdocuments as a document management platform (Farrers sells it internally as an 'e-file'). "Every matter file is broken down into the various sections you would have tabbed with a paper file – for correspondence, court documents, and so on – but we also incorporate file summary information, with key matter financials that link to contact information. Bills are in there too. You have a snapshot of the entire file."

No prizes for guessing the top driver: enhance service to clients. But, as more clients look for transparency and insight into what firms are doing with their

time, the specific benefit is the ability to share with them. "Extranets are built into the product, so we can seamlessly share with clients and any intermediaries too," says Davison.

Project the future?

Respondents said 'client portals' provided that insight – around pricing as well as workflow – and ranked highly as a technology to watch in terms of competitiveness – and 'case management' also came out on top of the tree.

But we felt it likely the latter was being used as something of a catch-all term for the tools underpinning the process and project management approaches firms are increasingly adopting to price more effectively. Just over two-fifths (41%) said they specifically used a legal project management solution – and a third (31%) said they might be in a position to adopt one by the end of 2016.

Project management became so integral to Danish law firm Kromann Reumert's way of working that the firm established it as a standalone department (the 'project centre') back in 2008. A frequent role for Nathalie Blicher Danielsen's team is the arrangement of virtual data rooms to facilitate due diligence, which includes training new users in the technology. The firm has established its way of working as a differentiator – working closely with public authorities to process insolvency paperwork and run case management more efficiently.

"As elsewhere, Denmark experienced enormous bankruptcies after 2008, some involving more than 200 subsidiaries," she explains. "We were able to develop a logical way of processing the cases. By gradually involving project management tools and human skills we created a new, more streamlined model. The project centre has gained a more significant role in handling documentation more intelligently by using different technologies.

"We became conscious that virtual data rooms aren't only useful for M&A deals. They could also be used for insolvency cases, or other matters that involved disclosing confidential documentation."

The firm decided it would be more efficient for the project centre team to handle some parts of the due diligence process – including client communication about data room creation, uploading documents and ongoing management of the system. "There is a lot of

technique and method behind controlling a virtual data room – knowing the different systems' possibilities and limitations, advising which tool best suits a case, and handling user rights," Danielsen says. "Our position was therefore that lawyers should do what they do best, and process and project managers should assist and handle assignments where it makes commercial sense."

Keoghs' Rowe also says process management is something that evolves with experience – and indeed points out it's akin to the concept of "adaptive case management" in the manufacturing world. "It isn't about pushing people down a prescriptive route," he says. "We give them technology to adapt the legal context to the request. It supports an agile workforce, but also allows for going off at a tangent."

Keoghs has reengineered processes to price fixed fees more effectively. Like Farrers, however, it has recently focused on technology that reaches out to clients and emphasises transparency – not only sharing matter progress, but also empowering them to make decisions. "Clients can perform scenario tests about what they intend to spend," says Rowe.

Up in the air

Above all these choices one thing looms large – the cloud. Almost a third (29%) of respondents told us their firms are "very likely" to adopt cloud for significant systems such as client relationship management. Of those, a third thought they would do so within two years. But not one had software for such things in the cloud already – and over a third (36%) are undecided as to the merits of a move.

The arguments about transforming basic technology to an operational cost (on the one hand) and lingering

security concerns (on the other) are well rehearsed – but views as to how things will now unfold vary.

Rowe believes it's not so much the principles, as the products, that are the problem. "There aren't many vendors with a system that would persuade law firms to move to that model for their core systems," he says. "If someone came up with a killer practice management application in the cloud, would law firms use it? Most definitely. In a lot of the back office space there just isn't

"Concern surrounding data security often comes up in client pitches – and you are in the challenging position of having to justify yourself."

Julie Berry, director of infrastructure and IT, RPC

enough innovation."

But, he says, when it comes to the practice management system, a lot of law firms "still believe control is everything". There are limits to the cloud, for now.

And then, behind that mindset, there are clients. Due diligence on entering outsourcing arrangements

should cover the duty to protect confidentiality and risk of access loss during downtime – but firms need to persuade those paying the bills. RPC's Berry says this probably won't be a problem with private cloud, where you can highlight that "in effect it stays in one box, just offsite", but software as a service is more likely to be scrutinised. "Concern surrounding data security often comes up in client pitches – and you are in the challenging position of having to justify yourself," she explains.

Your future is presence...
Mobility is just one side of the communications 12-sided die – unified comms and presence technologies are legal's next move

As firms grow, expand internationally, resource work drawing on more parties, and embrace mobility, lines of communications will inevitably be up for reassessment.

Successful technology here needs to meet two objectives – a consistent experience in the clients' eyes, but also the connection of project teams that may be constantly changing and regularly logging in from a range of devices in different locations.

A substantial majority of Legal IT Landscapes respondents told **Briefing** their firms were "considering" unified communications, presence technologies (managing employee availability) and desktop-to-desktop video (76%, 78% and 73% respectively).

With efforts in 30 countries to coordinate, it's no surprise that DLA Piper has thought hard about optimising comms. What may be more of one is that in one of those offices only one fee earner still uses a telephone.

"The handset is just an expensive confusion that wastes space," says Pollick. DLA has adopted Microsoft Lync, and he couldn't imagine working as effectively without it. "As well as saving a pile of money, it has transformed communication. A load of one-line emails are soaked up by instant messaging, people can share their screens on conference calls, and now we are even federating with high-profile clients. Most of my calls are video now."

DLA is also investing in proliferating myriad apps on the firm's mobile platform to facilitate greater remote collaboration – covering unified communications, document management and MI.

With a very different profile (three offices in the UK), Keoghs has gone down the same route. "We have desktop video conferencing from anywhere as part of our mobile strategy, and we are looking at linking with a number of our clients to give them instant access and presence information about where our lawyers are," says Rowe.

"You instinctively know it's the right thing to do when you have lawyers spread over 13 offices, but you can't really measure it," argues Hodkinson at DWF, who will also be tying desktop video into his room-based video conferencing system.

"You may also find one collaborative tool isn't necessarily going to work for all 2,500 people at the firm. Some may work better for different generations."

Davison has no plans to rip out the phone lines at Farrers – but he's certainly clear that the future is one in which lawyers are confined to neither desk nor device. He'll be trialling smartphones and tablets after Christmas – and the idea is that lawyers will be able to access their new e-files from anywhere.

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It seems obvious, then, when asked which systems were most suited to a cloud move, our survey came up with the ubiquitous email management, plus the collaboration, knowledge and HR tools where client data isn't part of the equation. Document management, however, was listed below even client relationship management.

But if the clients will have it, Davison says the security argument is easily answered. "Four people onsite can't possibly do as good a job as a cloud provider with its own dedicated security teams and 24/7 monitoring," he argues. "And it empowers us to concentrate fully on what's really important – delivering the service."

But the final word goes to Hodkinson – who says he's 100% certain law firms will migrate to the cloud for anything you could care to mention within three years.

"I don't want to spend my time looking after plumbing – and I don't want to be a slave to existing providers of IT services. I want to focus on value-added services – process reengineering, product development, levels of automation and integration." ●

A MATURER VIEW

Microsoft's Elliott Ichimura says technology's role in legal should be to enable process maturity, which drives up competitiveness

"There will never be a legal management system that says 'you're an enterprise law firm in a box," says Elliott Ichimura, global service industries director at Microsoft Dynamics, who delivered the keynote presentation at this year's ILTA Europe conference.

"The widely agreed business objectives are to reach a deeper level of insight and more cohesive point of view – but for the foreseeable future I think we'll need to have data warehouse capabilities that help you bring data from many different systems together.

"But firms will need to reduce the number of moving parts in each area of technology, consolidating the number of applications, with different degrees of data granularity and freshness, down to a smaller number that give the same level of insight. The result is fewer integration points, and less need for transformation of data to reach the same level of target granularity."

He adds: "All firms have similar, what I would call, buckets of technology by class – but they also need to identify some long-term vector, which is how they plan to outrun the competition." It is that sense of strategy that should lead to which specific IT projects to prioritise.

True competitive advantage, however, emerges where data insight and strategy intersects with a firm's "process maturity". Earlier this year research company Service Performance Insight (SPI) produced research for Microsoft that identified a significant change in some key metrics as organisations proceeded up a process scale, across several functions, from ad hoc implementation, to increased standardisation, measurement, and finally a focus on continuous improvement. At the level five "black belt" status, processes have been truly institutionalised, and comprehensive measurement and monitoring is undertaken.

While employee attrition rose marginally (from 7.4% to 8.2%) as process thinking grew roots, a firm's bid-to-win ratio increased from 4.05 tenders (out of ten) to 6.88. And the number of projects delivered on time increased significantly, from 73% to 85.8%.

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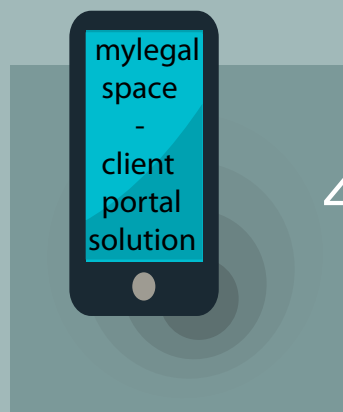
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Systematic approaches

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Briefing Industry Interview

Ready for
action

Mike Walker, chief software architect at Thomson Reuters Elite, talks to Briefing about the consumer forces shaping the technology that law firms will be using tomorrow

From ordering the weekly groceries or a taxi home online to building the dream holiday, today's consumers are increasingly expecting the information that's important to them to be both available and easy to analyse almost as soon as they've decided they need it. Legal businesses will increasingly need to be able to meet similar demands in their own spheres of activity, according to chief software architect at Thomson Reuters Elite, Mike Walker.

"If you take products like Amazon and Uber, they've essentially constructed a new way of buying a magazine or calling a cab," he says. "As models of alternative business structure now develop – and deliver 'Tesco law', as it has been referred to – price, initiative and interactiveness will become key drivers for client choices in legal.

"A conveyancing customer wants an update on their transaction at three in the morning. And a larger law firm needs all international parties on an M&A deal to have 24/7 access, potentially when a firm is closed."

Location, location, location-aware

Firms need to be in a position to offer such service levels, while inspiring confidence that clients' sensitive data is fully secured.

Driving and compounding this challenge, however, is a new generation of user (that is, lawyers and business services people alike), who values transparency and worries much less about the information they share than did partners of old.

"From a compliance perspective, accessibility to information needs to be both more available and more constrained. It's a bit of a catch-22," says Walker. "Whether a client is a homebuyer or an executive director, they're still probably on Facebook and Snapchat – and playing Angry Birds. And they still have certain demands they want to fit around their work and life – and to be able to action something there and then. Law firms have a responsibility to try to adapt their business

model to support that need."

The solution, he says, lies in part in location-aware security – tailoring data protection levels to different domains. Information is automatically delivered up to users differently depending on where they want access – and who else might either see it by mistake or be trying to get illicit access to it. This is a key feature of Thomson Reuters Elite's Workspace platform, launched in June 2014. "A risk officer, for example, wants to ensure that lawyers aren't exposing certain information," Walker explains. "With Workspace you can grant access to certain data if they are on the iPad in the office – for example, budgetary information – but if they are out in the field, at a customer site, they can log in the same way but the view doesn't include information deemed too sensitive."

Weighing cloud in the balance

Although he says it's an overused term, those accessibility and security concerns intersect with others in the legal industry surrounding the cloud.

Those concerns can't really be laid to rest until the landmark case of the US authorities attempting to extricate data from Microsoft in Dublin is settled, says Walker. Microsoft has made the point that if such extra-terratorial powers do indeed exist, its entire cloud computing strategy would be in jeopardy, as well as that of other US-based companies.

"Law firms are starting to embrace the potential of cloud, but they're not fully on board," explains Walker. "A typically accepted application is therefore one that provides both a level of confidence and doesn't involve putting all your eggs in the same basket."

Scalable computing power is one example. "You may need extra horsepower for three days when billing at month end, but you don't need to take on the service cost of hosting and managing security around that," he says.

"With cloud you can spin it up and back down again, even automating it to kick in on reaching a particular

threshold, but you only pay for what you use. Onsite data centres are traditionally set to the busiest time of the month, but sit there quite dormant for the rest of it.

"By scaling and using fewer servers, you also reduce your exposure to attack. You have fewer machines to maintain, patch and update each month."

Removing the need for managing anti-virus and other security updates in-house also cuts the workload of the IT department – freeing up more of their time from operational matters to focus on the more innovative work that constitutes innovative competitiveness.

"Moving my email, for example, to the cloud, means managing those servers is one less challenge for the IT department – not to mention upgrading when the next feature comes out and navigating the issue of compatibility.

"If part of that infrastructure work can be taken away, IT is in a position to devote more time to the innovation that will improve productivity and the client conversation."

Making mobile richer

One example of that added value, he says, is making task management more fit for the new world of mobility. "You can give someone the full desktop experience on their mobile device, but that isn't truly 'mobile first'. People want to action certain things based on information they receive at more times of the day – approve a cheque, or a new business intake request perhaps, while waiting for the kettle to boil. But every time you have to log in again, or move to a different system, that's disruptive.

"A lot of today's mobile applications allow you to consume information, but they don't typically aggregate information from all a business's systems to allow you to take enough practical steps. And it's the user experience that is critical to mobile success."

With Workspace, Elite has taken steps to deliver far more than this – a provision that allows the collection of tasks from separate systems into a single view, but also with the ability to add commands and the

opportunity to complete. "So it's 7am and I pick up my phone – and I see I have a couple of new holiday requests," says Walker. "I can get the detail I need from a particular system, approve it, and it's done."

And with more integrated management information, this enhanced user experience can be tailored to a person's role. "A matter might involve 300 fields of potential information, but a particular lawyer is probably only looking for the 10 or 12 that are pertinent to them, and many may be blank," Walker explains.

> *"A lot of today's mobile applications allow you to consume information, but they don't typically aggregate information from all a business's systems."*
>
> Mike Walker, chief software architect,
> Thomson Reuters Elite

Measure for measure

The trend for legal technology (and all business technology) is taking information from more and more sources, requiring the sum to be at once seamlessly created and tailored to maximise productivity and efficiency.

"We'll be mining information from all sorts of data points (aka 'big data') and those information streams will become more readily available in the workplace," says Walker. "For example, a cloud-based system mines the data available and identifies and learns a lawyer is at his optimum billable best when he's drinking more coffee in the morning than in the afternoon," he laughs. "He slows down in the afternoon – so make better

coffee more widely available in the morning!

"That's a joke, of course, but the point is this is a more connected world. We could measure the impact of temperature on productivity, or correlate health and wellbeing metrics against time off and holiday booking. Utilisation on particular tasks may be higher when people are more fully refreshed by their recent trip. There are so many forms of information that could potentially be collected and turned into true business intelligence.

"Current business intelligence is often really reporting. The future lies in taking information that may seem to have little relevance, and making it relevant by virtue of some kind of connection."

Connecting data to life

To find a really personal version of this 'small can be big' argument around data, Walker returns to the connected world we are all familiar with – tapping away on our smartphones and tablets in bed.

"I spoke to a business that had asked record companies for their iTunes sales data to correlate with Twitter activity of celebrities and playlists at radio stations around North America. They started to calculate things such as a pop star tweeting at 9pm led to sales spiralling 10%. But if he did it earlier – at 7pm – that would be 15%. The conclusion? Tell Justin Bieber to get up earlier! That's a form of data that can add massive value to how all companies shape their staffing to maximise exposure and sales."

Walker's team is now working on applying principles like these to technology in the legal world.

"We need a rhythmic approach to data – continually collecting and distributing it in a way that is simple to

interpret and act on. As new businesses enter and step on the toes of the traditional law firm over the next few years, that is going to be critical for success."

Could the timing of your managing partner's tweets make a significant difference to the yearly results? In a world of such blurred boundaries and rapid change,

"The future lies in taking information that may seem to have little to no relevance, and making it relevant by virtue of some kind of connection."

Mike Walker. chief software architect, Thomson Reuters Elite

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Briefing Industry Interview

Never out of office

Vodafone freed its UK employees from the conventional office – and is now on a mission to help UK law firms do the same, says Frances Quigg

Many law firms have given thought to how they configure office space for maximum productivity. Break-out zones, and sometimes even informal café-style hubs, are now more common – and heads down behind closed doors is firmly out. The reason? Lawyers, focused on their own cases, may need nudges toward the open communication and knowledge sharing that unlocks new opportunities.

But typically conservative, they could often go further – and learn from other industries. Vodafone's contemporary UK HQ in Newbury is known as the 'campus'. The description is telling. Much as a university might say of its students, the company wants to empower employees to work and learn as independently – and therefore effectively – as possible. By facilitating core activities rather than imposing a working 'life', this

has increased overall company performance. And while the campus is a consolidation of over 60 former offices, overall occupancy of the premises has increased from 3,000 to 5,500 – taking in 84 different job functions.

Similarly focused on encouraging collaboration – and of course getting more clients through the doors – it's a journey that should strike several chords with the management at top 100 law firms.

Led by chief executive Jeroen Hoenkamp with zeal, at Vodafone much of what traditional companies automatically associate with the office environment is now out.

"We brought managers out of their offices to sit on the floors with their teams," says Frances Quigg, head of better ways of working. "Nobody here has an office, and nobody has their own desk. Personalisation of desks and work areas usually also means territory and power, and our ethos runs counter to command and control."

Instead, people work where they need to be. That might mean a laptop and link-up at a desk, but equally it might be from one of the campus coffee shops, it might be from home, it might be on the move. "The key issue is trust," says Quigg. "We have sought to dismantle a culture of presenteeism at work and trust our people to work in the way and place that makes most sense. People are not judged by where they are, but by how what they do affects the business."

Some law firms have already embarked on partial hot-desking, both reducing office overheads and incentivising lawyers with their support for flexible working – and enabling work and research on the move. They may have fewer desks at head office than people that could occupy them, work regularly from client premises, and utilise the scalable resources of 'virtual' firms on a project or temporary basis. But few could claim they are a world without hierarchy or division. And a culture of presenteeism can persist.

By contrast, BWoW's open, flexible approach and culture can even prove a key selling point in terms of recruitment and retention, says Quigg.

It seems almost paradoxical that to facilitate this flexible culture a few hard-and-fast rules are required, however. "Everyone must clear any desk they have been using completely every night," Quigg explains. "As well as establishing the principle that desks are a flexible resource, that means piles of paper just aren't possible." Employees have the option of a personal locker if they

want to store items. And coupled with a policy of having far fewer printers around, and simply less space available to store hard copies (those filing cabinets are another cost), Vodafone has been able to reduce paper consumption from 30 million sheets a year to approximately 6.5 million – saving around £3 million a year. "Trying to be more paperless ought to be on the radar of most companies, and legal certainly isn't an exception," says Quigg. But if paperless is a possibility for law firms, there's still a long way to go in terms of culture change.

Briefing's readers will also appreciate another item on Quigg's hit list. "A common area of inefficiency is finding an apparent lack of meeting rooms available, but if you then walk the corridors, you find people haven't turned up," she says. So a system has been put in place meaning any rooms not occupied 15 minutes after a start time are automatically made available again. Organisers must log in on arrival, and screens display immediately whether a room is in use. Vodafone now has an average meeting room occupancy rate of 85% – "unprecedented across any industry", Quigg says. For spontaneous internal meetings there are informal areas to catch up and collaborate, sharing information using tablets or other devices.

If this all sounds a touch chaotic – well, Vodafone's in-house lawyers were a bit worried too, she admits. But there are library rooms where full quiet is imposed, backed up by background noise-reduction to assist concentration on business-critical tasks.

"When we started to show clients around the campus, they asked if we could show them how to implement some of the things we've done," says Quigg. "My team spends most of their working time with customers, helping them to do just that."

Legal is a sector navigating as much change and cost pressure as any – and historically has a highly siloed structure. Many firms have experimented with new office layouts, rethought management of their resources and invested in flexible and mobile working tools, but that doesn't necessarily equal the culture change that really releases the shackles.

Find out more about

Vodafone
www.vodafone.co.uk/bwow

Industry Analysis

Lease and thank you

Law firms could improve their cashflow and save money by leasing their IT infrastructure, argues Mark Orchard, tax specialist at Econocom

In spite of increasing involvement of procurement professionals in law firms' purchasing decisions, the function can still be quite decentralised compared to businesses of comparable size. This can lead to a disproportionately large number of potential suppliers and – sometimes – a lack of consistency when following policies and procedures that are designed to extract maximum value for money.

Partners who have long held their positions have their own idiosyncratic ideas about what is behind the level of service their own clients have come to expect – and may not entertain any change in policy at all for fear it places the supplier relationships at risk.

Inevitably, therefore, such a culture may also mean paying over the odds for some goods and services. And at the same time, securing sufficient capital expenditure for a large project can involve lengthy consultation with a wide range of stakeholders holding divergent views,

potentially pushing it into paralysis.

One possibility law firms may not have explored as a result of such forces at play is the leasing of the IT infrastructure rather than purchasing it outright. Partners may instinctively see leasing as something of an unusual choice if cashflow is not a problem – in spite of the fact the tax advantages mean it makes very good financial sense.

The treasury departments of large corporates, by contrast, will always assess financing decisions on such a post-tax basis.

Taking shelter

Any lease lasting less than around five years is a much more tax efficient purchasing choice because firms can shelter all the tax relief. With a three-year lease, for

example, you will recover 100% of the tax relief over that period, because the rentals are fully tax deductible. By contrast, purchasing the asset means the protracted process of claiming capital allowances may take over seven years to recover just 90% of the shelter. The savings are usually greater than any interest element charged in the lease. Firms are regularly upgrading their technology estate, and all this investment can take advantage of this cost-effective model.

Moreover, if it's hardware that is being financed firms can take advantage of any residual value the leasing company has built in – which can be as high as 20%. On a three-year refresh cycle, this means firms would only repay 80% of the cost of the asset, but leave the issue of future obsolescence – and indeed disposal – to the provider.

If a company is planning a software project it will not have the residual advantage – but leasing still delivers attractive tax advantages and cashflow management. With a project rollout taking a year or two, the costs can be warehoused so the business only begins paying for it once the system has gone live and is delivering. At a time when you may also be paying for the support of a legacy system that is already in place during such a transition period, it is a strategy that releases cash to be spent on other facets of the business.

Partner positive

At a time when clients are exerting more pressure than ever on law firms to justify their pricing, cost effectiveness ought to be at the forefront of boards' and partners' minds in all regards. As 45% taxpayers, partners need to realise that the tax savings from leasing are even more compelling for them than for the major corporates that benefit from these savings already.

In truth, leasing also represents a fairer distribution of the acquisition cost across the partnership, as new partners will be joining, and others moving on, while the technology is delivering its return on investment. Why should the partners present at the time of

purchase be forced to finance the whole thing? In any event, **Briefing** magazine's recent research on trends in legal technology found more than three-quarters (79%) of managers thought the partnership structure seriously restrained investment in IT. Firms currently spend an average of just 4.1% of their revenue on systems and infrastructure. By leasing, however, the firm, can transform the purchase from capital to operating

> *"Any lease lasting less than around five years is a much more tax efficient purchasing choice because firms can shelter all the tax relief."*

Mark Orchard, tax specialist, Econocom

expenditure – which should be more palatable.

Partners may just not have given due thought to the funding alternatives. If they had, they would know leasing isn't merely a method of borrowing money when it is in short supply. It can also be a vehicle for achieving savings through sophisticated financial management. The advantages are threefold. The firm receives the asset they need to deliver the next stage of their strategy, they receive the tax advantage as they pay for it in convenient instalments, and in the meantime they also get to hold on to their cash.

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Case Study

Charge at speed

Higgs & Sons turned to Advanced Legal's Laserform Hub to reduce the risk of failing to register legal charges on loans at Companies House

Sometimes you need fresh eyes and the verve of youth to create change. In business, you also need a receptive system. Fortunately, Higgs & Sons has both – which has helped it change the process for sending information to government agencies – saving money, time and stress.

The government's 'digital by default' strategy was created to drive more businesses to communicate with it using internet technologies. For law firms, this means digital submissions of forms to agencies and departments, such as Companies House. But the goal requires people to realise how such process improvement can be useful. Usually this needs someone new to a firm to ask: 'Why are we doing this this way?'

In the aftermath of the global financial crisis, corporate lending was quiet, but that's now beginning to change. And it means a concomitant increase in the volume of data to be transferred to government agencies, notoriously slowing turnaround times.

If a company buys a factory and secures a £2m loan, the legal charge securing that borrowing needs to be registered at Companies House, explains Higgs IT director Stephen Brown. But welcome growth in lending means this process is being repeated more times a day, so the administration burden grows with it.

"One of our associates, Richard Saxton, came to me and explained that one of the most stressful tasks for a lawyer in his field is the registration of legal charges. We're always interested in innovating, so that our processes can be improved, and he'd thought of a way to make this task much easier."

The registration of legal charges must be done within 21 days of the date of creation of the charge. Otherwise a court order must be obtained, which is costly, time consuming and "quite frankly, embarrassing", says Brown. It's a frequent area of negligence claims against lawyers. The 21-day time limit includes weekends, holidays and inevitable postal delays, and Companies House only guarantees to review the submission within eight to 10 days. But regular backlogs mean this doesn't always happen. The application can also be deemed invalid after submission, so even senior lawyers sit on tenterhooks waiting for a green light. "If it isn't done at all, that's deemed negligence. It's a real and regular risk," says Brown. None of this makes for an efficient workflow.

"Richard was interested in how we could improve the process and help lawyers do their job better. He'd come across the new Laserform Hub from Advanced Legal, and told me it would be no work at my end to implement."

He turned out to be right. "There's no software to install, it's web access to a portal, and there's no confidentiality risk. Our lawyers are used to using and uploading Laserform forms in other work areas, as it's been part of our desktop client for seven years. There really was no requirement from IT."

Tighter turnaround

The objectives were simple but clear, says Brown: reducing stress, risk and error, and so completing the process faster. Reduced postage costs and application fees were further benefits. As more government agencies start to work digitally, the hub will simplify processes inside firms by providing access to forms and government portals from one place and with one interface.

Higgs & Sons is a long-standing Laserform customer, so the firm is used to form automation. "We saw the new technology and started to think how it might fit further into our business," says Brown. But Saxton (having joined recently from a global firm) was surprised how quickly Higgs & Sons could move as a business once the decision had been made. "At a bigger firm, there are layers of people that you need to speak to, to get permission," explains Brown. "It would be hard to get things done quickly, even though this is a quick, low-cost initiative with an existing supplier."

Smaller legal businesses (Higgs is number 143 in the 2014 top 200) can teach bigger firms about agility. "Here we allow real autonomy but still support the project. We're agile, so we can just change and adapt if we see value," he says. The Laserform Hub has brought immediate value in terms of quality and peace of mind, reducing risk to the firm and clients and saving fee earner time, making for happier and healthier lawyers. Most validation is done as you complete the forms, and Companies House guarantees to review the form in two days.

"The whole process is often complete within 21 hours," says Brown. "Even if you needed five tries to get it right, it would still be quicker." And when you submit digitally, there's a discount which more than covers any added Laserform costs, he says. Fee earner adoption has been almost total.

An email telling everyone about the new process, and why the firm was doing it, was sent round and Saxton offered to sit with people and take them through it. Dreading a deluge of requests, in the end he got only one – and halfway through his colleague realised just how straightforward it was.

"Around 90% of our fee earners who work in secured lending are using it actively now," says Brown. "Some lawyers can be technophobes, but this is so intuitive. You can validate and check forms online before you submit, and unlike the government portals, save progress and come back to the submission at a later time. It's appealing and reassuring to know you'll hear back and get that certificate of registration so quickly. With a hard copy, you had to complete it with no mistakes, then take a photocopy, file it, scan as a PDF, and so on."

Some elements are even pre-populated because Higgs uses Laserform across the business. A job that took 40 minutes, with lingering doubt, now takes 10 minutes, with peace of mind. Now the firm will move on to using the built-in analytics to look at the data produced around submissions – fields that cause rejection, completion times, and whether there are training needs for example.

The firm is striving to be agile, because that's where it thinks competitiveness lies. "The new challenge for law firms is to be more responsive," says Brown. Part of the solution lies in getting people to trust technology. "In the past, we have promised the earth and delivered soil," he says. "We need to provide more value evidence for lawyers – and lawyers have to take on board that IT is part of their world and embrace technology."

Fundamentally, all this change is driven by the client, he says. "Their demands always come down to improving productivity, efficiency or value. All client demands push on one of these."

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Case Study

Gaining
access

Michelmores chose Linetime's Liberate to get a better handle on cost and create new channels for increased client engagement, says Simon Clarke

Michelmores is a firm that reflects the green shoots in the legal market, and it has a "strategy of ambition" that's intertwined with IT.

"We're investing a lot to enable us to meet the needs of a buoyant and changing market," explains IT director Simon Clarke. "We're seeing growth in international markets, and technology plays a key role in helping us meet changing demands."

Michelmores recently focused on profitability of its new homes sales, for which the business needed "robust, competitive software", says Clarke. "We needed to deliver plot sales with more profitability in a competitive market and help to engage clients better. We chose Linetime's Liberate because it integrated with the firm's existing document management system, Worksite, which means more time saved and better

leverage of our Worksite investment."

A more integrated case tool is now a "must-have", says Clarke, because it drives work production costs down and profitability up. Perhaps more importantly, it also improves customer engagement. "We'll also be looking at gross profit margins for work, and it will absolutely help there, too. Before we couldn't analyse costs, but now we can look at the matter from cradle to grave, and see where we can save," he says.

"By componentising a process, we can ensure the right person is doing the right work at the right time. A solicitor does one part, and a paralegal another. Skills are allocated efficiently. Fundamentally, we have control of the work and costs of the individual components – we couldn't do that before."

Keeping the firm's fees competitive is very

important, but it's only one reason for better case management. "Software certainly enables us to reach a certain price point – without it, it's just not possible," Clarke says. But clients also want visibility and communication on their own terms. These issues are now a big a part of the decision-making process, starting right at the beginning of the client relationship.

"Clients ask 'How does this law firm engage? What and how do they communicate?' It's very important, from tender to ongoing engagement. Clients want to feel that they are communicating and influencing the process. In essence, we're helping them with their own internal reporting requirements, because we now create bespoke reports. That's been a big challenge in the past, and now we can meet specific client needs."

Key to the firm's successes is that the business owns the workflow. Creating and managing them isn't an IT function – unless something is particularly tricky or unusual. "We now have two people in the new homes team skilled in workflows, which gives us resilience – and of course they can ask IT if needed," says Clarke.

If IT does the work, he says, there's "a danger 'what IT thinks' is created".

"Using a system like Liberate, which gives workflow management power to the users, means you don't have to be an IT expert. It's a much better outcome if the business understands what is possible, and then designs the process around that goal."

Customer choice

Michelmores recently started using Liberate's B2C portal and now plans to leverage the business intelligence features available.

"It's about communicating and reporting. I think it will be a useful part of client experience – building interactions that happen when clients choose," Clarke says.

Clients want that to happen, and law firms have no choice but to comply. "It was a slow-burn change, but as the recession falls away clients are investing again,

and this time they are asking for law firms to react differently too," he says.

For example, they are demanding availability when they want, not when lawyers choose. But Clarke says this doesn't just mean giving lawyers more mobile devices. "A laptop or mobile isn't mobility. Giving a client a real option to contact a lawyer in the evenings or on holiday – that's mobility. Technology is the enabler, but cultural change needs to happen – the objective related to the technology.

*"Giving a client a real option to contact a lawyer in the evenings or on holiday – that's mobility."*

Simon Clarke, IT director, Michelmores

"When you're a consumer, devices and availability are endless. Then you move into a corporate scenario and everything is suddenly restrictive."

The legal market is experiencing a dramatic viewpoint change, Clarke says. "In legal, technology hasn't been seen as the enabler – but the business is now asking IT for help. I think this is a change that's gaining momentum. At last we're no longer delivering technology solutions – we're delivering a business solution with technology."

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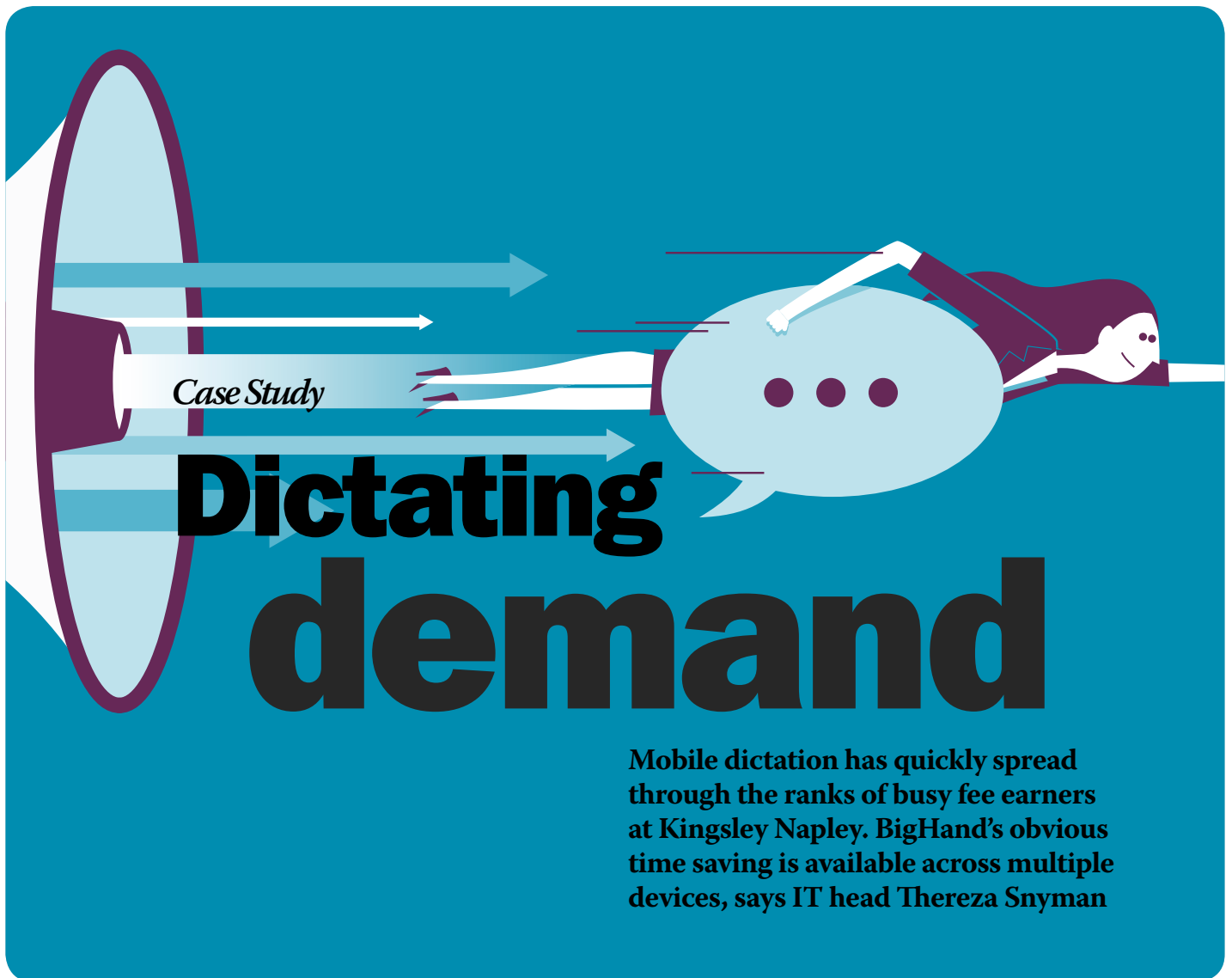
Dictating
demand

Mobile dictation has quickly spread through the ranks of busy fee earners at Kingsley Napley. BigHand's obvious time saving is available across multiple devices, says IT head Thereza Snyman

Responsiveness has become essential to every forward-thinking legal business – being proactive in meeting higher client expectations can translate into stronger relationships. A key client need is to see more of their legal advisers, wherever the client might be – so mobility is fast becoming a must-have.

Buyers of legal services increasingly want higher service levels, and are happier to stray from even well-established relationships. But they want service on their terms. Firms must therefore think strategically about what their clients really want, and act ahead of the curve, to deliver service levels and methods to match. 'Anytime, anywhere' mobility is now considered a given to remain competitive by many top firms, so legal IT leaders need to leverage the best tools to make that level of service a reality.

Kingsley Napley's head of IT, Thereza Snyman, says her firm has become increasingly focused on building its mobile capabilities. "Our teams travel up and down

the country. They need the capability to interview witnesses, for example, and to continue working wherever they are. That applies to any lawyer, who is not necessarily at home or in the office, [but has] access to our usual tools, such as Citrix."

With growing demand for remote working from fee earners, and increasing client expectation of a more mobile legal counsel, firms need to find the right technology to keep up with industry trends that enable them to be as productive as possible. "There has been a far greater demand inside the firm for mobile working, using better laptops and phones. It is increasing efficiency and using what otherwise would be dead time," says Snyman.

A vital element in Kingsley Napley's mobile journey is BigHand's digital dictation solution, which the firm has been using since early 2012. It's having a significant impact on efficiency and capability at the firm, says Snyman. "Our people can be sitting with a witness,

dictate the statement, get it typed up immediately and get their dictations back for review while they're still in the room."

Bringing output forward in this way can make a big difference, she says – which is why mobile digital dictation usage has spread to all departments. "We don't have a policy of targeting specific departments. They know it's available and they request it if they need it – that way use grows organically by word of mouth. We have fee earners in the criminal, family, employment, immigration, regulatory, and property teams who use mobile dictation – it's used across the board." Just over two years after the original implementation, around half of all fee earners have now requested access to BigHand's mobile dictation app.

Device diversity

Although usage varies with the fee earner, workload and other factors, there have been instances where lawyers are using BigHand's mobile software for up to 50% of their digital dictations over the course of a month. Kingsley Napley has facilitated that level of usage by implementing the service on iPhones as well as Blackberry to generate more user uptake.

To enable this strategy, the firm needs mobile device management, which allows tighter control over what hardware and software the firm supports, as well as improved security, says Snyman. Limiting devices to Blackberry and iPhones, plus Windows phones in a recently started trial, means the firm has consistency over which tech it can support effectively, while still providing users with an ample range to choose from. Plus, it cuts down on the types of operating systems and devices the firm has to support. But whichever platform a fee earner is using, it's supported by BigHand.

Snyman's strategic vision for IT is one of intuitive technology wherever possible, removing obstacles for a smoother client experience – something for which mobile BigHand capability is vital. "Tools like digital dictation have to be available when people need it. In the run-up to a hearing, for example, the litigation teams can get extremely busy dictating witness statements, attendance notes, letters and emails – and mobile dictation has a significant impact on turnaround times."

Empowering your people with the right tools hands more control to the user, says Snyman. "Using mobile digital dictation, our fee earners can manage workloads better, even when they are not in the office or have no access to an internet connection. It has become part of the normal working toolkit available to all of our users, and is easy to set up and start work on straight away."

Dictation best practice has also become part of induction training at Kingsley Napley. Fee earners become far more aware of issues around security (such as not dictating in public places, or where they can otherwise be overheard) and the importance of sound quality (less rustling of papers and swallowing of words, for example).

But it's not always easy to retrain more experienced fee earners into better ways of dictating. "We have therefore decided to capture them early and embed dictation 'good practice' as early as possible," says Snyman. Inserting dictation training into learning and development acknowledges it's a core skill that needs to be learned, and that isn't something every firm does. Snyman's strategy is to build intuitive and responsive IT, not only for the benefit of the younger generation entering the business, who may be more demanding of the technology they use, but also to facilitate adoption by an older generation. The easier and more intuitive it is to use, she says, the better the adoption rate.

Also on her roadmap is integration of the firm's digital dictation tools with its document management system. "The aim is to improve efficiency, by automating more of the process, for example, by pulling information already held on the DMS into the correct template and automatically profiling the document to the correct client/matter folder." She explains this creates significant process improvement.

"It's all about focusing on improved efficiency and service. The question regarding many of the tools already available is not 'why should you do it', it's 'why haven't you already done so?'"

In terms of going mobile, it's a question most law firms should certainly be asking themselves.

Learn more about
BigHand
www.bighand.com

The pace of technological change combined with the scars of the financial crisis has led many industries to consider how they need to change their business models and processes for the better. For most law firms, however – long fiercely traditional, heavily regulated and now facing the prospect of fresh and unfamiliar competition – the challenge is here and now.

"Client GCs and procurement teams are feeling the pressure within their own organisations, and that is driving a different dialogue, says Paul Cooke, director of legal and professional services at Williams Lea. "The big challenge for law firms is meeting the demand for more demonstrable value and higher service levels, across multiple offices or jurisdictions, while also maintaining profitability."

A growing number of firms are turning the challenge to their advantage, he explains – realigning their resourcing to reengineered processes. This both delivers on the internal corporate drive to improve fee earner chargeability and demonstrates a keen attention to the value equation that will play well with clients.

Information flows

A key aspect of process reengineering is recognition, and possible adaptation, of the data lifecycle, says Cooke. Firms need to evolve how information is captured, transferred over the course of a matter, and then potentially repurposed for further uses – whilst also thinking about the longer term cost of retaining data for regulatory purposes.

"Creating a framework to capture data digitally at the start of a matter enables that data to be used more frequently and in a greater variety of ways," he explains.

"Data is transformed from something you hold in a cabinet, or are obliged to store in a warehouse, into a critical asset and component of business strategy."

With the increased demand for agile working, whether that's at home, or on the move, that data should also be readily accessible, in a format that is easy for immediate reference. "Lawyers will want to be able to review, amend and approve matters at different stages and on different media," Cooke says.

But recognising the importance of their digital document strategy, firms are at a different stage of maturity when it comes to rationalising resourcing decisions.

"There's value in optimising your management resource and really concentrating on the core product – and that can be easier without the distraction of some non-core capabilities."

"Outsourcing some back-office functions, for example, will enable a firm to drive efficiencies and outsource financial risk, not just process," Cooke explains.

Firms are now exploring a growing range of options in this regard. They range from more traditional onsite managed services to shared service models, both onshore and offshore.

"Human interaction is always onsite, but the most suitable location to perform the activity is dictated by work type, skills base and cost," says Cooke.

Williams Lea, for example, provides services internationally to professional and financial services firms, as well as law firms in the UK, via a shared services principle, including an increasing demand for offshore capability, on everything from administrative support and wider document management review to sales development support and brand building. In the case of the former, a firm's own secretaries will be able to use time previously spent on more mundane tasks on activities and communications to create added value to the lawyer.

Plus the option of a pay-as-you-go model that many clients may themselves embrace in other aspects of their business will both mitigate financial risk and demonstrate ability to deliver client value at the right price.

Cooke says the market is seeing more demanding requests from clients within tender documents, and as part of the selection criteria, to demonstrate alternative pricing arrangements.

"Clients now expect to see firms offering tangible examples of how they can be more innovative around both price and process."

Find out more about
Williams Lea
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Data
delivery

**Managing data digitally and shared resource models
will enable firms to meet changing client needs, says
Williams Lea's Paul Cooke**

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