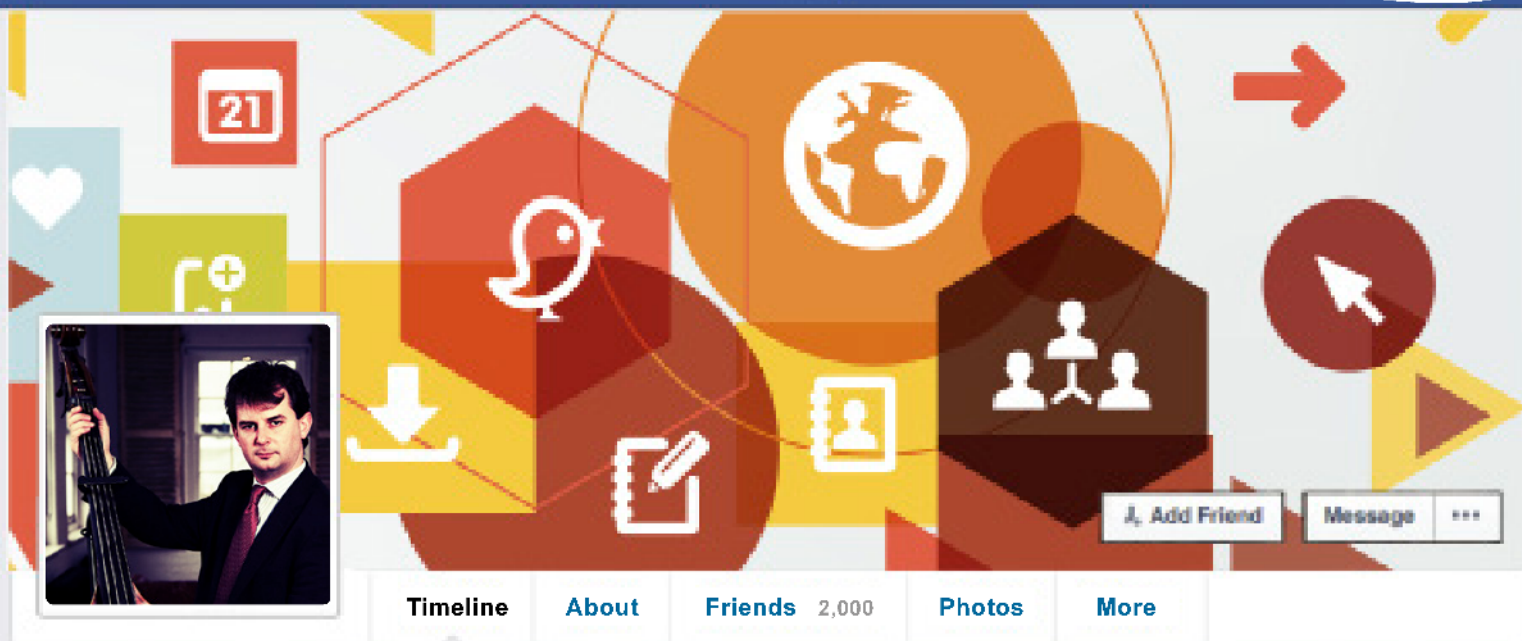


# Briefing

Is legal actually a content business?

MAY 2015



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## What do law firms and media have in common?

They both create content that has huge marketing value. And they don't even need cat videos ...

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6 May 2015



THE BRIEFING INTERVIEW

## Profile pitcher

Nick Thody, head of client knowledge at Osborne Clarke, on how law firms can make themselves more content-aware and what we do

*"It's no good popping content up on your blog and stumbles across it. It needs packaging and a story."*

**Extra! Extra!**  
Supplement:  
Turning  
paper  
into  
process  
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153,920.53

Total  
Fees  
Costs

Billed 95%  
Target 94%

46%

90%

Aged Accounts

Aged Unbilled

HOURLY BUDGET						REMAINING BUDGET	
Q1	Q2	Q3	Q4	Q1	Q2	Hours	Amount
216.65	216.65	216.65	216.65	216.65	216.65	216.65	\$108,325
66.65	66.65	66.65	66.65	66.65	66.65	66.65	\$10,660
283.30	283.30	283.30	283.30	283.30	283.30	283.30	\$134,335
66.65	66.65	66.65	66.65	66.65	66.65	66.65	\$12,664
66.65	66.65	66.65	66.65	66.65	66.65	66.65	\$12,664
349.95	349.95	349.95	349.95	349.95	349.95	349.95	\$147,649

Hourly Budget

Hours	Amount
216.65	\$108,325
66.65	\$10,660
283.30	\$134,335
66.65	\$12,664
66.65	\$12,664
349.95	\$147,649

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SUPPLEMENT: TURNING PAPER INTO PROCESS

MAY 2015

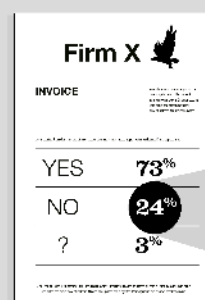
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Results and analysis from our research into how far top 100 law firms have got down the path to paper-light and fully digital

6. Do you have a system in place today to be able to accurately recover client-related costs for faxing, copying, or printing and scanning?



Eq. if n  
plans to

63%

### The digital difference

Expert insight into the techniques and technology for creating a digital-first law firm culture



# Perfectly content?



## Letter from the editor

**Law firms have information coming out of their ears. And as we iPad wielders and confessed smartphone addicts all know, that's not necessarily a good thing. The questions firms need to ask: Are they prioritising the right information in their processes? And is it being managed to make the business as profitable as it can possibly be?**

Internally, case and matter data needs collecting, collating, and perhaps a splash of colouring, to forge a process of continuous improvement for pursuing, winning, scoping, costing, allocating and pricing work. But just as much of a challenge is how firms turn their legal knowledge into the sort of captivating copy that succeeds in hooking the next big client. Our main interview this edition is with **Nick Thody, head of client knowledge at Osborne Clarke**, who is leading the firm's content strategy to that effect.

Our feature asks business leaders from **Linklaters, DLA Piper, Herbert Smith Freehills, DWE, Irwin Mitchell, Taylor Wessing** and **TLT** how they are using both words and the wonders of technology to get genuinely closer to clients.

And finally, our supplier community gives us some excellent insight into how IT and process can combine to make a safer, more efficient information business. We hope, as always, it's a really good read – and just on the right side of information overload!

**Richard Brent, editor, Briefing**  
richardb@lsn.co.uk

## Interview: Nick Thody, Osborne Clarke



Head of client knowledge Nick Thody is the join between Osborne Clarke's knowledge management and BD team to keep the right content coming

page 06

## Feature: Well, what do you know?



From social media and news feeds to sector focus and building communities by extranet, **Briefing** hears how firms are finding a host of new ways to take their knowledge to a client audience

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All interview photography this issue: Jonathan Goldberg  
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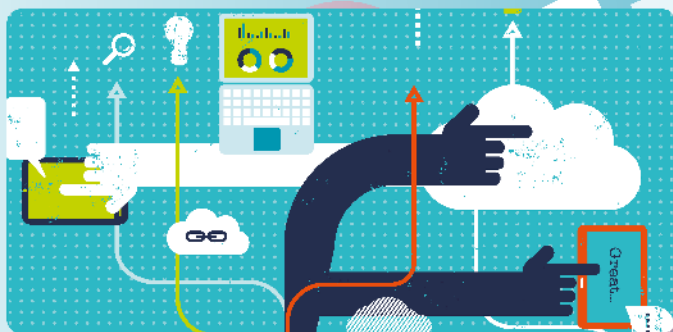
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## *The Briefing Interview*

# Media wisdom

*Law firms need to take a leaf or two out of the pages of the media world when it comes to transforming complex knowledge into content marketing for a new generation of consumers, says Nick Thody, head of client knowledge at Osborne Clarke*

*Words: Richard Brent*

*Photography: Jonathan Goldberg*


**Everyone's a journalist now, we often hear. The power of 140 characters can bring down governments or create overnight celebrities in an instant – and anyone with semi-serious aspirations to the latter will likely have a carefully planned Twitter feed at the very least. Probably accessed via their selfie-stacked website.**

Lawyers trade on the power of their words too. They gather, weigh and carefully digest analysis and opinion, and create value for their customers by combining historic knowledge and argument. They create 'content' all the time. But do they leverage it like publishing and marketing, reshaping that content in

shifting communication streams to shift product in an always-on age of shorter attention spans and appetite for instant gratification? Can law firms learn from the way things work in media and apply it to their own business models under no less pressure from the forces of invigorated competition and change?

### **Words of wisdom?**

At Osborne Clarke that is a core part of the job for (relatively) new head of client knowledge Nick Thody. His is a role that brings together a combination of

A close-up portrait of Nick Thody, a middle-aged man with short, graying hair, wearing a dark blue suit, a light blue checkered shirt, and a red tie with a white rabbit pattern. He is looking slightly to the right with a faint smile. The background is a textured, light gray wall.

*“The problem can be that legal updates are often written in line with the typical internal organisation of firms – the practice area – which is itself based on the way lawyers were trained for many years.”*

Nick Thody, head of client knowledge,  
Osborne Carke



client-facing lawyers, training and know-how lawyers (TKLs, equivalent to PSLs at Osborne Clarke) and central business development. Although a TKL himself for many years, most recently heading up the corporate and commercial knowledge team, 12 months ago he moved over to sales and marketing.

“Around three years ago it really came into focus for us just how many clients are looking to their firms for value-added services. Whether that’s training, seminars or publications, the more we thought about it, the more it seemed to make sense to have someone straddling those three worlds – thinking about campaigning and how we are marketing ourselves to key clients, but also keeping in very granular touch with what’s happening in terms of legal and regulatory developments in our practice areas.

“It’s good to have a lawyer embedded in the business development team to feed back to other lawyers about what’s happening there – and also to give sales and marketing regular input about what we should be saying to the market and clients about legal and sector issues.” They can be different worlds, he says. You could almost say there’s a translation element to the role.

One of the key areas where the overlap is felt is the creation of regular pieces for OC’s Connected Insights brand – a hub for news, blogs and others guides that can be quickly filtered for relevance by clients – or anyone else – either by location or by sector, on the firm’s website.

“There’s an element of coordinating activities for clients in my role, but it’s also about leading people on the production of our insights,” Thody says. “For example, I might well question the value of a lawyer in one practice group writing something on a particular subject if it isn’t really all that relevant to a client’s business, or to the sector generally.

“Then there’s continually evaluating what all forms of content read, feel and look like – which is what our brand team focuses on – and also managing how we’ll distribute what’s written, rather than just pressing send to an entire database.”

Fundamental to the firm’s sector focus, he says, is to ensure products reflect priorities of, and conversations with, clients. “We want to know what’s on clients’ minds, and use that to shape what we create. It’s not just about the client listening to the law firm’s words of wisdom on a topic. We seek to understand clients’

strategic priorities and how knowledge can be usefully delivered to make a difference.”

Quite often lawyers may need to take a step back here, he explains – the reason it helps to have someone who is both an experienced lawyer and thinking from a communications perspective. “The problem can be that legal updates are often written in line with the typical internal organisation of firms – the practice area – which is itself based on the way lawyers were trained for many years.”

Patterns in thinking and communication become ingrained. The long professional training informs how a firm’s lawyers write anything – and so years down the line an intervention may be needed to introduce more flexible, arguably more commercial, habits when producing what is, at base, marketing collateral.

The same applies to choice of subject matter. “For example, the comfort zone is to write about the legal topic in which you’re a specialist, but that isn’t always strictly what clients want to read about. In-house lawyers will be interested in black letter law developments, but many of them – and businesspeople generally – really want to understand how that law relates to their particular business context.

“The firm needs to speak to current conditions in the client’s market. At the very least that requires an understanding of the key players in a sector – and ideally to be familiar with the issues in the sectors in which Osborne Clarke operates.”

## Conversation points

Engaging the audience in regular conversation, rather than regularly lecturing on topics, is an idea that’s definitely in line with how other content-creating businesses are trying to build more strategic, longer-term relationships with readers.

And Thody’s starting point down this path has been the designing and spreading of a different style among the lawyers who create content on their specialist area. Content needs to speak more immediately, pace get snappier, with clearly signposted calls to further action based on the potential problem or development any update addresses. This is, really, marketing basics.

“We all know what we enjoy reading, whether that’s a particular columnist or a dose of BuzzFeed,” he says.

“It’s about being fairly informal, with shorter paragraphs and a clear, journalistic style. The risk is that some lawyers will retire to their desks and resume writing like a 19th century textbook. Obviously there’s a need to be professional and accurate – but accessibility and accuracy aren’t incompatible.”

Thody says the firm is working towards a more structured process for generating marketing product – identifying topics, drafting, rewriting, checking and filing regular content to be pushed out. But he freely admits that this can rub up against some tropes of the oft-siloed, billable hour-based law firm.

“The reality is that some lawyers can be incredibly protective of whatever’s attached to their name – and often think only they are equipped to write on a particular subject. There’s also a constant tension between timeliness and quality of content. If a particular government consultation comes out and you write about it two weeks later, it’ll never see the light of search engine day.”

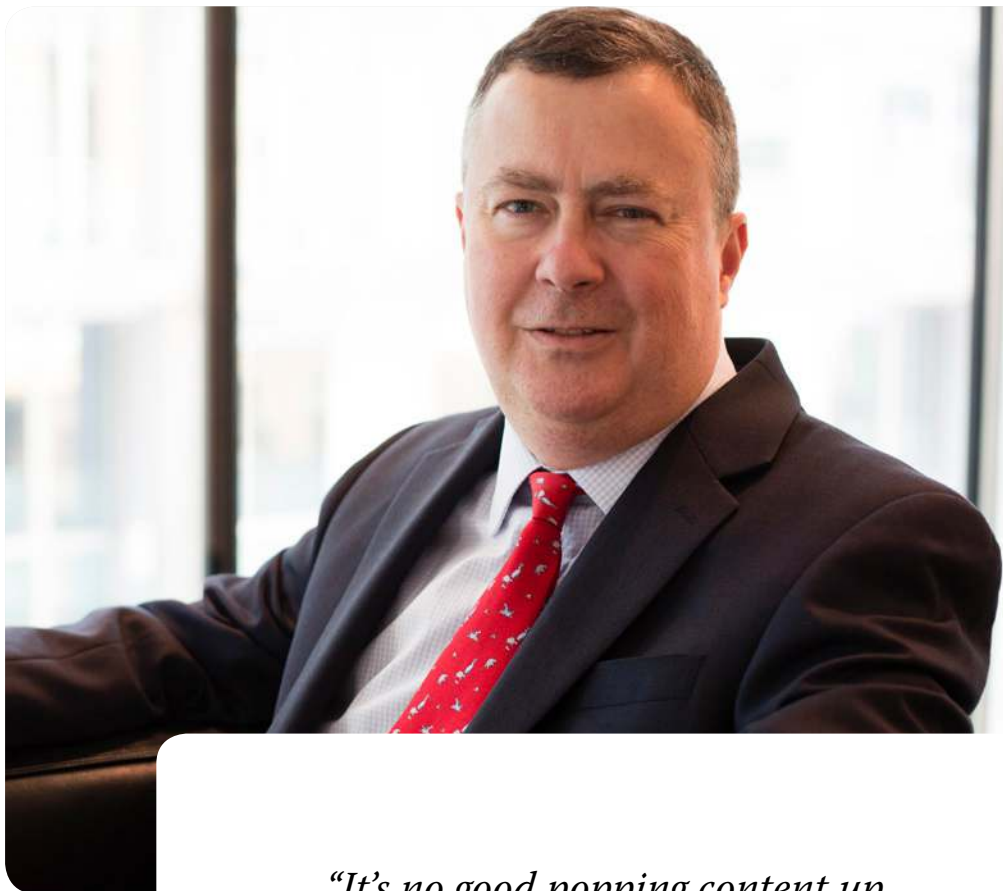
Indeed, he says that writing for the web first, where style, keywords and structure can be critical to a piece’s exposure and success, is a particularly new craft for the bookish lawyer – thus the benefit of his human bridge with business development. “There’s much greater pressure on us to get things out at short notice while maintaining the same high quality across the board.

“Plus, this is time that’s not spent doing chargeable work. You have to make sure you’re always using time effectively. So it’s no good popping content up on your blog and hoping someone stumbles across it. It needs packaging and distributing properly.”

OC is currently focusing resource on its databases

of contacts, he says. “You need to avoid spamming your clients – and mailings need to be appropriately targeted. We may decide to send a bulletin to our employment law contacts, but it might only be relevant to digital business clients. So cutting our database that way would result in an email to perhaps 50 people, but they’re people who may be more likely to pick up the phone as a result.”

Osborne Clarke is also one law firm that has invested



*“It’s no good popping content up on your blog and hoping someone stumbles across it. It needs packaging and distributing properly.”*

in the mobile-friendliness of its content, as much more gets served up via smaller screens. That’s because Google embarked on a new phase of ranking search results more rigorously based on mobile optimisation





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efforts this April – such as reducing the need to zoom and scroll, placing links more carefully to cater for fumbling fingers, and avoiding uncommon software. It affects searches in all languages – and 21 April, when the switch occurred, was named ‘mobilegeddon’ by the tech world, such was the impact businesses behind the curve could see.

But again, for law firms as much as any business, Thody stresses it’s all leading to improving that two-way conversation and engagement with the client.

“If you’re not doing everything with that goal in mind, I’d probably be querying why you’re doing it at all, he says.

## Challenging characters

With this in mind, firms would surely do well to assess which lawyers in the firm are keen on writing less formally in the first place. On the one hand, it’s just common sense for any business to harness people’s enthusiasm for particular tasks. It creates engagement. And perhaps the skill could even be part built into development, progression and reward structures.

A more proactive approach to changing how lawyers write is doubly important because data suggests lawyers tend to be backwards in coming forwards to sell their firms’ services in writing. Content marketing agency Passle has found the average lawyer at a top 200 law firm last year produced just 0.51 knowledge pieces (defined as non-news published insights). This is far short – the company would of course say – of their potential, and it’s notable that smaller firms were more prolific and experimental with their content. Eight of the 10 most active in this form of marketing fell outside the UK top 50.

“Most firms will have some form of objective for lawyers to create client knowledge product,” Thody says. “But sometimes you do have to accept that some people simply aren’t interested. They’ve built up their practice in a different way, or they’re under different time pressures. In my position you’re ultimately behind the client as a priority – and that’s quite right.” Thody has a roster of reliable internal authors who can be called on, he says, but clearly there’s room for this process to be more structured.

But if lawyers are uncomfortable turning their

thoughts into punchier, shorter paragraphs, chances are they’ll be plain terrified at the prospect of condensing into 140 characters. Osborne Clarke ranked in the top three tweeting UK firms in a recent study of social media effectiveness in legal (iCom, March 2015) – but the Passle research, which included consideration of tweets and their traction per lawyer, found the entire top 200 had fewer than 360,000 followers between them. It noted, with a raised eyebrow, that this contrasted with the one-year-old nephew of a single member of recently depleted One Direction (on a modest 500,000).

Even if you accept that social media’s purpose is to drive lively engagement with a fast-moving audience rather than offering plain vanilla legal speak, it’s probably unsurprising to witness many lawyers choosing to give it a wide berth. The stories of tweets that haven’t quite been thought through – with serious repercussion – are legion.

“If needed, I’ll help the lawyer writing a client update to think about the distribution channel,” says Thody. “Will this just be a targeted email, or is it something we’re going to particularly push on social media such as Twitter or LinkedIn? Being on top of appropriate distribution formats is important now. I think we’re particularly fortunate to have a lot of digital expertise here – but we’ve also deliberately built that up within the sales and marketing team.”

He admits, though, that protection of brand and reputation is an issue. “We have dozens of social media accounts, and the risk of that is something we’re very conscious of. Somebody deciding to tweet something they thought quite amusing at 9pm, even something inoffensive, might not be brilliant news for the firm the next morning.”

So do you centralise it fully within communications, and say only a small handful of people can use that medium? “Probably not,” he says.

“The jury may still be out in legal, but we don’t want to dissuade people from using their profile, having conversations and building networks. And the fact I speak to our head of comms everyday in my role produces a more joined-up approach than might otherwise be the case.”

He works alongside the guardians of the OC brand, regularly discussing the details of “fit, angle and when it’s appropriate to publish something”.



## The pricing's right

Thody says there's an element of being similarly measured as to what knowledge products can be realistically delivered – especially in the case of training aspects of OC's value-added services. "We want to support our clients as much as possible, that goes without saying, but training is a particularly resource-heavy exercise and you have to be rigorous in managing what can realistically be done. Every hour of training delivered has around five hours of preparation time in the background.

"We don't say we'll never deliver training in an area, but you do need to be clear about the cost of the investment."

Like any other content-heavy business, firms clearly need to think strategically about what they are offering for free, and be clear about the return they can expect in profitable engagement.

Subscription barriers aren't overly OC's style, Thody says, but it does operate one site where registration's required. "It was probably our first foray into digital publishing – a very focused microsite on marketing and advertising law," he says. "It has been running for around 15 years, and precedes our existing website – and it's useful to be able to compare how that product performs next to what's freely available.

"We'll also charge for some training products – and clients are quite open to having a conversation about that. It won't always be suitable, and most is delivered as value-add, but there is recognition among in-house lawyers that high-quality, tailored training is a business priority – and won't always be free."

## Searching for something

And what about the investment in – and training on – systems to facilitate internal knowledge sharing across offices and practice areas? Thody says firms are subject to the very same pressures that are driving its digitally driven clients as they serve their customers.

It's simply about being able to find any single piece of information or document as conveniently as possible, he says. How well top 100 firms empower their people to achieve that could easily be a factor in whether they successfully attract and retain them over new entrants.

"I do think knowledge managers can make this more complicated than it ought to be. As a knowhow lawyer, I'm familiar with obsessions over data structures and taxonomies, but the world has changed," he says.

"It's all very well a 40-something dyed-in-the-wool lawyer knowing where to find things through an intuitive understanding of complex structures – but the 25-year-old newly qualified arriving tomorrow wants to be able to search for legal and sector information in the same way as they do for anything else in their life. That's the standard that firms will be held to, and if they don't achieve it I think they'll suffer.

"We're building a new intranet – like many other firms I've no doubt – but the upshot is everything we produce will need to be digital and simply searchable across a comprehensive database. A law firm's internal system needs to reflect how information's managed everywhere else."

But from his business development perspective, he admits the nuts and bolts of this aren't strictly his domain to worry about. One of his internal knowledge tasks is to spread the sector focus that plays well with clients across the firm's lawyers too.

"Digital business and financial services lawyers, for example, need news, market and deal updates each week to keep on top of industry developments and position themselves as leaders in a rapidly changing field," he says. "It's similar to what we might produce for a client – but can obviously be even more informal and link to a wider range of materials."

Preparing these sorts of updates is "quite good fun," he says. "You can include material that makes people think across more boundaries and sectors, and innovate with delivery."

Indeed, a creative, lawyer-driven system for in-depth but user-friendly sector updates could well prove the next product boom for legal publishing businesses too, he says. Could an alternative business structure of tomorrow even be a law firm-publisher hybrid, serving up timely business updates tailored for both clients and its competitors?

That's a question for another article – but law and publishing are both grappling with gear changes in competition, forcing re-evaluation of their business models. Reinvention could be just around the corner – and if it is, Osborne Clarke will almost certainly be covering it in some capacity. ●



*Feature*

# Well, what do you know?

Law firms are potentially loaded with information – about their cases, clients and the business climate across borders. But are they storing, presenting and marketing that knowledge in ways that drive their business forward? Richard Brent reports



**Any business needs a good grip on what it knows. Nuances of key relationships, customer behaviours and market trends will all impact decisions such as growth plans, pricing and product design.**

Law firms might seem different with their vast knowledge of legal and regulatory process and case history. First, they need to get all that down on paper (or in this day and age, ideally, into a database). And then there's also the tacit knowledge of historic connections, common problems and best outcomes that may lurk in a dim corner of some partner's brain – potentially lost forever the day she decides to retire.

But while it's a lot of information to manage, it's ultimately just another useful product to sell. And for the time-poor, reading anything at all might be a luxury they can scarcely afford.

So in an age of information overload at the best of times, how do some of the most overloaded of all avoid piling it onto customers in a way that could succeed only in switching them off? How are the most thoughtful legal content kings and queens changing how their firms use information to sell their wares?

## Context is king

Linklaters' head of client knowledge and learning, Ian Rodwell, says it's critical that firms clearly contextualise anything they serve up.

"Clients say that firms need a very deep understanding of how they operate, their culture and strategic priorities, to ensure any information presented is as relevant and targeted as possible. To formalise that principle, they need to put themselves firmly in the client's shoes."

For example, how do we know that a piece of content is truly relevant to us? If it has been personalised, certainly, but also if that's more than just a name at the top of an otherwise identical newsletter.

"It'd be very difficult to produce a publication or stop-press e-alert contextualised for every possible group of readers, but there are other ways around it," says Rodwell. At Linklaters, for example, a partner or associate might top the item they want to share with a contact using some words of their own. Coming from a known

individual rather than an automatic email generator, it's already positioned as more likely to be genuinely useful, he says.

This call for clear content context is just one of several positive knowledge trends highlighted in the report *Knowledge to Action: Increasing the Value of Legal Knowledge to Business*, jointly published by Linklaters and a working group of senior counsel in June last year. Another is a substantial swing from both technologies and working practices that collect knowledge – harvesting and organising it to provide to clients – to processes that effectively connect both sides of the relationship. Social media and client-facing wiki arrangements are one obvious example, but Rodwell's research also highlights in-person knowledge-sharing activities such as offsite strategy briefings. Some interviewees who fed into the report even predicted the rise of a more specialist firm, specifically with greater skill at partnering with clients, alternative business structures, or even other firms.

Why, for instance, should law firms guess how clients want their information delivered when they could involve them in that decision? As digital avenues expand, an e-bulletin might not be necessary at all.

"There's a growing client expectation that panel firms are willing to collaborate in the interests of overall efficiency," says Rodwell. And so some are extending this to information provision, setting up joint initiatives to create content streams.

"We have clients looking at hoovering in content from multiple sources onto intranets, and using third party aggregators to slice and dice it at their end depending on the particular needs of individual teams," says Rodwell. "It might just be law firms feeding in, but it could also be other information providers or regulator websites. Technology can scan for absolutely anything connected to a topic, such as data privacy or anti-bribery, and produce an individual newsfeed."

## Story time

Another way firms could collaborate more – including with clients – is formalising after-action review of



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completed projects. From conversations with knowledge management specialists in other sectors, Rodwell found clear common ground in using a process to pick over key lessons learned – precisely the sort of less tangible information that might otherwise go unrecorded.

“It was striking the extent to which other businesses have a process really embedded for surfacing such

update tangible checklists for particular deal types (thus also managing risk more effectively). They could involve a joint conversation and activity with clients, or just provide a method to assess how well internal teams have collaborated.

Andrew Telling, head of knowledge management at Taylor Wessing, has done something like this – creating

an e-bible zone, collating key takeaways from various transactional matters into a user-friendly format available via the firm’s knowhow system.

“The point is to enable people to get to grips with current market practice,” he says. “Black letter law updates are just one aspect of knowledge management. There are also practical steps people are taking to solve a problem. An easily searchable record of the market standard on certain tasks – drafting documents, say – is much easier than using four or five similar matters as a basis.”

But Geraldine Jackson, head of central KM tools and technology at DLA Piper,

says such ‘storytelling’ is still often woefully underused in legal – and that it would make a particularly big difference in a geographically dispersed firm such as hers.

“A lead relationship partner in London may be dealing with the London branch of a global client, but easily lose sight of what’s happening at a relationship level on work taking place elsewhere,” she says. “Context doesn’t just mean understanding a client’s sector – there’s also

the client’s culture. And it can make a big difference to a client’s outcome if fee earners are also collaborating more on a less formal level than workflow.”

Firms need more informal conversations through more formalised structures, she explains, drawing comparison with her previous career in advertising. She created a global network of account managers, using local people to explain how to launch a new product – in this case a well-known lollipop brand – into a local market.



*“It can make a big difference to a client’s outcome if fee earners are also collaborating more on a less formal level than workflow.”*

Geraldine Jackson, head of central KM tools and technology, DLA Piper

knowledge – articulating what was intended from any activity, what didn’t go so well, and what could be improved on next time,” Rodwell explains. “There’s probably a certain amount in law firms, but it isn’t as widespread as in other areas of business.” Those range from oil and gas to pharmaceuticals – and even large-scale sports events.

At knowledge-heavy businesses such as law firms, he says, similar processes could be used to create and

Briefing

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24 JUNE 2015, GRANGE TOWER BRIDGE

The Briefing Business Transformation conference recognises one of a number of key strategic issues that large law firms are tackling right now.

Our research identified a clear demand for a relevant, topic-focused and thought-provoking conference that delivers delegates access to fresh and innovative ideas from high-calibre speakers both inside and outside the legal market. Expect to see expert panels of GCs, leaders in business transformation and executives from law firms leading the transformation of their businesses.

## AGENDA

- |   |   |
|---|---|
| <p>09.00 Registration and coffee</p> <p>09.30 Welcome and opening address</p> <p>09.35 KEYNOTE ADDRESS<br/> <b>The transforming professional organisation</b></p> <ul style="list-style-type: none"> <li>• The changing legal services environment</li> <li>• Leadership for change – overcoming the barriers</li> <li>• Why do companies fail to innovate when the need is so obvious?</li> <li>• Towards the ‘new’ legal firm business model</li> <li>• Leveraging high performance – some key questions</li> </ul> <p><b>Richard Scase, professor of organisations at the University of Kent</b></p> <p>10.15 PRESENTATION<br/> <b>Aligning transformation strategy to client needs; the rise of the millennials</b></p> <ul style="list-style-type: none"> <li>• Responding to changes in buyer behaviour; rethinking how your firm goes to market, what it provides, how it delivers and how it prices</li> <li>• Exploring innovation as the mechanism for meeting client needs and adding value</li> <li>• The key driver for law firm transformation: survival</li> <li>• As clients change their bidding processes, what will that mean for law firms</li> <li>• Understanding how clients are monitoring spend and looking to engage with firms in the future</li> <li>• Navigating new relationships with procurement teams</li> </ul> <p><b>Stephen Allen, head of market strategies, DLA Piper International</b></p> <p>10.55 PRESENTATION/CASE STUDY<br/> <b>The challenges of law firm change</b></p> <ul style="list-style-type: none"> <li>• Using client focus in communicating strategy and the need for change</li> <li>• Getting lawyers’ buy-in and tackling group resistance</li> <li>• Creating and maintaining momentum on the change journey</li> <li>• Addressing conflict and competing demands of stakeholders through vision and leadership</li> <li>• Adapting the change agenda to fit the local needs and priorities</li> <li>• Creating a culture of continuous improvement and innovation</li> </ul> <p><b>TBC</b></p> <p>11.35 Coffee</p> | <p>12.05 FACILITATED WORKSHOP<br/> <b>Winning a lawyer’s heart and mind; developing change capabilities within your organisation</b></p> <ul style="list-style-type: none"> <li>• The role of training in supporting transformational change</li> <li>• Creating a receptive environment through development of business skills and firm wide thinking</li> <li>• Tips and techniques for tackling resistance from individuals</li> <li>• Exploring the impact of change on people; supporting individuals through the change process</li> <li>• Getting engagement from busy people; just enough communication and information</li> </ul> <p><b>James Edsberg, senior partner, Gulland Padfield</b></p> <p>12.55 Lunch</p> <p>13.55 (STREAM 1) FACILITATED WORKSHOP<br/> <b>Engaging and empowering employees in the new workplace</b></p> <ul style="list-style-type: none"> <li>• Matching legal talent to business needs, reshaping teams to meet the demands of clients</li> <li>• Creating a more agile workforce</li> <li>• Empowering teams to maximise fee income, productivity and utilisation to deliver planned results</li> <li>• Gen Y or Gen C; where is the latent energy to power transformation?</li> <li>• Taking people on a transformation journey when you have conflicting objectives, challenges and aspirations</li> </ul> <p><b>TBC</b></p> <p>(STREAM 2) PRESENTATION<br/> <b>Transforming a firm that has undergone a merger</b></p> <ul style="list-style-type: none"> <li>• Understanding the transformational opportunities arising from mergers and post-merger integration</li> <li>• Managing integration and creating a common culture</li> </ul> <p><b>James Philpott, director of corporate development, Bird &amp; Bird</b></p> <p>(STREAM 3) PRESENTATION<br/> <b>Achieving global operations</b></p> <ul style="list-style-type: none"> <li>• Creating consistency across international offices</li> <li>• Creating an international perspective on career development, knowledge sharing and access to skills and expertise</li> <li>• What are the advantages and disadvantages of working across jurisdictions?</li> <li>• Integrating business service functions across global firms</li> <li>• Exploring the challenges of international rollout with diverse user groups</li> </ul> <p><b>TBC</b></p> |
|---|---|

“Very good – we rarely get the time to do something like this: discuss transformation.”

**James Huckle**

Commercial director, Holman Fenwick Willan

“Very good – the topics were spot-on and speakers consistently good.”

**Andrew Neill**

Global programme manager IT projects, Withers

## WHO SHOULD ATTEND

- Leaders involved in change management and business transformation
- Directors and senior managers in finance, operations, HR, facilities, telecoms and IT
- Managing and senior partners
- Managers responsible for implementing legal project management

14.35 Coffee

### PANEL DISCUSSION

15.05 **As the pace of change accelerates, are business services emerging as change agents?**

- Are firms reshaping their business services functions to meet the needs of the firm and its clients? Should firms be transforming existing business services functions?
- What role are business services professionals playing in driving and leading change in how the firm is run?
- What is their role in re-engineering legal process and in creating new legal products and services?
- Are they acting as thought leaders in planning the strategy and implementation for transformation of core legal processes?
- Are they leading the way in demonstrating global attitudes to teamwork?
- Moving from disparate functions to singular functions; what benefits can this bring?

**Cathy Mattis, head of process improvement,**

**Berwin Leighton Paisner**

**David Halliwell, director of knowledge, risk and**

**legal services, Pinsent Masons**

**Richard Jones, head of transformation, Hill Dickinson**

### PANEL DISCUSSION

15.45 **Using technology to support transformation: is technology driving change or is change driving technology?**

- Using technology to enable transformation and aligning technology with client needs
- Integrating legacy platforms; how to plan for the future
- Investing in technology to support innovation across the firm
- Leveraging data and analytics to allow firms to make informed decisions about clients and strategy
- Technology capability and its impact on the success of a change project

**Bruce Braude, head of strategic client delivery,**

**Berwin Leighton Paisner**

**Julian Morgan, head of drafting applications,**

**LexisNexis**

### PRESENTATION

16.25 **Lessons from the professional services sector**

- Insights into how the accounting and consulting professions reshaped their business and operating models
- Identifying relevant learning from other professionals and applying it to the legal sector
- How professional services firms have trained their people to make change part of their culture
- Techniques for measuring and reporting efficiencies and profitability as a result of change

**Sanjeev Gandhi, director, PwC Consulting**

17.05 Summary and close of the conference

17.25 Networking drinks reception



“Very worthwhile, informative and useful.”

**Chris Andrews**

Risk management director, Simmons & Simmons

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The law is no different to that lolly. “Any lead partner needs to know that a client in Hong Kong can be a very different beast to the same client in London – and why,” Jackson says.

The argument also applies to creating client product and content marketing. “The same information might well be relevant in another jurisdiction, but the same distribution channels won’t necessarily be effective. You can’t just assume you can use exactly the same process to engage a local market,” she says.

So, although it already markets local news and updates locally, DLA is now working toward a way of tailoring content that’s globally relevant to that local market. “A targeted newsletter currently hits all jurisdictions at once. In future, we need to foster greater understanding of the impact of different cultures on content,” says Jackson.

## Tweet success

A man who certainly sees the value of storytelling is new sales and marketing director at Irwin Mitchell, Kevin Peake. Arriving with a background in branding and engagement for the likes of Aviva, Abbey National and npower (one brain behind Wallace and Gromit ads for the latter, no less) – his focus for the law firm’s brand development is on tapping into how the worlds of legal and ‘news’ provision are already closely connected.

The homepage of its refreshed website, for example, doesn’t offer a string of press releases for journalists to sift through, but a thick banner of scrollable bold images and headlines (a media wall, says Peake), clearly designed to call a news organisation to mind. “Blurred Lines Copyright Case” and “Germanwings Alps Tragedy” they shout – linking through to what the firm’s experts are saying to the world media.

“As new people move into the ABS marketplace, Irwin Mitchell needs to think in terms of competing not only with traditional law firms, but potentially also with other big new players,” Peake says. “The supermarkets are still on the radar – and the way we think the world will go favours clear, consolidated offerings that make life easier for consumers.”

Content needs to be in line with that trend. “It’s obvious in hindsight,” he says, “but approaching my first interview for this role I was reading the newspaper and suddenly realised it was full of law. Every day something

happens that’s tied to a law change, or involving a legal decision. Law firms just don’t see themselves at the sharp edge of the news agenda as much as they should.”

Peake’s rebrand sets out to address that. “We want to highlight how we feel our people are the best experts in the marketplace – but we achieve that by communicating the stories effectively.”

“We’ve also taken people we’ve identified as most media-friendly and positioned them as proper commentators. So we publish video footage as well as listing their key achievements. If you’re a TV producer, you can verify whether someone looks good on camera and can hold their own in an interview.”

Each media expert is also directly responsible for driving engagement through their own Twitter account. A cosmetic surgery specialist, for example – tweeting as @cosmeticlawyer – hashtags live tweets during the Channel 5 programme *Botched Up Bodies*, and an intellectual property partner did the same during *Dragons’ Den*.

“As people came forward to pitch, she was at home searching Companies House databases to tweet any problems they could encounter with copyright,” says Peake. “By using the programme’s hashtag she got actual business out of that – even from people who had appeared on the show itself.”

Empowering people to connect directly with the world as client base is essential, and logistically inevitable. “The marketing team will provide guidance, but we’ve 35 Twitter accounts, so it’d be impossible to manage them all centrally. And one of the big issues for any business providing content now is speed – the ability to act out of office hours, for example, and reach people when they’re most actively engaged,” says Peake.

Irwin Mitchell has also been experimenting with video, and has its own active YouTube channel. “In personal injury one of our brand values is emphasis on the whole process, not just winning the case. We employ our own client liaison managers who act as community care support throughout a case. So we’ve spent quite a bit of money designing life-story videos. If you want to tell the story and highlight the issues behind a catastrophic accident, video may be a much better way than pages of complicated words.”

In March the firm even started doing videos on Vine. “Fitting messages into 140 characters or six seconds while keeping the gravitas is an intellectual brand challenge in



⚙ **Master Data Management**

⚙ **Information Governance**

⚙ **Knowledge Management**

⚙ **Business Process**

⚙ **Integration**

the legal market,” he says.

## Product placements

But do such tips and techniques travel from consumer to corporate – where the end needs of the customer are so different? Legal businesses are sending more messaging to the world via video, but you couldn’t call it the norm. And the inherently risky nature of any decentralised sharing continues to be a challenge.

Last year, for example, Passle put DWF in the top five most active firms for publishing online, including through Twitter (Irwin Mitchell came top). But Lisa Smith, head of knowledge services there, admits it’s the partners who create most of their content.

“Before we publish anything on the website, or promote via social media, content undergoes a quality assurance process, which includes basic proofing and optimising for online use, as well as conflict checking and sign-off by the senior partner in the specific area of the business. Time to market is also crucial, which is why we’ll soon be using an online submission form to speed up the process.”

And the firm can also analyse any trends on social media as they develop – and incorporate it as content into both internal and client-facing alerts.

More of a current game-changer appears to be the way firms are seeking to engage clients by turning service elements into new products that allow them to interact with the firm in new ways.

DWF has invested £12m in new tools, says Smith, including a mobile app for 24/7 access, client extranets for clearer case tracking and management information, and a first foray into e-billing.

But perhaps most striking in the mix is an award-winning ‘crisis response’ service, bundling everything from business continuity measures to psychological support into a package of items and assistance that can kick in at the touch of a button.

“Should a crisis occur, such as fatalities at work, dawn raids or product recalls, the team immediately provides the necessary support and puts crisis management plans in place,” says Smith.

That’s on top of the core legal offering – where formal updates are accompanied by workshops/training, onsite risk assessments, free e-bulletins and

delivery by bespoke client extranet.

Simone Pearlman, head of legal knowledge at Herbert Smith Freehills, says a cornerstone of her firm’s client content strategy has long been its webinar programme – and both that and video as a medium have become even more important since the Australia merger has led to many more multi-jurisdictional projects that demand more creative comms.

“We send clients bulletins, guides, some fantastic horizon-scanning documents, and analysis on various areas such as M&A trends. But our clients are often on the move or working in remote locations – so web-accessible tools are really important to them,” she says.

Sarah Vickery, head of knowledge management at TLT, has recently introduced a branded legislation tracker product for key renewable energy clients – something she’s now hoping to adapt for other sectors too. It’s updated monthly – and sets out changing energy and consumer legislation, providing a colour-coded priority checklist of what’s coming up.

“At least one client uses the tracker as a discussion point for key internal team meetings, so we’ve moved to updating it fortnightly for them,” she says. “The visual element means they don’t have to wade through reams of text for critical points – and obviously a lot of in-house teams don’t have access to a lot of these sorts of resources – or the library teams to help them.”

Vickery has also set up a series of extranets, not only to serve up workflow and data to clients, but increasingly as a platform for less formal engagement.

“A few years ago our pensions extranet won an innovation award,” she says. “A pension scheme’s trustee can work directly with our team, such as by accepting suggested amendments. But there’s also a question and answer function that immediately alerts lawyers to any query. We also use it to alert IP clients to what we’re doing about any infringing goods we’ve found on eBay.”

Now, she says, with business development they are looking at using the extranets to manage events – taking client input, liaising with organised speakers and starting to build a community before the day.

Telling at Taylor Wessing, says: “People are alert to the potential for apps and more interactive tools for clients – but I don’t think there are that many around. They also tend to be on an individual basis for clients, rather than to make knowledge generally available.”

One of Telling’s recent projects has been to create



content-rich microsites for sectors. One, TWTechFocus – for startups and growing tech companies – even introduced a free document builder in April so clients could create funding term sheets more cost-effectively (building on a suite of other free documents).

“We realise lots of people will be able to see and potentially use it, but we have the confidence to say we think it’s appropriate to put out there for this sector.”

More generally, his microsites set out to serve targeted, relevant news that simultaneously drives up engagement and boosts internal business intelligence.

“A life sciences client may well be interested in finding out more about what’s going on in other sectors. They don’t only do life sciences. As a business, they’ll

have an HR function, a property management function, and so on.”

Internally, teams can also use these content crossovers to encourage cross-selling. “There’s ongoing work on analysing matter inception data for trends. We want better categorisation to direct efforts and communication at a very early stage.”

It’s a good final example of how the boundaries of the legal knowledge future – between what’s useful to the business and its client – are truly blurred. The future will be one where more is shared, more freely, both internally and externally, but that doesn’t mean that both can’t win. So long as it’s the right information reaching the right eyes or ears at the right time. ●

## Intelligence designs

Law firms aren’t only in the game of providing content. They also need to collect it – about their clients’ businesses and future plans, but also about those clients’ sectors to build greater current awareness into business development process.

“We have a business research team who are continually sourcing information about the sectors and clients we’re most interested in,” says Simone Pearlman, head of legal knowledge at Herbert Smith Freehills. “Our professional support lawyers embedded in a practice area also work very closely with business development on actively plugging into sectors.”

The firm is also rolling out a new purchased business intelligence service. “It’s important to continually scan the market for new ways that make intelligence easier to collect,” says Pearlman.

Lisa Smith, head of knowledge services at DWF, says: “Our current awareness provision has been sector-focused for some time, incorporating daily and weekly alerts about clients, targets, issues and trends in the markets they operate in. It has been especially useful at bringing groups of

people together with similar sector expertise in our many post-merger situations.

“We’re now looking to extend our internal self-service offering to include business and sector information for lawyers ‘on demand’, with minimal intervention needed from knowledge services.”

Sarah Vickery at TLT set up a new sector and client intelligence service. She receives daily updates on her top 100 – both clients and targets – and seven core sectors, which are fed into a system of internal blogs.

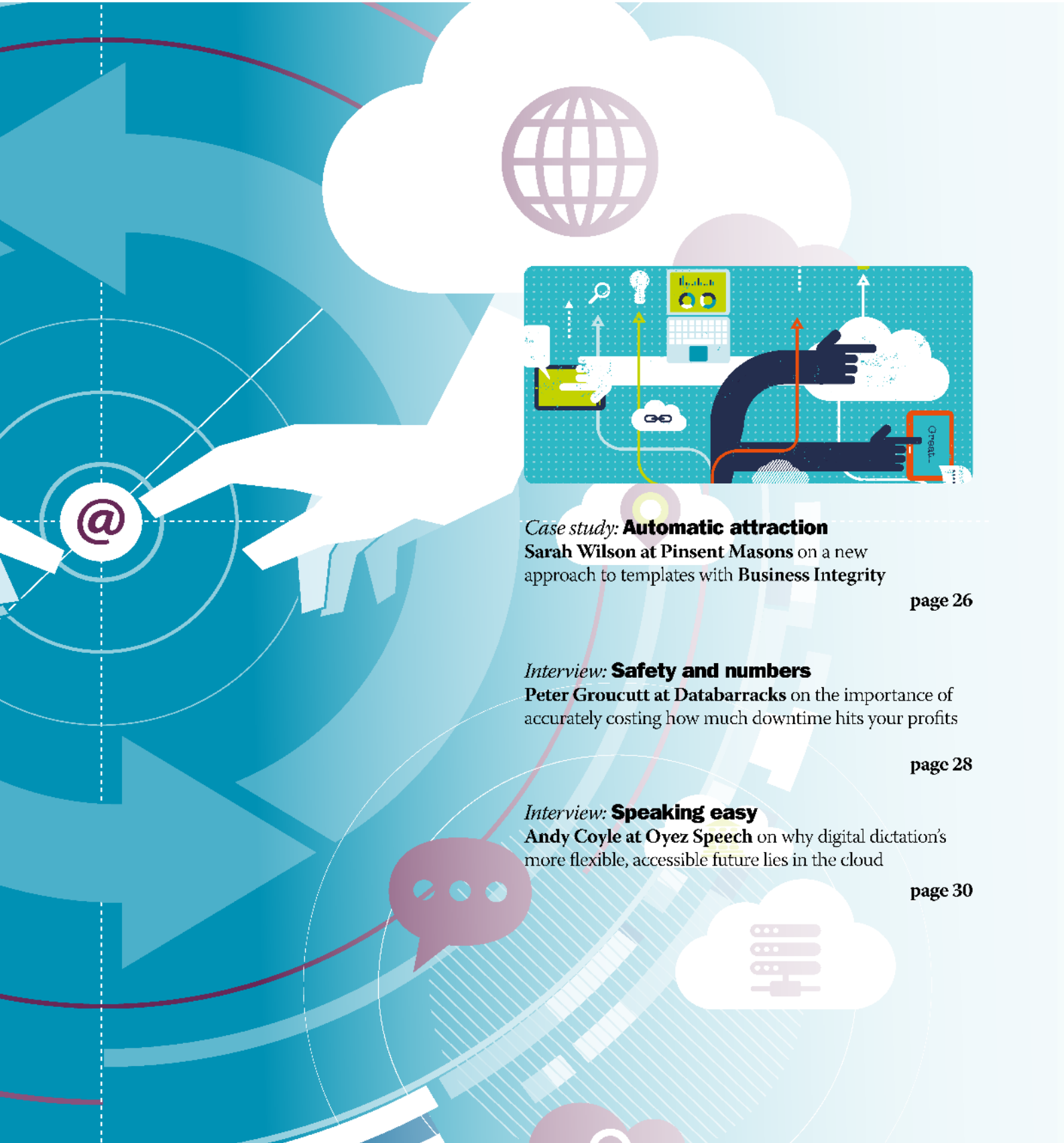
“People who are interested voluntarily sign up for daily, weekly or monthly alerts – and, as you’d expect, it’s really popular with the client relationship managers,” she says

But her team also actively encourages the entire legal team responsible for any sector to sign up.

“It’s very important to client service that the lawyer understands more about the industry and issues they’re operating in,” she says. “They can be sensitive if there has been some bad news in the press, for example – or congratulatory if someone has had a major breakthrough. They’re not doing their legal work in a bubble.”

# Data drivers

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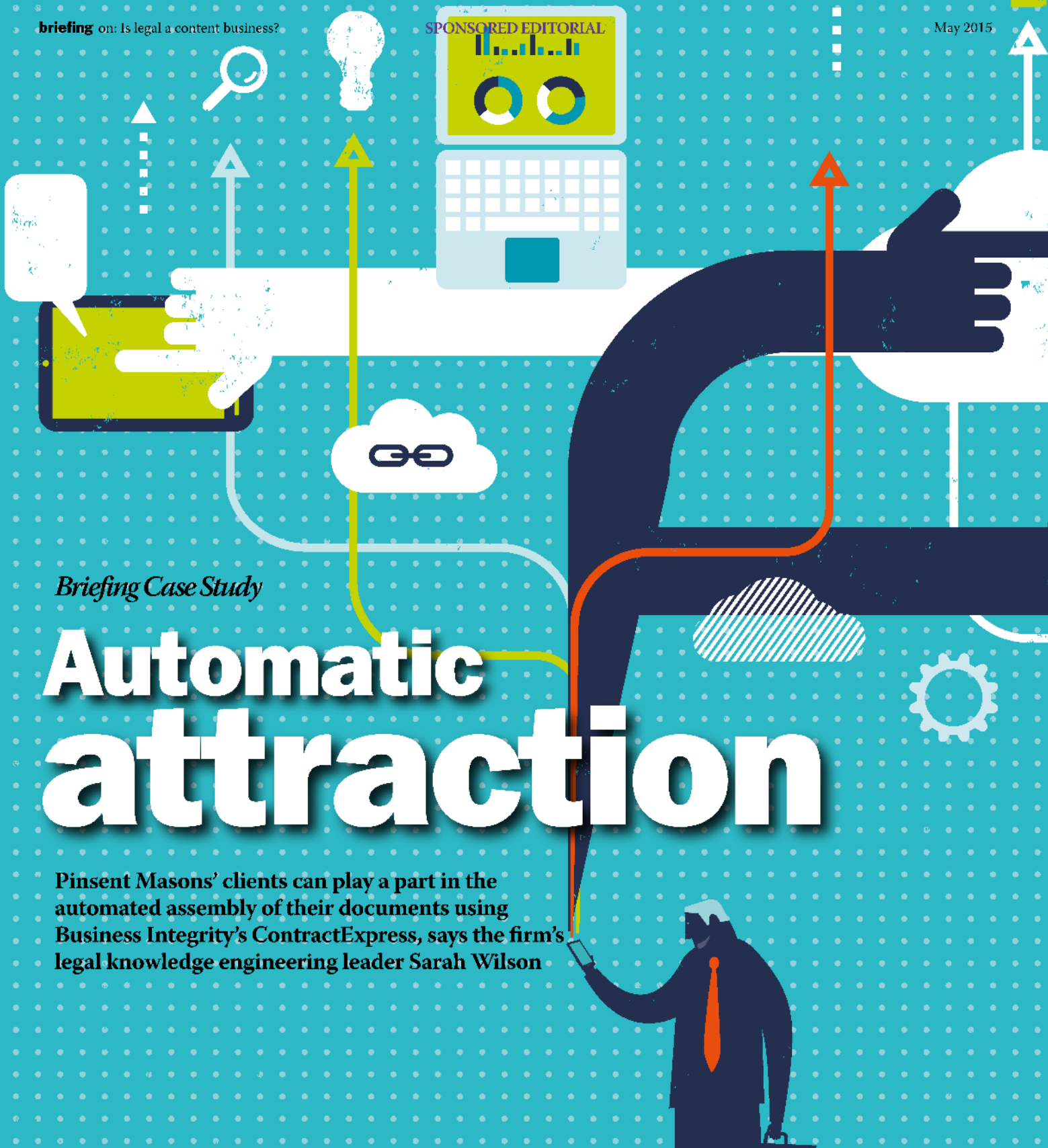
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*Briefing Case Study*

# Automatic attraction

**Pinsent Masons' clients can play a part in the automated assembly of their documents using Business Integrity's ContractExpress, says the firm's legal knowledge engineering leader Sarah Wilson**

**Differentiation and standard process sound like polar opposites – but that's not necessarily the case.**

Process mapping methods and workshops are all the rage. Firms are painstakingly taking apart the typical transaction and reformatting for efficiency. In many cases legal business leaders are rethinking how tasks are resourced internally, using more third parties – especially for more standardised elements – and adopting new

tools and techniques for internal collaboration on projects.

## **Questions answered**

Automation of standard documents is another key weapon – with clients often now allowed to help create

their own. The SmartDelivery team at Pinsent Masons, for example, has created technology that lets fee earners populate new documents from templates based on a single set of content-scoping questions. And clients can answer those questions themselves using a portal. The firm has integrated its own internally developed online instruction system with the ContractExpress document automation solution from Business Integrity, so that clients are able to submit information online in their own time.

Sarah Wilson, who leads the firm's legal knowledge engineering team, says clients can provide information relevant to a document questionnaire, which a fee earner completes and assembles into an approved document.

David Halliwell, the firm's director of knowledge, adds it's seeing much greater client demand for such online collaboration with clients in general. "It's a trend for a more collaborative relationship that informed development of our SmartDelivery platform – an initiative that won us an FT Innovative Lawyers Standout award for value resourcing in 2013. It allows lawyers to partner with clients directly in designing fixed fee arrangements for a growing range of work," he says.

"The lawyer doesn't have to do anything additional with that data when it arrives," says Wilson. "It's used to populate parts of the relevant questionnaire, and the lawyer can then complete the more technical elements of the document using their expertise and just-in-time knowhow."

## New standards

Pinsent Masons had been using ContractExpress for four years prior to this accolade. Internally, it enables legal knowledge engineers to create and update templates on receiving mark-ups from lawyers and practice development lawyers. They're able to produce templates that provide for a range of optional elements and apply the questionnaire framework to automatically determine the information that must be included in each individual case. A particular advantage of ContractExpress is that this can all be done within Microsoft Word and so doesn't require programming skills.

"The key benefits for us are a more efficient internal process and improved risk management," says Wilson, whose team has created almost 500 automated precedents for its library since first using the tool. "There's an obvious time saving having lawyers deal with one set of questions to create a new variation on a standard piece of work".

As a result, Wilson's knowledge team and the practice development lawyers who manage and update the templates can also switch from juggling a larger number of them to improving the content of a smaller, more select group.

Driving up initial template quality inevitably reduces risk – and with automation in the mix, the creep of human error is combatted on two fronts.

"Using the same entered information for a larger set of documentation safeguards consistency across a practice," Wilson says. The result is a layer of reassurance over robust compliance and improved client service.

"We've moved to use the capabilities across all our practices now," she adds. "We began with areas more obviously suitable for standardisation, such as parts of property and employment, but now we're seeing banking and corporate becoming big users too – areas where people have often thought matters are just too complicated to introduce any automation.

"People have been led to see the efficiency gains gradually. For example, in the share acquisition process, even if a corporate fee earner doesn't want to produce an automated share purchase agreement, which is a very bespoke deal, they can still use the automation process to create board minutes, lists and other parts of a suite of documents. ContractExpress can produce suites of documents, saving people the time of locating and amending each individual precedent – and I think that has increasingly won people over to the case for automation."

At Pinsent Masons automatic reactions for greater process efficiency – and product consistency – are here to stay, because they're helping to build a more transparent and streamlined business.

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Learn more about  
**Business Integrity**  
[www.business-integrity.com](http://www.business-integrity.com)





A close-up portrait of a middle-aged man with short, light brown hair and a slight smile. He is wearing a dark grey suit jacket over a blue and white striped collared shirt. The background is slightly out of focus, showing a building with a sign that partially reads 'UNDERG...'.

*Briefing Industry Interview*

# Safety and numbers

Firms need the resources and expertise to calculate the true cost of downtime, says Peter Groucutt at Databarracks

Information is the lifeblood of all law firms – so a serious disaster or major IT failure can prove operationally fatal. From natural disasters to criminals in both the physical and online world, the range of risks that all businesses face is fierce.

This calls for robust plans that can be activated, if hopefully never needed. But law firms need to know the detail of what they are dealing with as precisely as possible to prevent a problem escalating into serious reputational damage – as cost-effectively as possible.



“The IT department’s under a great deal of pressure from partners to safeguard productivity, but often with little resource or understanding of how risks and costs stack up,” says Peter Groucutt, managing director of Databarracks (recently named a legal sector disaster recovery ‘niche player’ in Gartner’s Magic Quadrant analysis). “They’re responsible for implementing reactive disaster recovery plans, but they also need to be designing and managing proactive responses to emerging risks.”

All businesses face threats like fire, but Groucutt also cites the ransomware CryptoLocker, which poses as seemingly innocuous email attachments to spread infection. It’s a good example of how something with the power to take a law firm down might not even be on management’s radar, as nobody’s even heard of it yet.

A key issue is that a major crisis now has power to bring down a complexly connected group of systems, perhaps for an unpredictable period of time.

“As channels change and multiply, tracking information grows more complex,” says Groucutt. “Today’s practice and customer relationship management systems are integrated with many other ways for lawyers to collaborate – and multiple automation tools are driving up productivity.”

Firms need to know people can access data from all those pools at exactly the right time to progress cases, come hell or high water.

“It’s an age where questions demand quick replies – and law firms face much more competition providing them,” says Groucutt. “So if they can clearly demonstrate that the right lawyers will always be in front of the right information when they need it – for the shortest possible time – that capability can win them work and be a differentiator.”

## Counting the costs

Information downtime and security must therefore be accurately and strategically costed. Law was once an industry in which such risk was relatively straightforward to calculate – whereas for other businesses it was a far more elusive quantity.

“If you take a hedge fund or alternative investment management house, it’s really hard to say what an hour, day or week of downtime is worth. It can depend on the

particular hour, or even minute, something hits,” says Groucutt. “It’s hard to measure the extent of your risk exposure as a major trade is about to be processed, for example.”

The main reason law firms had it easier was the predictable billable hour model. You could essentially estimate that the loss of billings over a certain period amounted to a particular cost

“There were still the ‘softer’ costs of reputation and client satisfaction risk. But unless you were at the climax of a really critical transaction for a client, longer-term reputation damage wouldn’t set in until after a week or so.”

Now that clients are after more transparent cost via fixed fees and other bespoke pricing alternatives, it’s actually harder for the firms to assess how much they ultimately stand to lose from a period of downtime.

Maintaining availability of systems also needs several options in place. Different risks need different solutions to get things back up and running again. Replication of systems to a secondary site will protect your data against flood or fire damage, but a cyber threat can lay dormant for weeks, so the offsite location can also be infected and you’ll need to recover data from backups.

“With Cryptolocker, lots of people with very resilient disaster-recovery plans were still hit very hard. They took action but the ransomware lay dormant,” says Groucutt.

“Other threats aren’t answered by activating the same solutions, either. If you lose a time-critical client email, that’s a backup problem. You wouldn’t fail a firm over for 15 minutes so they can have an email back, because that’ll cost more in terms of other time lost.

“By the same token, the loss of an entire server isn’t a restore problem. By the time you’ve restored all the data, too much time will have passed.”

Firms need the right set of tools for each job – and that means resources to understand the interplay of different elements. They also need a strategic approach to disaster recovery – building the cost of short and longer-term risks, plus the savings gained through protection, clearly into the business plan.

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Find out more about  
**Databarracks**  
[www.databarracks.com](http://www.databarracks.com)



*Briefing Industry Interview*

# Speaking easy

Law firms need to move with the times – and that means a cloud solution for digital dictation, says Oyez Speech director Andy Coyle

**Office workers are increasingly becoming less tied to their desk or any single device. It's a trend that impacts the use of applications like digital dictation as much as any other task in the legal process.**

Whether working globally, or in the UK only, lawyers are often part of dispersed project teams that face increasing customer demand for fast response. To succeed, these teams demand reliable access to the work tools that allow them to hit key deadlines seamlessly. In this context, says Andy Coyle, director of Oyez Speech, firms need a move to the cloud to get flexible, accessible and cost-effective digital dictation.

"If you only have one standard recording device you have to wait until you're back in the office to start creating work. But adding the power and convenience of modern smartphones into the dictation process allows lawyers to work faster and more flexibly. It's easy to dictate and send a document for transcription while on the move. Users can arrive at another appointment knowing the dictation can be completed and returned to them before the end of their meeting.

But standard digital dictation technology often ties you to one PC through its cost structure. If people want to upload from another location, says Coyle, they need to pay for another licence – and that can get very expensive.

"In reality, most people just don't work from a single PC any more. They're in multiple places – working at home, the office and travelling between locations. The flexibility of cloud is what's needed to manage the dictation process effectively."

**Briefing** readers just so happen to agree. Our Legal IT Landscapes 2015 research found that IT leaders said digital dictation was one of the very top technologies ripe for a move to the cloud.

## Silver linings

Coyle also sees a particular trend toward dictation by voice recognition, as firms respond to productivity pressures caused by growing competition.

"There's a constant drive for cost reduction, and voice recognition helps deliver that," he says. "It allows a lawyer to dictate directly into their PC while the document automatically assembles in real time."

Clearly that will have an impact on the workload

of administrative support staff – but the flexibility of cloud-based dictation also enables administrative managers to better plan all workflow in advance, shifting resources around to meet operational requirements.

For example, OyezSpeech 7, launched in January, brings together a blend of internal staff resource, voice recognition functionality and a convenient outsourced transcription service, routing work to meet the precise needs of a practice. Firms can prioritise pieces of work across departments to create a cost-effective process for each document and the firm as a whole.

"The traditional model of a lawyer dictating to a secretary while sitting in the same building was hit hard by the recession. Firms needed to cut costs and that began with administrative staff," Coyle says.

Lawyers began sharing dictation workload across fewer secretaries, he explains, but that had its own problems. Larger cases could lead to resource shortages that were further compounded by staff absences. Document completion was taking longer and client expectations might not be being met as a result.

"With the cloud model there are multiple ways of getting the same job done with fewer resources," says Coyle. "Firms don't need to hire more secretaries to deal with occasional peaks. If backlogs grow, lawyers can choose to use voice recognition or outsource the overflow if they require support."

The external transcribers use the same system as internal staff and pay-as-you-go flexibility means costs are completely transparent.

Another factor in the changing landscape is the millennial generation gradually moving into more powerful roles in the workforce. They understand they're expected to work hard – but they expect the technology tools that work best for them. Meeting this demand may be crucial to successfully filling your talent pipeline. Coyle says that cloud is a more future-proof business model that allows these people to work as efficiently and flexibly as they want – and the firm wins too.

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