

# Briefing

INNOVATION AND TECHNOLOGY

DECEMBER 2015

*Feature*

## Info on the edge

How are law firms putting the data deluge in closer proximity to the fingertips?

*Industry views*

## System thinking

Supplier thoughts on securing the IT to thrive in the professional future

## Time travel

*Karen Jacks, IT director at Bird & Bird, on the productivity gains of investment in a more intuitive user journey*







## LexisNexis® Enterprise Solutions Powering your practice

### LexisNexis® Enterprise Solutions

Creating enduring and valuable relationships with your clients is all about delivering excellent service at a competitive price whilst ensuring efficiency and profitability for your firm. To do this you need the right technology; built to adapt to changing competitive legal markets, delivered by an industry expert.

LexisNexis Enterprise Solutions offers powerful software built with legal market expertise to help you get ahead – and stay ahead.

- **LexisOne™** - Enterprise resource planning
- **Lexis® InterAction®** - Client relationship management
- **Lexis® Visualfiles™** - Legal workflow and case management

### Contact Us

For more information, please contact us:

[salesinfo@lexisnexis.co.uk](mailto:salesinfo@lexisnexis.co.uk)

+44 (0) 113 226 2065

[www.lexisnexis.co.uk/enterprisesolutions](http://www.lexisnexis.co.uk/enterprisesolutions)



Follow us on Twitter

@LexisNexisES



Enterprise Solutions

# All about the journey



## Letter from the editor

**To travel hopefully is a better thing than to arrive. That's one of the 'inspiring' quotes I'd share on my social media streams. And as it's that traditionally reflective time of year once again, it's going to get an outing here.**

It's true of business as well as more personal ambition. Firms need results and ROI, of course – but the voyage of productivity or competitive advantage is one that's never really complete. Continuous improvement is the order of the rolling days – as true of developing business as it is of character.

Technology – the vessel in which today's legal business brains always sail – is about a good experience of the moment too. Our main interviewee this issue, **Bird & Bird's Karen Jacks**, explains that usability trumps functionality in unlocking IT's potential to transform.

And even clients' satisfaction doesn't rest solely on the final bill – if you can demonstrate consideration of how you got them there to build trust in future travels. In our feature, we ask IT leaders at **BLP, DWE, Simmons & Simmons, Irwin Mitchell, Birketts** and **TLT** how IT is changing the way clients reach their legal services – and more besides.

Finally, our supplier section bulges like a particularly bumper festive hamper – full of insights to ease you into whatever's in store come 2016. We'll see you there!

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

## Interview: Karen Jacks, Bird & Bird



From customer relationship management on mobiles to timely project alerts earlier in a process, the IT director of Bird & Bird is investing in a multitude of tools to take technology up a notch

page 07

## Feature: Info on the edge



Insight equals competitive advantage – but it's also complicated. Firms outline how they're balancing demand for data transparency with the danger of information overload

page 16

This month's interview with **Karen Jacks** was transcribed by:

**TRANSCRIPTIONSERVICES**  
from **IntelligentOffice®**

Find out how much your firm could save:  
[www.intelligentofficeuk.com/cost-calculator](http://www.intelligentofficeuk.com/cost-calculator)

# AMP UP EFFICIENCY WITH NEXT-LEVEL PROCESS FLOW.



THOMSON REUTERS

**ELITE™**

## FINANCIAL MANAGEMENT THAT FREES YOU TO PRACTICE LAW.

You've got a lot on your plate. How about a fast, intuitive system to speed your business-management activities? The new Workspace from Thomson Reuters Elite™ puts all client and matter activity in a single view. So whether you need to view financial key performance indicators (KPIs) or matter information or documents, you access them in one place. And, the system pushes deeper insights about clients' businesses to your lawyers at their desktops or mobile devices, to help anticipate legal needs and grow legal spend. It's next-level process flow that frees you to practice law. Where you can truly excel.

DISCOVER A BETTER WAY AT [ELITE.COM/AMPUP](http://ELITE.COM/AMPUP)



See a mobile interactive preview;  
scan code with your smartphone.

© 2014 Thomson Reuters L-391201/6-14  
Thomson Reuters and the Kinesis logo are trademarks of Thomson Reuters.



THOMSON REUTERS™



# Industry analysis index

*Interview:* **Staying a step ahead**

**David Espley at LexisNexis Enterprise Systems**  
on managing information moves with Microsoft

page 25

*Interview:* **Equalise opportunity**

**Tony Parish at G3 Comms** on how unified  
communications levels the global playing field

page 27

*Interview:* **No expenses spared**

**Dave Terry at Chrome River** on a dramatic  
increase in expense and invoice efficiency

page 29

*Analysis:* **Smarter security**

**Gillian Walton at Purple Skies Consulting** on  
placing people at the heart of mobile management

page 31

*Analysis:* **Attacking costs**

**Chris Labrey at Econocom** on counting the  
cost of continuous cybersecurity planning

page 33

*Interview:* **Accelerating search**

**Michael Kearney at Encompass** on investing  
in automation's triangulation tricks

page 35

*Analysis:* **Teamwork on trial**

**Kim Walton at Enable** on whether document  
production's innovation moment will arrive

page 37

**TRANSCRIPTIONSERVICES**  
from IntelligentOffice\*

Save money by outsourcing your  
document production to us.

Visit [intelligentofficeuk.com/cost-calculator](http://intelligentofficeuk.com/cost-calculator)

IF IT WORX, IT'S



# CARING ABOUT (THE SMALL) PRINT SINCE 1989

Here at UTAX, we don't just look at the big picture; we pay attention to the details too.

We work together with you, through our authorised partners, to provide tailored solutions designed to best manage your print environment.

**UTAX: THE UK NETWORK OF  
PRINT SOLUTIONS EXPERTS**

For more information call  
**+44 (0)1793 786 000** or  
email **[sales@utax.co.uk](mailto:sales@utax.co.uk)**



[www.utax.co.uk](http://www.utax.co.uk)



*The Briefing Interview*

# Future natural

*Whether it's more efficient completion of tasks or stronger strategic insight, investment in technology begins and ends with the user experience, says Bird & Bird's IT director Karen Jacks*

*Words: Richard Brent*

*Photography: Jonathan Goldberg*

**One way that law firms have been looking to grow in the year just passed is to think about what they could offer to clients outside their domain of pure law expertise.**

In some cases that may mean non-chargeable 'just making life easier work', of course – new ways to collaborate with the firm to save time, shift spend or reduce risk, for example. But as other professions circle menacingly around the post-Legal Services Act pie, some firms have shown an equivalent taste for slices of new revenue.

In February, Bird & Bird set off down this path with the launch of Baseline – a joint venture with ASE Consulting to deliver broad IT project management support. The attraction is clear. Bird & Bird specialises

in legal challenges surrounding emerging technologies. But it's just as obvious that IT is a prime example of how legal advice never operates in a vacuum. Any IT change programme will be a long-term project, with the inevitable budgets, deadlines and other deliverables to manage. By partnering, Bird & Bird sets out to make the process of seeking help with such things easier for clients – advising on options for planning, design, requirements identification, procurement and contracting, alongside the legal problems that can throw progress off track. At its launch, the firm's chief executive, David Kerr, said: "Baseline is an example of how we can be part of a more comprehensive solution for clients. That helps our clients, and means we'll be able to attract more high-quality legal work, so it's a



*“We wanted to be more transparent with clients about how pricing works – and ultimately more flexible.”*

Karen Jacks, IT director, Bird & Bird



# Linetime

## THE PERFECT FIT FOR YOUR LEGAL PRACTICE

### **Made-to-measure software**

At Linetime, we believe that by listening to our customers and by reacting as their requirements change we have helped to transform the operational efficiency of some of the UK's foremost law firms. Our Liberate suite of software has many "off the peg" components which can be further tailored to the individual needs of the user. As well as assisting with their daily tasks we also help and improve the overall efficiency and profitability of their practice. So if you're looking for a legal software supplier that provides a tailored fit then look no further. Call us now.

### **Case Management**

A comprehensive suite of predefined screens and workflows can be easily tailored by the user to provide a perfect match to the firms requirements and processes. Deadlines, standards and SLAs can be automatically monitored and adhered to, allowing users to focus on the real work in hand. Liberate allows the retention of a complete electronic file that can be printed or published to PDF. As well as accommodating a high volume, workflow driven, case load the system can also cater for the more ad hoc "matter management" and complex areas of work. Liberate assists all types of user to increase efficiency and maximise profitability.

### **Practice Management**

### **Business Intelligence**

### **Online Case Tracking**

### **Online Payments**

### **Client Relationship Management**

### **Matter Budgeting**

### **Debt Recovery**

**CALL 0113 250 0020**

[www.linetime.co.uk](http://www.linetime.co.uk)  
[info@linetime.co.uk](mailto:info@linetime.co.uk)



**Linetime**  
Legal Software

really significant step forward for the firm. Clients want to work with those who understand their issues, focus on delivering solutions to their own challenges and share the risks with them.”

## On high alert



*“You can pack all the functionality you like in there, but it has to be usable and it has to be used.”*

Karen Jacks, IT director, Bird & Bird

The firm had better have the tech for its own people in pretty good shape, then – and oversight of that falls to IT director Karen Jacks.

But one of her biggest recent wins – an award-winning project-tracking tool that posts alerts at potential matter turning points – is something designed to deliver new levels of insight and value both internally and for the firm’s clients.

“We wanted to be both more transparent with

clients about how pricing works, and ultimately more flexible,” says Jacks. “The tool tracks the actual costs accumulating against estimates throughout a matter – which triggers alerts to partners in good time as the percentages approach.”

Client conversations about matter progress and results can therefore be more constructive. “Clients

are assured that there won’t be really unpleasant surprises right at the end with no warning,” says Jacks. “If something’s causing concern we can rescope elements sooner rather than later – and the tool can work with any pricing arrangements we may have agreed.”

But that’s as important for firm as for client. As the pricing options expand, the process of ensuring individual pieces of work are appropriately profitable in the grander scheme of things grows more complicated.

“Agreeing more fixed-fee arrangements obviously means more pressure on our profitability,” says Jacks. “The client has the satisfaction of paying a certain price regardless – but internally we need to know the impact of that fact on other current and future work. We need to be measuring what we’re doing constantly.

The internally-developed alerting app sits over Aderant’s MatterWorks for matter planning. Bird & Bird was an early adopter of the software, feeding into product development down in New Zealand before implementation in 2011.

“The app’s not hugely complicated, but it’s very flexible,” says Jacks. “We can manage the email alerts down to the individual matter or just one office, for example – and have them sent to the matter partner, a lead associate or one of the commercial accountants in place to support the finance team on business planning and pricing.”

The app fits neatly into a suite of IT components the firm has available to fine-tune its business pipeline, from initial pitch, through scoping, and subsequent rescoping, to track how estimates fare from a long-





Endorsed by



The Law Society

## Proclaim® is the only Practice Management Software solution Endorsed by the Law Society.

It speaks volumes that Proclaim, Eclipse's market-leading system, is the solution of choice for 23,000 legal professionals in 900 organisations. Proclaim encompasses practice, case and matter management, and is now the only system to be endorsed by the Law Society.

From new start-ups to industry heavyweights, Proclaim is the system of choice for forward-thinking law firms.

- Fully integrated Practice Management Software solution
- SAR-compliant legal accounting
- End-to-end case and matter management workflow processes
- Ready-to-go workflows for specific practice areas
- Fast to implement, easy to use

Contact us for a demonstration – see the Proclaim difference

**CALL 01274 704 100**

[www.eclipselegal.co.uk/lawsociety](http://www.eclipselegal.co.uk/lawsociety)  
[lawsociety@eclipselegal.co.uk](mailto:lawsociety@eclipselegal.co.uk)



**E C L I P S E**

Part of Capita Plc

term profitability perspective. And other parts of that process aim for similar improvement in certainty and consistency.

The process of reaching cost estimates in the first place, for example, are set out for clients in one of Bird & Bird's MatterWorks fee packs, which is contained in a wider pitch pack – created in part through automated document assembly.

"Pitch pack immediately pulls in data from a range of sources and in different formats – pictures, graphs, biographies and standard comments on areas such as accreditations. Fee pack can form one part of that. It's a slicker summary of what we'll do for both clients and lawyers than the two larger documents."

## What's the use?

Like use of a simple email as a frontline alerting tool for what is otherwise a complex process of safeguarding firm-wide profitability, pitch pack illustrates one of Jacks's mantras – usability comes first, and you need input from the users themselves to turn a concept into changing daily practice – the mark of any successful project.

"It's fair to say that a finance or IT person may look at a screen very differently to a lawyer," she says. "You can pack all the functionality you like in there, but it has to be usable and it has to be used." Jacks is open to lawyers coming back on a design test to explain that "we just wouldn't do something like that", she laughs.

"For big programmes we tend to assemble steering groups with representation from several offices. People have input on products at the points of evaluation and selection and – all being well – during deployment.

"But regardless, a screen's appearance to a lawyer today shouldn't have lots of fields demanding decisions about whether or not to fill – and nothing should need hours of training to become a productive tool. You want what I call the Amazon experience.

"Nobody taught you how to find and order that book. The website stores your credit card and delivery address details to save you time, and the process just happens. That's how people want to work. We need to translate such principles from the retail world to the work of professional services."

For example, Jacks says she's also now developing a

new interface for client matter inception – overhauling the screen's look and feel to cut out text clutter and introduce far more intuitive interaction.

"There'll be a simple sequence of guided steps for opening a matter – 'click here'-type language – alongside summaries of recent activity such as conflict checks completed on other clients. It's almost a social media-style twist on how the information is managed and connected – and that's another tech trend we need to breathe into new product design for legal."

## Automatic updates

The firm wants to reduce manual handling of data wherever that's possible to increase both the efficiency of work and everyone's satisfaction with it (employee and client alike).

A further example, says Jacks, is collaboration with another software vendor to design a tool for storing all data related to any large-scale global due diligence exercise. The result is a more templated way of collecting and collating all deal information internationally, says Jacks, automatically feeding it through from any of a number of participating practice areas or offices.

"Rather than repeatedly organising and aligning data from all the many sources, it means lawyers can spend more quality time dealing with the document content," says Jacks. "And a report can be repeatedly produced, giving an up-to-date picture of progress back to the client.

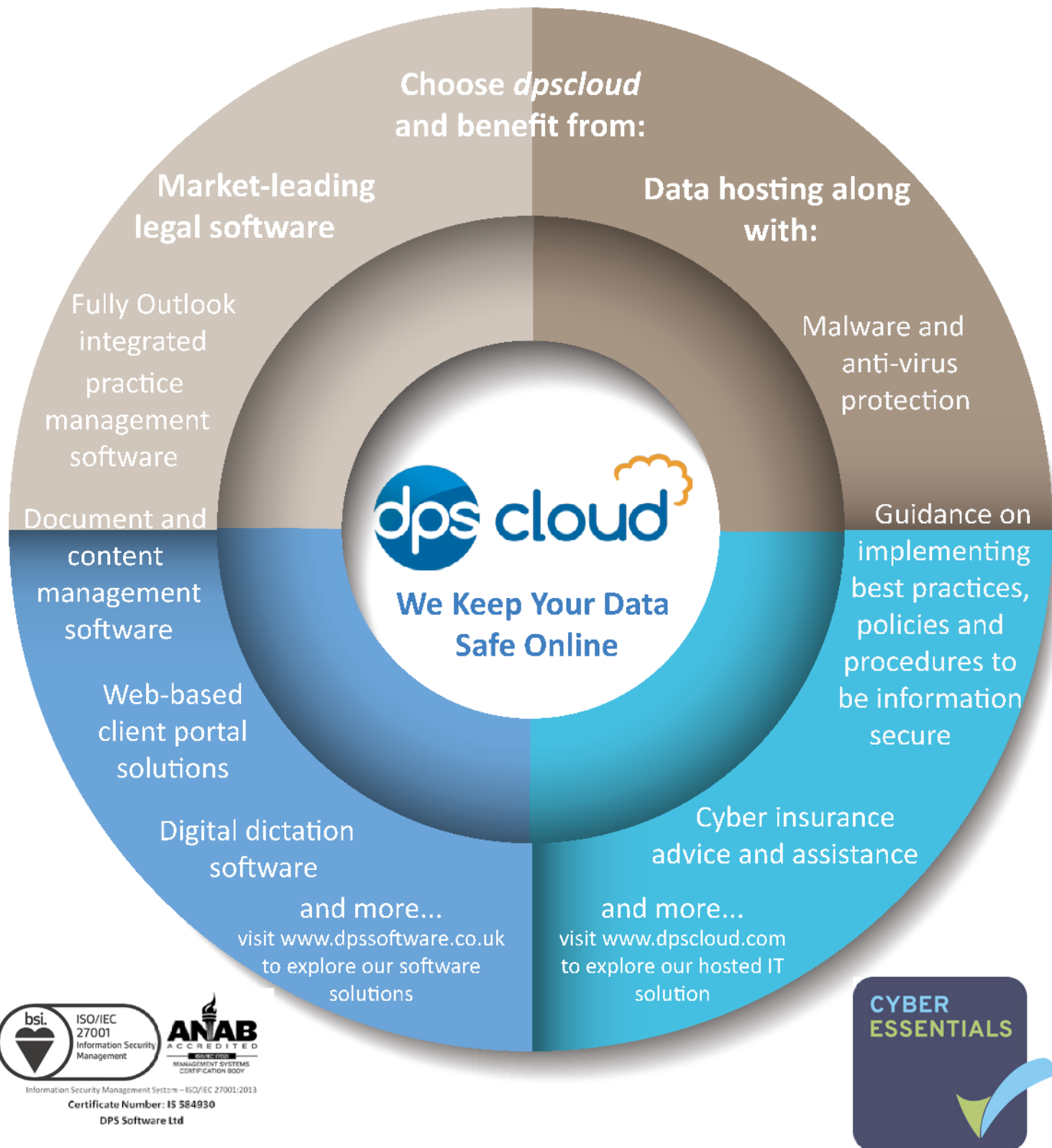
"We also created a mobile app to deliver that status report. It doesn't contain lots of the specific deal detail or allow clients to take actions based on the contents, but it provides an efficient update.

"One client has already been clear that using the technology to automate and create consistent presentation is a reason we've won the pitch."

Like many a piece of due diligence, it has been a long project to bring to fruition, Jacks says, and it isn't over. The plan is to evolve through incremental enhancements identified by users through experience. "As you'd imagine, there has been a huge amount of interest from our corporate team about exactly how it operates – and the international collaboration needed has been particularly time-consuming," she says.



# The Unique One-Stop-Shop Solution For Your Law Firm's Technology Needs



**Contact Us Today For More Information**  
**[www.dpscloud.com](http://www.dpscloud.com) | [www.dpssoftware.co.uk](http://www.dpssoftware.co.uk)**  
**020 8804 1022**

“Corporate due diligence is one area where IT really shouldn’t be deciding how things will work. User input is crucial, and you need to build quite a bulk of initial buy-in to launch any new tool on the workforce. True success will be dictated by everybody adopting it just as they should. Education needs to be as carefully designed as the product itself with that in mind.”

But consistency is, of course, key to an international firm thriving in almost every respect. Global clients need global service levels and firms need global datasets to deliver those – and systems must be on a path of suitable integration to support global business objectives. Bird & Bird now has a global HR system live in a number of its offices.

“In its very simplest terms, we just want to be in a position where we can locate everything about our people in one place,” explains Jacks. “But without a global system, it’s also really hard to identify the talent information you need for sophisticated resource planning on that scale.

“We want as much useful intelligence about our people, from their expertise, experience and languages to less formal personal development goals and desire to move around the firm.

“For example, we have a big secondment programme which is always moving – but a challenge to our momentum is the identification of exactly who’s available with the right skills for an opportunity.”

## Chasing paper

Many automation and other efficiency-boosting ideas fall under the firm’s Working Smarter programme – and an ongoing consideration is what more can be done for the mobile working experience in all its various forms.

For example, Jacks says she’s exploring how the firm might make better use of technology to enhance the billing process. “We’re big users of tablets in general, but we think we can use them more for managing billing and time capture. We’ve had a mobile time recording app up and running for some time now – the big challenge, again, is keeping the momentum behind driving adoption.”

At the same time, tablets are encouraged as a route for accessing circulated documents – indicating Jacks’s preference for paperless meetings. “We’ll

send our lawyers papers to view on-screen instead of printed agendas, which they can open, annotate, save and store back. As well as enabling more productive collaboration, it’s more secure than either printing or storing something on a single device.”

Bird & Bird’s recent partner conference was fully paperless. The marketing team designed an app that could open up the conference agenda on whichever device the lawyer happened to have.

“A conference is a big planning exercise. A lot of time and effort goes into updating materials as things change and keeping everything current,” says Jacks. “An app of course streamlines that process, as well as being a single point of reference for everybody to refer to on the day.”

Mobile IT options are particularly in focus at present with a big office move for Jacks to manage in 2016 – introducing a more open-plan layout to encourage more movement, communication, and the joining of the many different delivery dots around the work space.

“We want to free people to move from a technology perspective,” explains Jacks. “They should be able to pick up and put down devices and work near seamlessly, perhaps with the same interface whether at their desk, on a laptop or with tablets – and we’re exploring better federation for collaboration with clients as well.”

Jacks is also considering the firm’s next client relationship management investment in light of migration to mobile-first working patterns.

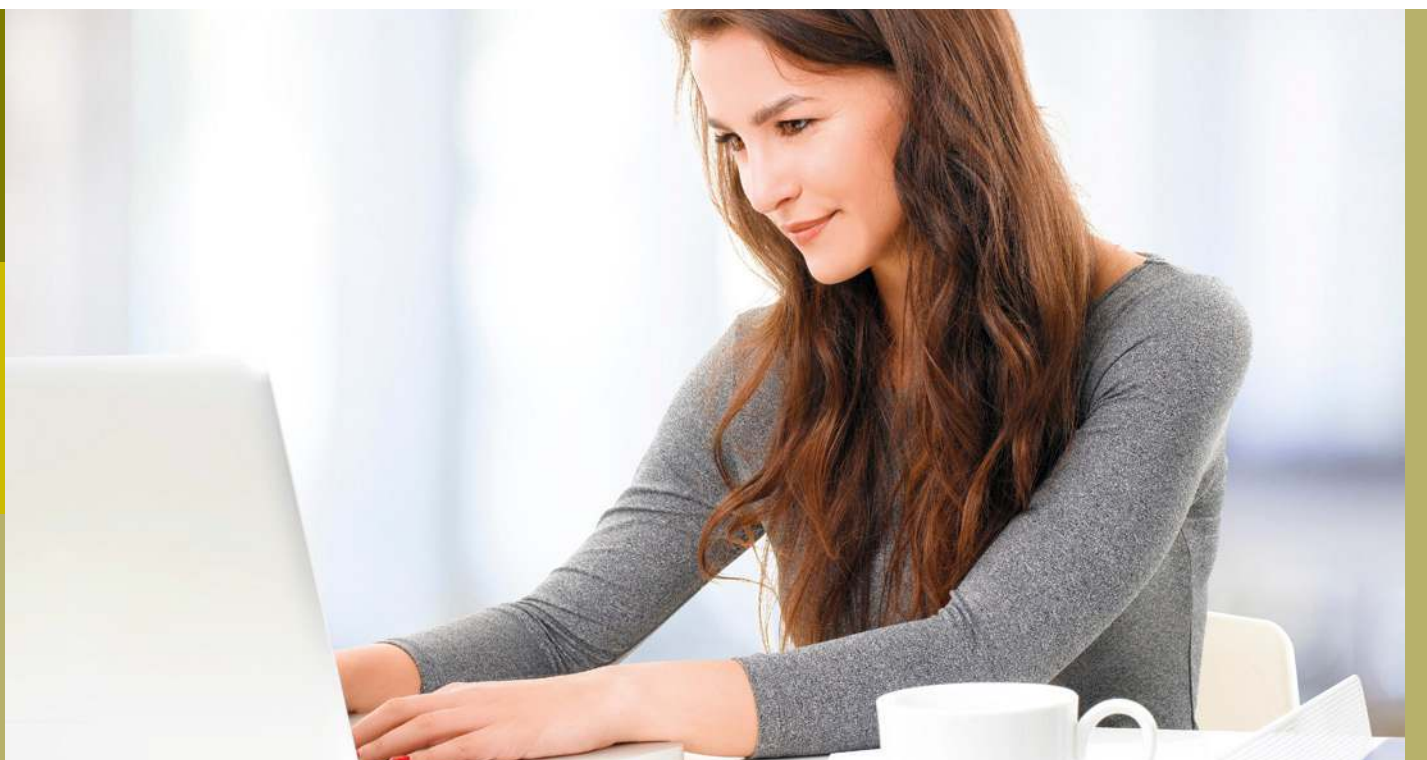
She says: “Our CRM data is currently still quite fragmented. We’ve looked at several products, but with people less at their desks, it’s clear to me that we need to think about how [the CRM works and feels] on mobile as a first priority.

“If somebody’s attending a conference, or goes to meet a client, and wants to check a detail or record a discussion, they need to be able to do so as simply as possible, then and there.

“Mobile follows the desk interface in lots of product development – perhaps it’s desk with a bit of mobile tagged on – but this current proof of concept in one of our offices is a system that has been designed for mobile access from the outset.”

Also in the consideration mix is that it’s a cloud-based system – but as with many of the firm’s recent investments in technology, the ultimate test will be whether sufficient usability in the eyes of fee earners makes better, more productive behaviours stick. ●





## See the whole story that lives within your firm's data.

Qlik® from Informance lets you create visualisations, dashboards, and apps that answer all your firm's most important questions - with more power than you can imagine.

Our unique Qlik Legal Dashboards give you an instant, real-time view of your firm's data for more informed decision-making and improved efficiency and profitability.

- Financial Performance Management Dashboard
- Risk Management Dashboard
- Sector Management Dashboard
- Business Development Dashboard
- Human Resources Dashboard

Informance is a Qlik Elite Solution Provider with unrivalled experience in delivering Qlik solutions to the legal sector. Our Qlik Legal Dashboards have been developed to meet the unique KPI requirements of law firms.

**Telephone: 01926 623456**

**Email: [cathryn.hunter@informance.co.uk](mailto:cathryn.hunter@informance.co.uk)**

*Feature*

# Info on the edge

Our word of 2015 when it comes to legal tech is transparency – as important for keeping pace internally as it could be to keeping your clients. Richard Brent reports



**Their strategies may diverge, but at least one consistent direction of travel for law firms in 2015 has been to make more information more available, more of the time and in more places.**

In the era of Amazon shopping on the one hand, and Wikileaks shocking on the other, it's hardly surprising that both legal business and their clients want to know things right now, if it's there to know. Convenience and process transparency are orders of the day for consumers – and clients and employees alike now want similar standards of upfront service where they work. How well law firms are able to recreate such digital-age immediacy in their more formal environments, where security and reputation are, of course, sacred, may well be what comes to define next year's big winners.

It's certainly well up there on the agenda at DWF – which was singled out in the technology category, among others, in the 2015 Financial Times Innovative Lawyers report.

Earlier this year the firm launched its DWF link hub for clients – a platform for access to all manner of management information about WIP, but also an opportunity for clients to instruct, upload and edit some work for themselves. It's tapping into a trend, says the firm's chief technology officer Richard Hodgkinson, of clients favouring a more collaborative approach to shaping how their business proceeds.

"More of the client base now want greater control over their legal exposure than in days gone by," says Hodgkinson. "And with digitisation we can try to create as complete an online experience as possible.

"Our clients conduct lots of other key business tasks online whenever convenient – and as service providers, we have to try to move into that same space for them as best we can."

DWF link is a work in progress as components keep coming onboard. "Clients can already log on for quite a personalised experience – to read about sector-specific news and events, for example – and also see just how teams on the client and firm sides are collaborating on documents," says Hodgkinson.

Of course, more insight into what's happening on and around matters right now makes for better management of future business. But there are also the more routine tasks that top and tail a piece of work. Stripping out the time they have to take – rather like alternatives to being put on hold to speak to your bank

manager – simply makes for less-stressed customers.

"Clients can already instruct – so the next phase will be to align the whole onboarding process – passing through steps like money laundering and conflict checks automatically," explains Hodgkinson. "In future, these stepping stones that occur again and again really ought to be entirely friction-free." That extends right out to rolling out digital signatures, he says.

Then there's the money. "They can already log in to pay or query a bill with a quick click – and the next step will be to provide more transparency, earlier, around just what that bill is likely to be."

Tom Wagstaff, director of knowledge management and innovation at Birketts, is also focused on serving clients in new ways – and an inaugural extranet solution is set to go live next spring

He says: "First, we need to identify exactly which clients it will suit – but one use would be private clients viewing their trust deeds or wills. And corporate clients with large volumes of HR activity could see comprehensive lists of their settlements."

The rationale is more to deliver comprehensive and regular updating in a more convenient format than setting up select client self-service options like DWF – but Wagstaff appreciates the potential for something more dynamic that could lead to collaborative generation of documents in future.

The solution also builds on the existing Birketts Online Support Service (BOSS) – a portal for HR clients to access template letters and guidance notes across a range of HR matters where they can essentially fill in the blanks.

## Model behaviour

It was growing client demand to be more informed and empowered around work handed to firms that led DWF to launch a wholly owned technology subsidiary this year. Called 15squared, it came about with the acquisition of a cloud-based platform for volume insurance in the course of a merger. However, under Hodgkinson's chairmanship it's now taking client requests. Thus far launches include a new way of representing and reporting asset management online (DWF Pinpoint) and an app for streamlining organisational crisis communications (DWF Notify).

Hodkinson says: “Amazon-style semi-self-service won’t suit every client – but we don’t think the future’s firm will only be dealing in documents. We’ll present a suite of services that, of course, have threads of legal expertise, but also involve other intellectual capability. And it won’t necessarily always be driven by what the lawyers are doing.” That might mean business consultancy, he says. Or it might well mean the

*“We’ll present a suite of services that also involve other intellectual capability.”*

Richard Hodkinson,  
chief technology officer, DWF

development of good software.

Inevitably, 15squared also has eyes on what’s happening in the artificial intelligence space. In 2016, Hodkinson is set to restart a conversation with IBM Watson that was terminated by too many competing projects this year – but he’s clear that investment in the area will be a game changer for the profession.

A bit further down that particular path is BLP – which implemented the Ravn Applied Cognitive Engine from Ravn Systems in September. A ‘contract robot’, Ravn ACE takes data out of standard legal documents and performs necessary cross-checks automatically (with “perfect results every time”, says the press release) – and fast, of course. Legal joins the likes of financial services, telecoms and media to test what it could mean for the business model.

Much space has been given to discussing what AI will mean for the future career paths of the lawyers it replaces – but does it also have implications for more client-centred ways of working?

Bruce Braude, head of strategic client technology

at BLP, says: “We’re seeing the biggest impact on repeatable, and relatively standard, processes – and those are processes where there’s high volume.

“But that doesn’t mean the transactions need to be easily repeatable in their entirety. Complex transactions will often still contain repeatable components.” A typical example is due diligence, he says.

And the robots might not yet be taking calls from clients – but that doesn’t mean they can’t have a clear role in the value proposition and negotiations.

Braude says: “Two key client requirements are cost-effective service and improved risk management. This type of technology helps to deliver both those outcomes.”

For example, the AI can be applied to replace the most common method of due diligence at present – which only involves a sample of what’s available to test.

“In agreement with the client we’ve been able to conduct due diligence on a full dataset, previously ruled out over cost or time pressures,” says Braude. “The client gets much richer insight – and ultimately better risk management. And that understanding can impact their future commercial decisions.

“The challenge for implementation is to understand with precision where you are pushing the technology to its limits – the levels at which you need to be more augmented with human expertise to ensure accuracy and quality.”

Generally, adds Braude, the firm has also invested in analytics to give clients greater insight into both law firm processes and the documents they deliver.

“Various correlations with volumes and timings gives clients very valuable insight into the steps involved in our processes for them,” he says.

“Data extraction tools can also help them to analyse the substance of legal contracts for insight into trends and relative contractual risks in different scenarios. Understanding patterns helps them to anticipate what may be just around the corner.”

And currently less common in the UK market, he says court data can be analysed for probabilities of winning and when to settle. “If we’re advising clients on litigation we should be using all the statistics we can determine to present the range of options and impacts.”





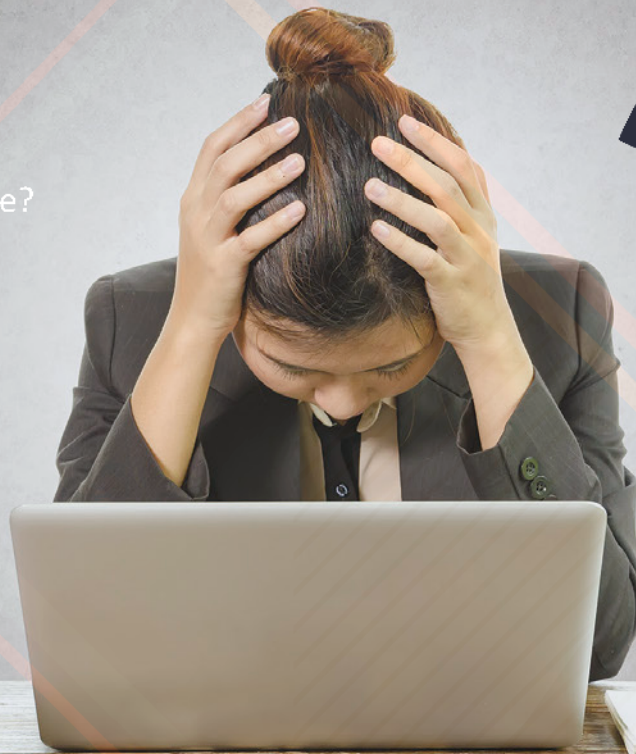
**Fearful**  
of dangerous  
search & replace?



**Tired**  
of tedious cut  
& paste?



**Exhausted**  
by too many late  
nights doing drudge  
work?



## Qorus Breeze *Proposals*

is a powerful solution that is helping firms like yours to create superb proposals & pitches while reducing operational costs:

- Ensure that content stays up to date & is easy to find
- Integrate with your CRM system so that client information is always correct
- Enforce brand consistency through smart Word & PowerPoint templates (no need for coding)
- Integrate with your website so that when you've updated content once, it's updated everywhere
- Empower business developers, marketers & lawyers to create outstanding proposals & pitches on demand



Contact us to request a demo

**+44 203 143 3418**

[info@qorusdocs.com](mailto:info@qorusdocs.com)

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



Create. *Collaborate.* Captivate.

## Reporting the future

Greater transparency can also present internal benefits for a firm in 2016. Tim Kiel, IT director at Irwin Mitchell, says: “In the past we’ve generated daily or weekly static reports that get emailed around for fee earners to refer back to, but we’re now moving to a more real-time solution. The data is more current,

*“The point is to see what you’re doing quickly – that means less time dwelling.”*

Tom Wagstaff, director of innovation and knowledge management, Birketts

and advanced visualisation tools we are using are such that fee earners can find and drill into much more information, which aids in decision making.”

The next step will be to extend this software’s capabilities out to certain clients for some data on matter progression, he says. “Our personal clients clearly want to know where their case is at any given moment – and banks and insurers we work with can also benefit from a richer level of data.”

Graham Sankey, head of IT at TLT, also had more advanced reporting on his 2015 priority list of projects.

“We needed better visualisation and drill-down, as well as the ability to run ad hoc reports,” he says. “Our previous reporting was very static, updating changes overnight. Moving forward, things will be no more than five or 10 minutes out-of-date. There are standard dashboard presentations of key metrics, but they can also be tweaked to the individual user.”

Sankey also agrees that clients are calling for more effective reports and data capture from the firm. In his case, however, that has led to more regular ‘status and outlier’ reporting, not opening time and billing

information to outside eyes.

And Wagstaff at Birketts has also bought into a more customised, and therefore convenient, reporting process. “The point is to see what you’re doing quickly – and that means less time dwelling. It’s good for productivity that lawyers know exactly where they are,” he says. “As a former fee earner myself, I know they like to monitor personal progress against objectives

very closely over the year. You can view performance by individual and team – but also by client or matter.”

It means energies can be redirected as necessary. “The available data can also be tailored to different management levels and remits, right up to the CEO having easy oversight of each practice’s relative performance,” he says.

But clarity can demand consolidation of existing data as well as ever more of it to mull over all the time – however convenient the presentation.

Irwin Mitchell’s Kiel says: “Our firm is probably no exception in traditionally reporting data by accessing many different systems. We’re in the process of building a central data warehouse to cleanse all client data for a clearer single version of the truth.”

And consolidation is also on the cards for the firm’s wide-ranging case management requirements following a string of M&A activity (one, with Thomas Eggar, confirmed just as this issue went to press). In September, Kiel kickstarted a process of identifying common legal processes across practices through a series of workshops that combined fee earners and the necessary IT technical expertise.

“We asked which processes had to be followed and which documentation people needed to generate for clients by each phase of a matter’s life, and went through a process of creating a series of prototypes to feed back comments about every two weeks.

“The system needs to be common enough to process all work more efficiently, but flexible enough for everyone to divert from the so-called ‘happy path’ when necessary for case developments that just can’t be foreseen. Then there’s a manual overlay on top of that for those things that are once in a million.

“You can’t build for absolutely everything our firm



What would **you** do  
with more time?



PitchPerfect



See why  
**PitchPerfect**  
is the answer.  
Scan with your  
smartphone.

does or the costs would just go through the roof.”

## Environment friendly

And another critical factor for Irwin Mitchell when deciding how to proceed with case management was

the potential for greater mobility.

“Our partners spend lots of their time on the move now. They will often log onto laptops to authorise case progression and other activities,” says Kiel. “A system that supports mobility, including the use of a mobile app, was very important – as is ensuring the right levels of governance and control for that capability.

# Simmons & Simmons: Taking up tools

One way clients can certainly get transparency on cost is the subscription model – and tech can now help tailor such services to clients’ circumstances too.

In November 2015, for example, Simmons & Simmons launched its MiFID2 Manager online tool for financial clients affected by changes to the Markets in Financial Instruments Directive (MiFID) – due to be UK law in just over a year.

“Client conversations found they needed a more practical way of digesting this very complex information in their own time,” says financial services partner Charlotte Stalin. But to be honest, she adds, sharing the knowledge involved with her own colleagues to meet the “tight turnaround windows” was no less in need of some technical support.

Marking the tool out, she says, is the degree of client choice – and control – over what they’ll get. “The firm will pre-filter reports by the likely impact on their type of business each month,” says Stalin. That package is available on subscription.

But clients with the biggest ongoing projects are more likely to subscribe to another level of bespokeing that involves their own questionnaire-style input. “As with lots of European legislation, there are a number of levels to consider – framework rules followed by layers of granularity,” she explains. “Compliance needs will depend on a client’s specific activities, and perhaps their own clients.” The functionality filters

out the irrelevant aspects of the regulation to practical actions the client can take now.

At Simmons, the IT department, lawyers and online services will always work together to shape just what can be done with technology. That’s simply a reflection of how client teams work, says Stalin. Their IT and operations talent will support projects directly – and when it comes to legal knowledge lawyers must, of course, feed into what business support does.

Indeed, it’s probably the content design that’s the bigger challenge with changing client-facing tools. “Unlike with financial information, there’s always some tension between maximum efficiency and ensuring clients have the right view,” says Stalin. Channels are therefore only developed following detailed consultation with those clients – often resulting in something that can then be applied for others.

Simmons, at least, has a fair amount of practice in the area. Online hub elexica.com was launched in 1999, and the navigator subscription service for regulatory and tax advice arrived in 2007 – picking up several awards. Subscribers to MiFID2 Manager will now use the same login details for a familiar experience.

Where clients need to instruct the firm fully as the legislation plays out, they will also have access to dedicated deal rooms for document collaboration and project management tools.

At Birketts, meanwhile, a project has transformed how internal information is managed to give fee earners a cleaner experience all round. Rather like the one-stop-shop for clients to access all the information they might need, the Oculus KM system – built entirely in-house – fulfills that function for lawyers.

Says Wagstaff: “They’ve access to all their legal knowhow, precedents and historic advice – but right next to that they’ll find marketing collateral for the next job of the day. The left hand pulls down a document for drafting a lease, and the right quickly finds the team’s latest service e-flyer for a pitch. The day’s key tasks can be completed from the same environment.”

With user experience front of mind, the firm’s learning resources were then also incorporated – such as quick tips for a presentation or guidance on points of house style. And now compliance has got in on the act – a fourth pillar provides a repository for all best practice and policies.

But most crucially, says Wagstaff, “lawyers have the ability to shape that environment for themselves”. Information layout can evolve as teams or priorities change. “We’re doing away with the need for IT

development and support to intervene and work on their behalf.”

The firm’s intranet has benefited in the process. “It was basically overburdened, and this has given us a clearer vision of what it should be,” says Wagstaff. “With all those materials gone, it has become purely a communication piece – almost an electronic firm and social magazine.”

But with a broad practice mix, he says the firm isn’t set to force any informal chatroom-style interaction on its people. Emails will still be flying about for the foreseeable future.

“I wonder whether the typical traditional lawyer really has the appetite to communicate in the workplace in those ways we see people engaging much more in their personal lives,” he says.

Is that typical lawyer’s profile truly changing as technology takes over more of our information-hungry lives? It’s a valid question. Perhaps firms can get away with resisting the work-life blur encroaching elsewhere in life. But it’s the appetite of the clients for new communications that may force the issue. After all, as Amazon knows, that customer is always right. ●

# EIM

## EXCHANGE IMPORTER MODULE

Take control of your users’ mailboxes and eliminate client-side e-mail processing

The most powerful way to import Exchange content into iManage Work or SharePoint



 iManage

 SharePoint

 **DOCAUTO®**

 [www.docauto.com](http://www.docauto.com)  [docauto-inc.](https://www.linkedin.com/company/docauto-inc)  [@docauto](https://twitter.com/docauto)



# Shaking up the systems

## INDUSTRY ANALYSIS INDEX

*Interview:* **Staying a step ahead**

**David Espley at LexisNexis Enterprise Systems**  
on managing information moves with Microsoft

page 25

*Interview:* **Equalise opportunity**

**Tony Parish at G3 Comms** on how unified  
communications levels the global playing field

page 27

*Interview:* **No expenses spared**

**Dave Terry at Chrome River** on a dramatic  
increase in expense and invoice efficiency

page 29

*Analysis:* **Smarter security**

**Gillian Walton at Purple Skies Consulting** on  
placing people at the heart of mobile management

page 31

*Analysis:* **Attacking costs**

**Chris Labrey at Econocom** on counting the  
cost of continuous cybersecurity planning

page 33

*Interview:* **Accelerating search**

**Michael Kearney at Encompass** on investing  
in automation's triangulation tricks

page 35

*Analysis:* **Teamwork on trial**

**Kim Walton at Enable** on whether document  
production's innovation moment will arrive

page 37

A portrait of David Espley, a middle-aged man with a receding hairline, wearing a dark blue jacket over a light blue shirt. He is looking slightly to the right of the camera with a neutral expression. The background is a blurred outdoor setting with a stone archway and some foliage.

*Briefing Industry Interview*

# Staying a step ahead

**Maintaining momentum with Microsoft opens doors for law firms to change their data ways, says David Espley at LexisNexis Enterprise Solutions**

Photography: Jonathan Goldberg

**In legal, familiarity does not breed contempt. The key to persuading busy professionals to adopt any new ways of working – behaving differently, communicating proactively or doing more with data – is to present them in contexts they already understand and value.**

That's central to the rationale for LexisNexis basing its LexisOne answer to the traditional practice management system on Microsoft Dynamics enterprise resource planning (ERP) software – a move which won it the 2015 Microsoft Dynamics UK independent software vendor of the year award this August.

“A platform that looks and feels like a Microsoft system is a more gentle transition to a world where lawyers and managers make better use of information,” explains David Espley, new UK technology director for LexisNexis Enterprise Solutions. “All our customers are already well accustomed to working with documents in Word and Excel, for example. The idea is to take that simplicity, but give it the power to do much more for a business. A greater range of data gifts a firm competitive advantage in developing pipelines of both future business and future talent, as well as continuously improving working efficiency.”

That’s especially true of firms managing a process of international expansion. “One of the main benefits of any ERP system is that it’s built to work across, and can help to build, business in multiple geographies. A real-time status change in Singapore is also visible in London immediately. Reporting of real-time work in progress allows people to move on important decisions faster.

“If you want to do some parts of a matter in one continent and tie them up in another for reasons of convenience or cost, appropriate data can be handed around to manage that process.

“We looked at how other sectors plan and run their businesses – such as using a world time map, for example – and it’s areas like that where Microsoft’s investment has made a huge difference to the result. Then we invested in adding the more legal-specific features that can benefit alternative business structure and forward-thinking firm alike.”

## Cloud sounds

Another common element in the development of both Dynamics and LexisOne is commitment to delivery through the cloud. At some point, both companies will offer public and private cloud-hosted versions of this data accessibility for even greater flexibility, says Espley.

“Cloud enables people to interact with real-time analytics more cost-effectively, from more devices, in more places,” he explains. “Documents trigger a workflow, which triggers payment for that particular set of work.

“You can view – and act on – complex data dashboards from the comfort of your home. You can link in Skype for business and record a real conversation

against a matter. There are lots of exciting developments that will arrive with cloud enablement – and both our businesses are right on that roadmap together.”

He says: “The challenge for the legal market will centre on whether it decides to adopt public cloud and relinquish control to large vendors. We want to take our customers with us in exploring the advantages of using very secure, stable, large-scale infrastructure, which any of us would find it hard to replicate individually.”

In some cases, it’s really the understanding of what constitutes tight security that could be the obstacle, says Espley. “Of course everyone wants the confidence that their choices are impenetrable. But even if someone manages to break in, data protection is now at a stage where decryption is almost impossible.

“The prime public targets of data attacks that make the headlines often haven’t followed best practices surrounding issues such as encryption – and it’s interesting that some law firms feel they would fare better investing in that protection on-premise themselves than they would using a security expert.”

Others don’t feel that way. Investment banks, for example, have harnessed cloud processing both to crunch data for a defined period and to share it quickly for that much sharper identification of the next opportunity. “Hundredths of a second can confer a trader competitive advantage, so data agility is clearly key,” says Espley.

Another useful counterpoint comes courtesy of the retail sector – which uses data analysis to get closer to customer requirements and preferences, costing and planning in light of changing circumstances in real time.

That’s not to mention the internal customers – the lawyers – who want simpler ways to search for information and manage matters in their working lives no less than in their private time.

“There are lots of safe but exciting opportunities for firms to use IT in new ways – and it’s the people trying them first that reap the best returns in efficiency and engagement before that practice later becomes commonplace,” says Espley.

---

Learn more about

**LexisNexis**  
**Enterprise Solutions**

[www.lexisnexis-es.co.uk](http://www.lexisnexis-es.co.uk)





*Briefing Industry Interview*

# Equalise opportunity

**The flexibility of unified comms in the cloud can help firms to grow business both faster and smarter, says Tony Parish at G3 Comms**

**As more firms expand overseas, work from remote offices and travel between multiple locations, consistent responsiveness is a challenge.**

But having the right comms infrastructure can help overcome those hurdles and ensure the higher-quality service clients demand.

“Bringing together the different apps people use within their businesses onto a single platform can significantly boost responsiveness and productivity,” says G3 Comms chairman Tony Parish.

“Firms can have multiple systems from different vendors to get the features they need, but those systems don’t necessarily integrate with their desktop or the way they want to be able to work. Dealing with different applications creates a burden. Communications solutions can become unwieldy when the applications don’t talk to each other, getting contacts and information from different platforms.”

Systems and comms can, and should be, more joined up, he says, to boost the user’s experience and productivity by working anytime, anywhere – from any device. “When usability improves, so does client service. Getting all your information where people need it – on the go, at home, or in the office – makes workflow processes slicker and far closer to real time. Integrating the applications users and clients need – whether it’s voice, video, presence or instant messaging – means smarter collaboration.”

Click-to-dial is one example, says Parish. Rather than 200 people needing to find someone’s number 10 times a day, dialling becomes a process that takes seconds. “The organisation saves a vast amount of time and

effort, improves its service, and provides a seamless user experience,” he says.

Such quicker access to information is now a differentiator. Millennials grew up with that seamlessness, says Parish. “The younger generation of clients will demand a smoother, speedier service – akin to what they get in personal applications. Plus, they want to engage in conversation from any platform – chat, voice, video and instantly. The game is changing, and firms need to be awake to it in all areas, right down to their infrastructure.

“The ability to deliver a better service by integrating comms and linking information across platforms can improve efficiency without having to be particularly tech-savvy. For example, a fee earner should be able to see the matter number and history automatically when speaking with a client. Automation in comms can make a big impact in simplifying your processes.”

## Cloud for coverage

Meanwhile, a lot of firms have gone global either through mergers or acquisitions or acting in smaller offices abroad. Setting up in new locations gets a further boost, says Parish, from using cloud services to get consistency globally. “A universal level of services standardises the user experience for all your people – it doesn’t matter where they are.”

“Firms are also moving their operations into our data centres for higher security,” says Parish. “And private or hybrid cloud models mean providing cloud services



Photography: Jonathan Goldberg

with the security of on-premise solutions. The cost of private over public cloud is a comparably small price to pay for the best protection.”

Unified comms can also be a better fit for the business’s operational needs, says Parish, by moving the firm’s underlying infrastructure from big upfront expenditure to service-based models. “It allows the firm a more flexible footing,” he says.

“The op-ex model is attractive to partners for cashflow reasons, but it also means their organisations are strategically lean.” Firms are increasingly extending their global reach, he says, and speed of deployment becomes a crucial factor. A few years ago it may have been a six-week build. Now, a new office can be up and running easily in a week, he says. “Speed to market and getting return on investment on hires in a new region is going to be far quicker. The faster you roll out, the faster the firm can raise bills and bring in new clients as well.

“We’re seeing growing interest in easily integrated collaborative tools such as Skype for Business and instant messaging, from desktop to mobile apps. These

tools are here to stay. But being first also gives you competitive advantage. End-to-end systems integration – using feature-rich UC – combined with the sleek look and feel of Skype for Business to form a seamless set of features means firms and clients can communicate and collaborate anytime, anywhere. Ability to know when an international client is available to chat call or start a videoconference with partners in different cities in one click is a significant advancement.”

Firms partnering with the right providers and solutions integrators will reach their more available, always present potential – and give the home advantage on a global scale.

---

Find out more about

**G3 Comms**

[www.g3comms.com](http://www.g3comms.com)





A man with grey hair, wearing a light grey blazer over a blue checkered shirt and dark trousers, is sitting on a black stool. He is smiling and looking towards the camera. The background is a wall made of vertical wooden planks. The floor is a light-colored, polished surface. The lighting is soft, coming from the left side, creating a slight shadow on the wall behind him.

*Briefing Industry Interview*

# No expenses spared

Expense and invoice management is a huge challenge for the maze-like law firm approval matrix. Bespoke automation rules are a recipe for better compliance and lower cost, says Dave Terry at Chrome River



**Legal businesses are at various points down the path of creating digital knowledge environments – but in some cases even the most mundane of tasks remain strikingly reliant on manual ferrying of paper from pillar to post.**

Basic management of personal expenses is one clear case in point. “Many organisations will still physically tape receipts – staple packets of paper – to Word or Excel documents for overnight shipping to another office, incurring huge administrative expense,” says Dave Terry, co-founder of Chrome River.

“Someone else then spends time opening these packets, reviews the expenses for compliance, keys data into a reimbursement system, and passes the details to someone else to re-enter into a financial system for billing or profitability reporting. It’s enormous wasted effort and at risk of error due to manual, duplicate entry. Firms want to reduce cost – and automation of such a basic business process creates direct savings.”

That’s in addition to the creeping costs (and risk) of inaccuracy if you rely heavily on people for what’s perceived as a low-priority business task; the poor visibility of inefficient spending trends; flagrant non-compliance; or even out and out criminality. The latter, says Terry, is in fact one of the most provable pots of savings gained by expense automation.

“Fraud doesn’t just cost a few pounds directly,” he says. “The suggestion and revelation of such behaviour has a hugely distorting effect on an organisation’s credibility and long-term reputation, hard to undo and seriously damaging the brand.”

## **Points of purchase**

Even the firms embracing automation may also be doing so relatively inefficiently – failing to integrate travel management procedure or credit card payments, or lacking mobile access to submit and approve requests as promptly as possible.

“Expense collection is, of course, a particularly mobile function,” says Terry. “You’re having dinner with your client, but with your smartphone you’re also sat at the computer. Hop up after dinner and you can capture the information from the receipt with a simple photo right there. Of course people don’t want to collect wads of paper in their pockets and sift

through them manually the next day or week when they’ve forgotten what they’re for. Transactions can be captured at the time of spend and feed straight into an automated system – whether paying by corporate card or prompting people to take a photo. It’s only one step further to add guest names then and there, and even complete the full claim before you leave the restaurant.”

Meanwhile, failure to chase and process client-billable expenses in good time can weaken cashflow. “Clients won’t reimburse if charges have aged too much – so the key to payment is a simple and thorough process,” says Terry. “You can even drive compliance rules down to a particular client or matter to limit uncertainty or surprises.” Whether internally or externally, alerting people in good time when limits or triggers approach increases likelihood of cooperation.

He says flexibility to flesh out processes for themselves is a vital selling point for the 75% of top 50 firms that already use Chrome River to control spend. The Chrome River system has an underlying business rules engine that enables each firm to tailor both limits and approval processes to the firm’s specific circumstances.

“Of an expense report with 10 line items, eight may be billable, the other two have to fly off to another office for review, while the marketing head has to review other details sitting in another city,” says Terry. “It’s a complex matrix. Compliance rules can be created for individuals, titles, offices or entire regions, and automated business logic then determines levels of scrutiny.”

But the cost of partners with a spending problem is nothing compared to that of poor procurement practice or insight. Third party invoices and expenses can be managed – and simplified – by passing them all through the very same system. “As supplier invoices come in, you need them coded, routed for approval, and clearly held up to the light against policy,” says Terry.

Trawling the paper trail might not be a thing of the past – but automated expense and invoice management keeps cost at the forefront of management’s mind, while also offering the time for some respite from the receipt.

---

Find out more about

**Chrome River**

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

**CHROMERIVER**



### **Mobile working can put a whole new twist on the traditional two-hour commute to the office.**

It's usually an opportune moment to catch up on emails, work on documents and discuss work issues with colleagues. But there are also possibly unrealised risks. People might be reading over your shoulder or listening in to your important telephone conversation. Risks need to be communicated to all users, including what they can do themselves to mitigate them.

There's a whole analysis piece that needs to be undertaken – and which the project team and users both need to understand – before any implementation starts. You need a really clear understanding of what's going to change, why the firm is doing it, and what's in it for the employees.

Using mobile working to enhance effectiveness of the workforce is certainly a strategy that can increase productivity and create more profit. It can enhance client relationships by providing a more effective client service experience. If your workforce can work effectively and productively, your clients are more likely to be happy – and will potentially come back for more. But in order to implement this strategy, we need to strip processes back to basics to facilitate the change.

### **User journeys**

Analyse what the employee needs to achieve in their job function and their common pain points. Where are

they struggling? But these aren't general questions that can be answered in the boardroom. Each department and team needs to be part of a separate roundtable discussion. It may be that new technology features here – but maybe it's a change of process instead, or perhaps it's both. Always remember that technology is used to solve a problem or enhance a situation. It's not there to be enforced for its own sake.

If a solution is implemented without any such preparation, we run the risk of a failed project, over budget and over schedule. Another result may be people either not using technology properly or not using it as it is expected to be used. During the preparation phase one of the key elements is a communications plan. And if we assume everyone is busy, we'll appreciate they won't be able to retain a lot of information in one go. By drip feeding messages and breaking them up into bite-sized chunks, offering plenty of repetition over a period of time, communications stand a much better chance of being retained and acted on.

It's also important to review internal communications throughout implementation – for example, with a communications plan, delivering training, walking the floor, and so on. This review could highlight the need for tweaking those messages if they aren't being correctly grasped. Always be consistent, so the firm's people understand the nature of the change and how they can use it. That is all part of the change project. Gaining feedback from people, using a helpdesk or the aforementioned floor walking approach can all assist with pinpointing key areas for improvement.

Before implementing any mobile working change, the technology teams need support for a secure infrastructure. But the firm's people then need to know how to use the technology safely and securely. That's why it's so important to understand pain points during preparation. Issues should be addressed not just via the solution itself, but also through thorough communications and training.

If people aren't using the technology properly, they could inadvertently put the firm at risk – losing information, allowing an information leak, or failing to prevent a breach to the detriment of reputation.

Technology is no silver bullet – and there are a

lot of other things that need to change. Management and team members need to be more transparent than before. Management needs to trust the team to communicate when necessary – and team members must trust that management is leading a culture of strong and open communication. If a team member is working remotely and repeatedly not being kept in the loop, it's a certain recipe for future disengagement.

Ensuring that everyone feels part of a team, however

*“Team members must trust that management is leading a culture of strong and open communication.”*

Gillian Walton, managing director,  
Purple Skies Consulting

and wherever they work, is critical. And managers need strategies and support to make that happen. Managing a virtual team, for example, throws up different challenges to knitting together a team located in one office. Management needs the tools to ensure their teams feel included, or they will contribute less and once again disengage, damaging productivity.

Like any change, the mobile move really needs to be led by top management. But of course, that means that top management needs to feel comfortable with the technology too – in order to demonstrate by example. Education is a massive part of implementing mobile development. If not deployed properly, it can undermine expensive investment in security and risk long-term damage to reputation that's even more long and painful to recover from.

---

Learn more about  
**Purple Skies**  
[www.purpleskiesconsulting.co.uk](http://www.purpleskiesconsulting.co.uk)





*Briefing Industry Analysis*

# Attacking costs

**Cyber risk work is never done. Investment in IT security must be an ongoing activity, so cost-effective delivery is key, says Chris Labrey at Econocom**



**Today we are digital. Personal data is stored electronically and cyber attacks are frequent. So efficient data protection is essential.**

For law firms, working with confidential and privileged data every day, an effective IT security programme is a top priority to minimise risk. Every industry is vulnerable to cyber attack. In 2014, according to PwC, there were 43 million known security incidents in global business, the equivalent of 117,000 attacks a day. That's a 48% increase on 2013. And in the legal sector, 62% of law firms reported a cyber attack last year, up from 40% the previous year.

But one of the most alarming facts is that 66% of these incidents are discovered several months later, revealed by a third party, according to the Verizon 2013 data breach investigation report. As 78% of cyber attacks are executed without any sophisticated expertise or technology, companies need to implement efficient

and up-to-date multi-level security solutions to protect both business and clients.

As connected devices expand, security requirements will also shift from protecting a single piece of hardware to securing an entire network of devices. Each object is a potential intrusion entry point. Data protection, secure operations, traceability and resilience are crucial.

## The big data difference

New technology's empowering firms – creating a more efficient business process and offering a differentiating advantage. However, other emerging technologies such as the internet of things, cloud computing, the bring your own device trend and big data, give malicious individuals a new playground to exploit. McKinsey says approximately 2.3 trillion gigabytes of data are created

every day, with volumes growing exponentially. Big data often has few built-in security safeguards, making it especially vulnerable, so regularly checking how employees manipulate it is key. Employees represent the weakest links in IT security. According to Forrester, over a third of intrusions are allowed through by employee negligence – ignorance of security rules or inappropriate use of personal data or company files.

Moreover, it takes an average 43 days for a cyber attack to be discovered (according to the Ponemon Institute). Most companies can't resolve the issue in-house. Security specialists and consultants, lawyers and audit firms are often required, which can all cause a significant increase in cost.

The average starting costs for a major security breach at a large organisation has more than doubled to an average of £1.46m since last year – and the expenses incurred post attack will always be higher than those invested to prevent them. The bottom line – a proactive approach to IT security could also save you money.

Of course, private information published online, or confidential records compromised, can seriously tarnish brand image and break trust. The Ponemon Institute says almost half of organisations felt their reputation was damaged as a result of a data breach. And PwC says just a third of firms are 'very confident' in their IT disaster recovery capabilities. The low figure, combined with increased reliance on IT systems, indicates urgent need for action.

## Need for speed

So sustaining a strong security system is critical. However, budget is often a major restricting factor. Lack of funds for multi-level security solutions often leads to the implementation of sub-standard programmes and inadequate protection – and organisations need to refresh their digital security continually to keep up with the latest emerging vulnerabilities. The smart way for organisations to access such high standards, perhaps previously too expensive to buy outright, is to make use of finance solutions.

Leasing enables firms to replace investment peaks with fixed and fully tax deductible rentals. It gives them access to the technology they need when they need it, not just when budget dictates it can be bought. In

addition, by matching the lease term with the refresh cycle, firms reduce the risk of existing systems growing obsolete.

Rolling out a comprehensive IT security project also takes time. With a pre-lease facility, costs can be warehoused. The firm only starts to pay once the system has gone live and is delivering. You may also be paying for the support of a legacy security system in place during a transition period. Leasing releases cash to be spent in other areas of the business too.

Finally, companies that grow through mergers and acquisitions have to deal with disparate IT security systems introduced with each one. A powerful asset management solution helps firms to get an accurate, comprehensive overview of all digital security assets, trackable with a click.

## Choose lifecycle

Private and public sector alike have grasped the importance of IT security. The UK government has rated cyber attacks as a 'tier one' threat. However, the approach is normally purely technical or purely organisational, when it needs to be holistic.

Basic antivirus and malware protection are designed for home computers, not companies dealing with confidential financial data and information. Technology providers able to assist firms through the IT network lifecycle (design, build, run, transform), are best positioned to give business both resilient and proactive security. Specialists providing multi-level technology (preventative solutions, security incident management systems, data encryption, firewalls, and so on) enable firms to take back control of the network and fully exploit the possibilities of new technology.

With 95% of law firms telling PwC they plan to undertake a major IT project in the next 12 months, smart finance solutions are available to help protect customers, reputation and budget.

---

Learn more about

**Econocom**

[www.econocom.co.uk](http://www.econocom.co.uk)

econocom



*Briefing Industry Analysis*

# Accelerating search

**Faster sifting of company connections to streamline process perfectly illustrates automation's power to change, says Michael Kearney at Encompass**

**Alternative business structures and artificial intelligence are now standard issue for discussions about the future of law. Law firms rightly feel compelled to review many aspects of their traditional operating models.**

Alongside growing consolidation, increasing regulation and demand for digitisation, they are signposts that should be strong motivators for change in an industry often labelled conservative when it comes to adopting technology.

And the pace is picking up. The recent appointment of a global head of innovation and business change at Clifford Chance is just one point of proof. Another's the deal between Dentons and ROSS Intelligence, a start-up developing a legal adviser app powered by IBM Watson. These may be pioneering projects, but the rising tide

raises all boats and the net result is an industry-wide shift in attitude.

Haley O'Brien, legal product specialist at Encompass Corporation, observes: "Many years ago cloud was a scary word – whereas now firms see it as a way to overcome some challenges they face with addressing global IT in an increasingly consolidated marketplace. Data privacy, transfer of information across borders and mobility are just some issues still to be tackled."

And it's not just at the big end of town. Law firms of all sizes are now presented with solutions that allow them to take affordable advantage of automation to deliver speed and accuracy, and ultimately demonstrate greater value, to clients in a highly competitive marketplace. In this landscape we see law firms welcome Encompass Verify for Law because it



automates search processes, making them many times more efficient and effective.

## Age of reengineering

Legal practice is rich in information – and the digital revolution means this information can now be delivered electronically. That presents opportunities to revisit business processes established decades previously, questioning if these continue to best serve the needs of firms and their clients.

As the Susskinds recently commented, many people make the “mistake to reject the idea that professional work, unlike ‘simpler’ types of work, can in fact be computerised. This is often based on the belief that professional work is too rarefied or ‘complex’ to be performed by a machine”. However, this view, he continued, “treats professional work as an indivisible and uniformly complicated lump of activity. In fact, when professional work is broken down into its constituent tasks, a great many of these turn out not to be so complex after all and can be done by less qualified people with the support of systems, or indeed by machines.”

Encompass has worked closely with lawyers for a number of years to understand exactly what this breakdown looks like. We’ve been able to refine and improve each step – and ultimately to automate the end-to-end process to deliver a new way to search and review information.

Now lawyers are using Encompass Verify for Law to achieve a single point of access to sources such as Companies House, Land Registry, Dunn & Bradstreet and Zoopla, all within one intuitive interface. And they’re using the power of automation to combine and triangulate this information for a wide range of tasks – faster security reviews for banks and financial institutions, data on directors and shareholders for M&A research reports, uncovering property ownership, quicker due diligence, litigation research and



investigations into all manner of company connections.

Highly experienced, skilled lawyers and paralegals are the immediate beneficiaries of this efficiency. They are freed to focus on higher-value work, including business development and increasing their personal utilisation.

However, the ultimate beneficiary of radically improving search efficiency is the client. Chris Wilkinson, partner at Brown Wright Stein, says: “Encompass enabled us to quickly understand the situation and provide meaningful advice to our client regarding the various registered security interests. Our prompt response surpassed the client’s expectations.”

Like any other, the legal industry will ultimately focus on client value as the most compelling driver of change. When the competition and clients are already taking advantage of automation and technology to innovate business processes and achieve operational efficiencies, law firms must be prepared for keeping pace as a minimum. If they don’t, they welcome disruption from the new wave of businesses that are primed to deliver the same professional services – once protected by the veil of perceived complexity and the myth of automation immunity.

Learn more about

**Encompass**

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



*Briefing Industry Analysis*

# Teamwork on trial

**Kim Walton at Enable asks why document collaboration has lagged behind in the race to innovate**

**It's not easy to find an article about legal IT that doesn't mention innovation and efficiency.**

But in spite of the speed of technology change and advances in devices and access to information, there has been one area of legal IT that has seen little change in 20 years. That's the process for collaborating on transactional documents, where documents are typed using Microsoft Word and then distributed to external parties by email.

Email was the biggest game changer in the document production process since the word processor. It was quick and easy to use. But it also introduced a number of challenges. There was an increase in document corruption – and additional products were implemented to combat this, as well as for document

comparison and stripping metadata. At the same time, internal processes such as firm-wide house style and bespoke macros increased efficiency when working on internal documents, but they introduced more issues when working on other firms' documents.

## Tools for trade

So what changes have taken place with the advent of document collaboration?

The most notable is the increase in the number of lawyers amending documents. The handyman challenge on TV's *The Apprentice* highlighted that, given the right tools, simple tasks can be completed with little

training. However, they often take longer, proving more difficult than expected. Sometimes a professional is needed to do the job properly (although in any group there is fortunately a small percentage who know how to use the tools, and to use them well).

There have been several attempts to innovate in legal technology. In 2000, there was the battle of the extranets. Clifford Chance and Allen & Overy competed to provide the first law firm offering. In theory, extranets should have been a game changer for document collaboration. But although they've been extremely successful at changing the way we operate data rooms, they've achieved limited success with document collaboration. Why? Perhaps because an extranet just isn't as quick and easy as email – particularly if you don't control it.

Areas where technology has successfully changed process include document automation and digital dictation. Document automation will become much more prevalent, helped by changes in fee arrangements. And as voice technology advances, and we become used to talking to internet-enabled gadgets, digital dictation may be overtaken by its speech recognition cousin.

## The innovation equation

Another major initiative gaining traction is the UKDEG standard styles scheme. It's a standard to make it easier for organisations to work on their own and others' documents, and LexisNexis was the first publisher to adopt it.

But why has document collaboration lacked the innovation enjoyed in other areas?

Innovative products and others designed to increase efficiency need certain attributes. They solve a problem. They are easier to use than existing methods. And they are quicker to use than existing methods. Adoption needs a simple and attractive user experience.

There also needs to be both recognition of a problem and a willingness to change. But even with that desire, the prevalence of third party products integrated with Microsoft Office and the legacy of huge numbers are barriers to change. This is evidenced by the large number of firms using a version of Microsoft Office at least one or even two versions behind the latest.

Let's face it. If you're looking to invest, legal

document production is uninspiring compared to web apps, artificial intelligence, cloud computing, big data, mobility, and indeed whatever the next big idea may be.

So will law firms still be typing documents in Microsoft Word and distributing via email in another 15 years? Will they have the same third-party tools for document comparison, fixing issues and removing metadata? In 2027, will they have just upgraded to Office 2024, and then relax in the knowledge that the next upgrade is five years away?

Let's hope not.

A potential game changer is collaboration on documents in real time. Office 365 enables multiple users to work on a document at the same time. With Word 2016, Microsoft provides this in real time on the desktop as well as in the cloud. SharePoint and OneDrive provide collaboration spaces to share the latest version of the document with permitted users. Versioning can record every change to the document, as well as who made it. Imagine collaborating on documents without email distribution. Imagine the timesavings when you don't need to wait until someone else has finished their edits before doing yours. Imagine fixing document-formatting issues while other edits are being made. Confusing? Possibly – but no more so than trying to coordinate and incorporate riders, comments and different document amendments sent by email.

True collaboration is possible today. The question is, are firms going to embrace these technologies? In the short term, unlikely. Making this new innovative technology work seamlessly with other applications, such as document management systems, still seems to be prohibitive. The key is to invest in innovative companies that are willing and able to grow with their products; to create better products that provide solutions to ever-changing needs.

It's clear that collaborating in this way with clients – and other lawyers – in an increasingly mobile and global world could bring efficiency. But firms must be willing to invest in smarter technologies to make business process better.

---

Find out more about

**Enable**

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

