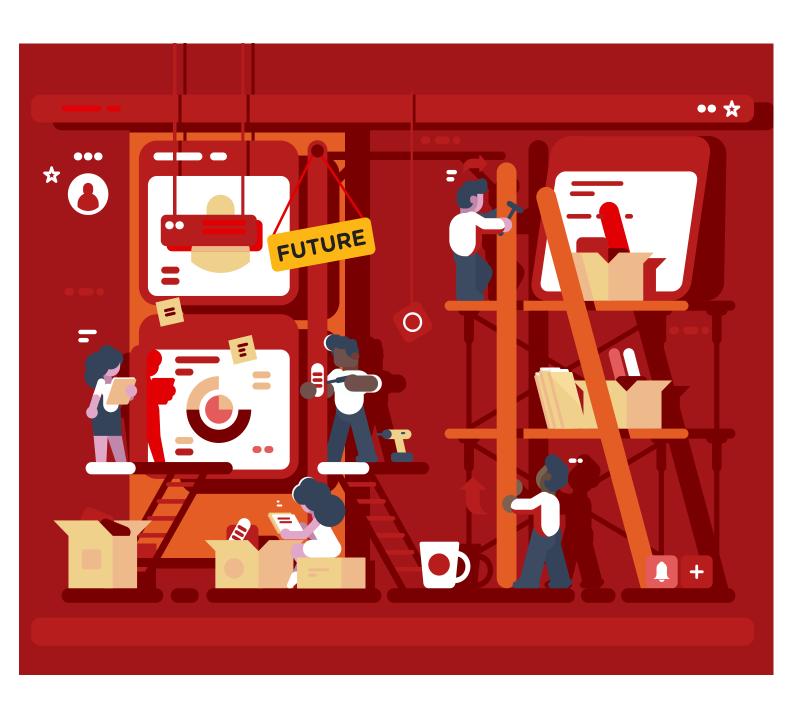


CV AND BELIEVE How Osborne Clarke improved itself for the future talent pool

CHANNEL FUNNEL Management at Minster Law on the chapters of an online adventure

SIMPLY INVEST Brabners on getting to grips with what clients really think



Can we fix it?

The pace of change is changing. Who knows what their legal business might look like in 10 years' time. No, seriously. Does anyone know?



In-house leaders from Astra Zeneca Canary Wharf Group **Civil Aviation Authority** International Personal Finance Funding Circle Royal Mail Vodafone

Business leaders from Advent International Chimp Management Infosum OJK Oracle

Law firm operations leaders from RPC, Osborne Clarke, DLA Piper, Gowling WLG, Norton Rose Fulbright, **Hunton & Williams, Keystone Law,** Weightmans

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Who we are... Snowflakes



Richard Brent is the editor of **Briefing**. He likes to get out and meet as many of you as possible, so contact him at richardb@briefing.co.uk



Kayli Olson is **Briefing**'s junior assistant editor. She finds stories and data. Care to contribute? Contact: kaylio@briefing.co.uk



Holly McDaid is **Briefing**'s client services manager, responsible for managing supplier insight. Contact: hollym@briefing.co.uk

Snow bother



Rupert Collins-White is Burlington Media's creative director. Contact him at: rupertw@briefing.co.uk



Sarah Cox is head of client services. She's responsible for everyone's happiness. Contact her at: sarahc@briefing.co.uk

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This month's interviews were all transcribed by:

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Editor's letter



Α

classic question for a December issue, perhaps: What would be at the top of your firm's wishlist if we could wave a magic wand for you this festive season?

But I do have an extra reason for asking. Are you after the same present as the UK government – a spot more productivity? Hot on the heels of the chancellor's recent budget, we now have unveiled a new industrial strategy to address "productivity performance." That's a nice, polite way of saying it needs a bit of a kick somewhere.

So, what's in the strategy? Well – there's embracing technological change. There's a lot of talk of innovation (the aim: to make the UK "the world's most innovative nation" by 2030). There's an increase in investment in R&D – 1.7% to 2.4% of GDP

Can a law firm in this rapidly changing and challenged business world really have a 10-year strategy?

– by 2027, with around £86m earmarked for "robotics hubs". And one of four new "sector deals" is artificial intelligence. AI is also one of four "grand challenges," solutions to which are needed to seize the day of a "data revolution."

Does any of that sound familiar? This issue of **Briefing** comes out alongside our annual **Legal IT Landscapes** research and report.

Among many a fascinating finding, I have to say one in particular stands out to me – that on a scale of zero to 10 for current successful automation of legal workload, firms score themselves an average 3.1. Asked how automated their legal work *could potentially* be, however, they up this to 6.8.

And that's before we even begin thinking about business services roles and tasks. I'll just leave that here.

Our main feature in the magazine then asks: Can a law firm in this rapidly changing and challenged business world really have a 10-year strategy? It has also been intriguing to hear so many perspectives on this topic. It seems some firms might need to think hard about exactly how they craft their strategies, as much as precisely what those future plans contain.

I hope you enjoy this final issue of 2017. It has been a fantastic year of scribbling, tapping and chatting to you all for me. Our conferences have also gone from strength to strength (a shout out to our team over there), and our new Frontiers series – which this year covered AI, smart contracts and agile working, as well as automation – returns with aplomb in 2018. A very merry and peaceful Christmas from me and all the team, and we'll be very happy to see you in 2018.

RICHARD BRENT EDITOR



NEWS FROM THE THOMSON REUTERS ELITE COMMUNITY

Are you an Elite client?

Join the discussion with your peers online at the Thomson Reuters Elite Community and visit https://customerportal.elite.com.

Hi everyone. It's a pleasure to be back in touch with you in this, the latest Thomson Reuters Elite update in Briefing. 2018 is just around the corner and we could not be more excited about what the coming year holds.

But as 2017 draws to a close, we want to take this opportunity to say a huge thank you to everyone across the Thomson Reuters Elite Community for helping make the last 12 months such a great year of ongoing growth. Elite really has gone from strength to strength, with so many of our market-leading solutions hitting new milestones as global uptake continues to grow. Here's just a snapshot of what's been achieved in 2017!

2017... THE YEAR IN NUMBERS

3E GOES FROM STRENGTH TO STRENGTH

222

FIRMS WORLDWIDE HAVE SELECTED 3E • 143 firms now live

- 40+ firms to go live in next 12 months
- **39%** of 3E customers migrated from Enterprise
- **69%** of Global 100 firms who bought a new system in last 5 years moved to 3E

3E BUSINESS DEVELOPMENT CONTINUES TO GAIN MOMENTUM

62+

FIRMS WORLDWIDE HAVE SELECTED 3E BUSINESS DEVELOPMENT (FORMERLY BUSINESS DEVELOPMENT PREMIER)

eBILLINGHUB HITS NEW HIGH

\$562B

INVOICED SINCE 2002

- 15 million bills processed to date
- Firms get paid on average 15 days faster when using eBillingHub

ELITE SOLUTIONS ACROSS UK 100 FIRMS

62%

USE ONE OR MORE ELITE EBMS PRODUCT

 49% own an Elite Financial Management product

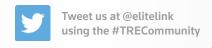
ON-GOING 3E MATTER MANAGEMENT SUCCESS

235+

FIRMS WORLDWIDE HAVE SELECTED 3E MATTER MANAGEMENT (FORMERLY MATTERSPHERE) ELITE SOLUTIONS ACROSS GLOBAL 100 FIRMS

93%

OWN AT LEAST ONE ELITE EBMS PRODUCT



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Briefing is the only legal business management title, and is focused exclusively on improving the work and worlds of law firm management leaders. Every issue is packed with relevant insight and lessons from peers and pros.

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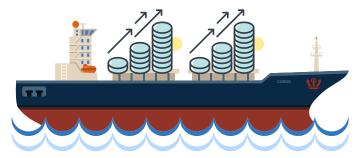
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ROUNDUP

Floaty McFloatface

eystone Law has become the third law firm to decide to go public in London.
First established in 2002, Keystone
– which has thrived on its 'virtual' model roots of agile working and lower overheads – converted to an alternative business structure
(ABS) in 2013. The following year it took a £3.15m cash injection from private equity firm Root
Capital, and it reported revenue of £26m for

Shares started trading on the Alternative Investment Market on 27 November 2017, and are intended to raise £15m with a placing price of 160 pence per share, valuing the firm at £50m.

2016/17, taking it well inside the top 100.

Founder James Knight – who will now be CEO of **Keystone Law Group plc** – said: "Our decision to list on the London Stock Exchange will provide

£15M

Amount Keystone Law Group hopes to unlock with its IPO on London's Alternative Investment Market

us with the most resilient and stable platform to support our ambitious growth plans long into the future. The UK legal services market is the second largest in the world and we believe the Keystone model is well placed to take advantage of this significant opportunity."

November has been quite the month for sizeable strategic announcements. Just in time for **Briefing**'s flagship annual **Legal IT Landscapes** report for 2018 we've also heard the news that **Farrer & Co** is to move to the Microsoft Azure hybrid cloud platform, including a new collaborative desktop setup based on Office 365 and Windows 10. Neil Davison, the firm's IT director, said in a press release: "With our IT infrastructure and environmental systems reaching the end of their useful life, we were presented with a rare opportunity to replace every

part of our infrastructure with an entirely new, next generation IT platform."

The firm will work with the digital transformation consultancy SystemsUp for the next two years on matters of change management, such as skills needs and process optimisation. Farrer & Co says its cloud- and mobile-first strategy dates back to 2013.

And it really just wouldn't be a new month in legal without something new afoot over at **Dentons.** In the midst of a stream of announcements in fact, the firm has launched its own in-house counsel consultancy – Nextlaw In-House Solutions – staffed with 50 former GCs across the globe, alongside legal technology and process management professionals. Services include the coaching and mentoring of new GCs, risk and compliance consulting, interim support and advice on how to invest in innovation that benefits the client base. Global CEO Elliott Portnoy said the move "is a further step in a comprehensive strategy to lead transformation and disruption in the industry."

Also providing disruptive support as we head merrily into 2018, **Mishcon de Reya** announced it has invested financially in two of the businesses that took part in its MDR LAB 10-week programme for tech startups in the legal space. The successful pair are **Everchron**, a developer of collaborative litigation management software, and

Ping, a product to automate timekeeping. Mishcon has itself signed an enterprise-wide licence with Everchron. Nick West, the firm's chief strategy officer, said: "We had a fantastic first year. We're excited to continue to work with all of our 2017 cohort and see what MDR LAB 2018 brings."

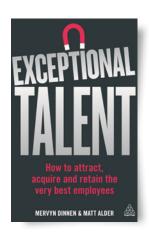
Farrer & Co is to move to the Microsoft Azure hybrid cloud platform, including a new collaborative desktop setup based on Office 365 and Windows 10

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READING LIST

Performance promise?

Exceptional Talent, by Mervyn Dinnen and Matt Alder, leaves Bird & Bird HR director Johnny Nichols wanting more – but perhaps too much so



his book provides a quick runthrough of the talent lifecycle, touching on all stages of the pipeline. This means there's a huge amount to cram into fewer than 200 pages, and it led to some frustration on my part as there are some really good sections where one wants more material. This is occasionally provided through case studies, but my overwhelming impression – at least in the early attraction/selection stages – was of skating over detail.

One challenge is applying all this good thinking to our 'unique' environment, full of 'special individuals'. In truth, much of the initial information was focused on the large-scale and volume end of operations, and how they can be improved through process and smart tech. But some general information is well provided – and intriguingly the legal space seems to be up to speed with some trends, notably video or digital interviewing.

I was particularly desperate to know more about 'micro-expressions', which did seem relevant – and something that sat well with the digital-interviewing section. But my excitement was dulled by the realisation that one paragraph was all I'd get. I was less keen on understanding how data analytics will help me to retain the goodwill of the 50,000 hopefuls I had rejected! But there were some good anecdotes and home truths about how amateur the recruitment process can be.

Chapters on performance management and competencies were, for me, a prime

example of skating over detail. The book touches on the move away from the apocryphal GE 'rank and yank' story of the 1970s, and moves through to the Accenture, Microsoft and Deloitte approaches to depart from ratings. But at the same time, it states annual objectives are pointless, as everything now moves so quickly. I found this too superficial perhaps challenging my own assumptions - but saying there's no point in annual objectives one chapter after having the CEO strategy-message, via video, for onboarding, seemed too much. My view is that high-level annual objectives - to know one is on a certain course at any point in time, and can survive the storm/ remain on course - have to be helpful. I found myself veering rapidly from rabid disagreement to astonishing agreement - all rather confusing, which I think is symptomatic of the book's length.

Many challenges are ones we'll all recognise, notably frustration over the inability of managers to give constructive and honest feedback. Unfortunately, there are no easy answers here. I did find it refreshing to read a book on this subject that is UK-based, and doesn't rely exclusively on US thinking, although, as you would expect, many case studies are of US-based organisations. But the book makes apparent trends and concepts we see in everyday life and addresses their impact on the employee lifecycle. It has certainly led me to consider a few changes that could have an impact.

Publisher: Kogan Page Publication date: May 2017 Price: £29.99 OFFER: 20% off – visit website www.koganpage.com and enter

code BRIEFING20

The book makes apparent trends and concepts we see in our everyday lives and addresses their impact on aspects of the employee lifecycle. It has certainly led me to consider a few changes





Jason Ford, head of Connected Services at DWF and former chief operating officer of Triton Global – acquired by DWF earlier in 2017 – on developing a brand new division

What is Connected Services and where did the idea come from?

It's a new division within DWF that is currently home to seven different businesses providing professional services to clients. Some of these are legal businesses, such as costs and advocacy, but others are not. The non-legal services include: forensic accountancy, investigation and intelligence, claims administration and handling, risk and compliance auditing, software development, technical expert and loss adjusting services, and research, development and innovation consultancy services.

How were you involved in designing and mapping what the service includes?

DWF's acquisition of the Triton businesses provided the impetus to create the Connected Services division. DWF already had a number of the businesses that now sit in the Connected division, but the Triton acquisition brought others with it. I was very glad to be asked by DWF's leadership to take responsibility for bringing all of the businesses together in the new division and for creating

the operating model that's now in place.

Where do you look outside the legal profession for inspiration to innovate business?

It has to be to clients. What are their challenges and how can we help overcome them? Sometimes that will be responding to specific questions, but we do have to understand clients' issues and then create solutions to present to them which they might not have thought about. And certainly something I learned from being COO at Triton Global was that it's key to trying to understand what makes people 'tick' in order to get the best out of them. There is no point having a 'one-sizefits-all' approach to managing people as they all respond in different ways and need their own types of encouragement and motivation.

What new forms of value do you think firms might be adding to service five years from now?

Five years is a long time.
We are already using robotics to streamline and improve service delivery and it only seems a short time ago that that sounded like science fiction.

So, the use of technology to reduce risk, manage and analyse data and help clients deliver end-customer satisfaction will be key, which is why our technology company 360 is at the heart of Connected Services. I am also a big supporter of multidisciplinary working (people with different professional disciplines working together to provide a fully integrated service to clients). I expect that to be well established and across a greater number of disciplines in five years. The purest form of this is that they are all in one organisation, but there will be increased use of collaborative working between different service providers for common clients.

What advice do you have for managing a project or service launch?

Three key things. One: spend time understanding the leadership's strategic goals and converting those into a practical project plan. Two: always do the follow-up – people are busy and have conflicting priorities, so make sure you follow up on overdue tasks. And three: have a good project manager, which I fortunately did have (thanks Vickie)!

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SPEAK UP

Mind your millennials

What wouldn't a law firm do? Embrace millennial attitudes perhaps, suggests LOD co-founder Simon Harper



s we head toward the 2020s, we are in a transition between generations of legal leadership – the boomers giving way to the millennials. This means a huge shift in attitudes about how law is purchased and provided. The millennial lawyer is now the emerging law firm partner or GC, accustomed to working in a digitally open world, where personalisation and transparency are the norm.

In May 2017, we released our fourth report, authored by the legal market analyst Jordan Furlong. In keeping with other LOD-commissioned reports, we asked him to look at a major disruptive force in the legal sector. The resulting report, The rise of the millennial lawyer, centres on how millennials have begun to drive an irreversible shift for the profession.

As Jordan points out in the report: "The market is changing from a dormant, low-tech, individualistic system to a dynamic, high-tech and collaborative one." At LOD, we are seeing this transformation already, as our clients demand change, their buying power increases and the market generally becomes more sophisticated. Millennial lawyers are driving this change.

So, what difference are these millennial lawyers making as they rise through the legal hierarchy? Here are some of the issues outlined in the report:

- Choice. Millennials demand choice in all aspects of their lives, so why not in buying legal services? Loyalty to a single firm is rare already, with clients far more willing to explore alternative legal services offerings.
- **Pricing.** There's no doubt millennial clients dislike time-based billing. Desire for flat fee structures and other flexible pricing will result in the billable hour being an exception rather than the rule. This will also put pressure on firms to provide value and certainty, as GCs increasingly use analytics to measure cost and productivity.
- Multidisciplinary. As deals and businesses

become more complex, legal teams will increasingly need to include non-legal specialists as integral members of their teams to achieve the best results. Millennial-led law firms will increasingly become multidisciplinary or strategically aligned with other specialists.

- Customisation. One size does not fit all. The millennial client wants solutions tailored to their exact needs and interests. Law firms and other legal providers will be required to deliver this, as quickly as possible, while allowing the client to have as much control over the project as possible. Millennial clients want to be treated like a partner, not just a purchaser.
- Diverse. Millennials take diversity issues seriously. They want to make the world a better place, and they expect their service providers to join them on this mission. Firms will be expected to reflect the cities and communities where they're based, and set targets for gender and racial representation, especially in leadership positions. Millennials will lead the in-house teams and law firms of tomorrow. However, it is also important to understand the issues that this change is currently encountering.

The millennial generation is already showing itself a real accelerator – not only as lawyers wanting to work differently, but also as clients, buying differently. These attitudes are bringing a new era for the legal market. Understanding this is crucial for law firms to survive and thrive. Millennials tend to resist traditional pathways to power and to keep the firm at arm's length. That makes them different from most senior partners, but it does not make them wrong.

But Jordan firmly believes that what's needed is to "get your people talking and working across the generational divides.

"Boomers and millennials actually have a lot in common, especially an interest in how best to serve clients. There's no better place than that to start the conversation."

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Wrongs of praise

The annual appraisal is falling out of favour as a performance management tool for today's millennials and the modern working world. Not before time, says Louise Hadland, HR director at Shoosmiths



ack in the 1990s, when Jennifer Aniston established the Rachel haircut and John Travolta was strutting his stuff in Pulp Fiction, I was sweating over my MBA thesis. Choosing the witty title of 'The value of appraisal for support staff' set me on a research journey that led to the conclusion that appraisals really weren't worth the paper they were written on (clearly described in far more academic and weighty words in the submitted paper).

The last 20-plus years have done nothing to alter my view. But then, little about the process has changed to prompt me to revise my opinion. Some cosmetic work around competencies and smart-looking online solutions have given a more current 'look and feel', but the basic precept of a manager sitting down infrequently (perhaps once or twice a year) to discuss performance with the individuals in her or his team has not changed.

Much has been written about the reluctance of baby boomer managers to address performance issues, or provide the kind of feedback millennials apparently crave. And what better excuse to park a perceived difficult conversation than to 'save it' for that person's annual appraisal – no matter how many months away that might be?

On the other hand, how many of these appraisals focus on what happened in the last month (sometimes week) and often on the negative aspects, completely ignoring a great contribution over the 11 previous months?

At Shoosmiths we determined the annual appraisal added little value to the business. Managers dislike the ritual, staff even less, and

HR had the thankless task of constantly nagging to make sure a bureaucratic box could be ticked that all were complete. Even the most cursory assessment of time spent on appraisals vs return on the effort found them wanting.

In April 2016 we replaced appraisals with regular one-to-one meetings – some weekly, some monthly, some less structured. Regular meetings allow objective/task setting and monitoring to be current, clearly relevant and fast-paced, matching our business environment, rather than getting 'batched' each year.

The world is no longer on an annual cycle in any business aspect, and the management process becomes future-focused rather than backward-looking. Most importantly, it is tailored to meet individual need so that support and development is a timely intervention, not a post-error punishment. There is no room for a one-size-fits-all approach for any people process in today's more complex and multi-role law firm.

In our new review world, there is still a printable document for paper diehards, but it's no more than an aide memoire to remind both parties of things that might usefully be discussed. It's not a necessity. The process is about time spent together and the quality of the conversation – not the paperwork. To date it has been well received by the vast majority of staff and managers, and it feels good to be able to deliver a flexible, effective solution to the business that removes an unwanted, under-valued, laborious appraisal process. As Vincent said in Pulp Fiction: "They call that Royale with cheese ..."



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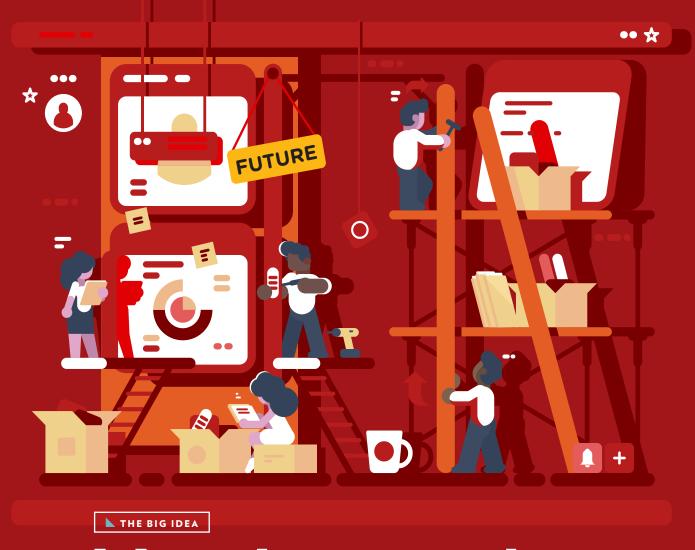
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Team profile

The management team at **Minster Law** on the importance of a journey to remove operating friction from client experience

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Hit the roadmap

In a world of relentless uncertainty, is talk of your law firm in 2025 admirably visionary or somewhat wishful thinking? Richard Brent investigates

n 2016, the charity Barnardo's announced a new 10-year strategy
– its first to look so far ahead
– designed to make it a more agile, diverse and digital organisation, better prepared to meet its changing challenges.

Adam Pemberton, corporate director of strategy and performance, says: "It's highly unusual for any charity to have a strategy that looks further ahead than three to five years. But Barnardo's is in the business of finding long-term solutions, not sticking-plaster, short-term fixes, for the problems faced by the most vulnerable children and young people in the UK. That demands we look beyond the immediate horizon for sustained, impactful interventions that transform the lives of those we serve – and do even more to prevent these life

challenges arising in the first place."

It's striking that this new direction coincided with another shift, the benefit of which legal businesses might also recognise (at least in theory). "Work on the strategy coincided with a top team restructure that create teams better placed to work together collaboratively to break down organisational 'silos'," says Pemberton. "We fully expect the changes in culture and ways of working that will deliver our ambitions to be a continually evolving piece of work over the life of the strategy."

But for all of the talk of 'the law firm of 2025' a 10-year strategy is surely quite a rarity in the legal profession as well. A few months before Barnarado's Mishcon de Reya unveiled it had one (admittedly, itself sliced into "three-year plans" for target revenue increases). Elsewhere, however,

"A long-term overarching strategy, provided there's an opportunity to review it on a periodic basis, can be an advantage, as it shows commitment to your direction of travel."

Jan Heuvels, international senior partner, Ince & Co



many are probably around half-way through their respective visions to take us to the end of this decade. Indeed, it was only last issue that **Briefing** covered 'project 2020' as underway at Norton Rose Fulbright.

And yet, you'd imagine law firms, no less than charities, are in the business of finding "long-term solutions" for those who need their services.

Moreover, perhaps the precise horizon of a strategy might assist with the way it's received and bought into internally. Jan Heuvels, international senior partner at Ince & Co, says: "A long-term overarching strategy, provided there's an opportunity to review it on a periodic basis, can be an advantage, as it shows commitment to your direction of travel. However, as part of this there should be shorter-term strategic goals, which can be measured, reviewed and revised to be responsive to market conditions."

At Ince & Co, he says: "There's no set time frame, but candidates for the role of international senior partner are asked to set out their strategic vision for the firm as part of the selection for the role, which takes place every five years. This may be a case of reaffirming the firm's existing strategy or setting a new course."

Dynamic enterprises

One trend we've clearly witnessed in recent years is the rise of people with titles such as strategy director – which must point to something afoot in how these decisions are reached.

Don Clarke is director of strategy – and a partner – at Keoghs. However, partners do not decide strategy. "We're not a traditional partner-led firm," he says. "We adopted what most people would call a corporate structure over a decade ago." The firm is an alternative business structure, and has already welcomed some external investment. And the culture has had time to evolve such that although partners are shareholders, they

don't expect the same 'say' that might be the experience in other firms. "Their roles are probably more clearly defined," says Clarke.

"An executive has responsibility for the day-to-day running of the business, and a separate strategy board formulates strategy, which is only passed on to partners for approval." The strategy board will meet a few times a year to discuss whether anything needs amending, and that amendment, he says, will be approved at the next partners' meeting. "We have a five-year plan, but I think you'd do well to plan accurately more than three years ahead. Most focus is on the next three years, because of how much the market is changing, and the way that technology is impacting so much of what we do."

For Keoghs, 'organic growth', 'diversification' and 'disruption' are strategy keywords. "If the market dictates, we're prepared to acquire as well - we want to be a consolidator, not consolidated, and our alternate business structure, which enables us to reinvest 100% of profits every year, puts us in a strong positon to realise our strategic ambitions," says Clarke. "Our main focus is that we'll only act for compensators, so we want to provide as many services they may need as possible. In essence, we're driving efficiencies in some of our areas, and diversifying into others less susceptible to either reform or commoditisation." In November 2017, the firm launched a marine, ports and offshore team as part of the diversification drive.

Richard Hinwood, head of strategy and chief of staff at law firm Withers, says: "There's certainly no harm in having a long-term vision, but strategy is fundamentally dynamic. It's not only what you plan, or what you try to execute; there's also what's changing around you. In a dynamic market, every so often reality coincides with your plan.

"Few would disagree that technology is developing rapidly, but sometimes it evolves

"In a dynamic market, every so often reality coincides with your plan. Few would disagree that technology is developing rapidly, but sometimes it evolves quicker than those involved in developing it realise that it will."

Richard Hinwood, head of strategy and chief of staff, Withers



quicker than those involved in developing it realise that it will. Strategy needs to take account of this." In a case such as the recent interest rate rise, he adds, economists are increasingly recognising that the market is reacting most to the 'signal' that the rate is going to rise, with arguably less reaction than to the rise itself. A hard-and-fast plan is far less relevant in such a dynamic market, he says.

Lloyd Snowden, associate at integrated business planning specialist Oliver Wight (EMEA), says: "Organisations generally need to consider a minimum of five to 10 years for strategy." However, he agrees that it's the intersection of long and shorter-term planning that's likely to be the bigger headache (and perhaps even absent).

"One of the biggest issues is that many organisations lack a process to actually deliver the strategy," says Snowden. "Statements such as 'grow the business by 30% in five years' are simple, but they don't tell an organisation how to get there.

"Although they may have strong strategycreation teams and plenty of processes to deliver short-term, there is no process to link the shortterm with the long-term. Integrated business planning is this link. It's interesting to note that 75% of deployed strategies fail because there's no process to deliver them."

Oliver Wight has a four-phase "maturity model" for planning that derives from an efficiency model based on the evolution of Italian weapons manufacturer Beretta since the 1500s (it's a Harvard Business School case study after Beretta dramatically beat the incumbent gun Colt to a contract for the US government in 1983).

What hope then for lumbering legal to react to rapid change in good time in 2018? It can't be denied, says Hinwood, the cost of implementing large-scale technology-based change is an increasing challenge for the traditional business model that has turned so well on paying out a significant proportion of its profit annually.

"Is the traditional business model fundamentally broken? Not necessarily – it still works. But is it the right model for the future? Arguably not. A lot of firms might need to change the model that has been highly successful for them in the past because it may be more of a hindrance in the future."

So, enter the in-house strategy director? "When you're handling such changes and maintaining consistency in a service industry – where it comes down to the service delivery of different individuals – that is then a whole additional dynamic and challenge," he says. "It has to be a healthy thing to have more people shaping strategy internally, bottom up as well as top down."

Engage successes

That last comment should also resonate at Irwin Mitchell – where Victoria Brackett, partner and CEO of business legal services, believes it's critical to people engagement that more junior team members are involved in developing the business strategy. She says: "First, you don't achieve good engagement unless you're sharing as much information as practically possible, and

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highlighting what you want to achieve.

"You also need to link the impact of day jobs to the strategy, so everyone understands their role in getting there. And, frankly, those aged 20 to 30 probably have better insights into technology and digital progress than many of us in management."

Now Brackett has introduced some groups for junior employees – both lawyers and in business services – to get more deeply embedded in some relatively long-term strategic projects.

One of these surrounds the client-onboarding process from the perspective of customer experience. "Partners aren't removed from the project entirely, but it's devolved to those dealing with the work area every day," she says. "People are moving something forward, and they also feel more engaged." Separately, the firm's also pulling people together to thrash out innovation in client experience via a 24-hour hackathon-style activity.

Snowden at Oliver Wight points out that organisations should have three horizons – execution (just 0-3 months), integrated business planning (everything from 4-24/36), and the strategic view of 5-10 years. "However, the entire organisation's focus is often compressed into the execution horizon. Decompressing the organisation must be a key aim to ensure the right people are both empowered and focusing on the most appropriate horizon for their role.

"It's also vital that companies make available the information required for each of the three horizons, otherwise people will have no motivation for this decompression."

Happy mappy

Irwin Mitchell is currently less than a year into the five-year 'IM 2022' strategy. "I expect there'll be technology in 2022 – and certainly in 2025 – that hasn't even been dreamed about yet," says Victoria Brackett. "But while it might sound unambitious, I also think many technologies for changing legal services delivery probably already exist in other industries. Law is still so far behind. Frankly, the next five years are to drag ourselves into a new world of technology already here. Beyond that might just be too much for a profession that barely changed for 20 years.

"We still sit at a desktop and do most things by email – we even write letters! However, the generational demand will force the issue, as without change we won't get the talent in. It'll be: 'I'm not doing law - it's just too fuddy-duddy'."

If a law firm's core products are still its people, some firms perhaps also need to consider each individual's strategic development within that system more fully. Brackett, for example, is now six months into a new "talent-mapping exercise" to create greater awareness of people's current performance, compared to their potential.

"Unless it's absolutely clear, one person's view of a team can be very different to another's – then the 'unfairness bug' pops up." That can then hit productivity. "People see recognition happening, and they feel they haven't worked any less hard. If you struggle to explain that, you lose engagement. So, we're mapping people's trajectories out alongside issues such as support and mentoring needs to fulfil potential, plus strategic business cases and succession timeframes."

In 2017, Ince & Co has worked up a new progression system for its London lawyer community, alongside some new mechanisms for the feedback that ought to drive talent up it. Heuvels says: "Lawyers now progress up a fourstep career programme of trainees, associates, senior associates and managing associates. They can move to the next stage once they've demonstrated a set of competencies focusing on legal skill, client management, business development, working with and leading people, business and financial awareness and ethos."

For those reaching managing associate, Ince has also opted to introduce the new 'legal director' role as an alternative to partnership. "Importantly, pay is now linked to performance so that we're able to recognise outstanding performance within a particular role too." Heuvels says.

Also, appraisal process is now electronic "where partners provide feedback to associates, with records reviewed at regular intervals throughout the year. At the end of the year, all feedback is formally reviewed by an associate's mentoring partner to assess whether they're ready to move up." This change is set to go global in May 2018.

The 'millennial' urge for more – and more immediate – performance feedback we hear so much about is but one example of pace of change picking up. The future's heading toward traditional legal business fast from all sides, and as the uncertainty of the broader business landscape also rolls on by, a fairly reliable roadmap ought to be a pretty obvious travel essential.

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Personal touches

The management team at Yorkshire-based personal injury firm Minster Law talk to Patrick Wingrove about a new age of efficiency with mobile-enabled case management

he legal market is becoming increasingly uncertain for law firms, but perhaps even more so for those practising personal injury. The

Jackson Review and subsequent Laspo reforms – which reduced access to justice for PI claimants – made PI cases considerably less cost bearing, and the government's plans to curb fraudulent claims by raising the road-traffic-accident small claims limit to £5,000 and introducing a whiplash tariff threatens to stifle the sector further still.

But Michael Warren, managing director of Yorkshire-based personal injury boutique Minster Law, says personal injury firms can thrive so long as they embrace innovation and technology.

"It's no secret that Minster was hit hard in 2016 when our revenue dropped by 52% – but we recovered most of that lost ground in 2017. My background is in insurance, not law, but actually running a personal injury firm is no different to running an insurance business – it's a path of constant development and improvement to get the product right for customers."

He adds that there were many elements to the firm's transformation of itself, but that perhaps the most important part of its journey – and recovery – has been the development of an interactive digital platform.

"Our digital service Your Case Online – which was first launched in 2015 but developed into a more comprehensive service in 2017 – enables clients to monitor their case and progress it by booking appointments and uploading relevant documents by simply taking and sending photographs, which come straight into our case management system. It guides them through every stage of the process.

"As an example, a key stage in any PI case is the medical appointment. The platform will automatically inform the client of their

appointment with a link and directions to it. They can also use the platform to keep a track of where their claim is and when to expect the medical report so that when it does come, it can be also be read and approved online."

The firm's personal injury tool has enabled it to reap considerable cost savings by pushing out work to clients and driving efficiencies – but perhaps most importantly, according to Warren, it has significantly improved the client experience.

"There's often a certain amount of what I call 'operating friction' between law firms and clients. Clients don't want to have to go back and forward to us to see how their case is doing or to book appointments, because it costs them and us time and money. But with our platform, clients can use their smartphone, which most people use every day, to do everything that they need and it keeps them in the know wherever they are."

Minster Law's chief operating officer Shirley Woolham agrees that the firm's digital customer interface has revolutionised the way it operates, but she adds that any firm thinking about a similar project should consider absolutely everything that goes into it.

"The mobile-friendly personal injury platform, which is now in its second iteration, was developed over three years with a 'lean start-up' approach. Our plan was to avoid creating an industrialised solution and instead focus on getting something out there for clients to use, which we could then develop over time."

The platform began as a simple communication portal for welcome documentation for new clients, which would let them see who was handling their case and the case handler's details as well as the details of the case. But over

FIRM FACTS

MINSTER LAW

Offices: 3 Countries: 1 Revenue: £43.1m

Headcount: 579 Ratio, fee earners to business services staff: 0.7:1



"Our plan was to avoid creating an industrialised solution, and instead focus on getting something out there for clients to use, which we could then develop over time."

Shirley Woolham, chief operating officer, Minster Law

time the firm used real-time customer insight, Google analytics and case-handler feedback to innovate, adapt and develop the product into an interactive, user-experience-focused platform.

Woolham says: "The platform is now much more complex and available to far more clients. Approximately 70% of our clients are eligible for the service – serious injury cases are too complex for the platform at this point – and out of those, 80% choose to use the service. So that's really high usage levels, which is very encouraging."

She adds that this success can be partly attributed to the platform's "exceptional usability"

 which was developed with the help of a UX designer, who worked with subject-matter experts at the firm to ensure the platform was intuitive and easy to use.

But, Woolham says, the platform is still far from perfect and Minster is continually working to improve and develop it.

"We're embarking on quite a detailed consumer research programme, which will involve steps such as contacting existing users to gauge their opinion on potential product adaptions."

Warren adds that part of this development may include extending the product's functionality to cover more stages of the PI case process.

"There are further strands which we plan to develop and evolve. For example, the platform doesn't yet cover the settlement of damages themselves. It should have a module which breaks down the settlement to show how much everyone's getting and how it's distributed to different parties.

"It will be challenging, but as long as we strive to improve the platform we can continue to offer a high-quality and profitable PI service to clients." Left to right: Gareth Cutts, IT director; Debra Cuddy, HR director; Michael Warren, managing director; Shirley Woolham, chief operating officer; Martin Hume, finance director, Minster Law







BUILDING OPERATIONAL EXCELLENCE IN UNCERTAIN TIMES

Chair's opening address

9.00 **Keynote: Disrupting the future**

Felicity Burch, head of innovation and digital, Confederation of British Industry

9.30 Panel: How can firms build operational excellence by leveraging technology, resources and alternative operational models?

- · What technology is currently being leveraged within firms, is its true value being realised, and if not, what are the barriers?
- How to overcome silos and get operational and business service leaders working constructively together across boundaries
- How should firms optimise the allocation and utilisation of resources?

Matthew Newman, assistant GC, Royal Mail Justin Nuccio, chief operating officer, Advent International Dominic Regan, senior director EMEA logistics, Oracle Stuart Whittle, business services director, Weightmans Dan Wright, partner, service innovation, Osborne Clarke

10.15 Lightning talk – Five minutes, one insight

Steve Rowan, chief financial officer, RPC

10.20 Unconference workshops: You write the agenda (prep session)

Choose what you want to get out of the afternoon roundtables, led by OLIL 2018 thought leaders.

10.35 Coffee and chat

FOCUS TRACKS - ROUND ONE - 11.05-11.35

A1 PEOPLE

Attract, retain, invest and enable

- How to present the firm to attract and retain talent
- Retaining talent and demonstrating career paths that fit with evolving career expectations
- Investing in people
- New ways of working
- Building the business case for wellbeing

Becca Johansson, head of operations, real estate, DLA Piper

B1 TECHNOLOGY

As technology transforms the way legal services are delivered, how can its value be realised?

- How to get the most out of the technology you are using
- Ensuring the combination of technology, legal processing and outsourcing creates integration
- The role of AI, blockchain, RPA and other innovations in transforming the sector

Wilson Legal

C1 | TRANSFORMATION

Outside the law - Case study: Achieving operational excellence in a technology startup

- The similarities and differences between lawyers and developers
- Communicating effectively in an agile working environment
- Incorporating workflow strategies
- Nurturing a self-organising mentality among team members
- Specialisation by skill, not discipline Danvers Baillieu, COO, InfoSum

FOCUS TRACKS - ROUND TWO - 11.35-12.05

A2 | PEOPLE

Personal development session

- The entrepreneurial mindset
- Steps you should be taking to increase your wellbeing and how this will have a positive impact on your performance and those around you Dr Trevor Gedeon, psychological skills mentor, Chimp Management

B2 | TECHNOLOGY

Law firm case study: Effective use of technology and integration

• In this case study presentation we will hear from a top-tier law firm presenter outlining how their firm is leveraging technology for better ROI and effect in the business

Aderant and law firm quest

C2 | TRANSFORMATION

Managing change

- Achieving firm leadership buy-in
- Prioritising where change needs to be made first and putting a change management plan in place
- Desired outputs/products
- Practical tips for quantifying ROI **Elevate**



FOCUS TRACKS - ROUND THREE - 12.05-12.35

A3 | PEOPLE

Case study: How to bring your people with you during change

 Case study presentation and discussion between Mason & Cook and a top 100 law firm client, covering managing change and reformatting work allocation Dave Cook, CEO, Mason & Cook and a law firm quest

B3 | TECHNOLOGY

Case study: Technology and data transforming legal services delivery

Prosperoware and law firm guest

C3 | TRANSFORMATION

Design thinking: Putting the end user at the centre of the process and developing a better understanding of client needs

- Design thinking: definitions and how to apply it
- Introducing design thinking in a change management context Chris Rowe, founder, Rehumanise, and empathic designer

12.35 Lunch

13.20 The OLIL in-house panel – the view from the client-side

James Ormrod, chief legal officer and company secretary, International Personal Finance Martin Potter, group general counsel, Canary Wharf Group Kate Staples, general counsel and secretary, Civil Aviation Authority Sarah Spooner, head of legal, Vodafone

INTERACTIVE MASTERCLASSES – 14.10-14.50

Option one: Creating operational excellence

- What does the operational support of a typical law firm currently look like? And if you started from scratch, what would it look like instead?
- The development of the 'extended enterprise'
- How do you get people to think in terms of the firm and not just themselves?
- What does the future lawyer look like? What skills and competencies will be most valued?

Led by Andrew Edginton, chief operating officer, Gowling WLG

Option two: Managing operational threats, uncertainty and risk

- Delegates will examine how they create a robust and agile operational unit able to:
- ... Mitigate and exploit known knowns, known unknowns and unknown unknowns
- ... In the context of a dynamic political, economic and technological environment
- ... And examine which roles, technologies, investments, processes etc are needed Led by Andy Wansell, managing director, OJK

14.50 Coffee and chat

15.20 Unconference workshops: You write the agenda

Around focused discussion tables, led by OLIL session leaders, delegates will network and discuss their most pressing challenges with their peers. Each table's content will be based on the results of the pre-event polling and the key topics highlighted by their group earlier in the day.

Rod Harrington, chief operating officer EMEA, Norton Rose Fulbright

Becca Johansson, head of operations, real estate, DLA Piper

Joanna Lorimer, director of administration, Hunton & Williams

Dominic Regan, senior director EMEA logistics, Oracle

William Robins, operations director, Keystone Law

Steve Rowan, chief financial officer, RPC

Stuart Whittle, business services director, Weightmans

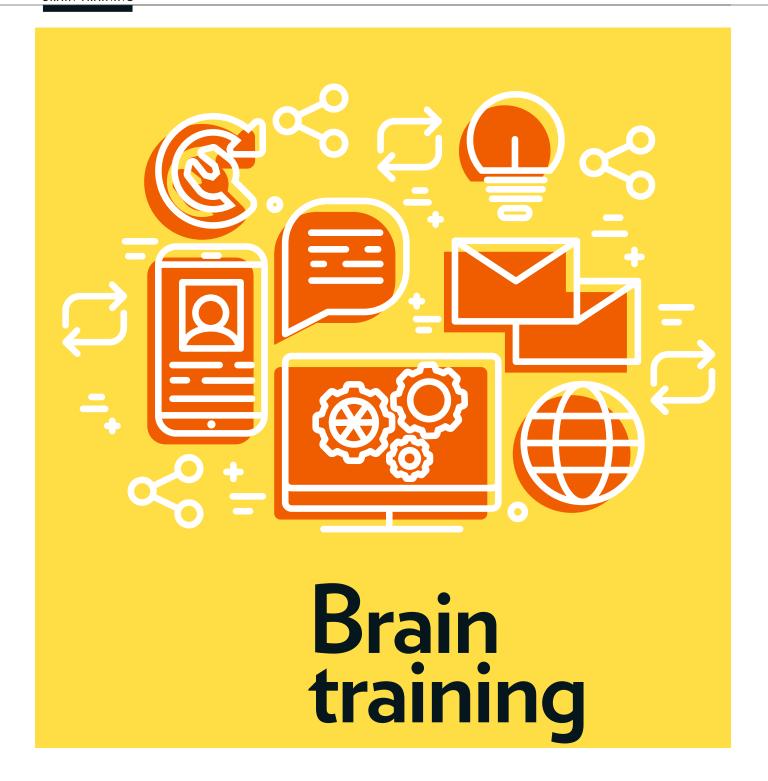
15.55 Closing keynote: The view from the new client – in-house legal operations leaders

Russell Smith, global head of HR, legal and compliance IT, AstraZeneca

16.25 Chair's closing remarks

Take an hour off your working day, on us. You're welcome.



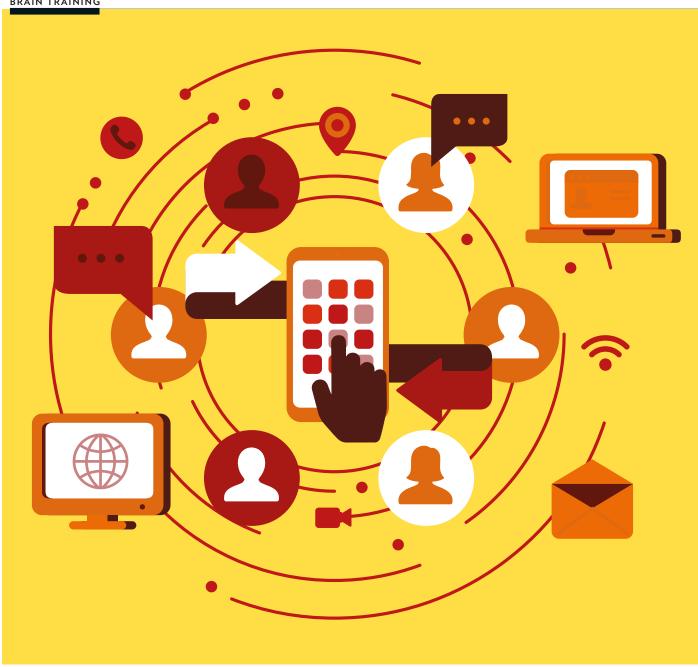


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Customer union

Janet Pickavance, chief executive of **Brabners**, says invest in engaging your employees in the process of improving customer service

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HANDS ON

Customer union

Janet Pickavance, chief executive at Brabners, outlines a process for understanding more about how you stand in the eyes of clients -Investor in Customers (IIC)

elivering a high-quality customer experience is vital to the performance of your business, irrespective of the sector you operate in. And for those working in the legal industry, some may argue it's even more important than most.

We're in the business of selling a service. The advice we provide our clients is designed to deliver the best outcome either for the business or the individual, and with a relationship that is fundamentally based on trust it's imperative that the service we provide is of the highest standard.

At Brabners we work with a broad range of clients, both across the UK and internationally. It's important that we seek feedback from them on a regular basis so we truly understand our clients, and can provide a consistently good service, giving them exactly what

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they need, when they need it.

Investor in Customers

While we have always measured client satisfaction, in 2015 we decided to bring onboard an external partner to independently assess and verify the service we provide.

I had experienced the Investor in Customers (IIC) process as a customer of another business – completing the survey for the firm's insurance broker – and the benefits were clear. I had an opportunity to provide open, anonymous feedback in a user-friendly manner, and I knew it would be fed back to the senior team. This gave me faith that any response would be taken seriously and acted upon.

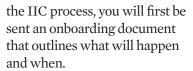
IIC is a nationally recognised organisation that works with businesses to measure and evaluate the customer experience. It has worked with more than 250 businesses over the past decade to help them ascertain current levels of customer service and areas for improvement.

Over that time the customerexperience agency has built a strong reputation as a partner that will help businesses to identify service issues, drive improvement, reward best practice and provide bespoke support. It's down to the credibility of IIC, and our experience of using the service, that we chose to partner with them for this project.

Getting started

If you do decide to embark on

The assessment will take six to eight weeks from start to finish, and to ensure we fully benefited from the programme we had one person devoted to it full time.



The assessment will take six to eight weeks from start to finish, and to ensure we fully benefited from the programme we had one person devoted to it full time. We also involved 'IIC Champions' from all areas of the business, from central support to partners and the management board, to ensure everyone in the firm was aware of the programme and felt involved.

Once you've prepared, the first step is to determine your client set. We mapped client records across the firm and gave our teams the option to include others should they wish. This allowed us to concentrate on the people we deal with most regularly, but also ensured that we selected clients using a range of methods, allowing for a sufficiently broad sample.

The questions

While the questions are split into

four distinct themes – understanding customer needs, meeting customer needs, delighting customers and creating client loyalty – one noticeable difference that has been introduced recently is a reduction in questions, from 48 to 32. This simplifies the user experience, but still allows the option of including six of your own questions if required.

We used those additional questions to measure our progress since 2015, as well as asking specific questions about our brand and market position, and these changes showed a marked improvement in engagement rates. Our response rate has doubled over the past two years, from 26% to 51%.

Once your survey has been approved it's sent directly to your clients by IIC, as well as to employees and your senior management team. The results are then collated and analysed alongside an independent assessment from the IIC's research team, before they present the findings back to you.

The results

There are three accreditations – bronze, silver and gold – and the highest accolade is awarded to those that consistently deliver outstanding client service.

Having surveyed hundreds of clients, plus our employees and senior management, we achieved an overall score of 8.30 out of 10. This saw us increase our score from 7.88 out of 10 in 2015, and we were subsequently awarded the IIC Gold





accreditation.

We secured strong results across the board, with an improvement in all areas and in 30 out of the 32 questions.

Our strongest area was 'delighting customers', specifically in relation to the question 'I trust Brabners to behave with fairness, integrity and honesty'. Here our score increased by 0.86 to 9.44 out of 10, the biggest increase of all the client questions.

Clients also scored us highly for knowledge of the client, quality of relationships, seeking client feedback and treating customers fairly, with these respective scores increasing since 2015.

We've worked extremely hard to create a strong workplace culture where our people and clients feel valued, and it's fantastic to see this come through in the results. The result also demonstrates the hard work and commitment of our teams, which is something they should be proud of.

What's next?

We're continually looking for ways to go above and beyond for clients, and taking part in this independent assessment is a vital part of how we do this. We made a concerted effort to listen and act on the feedback we received in 2015, and this has helped us to achieve the gold accreditation.

That said, there are still always things we can do better, and we're in the process of going through our feedback so we can implement improvements. We share all feedback with our team verbatim – positive or negative – as without this we wouldn't know how to improve.

Feedback enables us to focus, and one key area for us is to improve our score for 'anticipating client needs' – an area we scored 7.6 out of 10 for this year. To help us achieve this we are now in the process of implementing a new CRM system.

We're also keen to increase the level of engagement we have with clients during the IIC process, encouraging a wider set of individuals and businesses to provide their feedback.

The hope is that clients will recognise the IIC programme, understand why we're approaching them and therefore be more likely to respond. Importantly, this doesn't affect anonymity, as respondents are sent a secure link to the survey, which is still hosted by IIC.

When you think of a business

ALL THE ENGAGE

Nicola Burns, regional CRM manager at Brabners, gives her three top tips for improving engagement for the IIC survey activity internally.

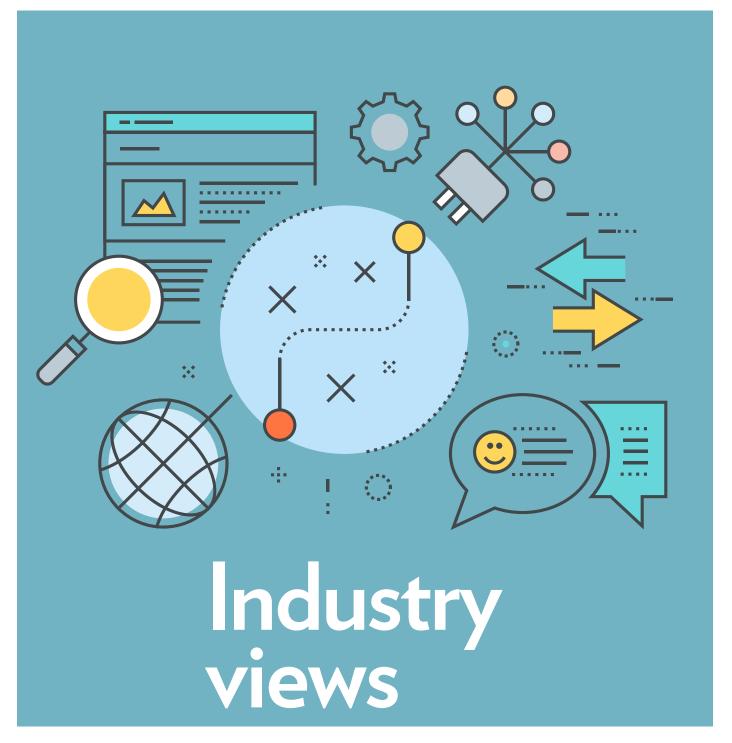
1 IIC champions. We had 27 people at every level from all different functions and departments across our offices – Manchester, Liverpool and Preston – as IIC Champions. They regularly wore IIC-branded t-shirts, and were available to provide support and advice. Importantly, they had the dual role of prompting colleagues to complete the employee element of the survey, as well as working with fee earners to ensure they encouraged clients to participate.

2 Desktop updates. We worked closely with the IIC team to get regular updates on survey completion rates, which we could split by team and office. With this information we created bespoke desktop images that regularly tracked how our teams were doing, and had the added benefit of creating a small element of internal competition along the way!

3 Consistent communications. We ramped up our internal communications programme, both in the run-up to the IIC survey taking place and throughout its duration. Wherever you went, we made sure our messages were heard. From posters at tea points to internal emails, desk drops and intranet articles, we made sure all employees knew about the programme and why it was important.

synonymous with excellent customer service, it's big consumer brands that spring to mind – the likes of Amazon, Apple and Virgin, perhaps.

We want to bring this level of association to the legal sector, and by partnering with an organisation to help analyse the service we provide to clients, we're confident we will be able to get there. It's not just great recognition for our people, but a tool we'll use to ensure continuous improvement.



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Peter Wallqvist,
VP of strategy at iManage,
says everything points to
competitive transformation
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Anna Richardson
and Geoff Mead at Osborne
Clarke explain how the team
at cvMail have helped to make
potential legal talent happier

For more information, visit: www.imanage.com

INDUSTRY ANALYSIS

Keep an Al on it

Peter Wallqvist, vice president of strategy at iManage, says your law firms needs an AI strategy – not for five years' time. Right now



rtificial intelligence (AI) are the words on everyone's lips these days, and with good reason. Whether it's providing us with better shopping recomm-

endations, being used by voice-enabled personal assistants to answer our weather, news or any other questions, or indeed recognising people in the photos you post on Facebook, AI impacts our lives practically every day. However, many lawyers believe that they can wait to figure out how to incorporate AI into their firms' legal operations. They think that, while AI can beat people at Jeopardy, the technology is still not ready to help a firm become more efficient, improve employee satisfaction, or create new value for their clients.

They are wrong. To cite a single example of how AI is transforming the legal market, AI-based 'robots' are being used by law firms today to classify, review and extract key terms from legal documents. While the robots need to be 'trained' by humans to conduct these basic cognitive tasks, once this has taken place they can complete the tasks exponentially faster than a team of lawyers, and with fewer errors.

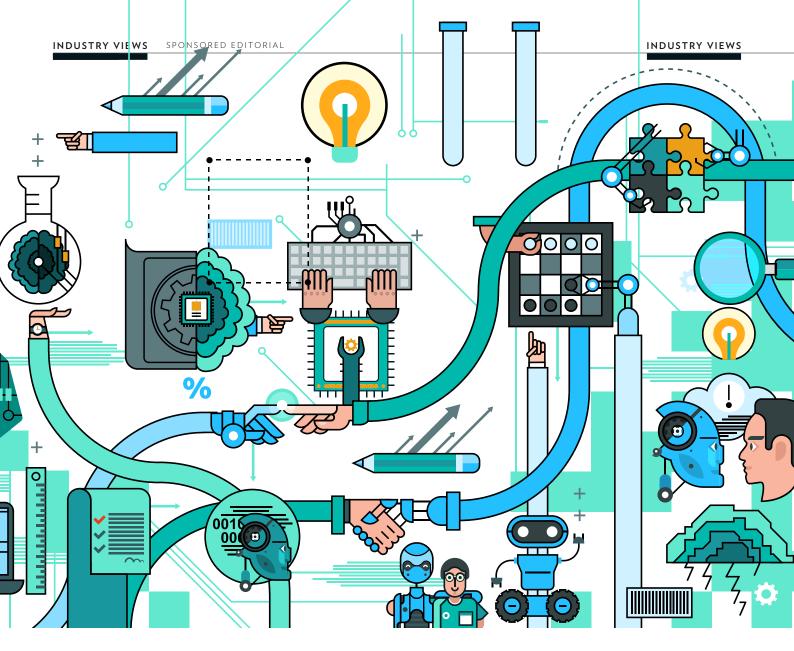
Using robots to organise, summarise and extract information from thousands of contracts, leases or other legal documents enables firms to address many of the key business challenges they face today, including how to address client demands for more predictable billing, how to attract and retain legal talent, and how to create opportunities to deliver more value to their clients. Firms that want to keep up with their competitors need to develop an AI strategy today – or risk seeing their clients move to firms that have one.

The hour has come

One of the most compelling reasons for firms to develop an AI strategy is that AI can address growing client demands for more predictable billing arrangements. Firms are understandably hesitant to move away from hourly billing and instead provide fixed prices on projects where it might be difficult to assess the amount of work that is required. In particular, with many such projects, it can be hard to determine the time it will take to classify, review or extract the terms from a large number of documents. However, by using an AI-based robot to quickly and accurately complete these document-classification, review and extraction tasks, law firms can minimise, or even remove, the impact of a difficult-to-estimate variable from their project billing calculations. Perhaps just as importantly, they become more efficient, and can bill their clients more for highvalue strategic work, and less for low-value mundane work.

Keep the talent – and keep it happier

Another reason for law firms to develop an AI strategy is to improve recruitment and retention of legal talent. The document classification, review and extraction tasks that AI-based robots can be used for are frankly tedious – and if the number of documents is large, can take weeks, or even months, of mind-numbing work. Most lawyers didn't enter the profession to do these types of tasks – they want to work on interesting projects that require creative, strategic thinking. By using a robot to complete the more mundane, often boring tasks, a firm will be more attractive to potential



Al is no longer on the horizon. It is here today. Those firms that have recognised and implemented Al strategies are already meeting client demands for more efficient and predictable billing.

hires, and lawyers currently at the firm will be less likely to leave for a firm that does have such AI capabilities. In addition, lawyers at the firm will be doing more meaningful and fulfilling work, and thus they will be more likely to put even more thought and effort into their jobs.

Higher value

A third reason firms need an AI strategy is the opportunity it provides to offer more value to clients. By cutting the time it takes to classify, review or extract terms from documents – from weeks or months to days or even just hours –

projects that might have been cost-prohibitive before become realistic. For example, if a law firm sees that one of its clients has tens of thousands of employment contracts, it could now offer them an "employee contract analysis" to assess risk and compliance issues in these contracts. Without AI, the time required to review all these employee contracts would have made the project too expensive for the client. However, with a robot able to review all the documents, and lawyers only focusing on interpreting the results, the project's price is low enough to justify the expense.

In the legal profession, AI is no longer on the horizon. It is here today. Those firms that have recognised this and implemented AI strategies are already meeting client demands for more efficient and predictable billing, improving employee recruitment, retention and morale, and creating new opportunities to deliver value to their clients. Those firms that fail to develop an AI strategy will miss out on these benefits – and see their clients and lawyers leave for firms that understand how that AI is transforming the legal profession.



Search here

Lynne Jones, head of library and information services, KM director Claire McNamara, and head of IT projects and change (RIC) Paul Jenkins, HFW, explain how Solcara Legal Search from Thomson Reuters helps the firm to run more smoothly

he ability for fee earners to find information quickly and painlessly is what makes the difference between a well-oiled law firm and one that's stuck in the mud.

Firms can no longer be competitive if they're reliant on manual processes or out-of-date systems. Now more than ever, clients expect the provision of legal services to be fast and to offer better value for money.

Claire McNamara, KM director at HFW, says the firm has addressed these consumer demands by using tools such as Solcara Legal Search from Thomson Reuters, which reduces the time fee earners spend on basic research.

"One of our key goals is to increase lawyer productivity and efficiency, and we look to legal technology to achieve this. Using Solcara to search our external information sources from our intranet has helped us to accomplish this," she says.

Head of library and information services Lynne Jones adds: "That's its key success for us – it is completely integrated into our intranet, making it accessible and easy to use."

A new vision

To kickstart its KM-efficiency journey, the firm completely revamped its intranet. Jones and McNamara worked closely with head of IT projects and change (RIC) Paul Jenkins to develop a sophisticated search functionality for the intranet.

Jones says: "We use a combination of SharePoint search capability for our internal information and Solcara Legal Search for our subscription sources. The Solcara functionality can be accessed from the

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search box on all pages on our intranet, but it works independently across the library pages.

"When we were thinking about designing our search application on the intranet, we had a very clear idea of what we wanted the user experience to be."

What's great about having Solcara work this way, Jones adds, is that users don't need any special training because all of the systems run on a single interface.

"It's important that our users get a single unified search experience. The ability to navigate between tabs to search internal or external sources means that all research can start in one place. They can then toggle between content sets to find relevant information. We demonstrate it as part of our library training, but it doesn't require much by way of formal teaching."

Jenkins says: "Systems must be designed primarily to aid the delivery of legal services and our search tool successfully achieves that goal."

"Our aim around integrating Solcara Legal Search into our intranet project was to further the business goal to be more efficient – and, of course, deliver a faster service to meet the needs of our clients."

Configure it out

Jones says that fee earners don't really care where the search functionality comes from, as long as they get results.

"We've configured a number of content sets based on resource type, legal sector and jurisdictions. The way this looks in practice is that search boxes sit on each page, giving the user the option to search material by content type or

Our aim around integrating Solcara Legal Search into our intranet project was to further the business goal to be more efficient – and, of course, deliver a faster service to meet the needs of our clients. subject based on their individual need."

The system is very heavily used now that it's embedded in our intranet, she adds. "You don't even realise you're using it, what matters is that it works."

HFW, as with many law firms, subscribes to a vast amount of online content. Historically, when the library team talked to people about practicalities of finding information, one of the big issues faced by users was knowing which resource to use to find the information they needed.

"It doesn't matter where things sit or whether users know who publishes it, now they can just run their search," says KM director McNamara.

Solcara Legal Search allows the firm to make sure that people are finding things that are relevant to them. This saves time and therefore money.

The firm pared down the Solcara search screen to reduce clutter on the page. Jones says: "Users were put off by seeing too many filters and toolbars, and having to work out the logic behind them. Now that it's clearer, people have more confidence that they know what they're finding when they do a search."

All about the client

The firm's main driver is that IT systems have to enable fee earners to deliver their work more efficiently, says Jenkins.

"The clients demand it – they want savings on fees and the only way to do that is to cut down the time between a matter being started and finished. It should be simple. It comes back to us using our systems, including Solcara Legal Search, to enable fee earners to work better," he says.

"The configurability and flexibility of Solcara Legal Search meant that we could use its key functions and drop it into place where we wanted it and change the look to fit our staff's needs."

For the library and knowledge management teams at HFW, integrating Solcara Legal Search meant they could help the firm's fee earners to get to information quickly, adding value to the delivery of legal services.



A law firm's brand is as much about lawyers' language and behaviour as having the right marketing materials, says Gary Shaw, group commercial director at Accesspoint

wareness, plus delivery, equals reputation (A+D=R)" is one of Gary Shaw's favourite marketing maxims.

"I always say that you can create all the awareness in the world, but if you fail to deliver the service, reputation suffers. On the other hand, you can do the best possible job – but if you don't let people know, that's just as bad. You have to create awareness, and you have to deliver."

That's a law firm's 2017 brand challenge in a nutshell – what a firm says about itself needs to match the experience (and any service, of course) the client receives. "A brand isn't just a logo," says Shaw. "It's a culture, covering personality and approach as much as what is promised."

Speech for the stars

Α

Law firms are perhaps too inclined to believe their brands begin and end with the work they can do – whereas 'how' they work may be just as important to a lasting positive perception.

"Even something like tone of voice is key – how people answer the phone, for example," says Shaw. "How does the firm talk? If you pride yourself on a highly professional image your choices may be different to an instance where a firm is putting itself out there as offering something more 'quirky', or otherwise different."

Language needs to be a fit for the needs and preferences of the client base in question. "I've been in situations where lawyers are talking, and clients think they're speaking in riddles." Even worse may be a culture where the provider overly dominates the client, or appears 'stand-offish'. "There may already be a certain fear factor when people visit their lawyer. Firms sometimes don't appreciate that, or don't match their language to the client's situation," says Shaw.

The result is a communication and conversation that doesn't quite gel, which – of course – is bad news for brand.

"Junior employees may intuitively adopt



attitudes and styles of others they see in action – especially if there's no central vision for how they should communicate instead."

Silo no more

Clearly, what a firm really needs to endorse are behavioural attitudes and actions that align with the brand. Here, however, there's another challenge to overcome.

"Everyone must buy in, from the cleaner to the head of corporate – for that a joined-up team effort is essential," says Shaw. However, firms' propensity to get stuck in organisational silos can frustrate this goal.

"Management may not communicate well with colleagues about goals in any case. But in order to really get people on board, you need to explain not only what you're doing, but why. What tends to happen more often is that everyone has individual financial goals, and they immediately start working – in their silos – to achieve them. They work toward their own goals, not common ones."

Fixing that isn't easy, he says, but it needs to be "top down and face to face – while inviting others' input and views, so brand values don't feel imposed.

"Brand marketing gains power through shared knowledge and understanding."

What's the measure of it?

Of course, sometimes the central vision itself may need to change before getting everyone on board with delivering the resulting brand promise.

Shaw says: "Sometimes a business can be doing quite well, and it just needs some revitalisation to get everyone singing the same song. In that case, you can retune and refine things more on track with brand values and goals. However, if sales and margins are declining, or the external environment is causing a problem – albeit your customer base hasn't changed – you might need a complete strategic review of where the business is going.

"How big is the gap, how are you going to get there, and who'll be the driver of the change?"

That review process will inform not only brand values (perhaps even some new ones), but also specific marketing activities. As with customer

Asking the right questions? These are Gary's:

- 1. What's the vision for the business?
- 2. What are the business goals for this year?
- 3. What are these based on opportunity (market demand and trend), necessity (volume or incremental growth) or strengths (eg margin delivery)?
- 4. What product (channel/service) delivers the most recommends?
- 5. What's the largest growth area?
- 6. What are the business's key strengths?
- 7. Which product/individual is the cash cow?
- 8. What's the practice best known for?
- 9. Is the business better known for the brand or individuals within it?
- 10. Are the marketing plan and communications aligned and supportive of the goals, strengths and opportunities?

service, says Shaw, firms might have lessons to learn from retail-sector organisations he has worked for in the past.

Take web traffic goals, for example. "You could have 50,000 visits to a web page – but are you converting the clients you most want? Are you targeting the right demographics with the right techniques? You could even have lots of sales coming through, but are those costing you in lower margins? Stay focused on the bottom line numbers.

"Most important of all is to monitor and measure, and then realign marketing depending on what you find."

Another potential weakness is consistency across customer touchpoints. "There are small things such as consistent email signatures and logos across platforms – but also attention to detail in responsiveness. Clients and prospects ideally want immediate contact, not a phone call five days later. It's an area where service can easily slip."

Firms should even proactively seek out reviews from happy clients, he says – one of the best forms of marketing being the fact others have been impressed before you. This word-of-mouth factor is as important for legal as it is in the world of hospitality or entertainment.

"Ambassadors can speak volumes. But firms sometimes forget to keep in touch when a case is closed – simply moving on again to where they can make some more money," says Shaw.

Then they're missing the all-important 'A factors' in Shaw's handy equation for reputation. "And when you're selling a service, you're only ever as good as the performance you last delivered."



INDUSTRY INTERVIEW

End-to-end game

Sanjeev Gandhi, new vice president and head of Intapp Consulting, explains why it's time for change at Intapp to help law firms harness new IT to change more competitively themselves

ne of the law firm strategies to watch in recent years has been diversification – finding new revenue streams you can run alongside legal specialisms you've long been known for to power up improved profitability.

A common – perhaps obvious – path for some to try to forge is into some form of added-value consultancy. After all, the synergies are already clear from the likes of the Big Four, which we hear are after significant new slices of professional-services action. And no doubt others in an uncertain business climate are seeing similar value in positioning products or services as a more holistic experience for the end user.

Technology businesses are also evaluating the ways they work with their customers and looking to tap into more touchpoints on a business's IT journey. Risk, data and time-management solution

supplier Intapp, for example, has just recruited a former senior member of PwC Consulting, Sanjeev Gandhi, to head a new global consulting team. This also ties up existing risk, client-development and data-strategy capabilities into a business strand to tackle firms' already intensifying array of IT change projects.

Power to the process

However, the move isn't quite as surprising as it might appear. Gandhi says PwC and Intapp have long enjoyed a strategic partnership – so his appointment is a natural extension on both sides.

"Over the last six or seven of my 17 years at PwC, I'd got to know the Intapp leadership team very well, and we've been very successful together.

Intapp is ambitious to grow, and I was ambitious to lead a global practice."

The timing was also right for both, he explains

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- but is there another reason now is the time for Intapp Consulting to make its move more fully in-house?

"The value of consulting to law firms now seems clearer," says Gandhi. "Historically firms have tended to view technology as a cost base (and issue) first and foremost." Now, finally – perhaps encouraged by evolution in areas such as artificial intelligence – it's being seen as a route to significantly greater competitiveness. "Firms in 2017 are more willing to see IT as a way of differentiating themselves in the market – and, with greater consulting capability behind our technology, we can work with customers to make them even more successful.

"The truth is, firms have underinvested in change management and the process of getting buy-in for projects. They've explored processes that affect an application, but rarely taken technology as part of a fuller end-to-end process running from fee earner, through business services, to the client." Although it's a very good thing firms are finally seeing technology as an enabler of more opportunity, it isn't the case that it's "the answer," he says.

"You can't implement new technology without auditing underlying policies and procedures – and training is an especially important area. Too many firms still regard it as an add-on rather than core. However, change management, communication strategy and on-the-ground training are essential components of introducing any new system."

Is there any one business risk he believes firms are most in danger of underestimating?

"It's data," he says without a moment's hesitation. "There's the quality of data you're migrating of course, but firms also need a data taxonomy and data governance. They need discipline around the quality of data that's fed into new systems, so they can trust it when it's time to report on it. Process and governance are as critical to success as the system, and technology isn't just a CIO issue."

Related to buy-in, Gandhi also expects to be helping firms understand the importance of building a business case. "Without one that's sound and accountable, and which can demonstrate return on investment, it's difficult to persuade people of the value of the whole change." Knowledge, and his relationships with most

"The truth is, firms have underinvested in change management and the process of getting buy-in for projects."

top-20 UK law firms aside, what else will Gandhi bring from his time at one of firms' key new competitors?

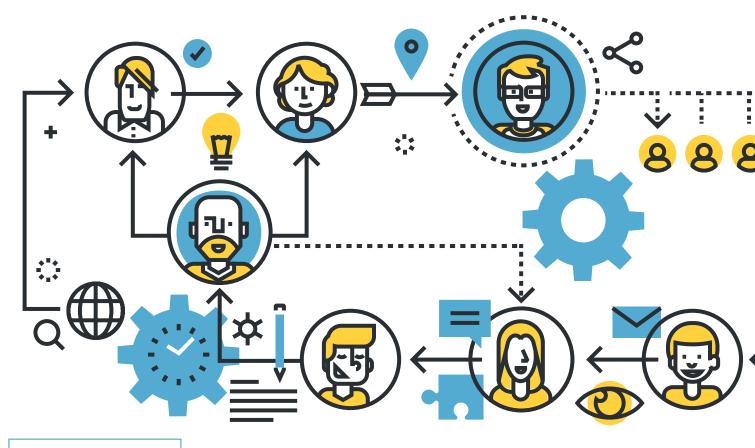
One lesson, he says, is that for Intapp Consulting to succeed it'll need "strong tools and methods" as much as expertise. "We won't achieve consistent high-quality service without them."

But internal talent development is another PwC priority he hopes to emulate – as is collaboration between the different teams of talent that make up the whole package. "We'll be bringing in other professionals with legal sector experience to join us – and the combination of technical expertise, sector knowledge and professional management consultancy skills ought to be compelling."

Although Intapp Consulting is a new group, it won't be separate. "Firms don't care which teams they're working with, but if we can effectively join forces they'll benefit. Ultimately, together we'll be helping to drive their own employees' behaviours in the right directions."

Recent months have seen several developments on the Intapp product front that could also help in this regard. In August 2017, Intapp Open Pricing promised "user-friendly wizards" to guide people around "modelling tools that simplify the development of profitability and service delivery scenarios." The same month the latest release of Intapp Open unveiled "AI-assisted review and categorisation of outside counsel guidelines." Risk managers can train the system to filter terms using natural language processing. "AI and robotics will be applied within many of our applications and workflows in future," says Gandhi. "They're likely to be part and parcel, rather than separate products, and it makes a big difference to the value we can offer to our customers."

But it could also mean plenty more work for Intapp Consulting, as firms adjust – painfully, perhaps, in some cases – to a more automated and AI-led future. As Gandhi puts it: "We'll be working with progressive law firms across the UK and US that realise there's a need to change."



INDUSTRY CASE STUDY

Hire purposes

Osborne Clarke has seen the benefit of happier candidates and recruiters in the days since cvMail from Thomson Reuters started delivering, say Anna Richardson and Geoff Mead

he 'war for talent' has continued to rage in the legal profession of 2017 and many a firm has identified a need to deploy some new battle tactics to keep winning.

One element in their armoury is the employee offer - the allure of more 'agile' working of course, as well as other incentives surrounding work/life balance and wellbeing as much as remuneration - but there are also tools to help recruiters identify and engage with potential employees more effectively prior to the interview.

Osborne Clarke introduced the Thomson Reuters e-recruitment software cvMail over a decade ago. The system has continued to evolve with the firm's developing recruitment strategy. But the team says that one of the biggest advantages is the relatively simple automation of a single task.

Senior recruitment manager Anna Richardson says: "Our very top priority is the candidate experience, and as soon as cvMail receives an application it automatically generates an acknowledgement email. It's such a simple thing - but a good first impression of the firm is absolutely key."

Recruitment advisor Geoff Mead adds: "The automation also saves manual work on the law firm's side. However, instant contact and clarity for candidates on their journeys are really important to a positive reflection of the firm, and therefore to successful recruitment."

But another benefit is achieving a broader view of available talent than people who put themselves forward for any one particular role. Today's law firms need to be much more proactive and flexible about finding the talent they want - wherever it may currently be - and cvMail enables them to



For more information, visit: www.cvmail.net

build up a talent bank they could potentially return to at a later date.

Mead explains: "Some good people will apply speculatively when there isn't a live role. Others may only just have been pipped to the post." The team doesn't want to lose those people's interest completely, and it will ideally be in a position to stay in touch. "With cvMail we can ask for permission to store their details and contact them proactively with future vacancies," he says. "We're also applying filters to group people into different types of opportunities for added efficiency."

"We've been able to introduce changes like a refreshed careers page and mobile optimisation. CvMail has quickly picked those up and helped us to adapt efficiently."

Perfect partner?

Talent banking is also likely to create a good impression – the idea that a person's skills are truly desired to benefit the firm in the round. And it's fair to say that Osborne Clarke had a good first impression of the team behind the tool too.

Richardson explains: "Other systems out there weren't as well tailored to the legal market. This one is especially effective for graduates and the more experienced of the hires we require, and the team also made recommendations based on particular operational needs, for example running training contracts."

And Mead highlights the system's flexibility as other aspects of recruitment activity change. "We've been able to introduce changes like a refreshed careers page and mobile optimisation. CvMail has quickly picked those up and helped us to adapt efficiently."

Richardson goes further. "When I first arrived the talent bank and templates were – frankly – a mess. It hadn't been well looked after at all. The cvMail team came to meet with me, and we created an action list of priorities. They really fell over themselves to help me on what became a project of around two months to turn it around.

"They also visited to train up any new recruiters we hired and spent time with the marketing team – nothing was too much trouble."

Mead says: "You do get out what you put in with an applicant-tracking system, but we also have a really good partner in the process." He himself turned to cvMail for more insight into the functionality surrounding the reporting of – for example - recruitment cost savings.

"We've been able to pick up salary trends for people at different points in their careers, and compare direct attraction efforts with results from recruitment agencies."

Richardson adds: "We wanted to demonstrate how much money we were able to save with certain approaches, and weigh up the potential of others to generate new efficiencies. You can also single out any especially horrific statistics, such as receiving 75 CVs for a PA role that resulted in just the one interview!"

And of course, the firm also wants to keep talent in the recruitment team happy. "If we didn't have the system there'd be a whole lot more admin work to do," says Richardson. "Officers can focus more attention on higher-level activities such as headhunting, talent banking and onboarding."

Mead says: "They're freed up to have that much more human interaction around the business and contribute to broader strategy pieces."

In 2016, Osborne Clarke even won an excellence in direct recruitment award – recognition that specifically cited several benefits that have flowed from the system. "There can be a lot of moaning about application-tracking systems – however, it's often as much the case that people aren't using them properly," says Richardson. However, just as a law firm may find with its own clients, the supplier's service can be as important as the product's technical quality in making a success of the overall work.

DAY IN THE LIFE

A doodle a day

Jonathan Patterson, managing director and head of development at DWF Ventures, draws a picture of his day working at the firm to bring out the creativity in others

enuinely the first thing I do in the morning is draw my priorities – hilarious as that may sound to some people. I've got a marvel comic book that one of my daughters got me – very un-corporate, I know – but it's all in the name of creativity and organisation.

I draw my priorities to fall two or three days ahead in the week. And starting or updating my doodles each morning definitely helps get me in the mindset of work. And my job thrives on creativity, so it's only fitting I start my day out that way.

If I'm ever running low on creativity juices all I need to do is revisit my doodles for a kinaesthetic top-up.

There's a book by Dan Roam called The Back of the Napkin, which teaches you how to draw really basic stuff like stickmen or cartoon drawings – I do a lot of smiley faces myself. But he gives you a method. I read it years ago and found it quite interesting, but it was all but forgotten until I came to DWF and dusted it off for some inspiration.

And because law firms are quite word oriented, drawing pictures really makes tasks stand out in your mind. I took that and applied it to a design thinking workshop for some of our fee earners at DWF. I made them draw out their ideas instead of writing them. Some people take to it, some drop it afterwards, but what it does is get people to think differently.

One of the big things around the

culture of innovation at DWF is trying to get people to get more creative – my latest suggestion, which hasn't been thrown out yet, is to get people to build things with Lego.

I try to limit the amount of time I spend looking at emails so I can spend it with people. I like informal or workshop meetings where you can really engage with an idea. I try to avoid 'grown-up meetings' – no one likes long or boring meetings where it's all talk and no play. People should learn to draw out the best of meetings, and I think the best way to do that is to change the format or environment you hold them in.

That being said, I do have grownup stuff I have to do in terms of reporting and dealing with the board – especially now that I have a new role in a new branch of the firm dedicated to research and development.

I spend as much time as I can with clients and with teams in the business, using things like design thinking to work out new ideas. It helps me to think in terms of buckets, so that I know what I've got to do at any given point and my morning drawings help me organise those buckets.

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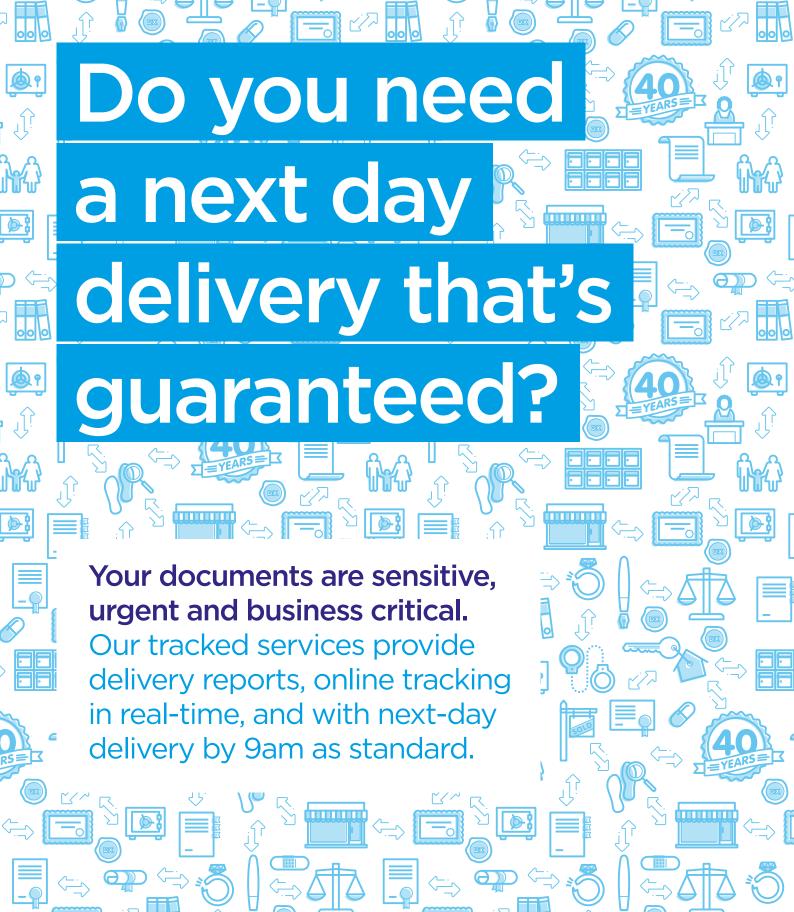


At DWF we try to have no more than five priority R&D buckets. Currently we're experimenting with an AI review service, digital tools, virtual assistants and new consultancy services, so it's important to attack those priorities in a very organised manner to ensure progress is made across all of them. DWF has got quite a clear creative and development process - we like to start with the client and use fast prototyping. This tends to be in 2-3 week bursts rather than drawn out ongoing projects - we want to be able to roll up our sleeves and get stuck into it.

My time outside of the office is mainly spent with my two daughters, aged seven and five – I can play Lego with them and they teach me so much. On a recent holiday I got to spend two solid weeks with them and it was amazing to see what they came up with. Children don't fear failure at all, it's not developed in their brain yet. They can let their creativity run free, uninhibited. That's why I try to encourage people to embrace their inner five-year-old when it comes to creativity.

At the end of the day I like to relax with Netflix and a glass of wine. I'm watching Suits at the moment, and it's quite refreshing to watch the US entertainment perspective of law but I'm not sure it's always that glamorous in real life!

As told to Kayli Olson



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