

# Briefing

SMARTER LEGAL BUSINESS MANAGEMENT

June 2017

**SUPPLEMENT  
INSIDE:  
CLOUD  
UNCOVERED**

**PLAY THE GAME**  
Psychology meets technology  
in the war for talent

**ICE WORK**  
What do the polar regions and a  
law firm have in common?



## *Machine yearning*

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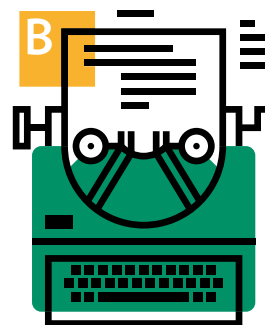


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# Editor's letter

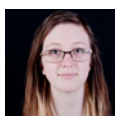


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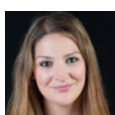
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**D**ifferences in the hopes and fears of successive generations was noted as one possible factor in a pretty dramatic political division around this time last year in the UK. And by the time you're reading this, who knows, some data might be available to assess whether age had a part to play in another big national decision.

Meanwhile, one tipping point in the balance of power is definitely upon us, according to one new report. Commissioned by LOD – the poster child for a workforce revolution, at least in this market – it argues the millennial lawyer has finally begun to outnumber the big, bad 'boomer' in law firms. So, we should expect to see that starting to come through in management.

LOD co-founder Simon Harper – who we're proud also to call a columnist – claims: "We're now in a place where we can see that millennials are the emerging law firm partner and GC. This is a generation that's already showing itself as the real accelerator of change. Not just as lawyers wanting to work differently, but critically as clients too, buying differently."

Report author and analyst Jordan Furlong conjures a vision where: "Right now, in the late 2010s, we are standing directly on the fulcrum between two eras of law, at a key transition point in the evolution of the legal services market. The market is changing from a dormant, low-tech, individualistic system to a dynamic, high-tech, collaborative one." Rousing stuff.

I don't quite see why "the millennial law firm ought to be a significant upgrade for their clients and their priorities" (examples given including pricing and diversity). That is to say, does it really take a bunch of younger, more demanding people to make firms focus on what clients want? The best I can offer is to wonder aloud if there's any truth in the stereotype that growing up surrounded by the growth of tech makes you a bit more open to using it to do things better – including for other people.

And so, on to a further possible tipping point. In our big idea feature this month (p14), we ask how well law firms are progressing with integrating another alternative mass of brainpower – artificial intelligence. The truth is they haven't been at it for long at all, but here's hoping it happens sooner than it did with millennials. Unlike them – and while I may not speak for everyone – we don't want the machines to manage a highly efficient takeover.

**RICHARD BRENT** EDITOR



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**Stop searching for information...**

# Ask Termi

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4036-002: Real Estate Transaction on another property has the following write offs:  
Invoice 10015: 51.00 GBP 14:08

Please confirm which client? 13:11

- 4003: ABC Unified School District
- 4200: ABC Studios
- 8001: ABC Insurance company
- 8002: New ABC Insurance company

What is the outstanding AR for ABC? 13:11

4200: ABC Studios 13:12

4200: ABC Studios has the following outstanding AR:  
369.00 GBP 13:12

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# Inside this month



20

*Change of outfit*

**“People can be concerned about change delivery missing the mark.”**

Jonathan Agar,  
CEO, Birketts



**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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▶ **ROUNDUP**

# US and them

In May, **Eversheds Sutherland** (International) came out with its first set of full-year financials since the merger between **Eversheds** and **Sutherland**

**Asbil & Brennan** in February 2017. The two partners in this union opted to stay financially independent, so US revenues aren't factored in.

And? Revenue is up 8% to £438.6m, whereas net profit fell 4%, to £84.1m. The firm's new chief executive, Lee Ranson – he started his four-year term in May – said: "Continued strategic investment in people, recruitment and, most notably, our US combination led to an anticipated slight dip in profitability."

## 2.2%

Compound annual growth rate for global legal services between 2012 and 2016, says analyst **MarketLine**

He added: "To have turned in this kind of result against the backdrop of Brexit and continued political and economic uncertainty in many of our key markets speaks to the strength and resilience of our business."

The firm has also just unveiled **ES/Locate**, a new e-discovery platform it created in partnership with **OpenText** – and hired Enzo Lisciottto as head of litigation technology from **Norton Rose Fulbright** to lead its implementation.

Meanwhile, another merger is quickly born. Management-focused employment law giant **Littler Mendelson** has spied an opportunity for further European expansion by launching in London with a little help from boutique **GQ Employment Law** (founded in 2010).

In a joint statement, Littler's co-managing directors Tom Bender and Jeremy Roth said:

"With our recent expansion into France and Germany, we now have more than 200 lawyers in major markets in Europe, reinforcing our position as the leading provider of employment law counsel to multinational companies."

GQ founding partner Jon Gilligan added: "We will immediately begin sharing client representation, knowledge management tools and technology resources."

And the latest report from **MarketLine** suggests we can expect – and should hope for – more merger activity as Brexit negotiations begin. The global legal services market slowed in 2016, and North America accounts for 49.6% of its value. And the US is a whopping 94% of the North American market.

An analyst at the company Christopher Leyman-Nicholls explained: "Given the dominance of this market, its decelerating growth harms the sector's global value, encouraging large-scale mergers around the world."

"MarketLine expects the US to be the main driver behind future growth, despite failing to grow in 2016. The US occupies nearly half of the global market, denying any other single country an influencing role. Were the current trend for mergers and acquisitions in the US to stop or slow down without the return of sustainable growth, the global market would likely decline in value."

Or ... perhaps millennials will come to the rescue. A new report commissioned by **LOD** declares: "Millennials are going to rewrite the DNA of law firms." Let's hope that means they'll also grow stronger. ▶

**"MarketLine expects the US to be the main driver behind future growth, despite failing to grow in 2016. The US occupies nearly half of the global market, denying any other single country an influencing role."**



**LAK PUREWAL**  
HR director, EMEA – Norton Rose Fulbright

We have a great record of recruiting, retaining and promoting talented women to our most senior business services roles. Currently, in the Europe, Middle East and Asia (EMEA) region, 66% of these roles are held by women. Some are long-serving and have worked their way up to more senior roles. Others are lateral hires who were attracted by the brand and culture of Norton Rose Fulbright. However, this does not mean we're complacent, and we continue to cultivate an environment of inclusivity where all our people feel they can develop their careers with us.



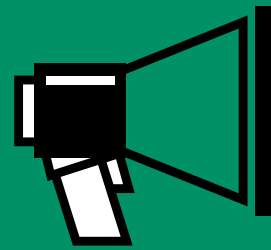
**CAROL ASHTON**  
International HR director – DLA Piper

In business services we don't observe the same reduction in female representation at senior levels, as we do with lawyers, and at DLA Piper we have equal representation of women in business services leadership. So, it becomes less about equalising the opportunity for women to progress, and more about ensuring that when we are looking at new approaches to personal development and career progression, we're not only focusing on our lawyers, but are paying attention to the aspirations and opportunities for business services colleagues too.

## LEX POP

# Leaders in waiting?

Does your firm still need to do more to see a greater proportion of women progress to the most senior business services leadership roles?



**JEMIMAH COOK**  
HR director – Kingsley Napley

We appoint and promote on the basis of talent and potential alone and are proud of our gender statistics (73% female, 27% male), which helps to attract top male and female talent. As a firm we aim to promote a flexible and open culture, which offers support to all at each stage of their career – such as when a woman returns from maternity leave. But we can always improve our processes and initiatives and we make sure we keep an open dialogue internally to work through the issues.



**JONATHAN BOND**  
Director of HR and learning – Pinsent Masons

Pinsent Masons created 'Project Sky' in 2013 to improve gender balance at senior levels in the organisation. This has focused both on lawyers and on business operations departments, with arrangements such as mentoring, maternity-leaver support, leadership development, gender pay reviews, succession and talent-planning models, as well as gender-balanced shortlists applying across the whole firm.



**DEBORAH DALGLEISH**  
Head of diversity – Ashurst

It would be a complacent organisation which felt that it had done enough to equalise opportunity for female progression. That said, our chief global officers for IT, knowhow and people are all women, and our heads of learning and diversity are also female, so we do have some good role models at the firm. With the exception of IT, however, women tend to be well represented in those business areas anyway – so our focus should be on equalising opportunity for women in non-traditional areas such as IT and finance.



# WHAT'S ON YOUR WHITEBOARD?



Martin Darroch, CEO at Scottish firm Harper Macleod, says his personal development in legal wasn't something to strive for until he found a firm worth investing the time in to change behaviours

## **Q** Why did you pick Harper Macleod?

**A** I'm a chartered accountant and trained for a firm that had several law firm clients. When I then joined Deloitte (1998), the partners asked me if there was anything they should know about me and I said: "I hate lawyers. I don't want any involvement with law firms." Fast forward a year, I got a call asking for a favour to go and look at a firm, which at the time was called Ross Harper Murphy. I was asked to stay as a seconded FD. During the secondment the firm approached me three times to try to get me to stay on. I'm a big believer in going for an opportunity if you get it, and at 25, how could I not? In 2001, we demerged Harper Macleod, which I decided to join as I felt that those at Harper Macleod had the right culture and approach to legal services.

## **Q** What do you think law firms can learn from other business sectors?

**A** It'll sound basic now, but it's still very relevant – going through security at an airport you have the 'How did we do today?' smiley buttons. I happen to know the head of HR

for Glasgow airport and phoned him to ask why they introduced it. It's because the shops are behind security. It is in their commercial interests to have happy people come through and then go into the shops. The same can apply to law firms. Are we getting the happy emoji or the sad emoji? Get the right structures underneath the business and measure your customer service.

## **Q** What's your single best tip for managing a law firm?

**A** For a chief executive, it's to remember your stakeholders. Depending on the firm's structure and size there might be multiple layers of partners and groups, who all want different things. A big differentiator for me is that I'm the equivalent to a full equity partner. I have everything to gain from that, but also everything to lose. In managing a law firm, you have to remember that you're using other people's capital. Another thing is being brave enough to ask the hard questions – but also being ready to listen to the answers.

## **Q** Where do you think law firms still need to manage a change in mindset?

**A** All law firms need to get their heads around the idea that anyone who is instructing you – whether an institution or individual – has experiences influenced by the consumer world. If I order something that will be delivered between 8am and 9am, then do it. Give me what I ask for. If you can't, then manage my expectations. It's not different in the legal market. At times the legal sector is only doing itself a disservice.

## **Q** What most keeps you awake at night?

**A** Beside my nine-month-old daughter, it's the Scottish legal market. Its total value has been in decline for the last few years. And because we're a very young business – the average partner is in their early 40s – we have to think about the next right move to enhance the firm for all. Around 18 months ago we were looking at new offices, which would save a half floor in overhead. But I couldn't sleep, I wrote down everything on my mind and decided we had to take the full floor. We're now at full capacity. We have to be ambitious, but need to get the scale right and spend time working out what should I say 'no' to. ▲

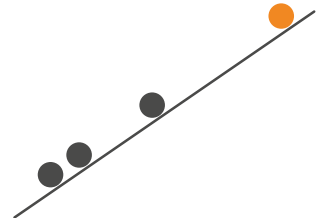
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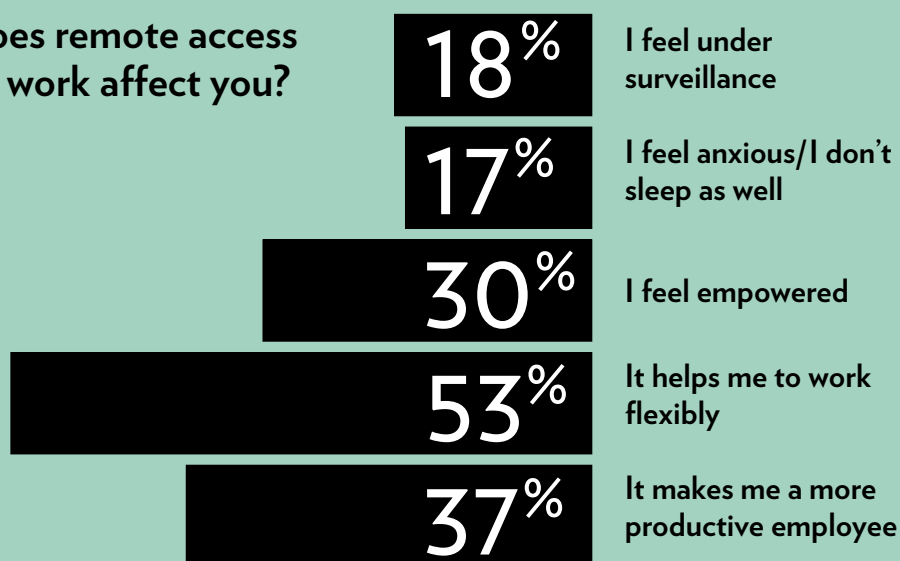
## Movement for good?



### Stressed out of office

Remote access to work – ‘agile’ working as it’s increasingly known – may be a double-edged sword. According to a new survey from the CIPD, two-fifths of UK employees say they check work emails/mobile at least five times a day outside ‘working hours’ – posing a potential challenge for HR teams. But views among the workforce are divided.

### How does remote access to your work affect you?



So, while there are very clear positives to working outside the office, CIPD says a lack of clarity about options and expectations can make for an environment where people feel they can't “mentally switch off”.

## BREXIT BATTLES

Tech fatigue is far from the only thing troubling the UK workplace in 2017. Brexit can also be bad news for business



### Mental health matters

For Mental Health Awareness Week (8-12 May 2017), the ‘This is Me – in the City’ mental health campaign was once again encouraging employees with experience of mental health problems to share their stories with colleagues via a video message (or other medium). First developed by Barclays, companies involved in 2016 also included Baker McKenzie, Clifford Chance, Hogan Lovells, Herbert Smith Freehills, Linklaters, Mayer Brown, KPMG and PwC. Led by the Lord Mayor's Appeal (@LMAppeal), on social media the awareness campaign uses the hashtag #endthestigma

## SPEAK UP

# An eye for design

Simon Harper, co-founder of LOD, says stay curious, and give some thought to building business by design thinking



**K**een observers of the zeitgeist might have noticed a couple of words recently trending in the legal world – ‘design thinking’. If it’s not already on your radar, 2017 may well be the year that corporate legal teams can’t avoid it. And it’s worth listening – design thinking can not only help you to identify and solve problems effectively, it can also shed light on the wider process of how to work better.

Design thinking has been a business school mantra for more than a decade. “It means taking a creative, experimental and user-centred approach to how we provide legal services,” according to Margaret Hagan, director of the Legal Design Lab at Stanford Law School’s Center on the Legal Profession. It’s an approach to solving the problems of clients (internal or external), which is centered on us as human beings and about finding solutions that are genuinely useful rather than just coldly analytical. It draws on logic and reasoning, but also imagination and intuition, to create a beneficial outcome.

Design thinking offers a framework for thinking differently about the problems we’re trying to solve and coming up with new solutions. Although this is to some extent a process, it’s a fluid rather than prescriptive one. I’d pick three key things to highlight:

**There’s something interesting about everything, and endless curiosity is often the key to getting to a well-designed solution. Also needed is a willingness to break the rules, not to be compliant – something that doesn’t always come easy to lawyers.**

**1 Frame the problem.** Design thinking recognises that we often fail, not because we got the wrong solution, but because we identified the wrong problem. To avoid this, our solutions need to be focused on the insights and needs of a client – or a composite version of multiple clients. Finding the right problem requires empathy. The best creative solutions come from the best insights into human behaviour, observation and conversation.

**2 Generate ideas.** This is about solving the problem in multiple ways, but design thinking teaches us that the starting point is an attitude more than a process: to be curious. There’s something interesting about everything, and endless curiosity is often the key to getting to a well-designed solution. Also needed is a willingness to break the rules, not to be compliant – something that doesn’t always come easy to lawyers.

**3 Try and test, and try again.** Lawyers tend to want everything to be perfect (and ideally risk-free) before releasing it to the world. But design thinking asks them to replace that potential for ‘analysis paralysis’ with a bias toward action – replacing the worrying and pondering with ‘just doing it and seeing what happens’.

In creating LOD, we were initially forced to do this by lack of time and resources. But ultimately, this process of launching, testing and iterating has been enormously positive. Learning by doing has benefitted not only our lawyers and clients, but our business as a whole.

Law is a profession well placed to reap the benefits of design thinking. It can give us a framework to test new ideas without the tyranny of an ‘innovation department’, and without big budgets or lost time. Who knows, design thinking could even lead you to a whole new phase of your career. ▀

# Competition winner

Clare Quinn-Waters, senior client development manager at Baker McKenzie, says being mature enough to collaborate with your competitors could gain you more than impressed new clients



**C**lients are getting ever smarter about how they want law firms to work, with efficient matter delivery a major opportunity for rationalising legal spend. Meanwhile, panel rates have been driven down, with an inevitable effect on profitability – so it's important that legal providers respond to these pressures in a way that continues to deliver best value for both firm and client.

But can collaboration improve the client experience and also the law firm's cost effectiveness? A roundtable of law firm BD heads recently considered this question.

As clients demand more for less, panels are increasingly asked to demonstrate a commitment to collaborate. Currently, this appears to be focused on training, KM and systems in the main. Often, collaborating with competitors can just seem counterintuitive, with some partners even viewing the concept as client naivety. A great deal of maturity is required on the part of client teams. However, there are significant gains to be made.

Formal alliances may be a source of innovation, as client teams are forced to think about efficiency and service delivery. A further benefit is that this may encourage partners to rethink how they work internally with other parts of the firm, and replicate the efficiencies with other projects.

Also, simply accepting that some firms are better at certain areas can lead to more targeted pitching, as well as flagging up potential areas for future investment and development.

However, each firm needs to be able to compete, so it may help if panel members each have a clearly defined role – for example, one firm is an employment specialist, another takes on litigation, and so on. Some panels choose to operate a best-of-breed model, with a GC creating a 'dream team' of lawyers from different firms on a single project. It's vital, therefore, that any firms represented in that team can quickly – and clearly – demonstrate why they should be awarded the kind of work they want.

Of course, client teams should also have the confidence to have tough discussions about pushing back, or even walking away.

My top tips:

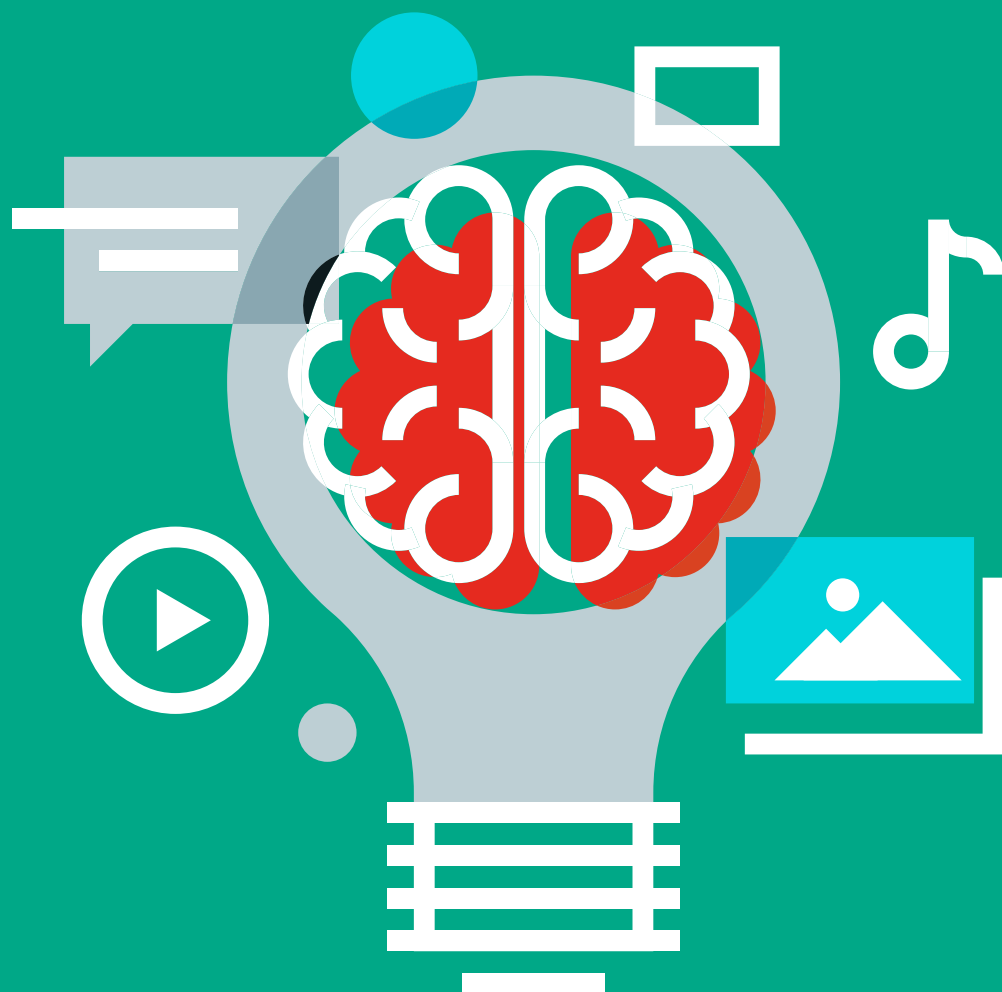
- Collaboration between firms with complementary, non-competing practices means alliances can proactively offer something to global or otherwise complex clients.
- Intra-firm collaboration also benefits from a blended team. Lead partners can focus on what they want to gain from the process, while junior lawyers who know the client understand how things will work in practice, and non-fee earners are free to explore more radical solutions.
- Where clients are demanding a lot of non-chargeable time, offer something else. Could 'reverse' or business services secondments be part of a solution?
- Finally, lateral hires from in-house positions may be very helpful in advising where to focus investment, and where to push back! ▲

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# Features

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### *Some like it robot*

How is machine learning changing firms today, and are they prepared for tomorrow?

## 20

### *Briefing people*

Jonathan Agar, CEO of **Birketts**, on the importance of being transparent for his own people

## THE BIG IDEA

Some say AI isn't all it's hyped up to be. But if firms are buying it, do they have a long-term vision for what it'll do? Richard Brent reports

# Some like it robot

**A**nother month, another report warning robots of some description could be quite successful in your career. This time it's analyst firm Gartner – which has pinned 2022 as the year “smart machines” may replace highly trained professionals.

Vice president and fellow Stephen Prentice says: “AI's effects on industries will force the enterprise to adjust its business strategy. Many competitive high-margin industries will become more like utilities as AI turns complex work into a metered service the enterprise pays for, like electricity.”

And it's good news for **Briefing** – in a way – that he offers up extensively, and expensively, educated lawyers as a great example. “Any enterprise that hires lawyers must pay salary and benefits big enough to compensate for this training for each successive lawyer it hires,” states Gartner's report. “On the other hand, a smart machine that substitutes for a lawyer also requires a long, expensive period of training. But after the first machine, the enterprise can add as many other smart machines as it wants for little extra cost.”

## Plan of attack

That's not to say that those in business services roles can relax. Gartner says several “routine” IT functions are also likely to be replaceable – roles such as system administration, helpdesk, project

management and application support.

“The CIO should commission the enterprise architecture team to identify which IT roles will become utilities and create a timeline for when these changes become possible,” says Prentice. “Work with HR to ensure the enterprise has a plan to mitigate any disruptions AI will cause, such as offering training and upskilling to help operational staff to move into more creative positions.”

Those CIOs ought to make use of a “five-year vision,” he concludes, to develop a plan for achieving the right speed of adoption that may also serve to reassure a jittery workforce.

But is such long-term planning realistic when technology changes so fast? And one year on from the AI hype machine in legal really getting going – the magic circle firms going public with their moves – do firms have an AI adoption strategy?





**“Every firm should be focused on the implications of technology for its practice and training needs – seven, five and even three years from now.”**

*Stephen Poor, chair emeritus, Seyfarth Shaw*

Seyfarth Shaw has also recently explored its robot options – with developing self-sufficiency key. The firm selected Blue Prism robot process automation (RPA), used by blue chips in several other industries. And chair emeritus Stephen Poor says: “A big goal in the diligence phase was for the successful vendor to teach our own team well, so we wouldn’t need to rely on external resources to implement further robotics in future.”

After a two-month pilot programme in late 2016 the RPA programme is now seeing impressive time savings, not just for high-volume processes such as onboarding immigration clients, but also in the finance practice, says Poor. “It’s where you have legacy systems – and are moving data between systems – that this technology really shines. We’ve only begun to scratch the surface.

“We knew the pilot would take longer than is typical. We purposefully picked a process with technical aspects that would make it difficult. We wanted to be sure we could solve those first.”

And although Poor agrees with Braude that machine learning is in the business of helpfully “automating tasks” rather than harmfully “displacing lawyers,” that doesn’t mean there isn’t a plan in place. “Every firm should be focused on the implications of technology for its practice and training needs – seven, five and even three years from now,” he says.

Through subsidiary SeyfarthLean Consulting, Seyfarth Shaw is now rolling out “robotic centres of excellence” to boost not just individuals’ technology skills, but also an understanding of how the combination of RPA and people will affect process. Poor explains: “We’ve got very good at process work over the years, but having this extra tool took some learning. The centres of excellence will work with teams around the firm on feasibility studies to make business cases, before picking up the process analytics and programming.”

Derek Southall, head of innovation and digital at Gowling WLG (who has also just launched Hyperscale Group while continuing in post at the firm), says the nature of jobs will definitely change – including in business services.

“Although new tasks will come along as others

“The first thing to say is, we don’t see AI replacing lawyers as a whole group,” says Bruce Braude, head of strategic client technology at Berwin Leighton Paisner, an early adopter of AI in 2015. “In the press it’s often images of robot lawyer armies – but we see the technology playing its part in carrying out specific tasks as part of the legal delivery process.”

BLP continues to use the Applied Cognitive Engine (ACE) from Ravn (bought by iManage just before **Briefing** went to press) for repeat real estate work. The tool can be used in a range of sectors, but here it takes data from Land Registry documents, and puts it into a spreadsheet for cross-checking to remove duplicates and review anomalies. Braude explains: “We still use ACE primarily in real estate, but we’re continually evaluating use cases for other work types, as well as for bespoke client problems.”

Across its work in AI and automation, he says, the firm has realised time savings of 30-80% on a range of tasks. BLP is also now trialling Extract Direct, a self-service version of AI that lets the firm train its robot on the points of interest to extract.

are replaced, the skills you'll need in an IT function – for example – will be completely different. For one thing, the more you work with disruptive technologies, the more likely you'll need to partner with suppliers. The skills are different and, given you're working with individual legal teams, there will be more projects. There needs to be a governance framework for people drawing on external suppliers through a partnering model."

### Higher client value

On the other hand, says Southall, as efficiency-enhancing as AI is, it might not be able to do quite as much work as many people think.

"There's often an assumption that lots of people could be replaced. However, when you drill down you find there are indeed great, clear use cases, but they're in discrete pockets of a business. You typically need a series of matters or documents that are reasonably identical to use these tools effectively – in short, you need scale.

"The client market may be more lucrative for AI providers than the law firm market – not because of any reluctance among firms, but because clients have the corpus of identical documents to get a real return on their efforts."

But there's another way instances of AI could be viewed as a threat to the lawyer – by removing the need for clients to deal with them at all. In March 2017, for example, insurance-focused Kennedys released a new version of its KLAiM online litigation management system, which enables direct instruction of counsel through a workflow where county court attendance is needed and costs aren't agreed. The firm says three-quarters of cases over two years have been settled successfully with the system, saving one client "well over a quarter of a million pounds annually."

Kennedys has also recruited Karim Derrick as head of research and development, and he's tasked with investigating where machine learning could be deployed to streamline workflow and help clients self-serve more in future.

"There's always two sides, and I'd subscribe to the Richard Susskind view that we're probably exaggerating AI capability for now, but underestimating it in the long term," says Derrick.

"However, I prefer to talk about augmented intelligence rather than artificial intelligence." He sees obvious parallels with his previous work in the education sector, using cognitive computing with text analytics and video to get a better

## Bruce Braude at BLP's top tips if AI is on your shopping list

- We investigate AI 'top down' and 'bottom up'. Top down is about starting with clients' needs and considering how AI could play a part in solving their specific problems. Bottom up is continuously monitoring the market for emerging technologies, and meeting new tech companies, of which there are many!
- Try to find one initial use case to prove the value. Don't introduce it to the whole organisation at once, but show the value it brings in one scenario. Then work with lawyers in the area to promote more widely and drive broader adoption. There is an extra challenge in getting lawyers to trust AI, compared with other IT, because it's doing tasks that haven't been done by technology in the past.
- It's not just about the technology. We also consider our relationships with suppliers, the quality of their people and our ability to work together toward shared goals.

understanding of students' true capabilities and grade them appropriately. "Rather than replacing professionals, we're really creating new forms of value that just wasn't there prior to the technology," he says.

Kennedys has a toolkit of products – of which KLAiM is one. "You're facilitating claims handlers to do as much as possible without necessarily needing to resort to lawyers," he explains. Another product, '@scene', is for capturing and processing information accurately at the time of an accident, "which potentially removes opportunities for later embellishment," fraudulent or otherwise. And another tool, called KI, applies analytics to help businesses foresee such fraudulent activity.

"All these could benefit hugely from applied machine learning – especially when you see them as a continuum instead of separate products," says Derrick. "Rather than a discrete machine learning service, we'd be free to apply where we see fit. And rather than me anticipating where that'll be, my role becomes to help the lawyers help their clients to identify the latent value in leveraging different combinations of our technology."

Like educators, those lawyers are also freed from some activities that are more akin to project management – "shifting data around" – than the skills they were trained for. Meanwhile, Kennedys

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**“What if an AI tool could automatically produce an ‘optimised dashboard’? It doesn’t need hardwiring or data entry, because it’s doing the analysis itself.”**

*Derek Southall, head of innovation and digital, Gowling WLG*

is also building up a team of data scientists to resource this direction of travel.

### Sum of parts

On the other hand, BLP’s Braude argues AI may have its largest impact on legal business in the growing field of disaggregating legal work into more component parts to maximise the cost-effectiveness of the sum.

“It could enable work to be done in a far more industrialised way. You optimise the process, and embed that in workflow platforms. AI tools undertake specific tasks in the chain.”

But like Derrick, he also pinpoints analytics. “As we capture greater volumes of data, we can improve forecasting of legal work, and that could be quite transformational in decision-making.”

In January 2017, BLP rolled out the shared platform from vendor slicedbread, which lays claim in both areas. Process tasks are automatically routed to the “right resources at the right time” – plus, use document automation – while more granular real-time management information (MI) is fed back to clients for “continual improvement and process optimisation.” Using portals, clients can review the analytics and initiate work, as well as collaborate with the firm’s team.

“On one level, offering real-time matter MI is itself a client service improvement,” says Braude. “But as we build up more data, we’ll also use it for process analysis in collaboration with clients – for example, to analyse how long tasks take and identify bottlenecks we can tackle together.”

Of course, some AI developments are specifically targeted at making firms’ own operations more profitably productive. In May 2017, the NextLaw Labs tech-investment venture from Dentons said it had backed AI-powered tool ProFinda. This uses matching algorithms to form a more reliable map of the full talent at your disposal to create better project teams, more efficiently.

Dan Jansen, NextLaw Labs’ CEO, says: “In large organisations like law firms you can have lots of emails flying around trying to find the best specialist for a piece of work, and you may need to speak to hundreds and thousands of people before you find them. Also, the first person to respond isn’t always the best person – perhaps they just did something similar recently. So, as an investor, NextLaw Labs found the use case for this very compelling – better, faster, cheaper.”

That case could apply in any professional services environment, he says – accounting, consulting or architecture – and in law there are several functions that ought to benefit.

“Knowledge management is always trying to identify where knowledge resides, so that’s an obvious place to start. But you also quickly come to business development. One of the most underreported stories is the extent to which global organisations are consolidating their panels of firms. It’s really important that firms involved in those higher-stakes competitions truly have the best people on the team.”

He adds that although – as Gartner says – AI in general may be cheaper than lawyers, it’ll also make future lawyers more efficient and productive than today’s. “We train the machines, and in effect the machines will train subsequent new lawyers by completing the routine task and highlighting where the human judgement is needed. It’s an efficient virtuous circle.”

So, if AI is muscling in on KM and CRM, could it actually pose more threat to other IT systems than it does the people using them?

Southall says: “Most firms now have matter management dashboards – the difficulty is that fee earners don’t like entering the data. So, what if an AI tool could automatically produce an ‘optimised dashboard’? It doesn’t need hardwiring or data entry, because it’s doing the analysis itself. Will even the most fantastic matter management system still be relevant in there years’ time? And what other systems might AI replace? Look at the Ravn deal. Every content-heavy system will need an AI capability, and vice versa. We’ll see many more marriages like this.”

We could be in for a world of “legal IT 2.0”, he says – where static systems make way for “something that leverages its own data and can do things in ways that haven’t been coded.”

Scary stuff? Or a natural evolution of incremental efficiency? Let’s find out. ▴



BRIEFING PEOPLE

# In the changer zone

Jonathan Agar, CEO of East Anglia firm Birketts, explains why legal business might benefit from an outsider's eye, but the IT and innovation agenda needs the firm hand of a seasoned fee earner

Above: Jonathan Agar, CEO, Birketts

Words Richard Brent Photography Jonathan Goldberg

**J**oining Birketts in 2013 from his role as the senior leader of the corporate and investment banking and finance division of Deutsche Bank, Jonathan Agar needed to embrace change – even where he himself was appointed to make change happen.

“There’s no denying that leading a law firm partnership demands a different leadership style to what I was used to in the past. There’s a lot of engagement and empathetic collaboration required, and the leader really needs to inspire a genuine desire to achieve their vision rather than force it through.”

It’s a little ironic, he says, that while culture is something you might find it difficult to describe

or measure, its preservation – “how well people are integrated and respect one another” – is “probably what we value here more than anything else.”

For that reason, the wheels of change at Birketts might turn a little slower than in other businesses he has been in – but that’s not necessarily a bad thing. “It’s quite refreshing that the outcomes of change projects can actually be better for that reason,” says Agar.

“In my previous business life, there was rarely an opportunity for people to really take changes on board and live with them, before the next set started to come through.”

And then there’s the well-trodden observation

### ▲ FIRM FACTS

#### BIRKETTS

Offices: 4  
Countries: 1  
Revenue (YE May 16): £39.2m  
Headcount: 560  
Ratio, fee earners to business services staff: 2:1

that lawyers can be almost inherently resistant to all manner of change. Agar says the Birketts partners knew they'd need to change in some ways to compete more effectively for the work they wanted in future, but they needed someone from the outside world to give guidance.

"It isn't just in legal that people can be concerned about change delivery missing the mark, but it is the case that someone who has been there before can help to inspire confidence." In his case, he says, his past demonstrated "how to take managed risk – challenging the way we deliver work, but also sticking to a change programme and not succumbing to fear in the first year."

#### Front feat

So, what to change? "Drawing on my background I knew we'd need to invest heavily, but with an absolute laser focus on frontline services," he says. And that led to what might seem a fairly unusual strategic appointment as the firm's first director of technology and innovation – a former lawyer. "The reason is he could effectively translate fee earners' requirements into solutions," says Agar.

"In banking it was very common for technology leaders to be former practitioners in an area such as trading, portfolio management or risk. I found that was a very powerful formula for frontline users." With the more traditional model, there's some risk of IT sitting in the back – or at least being viewed that way, he says. Occasionally, therefore, they do risk "missing the point."

Client collaboration technologies have been an investment priority for the new innovation remit, although virtual deal rooms are now "part of the package" on the firm's corporate and real estate transactions. And although Birketts is based in East Anglia, there's an international component to much of its expanding base of work that calls for round-the-clock client access to real-time information and matter documentation.

"For clients in Asia – where Saturday or Sunday may be a working day – there's real value in knowing the exact point their business has reached," explains Agar.

**"I knew we'd need to invest heavily, but with an absolute laser focus on frontline services."**

*Jonathan Agar, CEO, Birketts*

#### Down to business

But perhaps even more innovative than providing matter transparency for clients is the new level of strategy transparency for the firm's employees.

"All new joiners receive a copy of our business plan and strategy paper, and also the previous end-of-year report, so they can clearly see progress against the objectives we've set.

"It's one area we've worked very hard on for the last three years. I call it the 'which way is north?' factor. If everyone were to shut their eyes and spin around, we want as many people as possible to point in the same direction. Seeing the wider context of more granular tasks really helps in terms of people's personal motivation and buy-in to a shared purpose."

The business isn't "some dusty old firm", he says. Nevertheless, you sense a fresh chapter about to begin when the largest and oldest office – Ipswich – catches up with the rest by introducing open-plan working for all in 2018. Birketts' main building in the town today is a cellular Victorian terrace. Others are "tucked away in various corners." So it stands to reason that a modern office move, getting everyone together, will make a statement about the consistently collaborative culture Agar clearly wants to keep.

In the meantime, though, there's other progress to manage and measure. The firm recently appointed its first diversity committee, which will begin by investigating any potential barriers to more women progressing through to management.

"There's proven data that gender-balanced businesses perform better," says Agar.

It should come as no surprise that representatives of the diversity committee will be visiting each office to, yes, deliver a short presentation, but also "ignite the conversation." ▲

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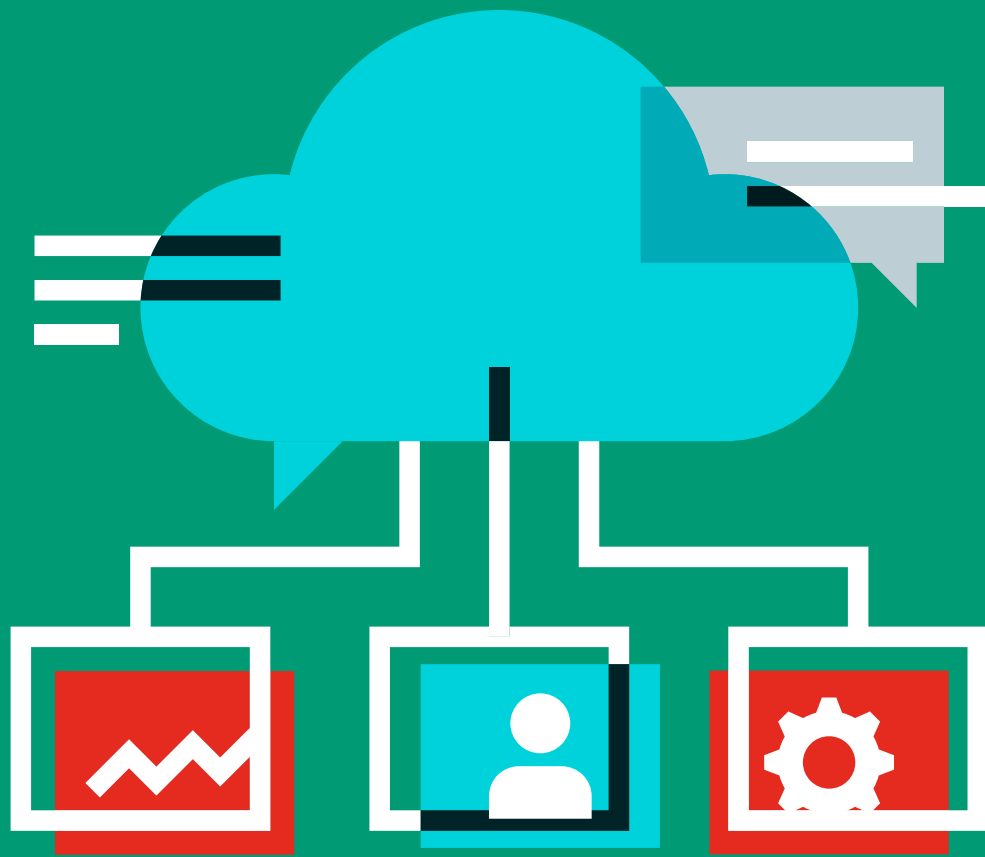


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Paul Lovegrove, IT service delivery manager at **Farrer & Co**, on the **Sunrise** service level

## FEATURE

# Clearing up cloudy IT

The barriers to cloud-based service are tumbling down.  
Kayli Olson reports



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K industry's journey to the cloud finally seems to be taking off, as more businesses prepare to adopt cloud services – the adoption rate stands at 84% today across the country, according to Cloud Industry Forum.

Legal is also getting in gear. In the **Briefing** Legal IT landscapes 2017 report, every respondent agreed that mobility technologies are fundamental to making law firm people more productive.

And what's more, over the next five years firms will be moving most of their systems to the cloud – with only a small percentage responding that they would never move certain systems to the cloud (32% for practice management systems, for example).

For some firms, there may still be uncertainty. Even though security is becoming less of a risk – as firms start to trust suppliers' security over their own – other factors such as Brexit, regulators and partner approval take its place, and getting into the cloud may seem like a daunting task.

Andrew Powell, head of IT at Macfarlanes, says: "Broadly speaking, a third party that runs IT services for a living should be able to make a better job of cloud infrastructure than someone who provides legal advice."

## Full strategy ahead

The driving force behind law firms' adoption of cloud will vary depending on size and type of legal work of the firm. But one thing's for sure, legal needs to get to grips with the fact that cloud could be the best way forward.

Karen Jacks, IT director at Bird & Bird, says her firm's strategy is less about moving everything to the cloud and more about choosing wisely. "We carefully consider which systems would be best suited for moving to the cloud," she says.

"The main advantage here is getting solutions off-premise and reducing overhead on support and maintenance needed by the internal team."

And savings are on the list of benefits for Kingsley Napley. IT director Thereza Snyman explains: "Cloud is part of the roadmap for our firm because investing in physical hardware is just too expensive – and I'm not referring to the cost of the tin. Taking into account the cost of securing, upgrading, maintaining and the sheer opportunity cost of using scarce IT skills to do routine, repetitive work – I would say cloud is very attractive as an alternative to on-premises solutions. Why do yourself what cloud providers can do better and less expensively?"

But cost isn't necessarily the number one driver.



Powell says: “With consumer cloud services it’s usually about cost but for us it’s about agility – being able to do things quickly and take base level infrastructure support away from our organisation, so that we can focus on adding value to the business rather than the nuts and bolts.”

### An agile way forward

Cloud may not be the thing driving firms to implement their various agile-working arrangements, but they’re both definitely heading in the same direction.

For Bird & Bird, collaboration and agile working come in many forms from remote access to app-based solutions – the firm has been using collaborative software in the cloud for five years and has recently moved its CRM system to the cloud as well.

“What we will be looking at this year is implementing Office 365 and how we can use that

move further forward, which is really adding more to our agile space,” Jacks says.

“Of course, there are some challenges with that. With various products, particularly on-premises – the more legacy-type products – we need to be very clear about how we can integrate those to work more collaboratively,” she adds.

Kingsley Napley is also looking to improve the agility of its team. Snyman says: “We have rolled out Surface Pros for our fee earners and are working to implement remote access across the firm.” And cloud has a part to play in that.

Macfarlanes is looking to increase its cloud adoption over the next 12 months – much of which is likely to be dedicated (hybrid) cloud to meet client requirements. Powell says: “I’m a big fan of using infrastructure as a service (IaaS) and cloud as a tactic to develop the organisation’s technology. Service provision becomes more fluid that way – allowing you to operate on an annual or

monthly cost model, without the traditional upfront spikes in expenditure, based on what is appropriate for the firm. We are keen to take advantage of that flexibility.”

He adds that it underpins everything the firm has done so far with Skype and agile working. Macfarlanes is also rolling out Surface Pros for its legal teams. “It just makes sense for cloud services to be part of that,” says Powell.

David Aird, IT director at DAC Beachcroft, says the legal industry is changing: “The cloud brings more flexibility, greater agility and better security than the majority of firms can provide on their own. It is likely that procuring services in the cloud where it benefits our clients will be our preferred model in the future.”

### Fast to fail

But is cloud necessarily the right way for every firm? Snyman says: “It’s definitely a journey. We already have a test environment to see what works and what doesn’t. It’s about gradually putting more and more into the cloud, a little bit at a time.”

Macfarlanes’ Powell agrees: “One of the benefits is that you can provision something to test very quickly, without having to commit to the ongoing expense of infrastructure. Try it for a month, and see where you get with it. And if it’s no good switch it off. That’s it. And you no longer need a big set of underutilised kit for future growth sat in the basement for three years not doing anything. It’s quite important to be able to allow projects to fail quickly.”

Aird says his firm has a cloud-first strategy: “The big driver for us is agility, allowing us to scale up and down. We can bring on new systems or take them off when needed.”

As for what cloud service law firms should buy, that’s up to the firm itself. Definitions of what cloud actually looks like will be thrown around, but ultimately the cloud is just a scalable infrastructure run by someone else, or the ability to procure services without worrying about location.

But law firms were certainly slow to start – there’s a mantra in the legal sector to “boldly go where someone has just arrived,” Powell laughs.

There’s relatively little reward in being first into

**“Each firm has to do its own research to find out what type of cloud, or hybrid cloud, best suits the needs of its practice and clients.”**

*Thereza Snyman, IT director, Kingsley Napley*

some of the new technologies in the legal sector, he adds. “If you happen to get it right first time there’s a killing to be made, but it’s risky. Law firms tend to aspire to being early adopters rather than being bleeding edge or laggards.”

Snyman at Kingsley Napley says: “Legal-specific vendors are beginning to offer cloud as part of their service. It’s only a matter of time before the legal industry moves the majority of systems to the cloud.”

### The big players

The cloud is starting to get its head out of just the consumer market, that is to say, the legal industry has some things to learn from the likes of Microsoft and Amazon – which both launched data centres in the UK in 2016.

Powell says: “We see quite a lot of vendors in the legal sector selling the idea of cloud infrastructure while making it physically accessible only to you. Dedicated infrastructure isn’t true ‘cloud’ in my view – it’s very different to something like AWS, where your data is on the same platform as everybody else’s.”

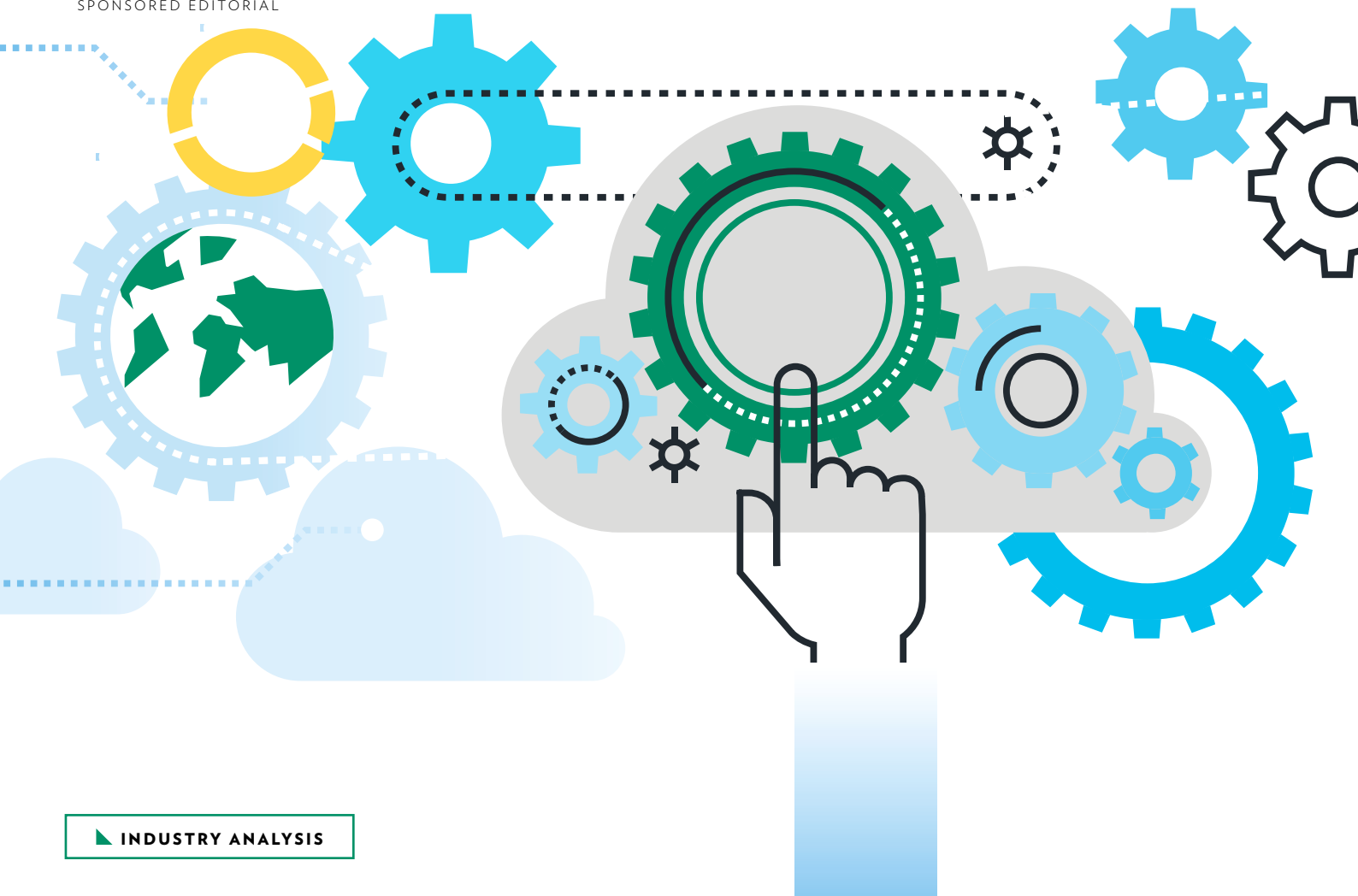
The problem with most true cloud services is that there’s not an appropriate service level agreement (SLA) to cover confidentiality, integrity and availability – meaning for most law firms (and their clients) “consumer-grade cloud is probably not good enough to run core infrastructure, due to regulatory and client commitments,” Powell adds.

Aird at DAC Beachcroft says he doesn’t really see a huge amount of risk in terms of security, although there are some challenges. “Security can never be taken for granted and we are continually vigilant. Security questionnaires from clients are also becoming increasingly robust and detailed. And advisers at Microsoft and elsewhere spend a lot of time analysing these areas, and have information and guidance to hand in case we need further support.”



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Briefing JUNE 2017


 INDUSTRY ANALYSIS

# Reach for the sky

Zia Bhatti, chief architect at iManage, explains how cloud services have developed in the legal industry and what features to watch out for in the modern cloud

In recent years, the cloud has gained traction in the legal world, with many firms opting to purchase solutions that are available as a cloud service rather than a traditional on-premises deployment.

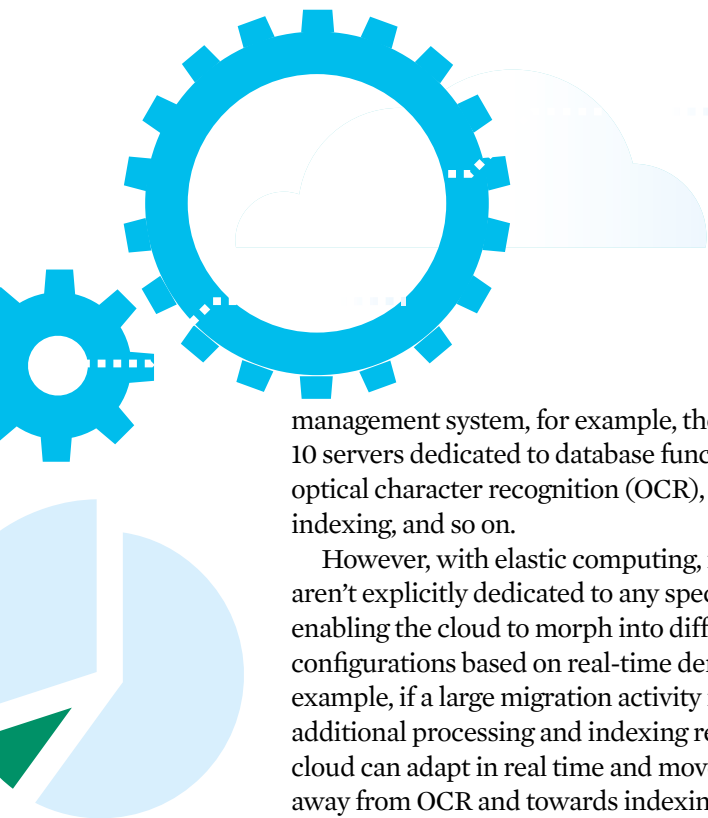
It's important to note, however, that vast technological innovations have taken place in the past decade, driven by leading internet companies such as Twitter, Facebook, Amazon and Google. Modern clouds are built on top of these innovations, and take full advantage of great leaps in scaling, resiliency and intelligent security.

Consider the following a quick checklist of some of the key characteristics of a modern cloud.

## Elastic computing – scaling without hindrance

Elastic computing is the new dominant paradigm, allowing a modern cloud to keep its site performing efficiently.

In a traditional cloud scenario, you have a fixed number of servers that need to be 'assigned' to specific functions. With a cloud document



management system, for example, there might be 10 servers dedicated to database functions, five to optical character recognition (OCR), three to indexing, and so on.

However, with elastic computing, resources aren't explicitly dedicated to any specific task, enabling the cloud to morph into different configurations based on real-time demands. For example, if a large migration activity requires additional processing and indexing resources, the cloud can adapt in real time and move resources away from OCR and towards indexing.

This elasticity translates into much higher performance than a legacy cloud with fixed and 'assigned' resources could deliver, because resources are always being intelligently allocated to the area of greatest need.

For end users, this means a fast and responsive system where performance does not degrade when load or demand increases — allowing users to carry out their key daily tasks and get their work done without any of the sluggishness that can accompany legacy cloud offerings.

### **Resiliency and availability – uninterrupted uptime**

A modern approach to the cloud also recognises that components can and will fail – and the application is designed to automatically route itself around these inevitable component failures.

Additionally, a modern cloud will maintain multiple data copies in active systems to ensure fast recoveries if an entire data centre becomes unavailable due to an outage. This type of availability stands in contrast to cloud vendors whose data availability approach simply consists of taking data snapshots and replicating them to a secondary data centre.

The resilience of the modern cloud extends to code releases: a modern cloud can stay online during code updates, so there's no longer any outage window or service interruptions when pushing out patches, bug fixes, or new releases.

For more information, visit:  
[www.imanage.com](http://www.imanage.com)

**With elastic computing, resources aren't explicitly dedicated towards any specific task, enabling the cloud to morph into different configurations based on real-time demands.**

Eliminating this downtime ensures that legal professionals don't have to miss a single billable hour in their day.

### **Intelligent security – advanced protection of sensitive data**

Encryption for stored and in-motion data is a base expectation for a cloud service. A modern cloud takes a more sophisticated approach to managing system and application security. It recognises that traditional defences — like firewall and antivirus — are no longer enough, especially in an era of sophisticated social engineering techniques like phishing.

A modern cloud incorporates threat-monitoring systems for network intrusion detection (external threats) as well as application usage (internal threats). Analytics with machine-learning/AI on application usage help to detect abnormal behavioural patterns — allowing modern clouds to proactively identify and defeat malicious activity. For firms, this means a better way to protect client data – as well as the firm's own reputation.

### **Capitalise on cloud**

If a cloud service doesn't capitalise on the spectacular technological innovation that has taken place in the past decade, it's not a modern cloud. A modern cloud is smart, secure, fast, agile and always up.

By looking for a cloud offering with elasticity, resilience and availability, and intelligent security, customers will be well on their way to enjoying these benefits immediately and gaining a platform for transformative change in the future. ▴



## INDUSTRY CASE STUDY

# First light of service

Paul Lovegrove, IT service delivery manager at Farrer & Co, says implementing a new IT service management system with Sunrise has supported the firm's service improvement programme

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or Farrer & Co, the end of 2016 meant the sunset for outdated IT service management software – and its start with Sunrise.

Good IT service management (ITSM) software is vital to the stability of daily work in any business – and for big law firms, with a large volume of people, projects and information, that's even more the case.

Paul Lovegrove, IT service delivery manager at Farrer & Co, says: "We knew we wanted to be more transparent with the business, get the customer more involved and ultimately deliver a better service – when we saw Sunrise ITSM we instantly knew that it would help us reach our goals.

"Selecting the cloud-based offering means we are always on the latest version of the software and security – one less thing to worry about." But, he adds, the biggest thing for the firm is that it's fully customisable and that no customisations are lost during an upgrade.

"Everything you see, you can edit in some way – change labels, add or remove options, even change the underlying ITIL-based workflows and introduce new services. It was made so that it worked for you rather than you having to fit in to work with it."

### Dawn of a new age

Before the firm went to market with the new system

it was essential to set a standard for its service desk team to meet – and the software in turn needed to be able to aid the team in upholding its mission statement.

As a part of its ongoing service improvement drive, it was important the firm selected a solution that had out-of-the-box best practice reports that could be benchmarked against from its inception.

One of the key differentiators of Sunrise ITSM was the inclusion of the Service Desk Institute (SDI) accredited report suite. The firm also looked at the SDI's guidelines for SLAs and worked them into the software.

For the time-sensitive work of a fee earner, answering queries and dealing with incidents quickly is a huge priority, Lovegrove says. "Logging incidents is straightforward and almost every single field can be customised. The ease of logging calls is not to be overlooked – it is so simple to create a new incident and it means that our analysts can log more calls rather than getting bogged down with other issues."

The product gives the service desk team the flexibility it needs in order to hit targets and continue to exceed the expectations of its customers – and it's easy to use.

"It's two-fold, the reporting is excellent and the ease in the software makes a big difference.

For more information, visit:  
[www.sunrisesoftware.com](http://www.sunrisesoftware.com)

Ultimately it works for our customer as we can provide them with a more timely service.”

And that’s not all. Lovegrove says: “Sunrise’s level of service is second to none. We get a really friendly and helpful service and they’re on top of any issues, instantly – it really adds to our satisfaction with the product.”

### Friendly competition

Sunrise enables Farrer to monitor its KPIs constantly through live data and weekly and monthly reports. “Our monitoring is much better than before. Next to my desk I’ve got a big screen on the wall that shows the ‘Wallboard’ – which basically cycles through different screens of KPIs and work in real-time,” Lovegrove says.

“It’s more proactive than reactive and it really makes a difference to our service delivery. I can see what the analysts are doing and if there are any pinch points – it highlights something as it’s happening rather than me having to wait until someone tells me something is being done or I see the report at the end of the week.” The KPIs are constantly being refined as part of a continuous improvement programme.

There are lots of different reporting options in Sunrise – any existing or new field within the software can be filtered and reported on. But Lovegrove says what really makes the software stand out is the gamification aspect.

“There are different badges you can win. For example, when you log an incident you get a badge and it counts as points to your total score. Your score goes up each day as you hit different badge markers. Then, at the end of the month we show the leader boards across a few categories – who logged the most incidents, best customer satisfaction ratings, largest number of calls resolved and so on,” he explains.

“We can chart all of that. Of course this is purely internal, but it creates some good-natured competition. You can also ‘level up’ – it’s all a bit of fun and gives the analysts something to aim for, especially for those analysts that are gamers in their spare time.

“It was something quite unique to the software, it wasn’t something we looked at doing but it adds

**“It’s two-fold, the reporting is excellent and the ease in the software makes a big difference. Ultimately it works for our customer as we can provide them with a more timely service.”**

another dimension to the application,” he says.

### Flexible future

The next step for Farrer & Co is to implement the Sunrise self-service portal. Users can log in to a dedicated webpage and view and update their current calls, see any announcements that the service team communicates on the system and access knowledge-based articles so that they can answer their own questions or solve their own issues.

“It will also give them the ability to log a new incident, which they can then monitor through the process of assignment and prioritisation – all part of the process of getting the customer more involved,” Lovegrove says.

Other products on the market simply didn’t do this as well, Lovegrove points out – which was a big driver for Farrer & Co adopting a new IT service management system in the first place.

Lovegrove says: “Our primary aim is to deliver outstanding customer service – so having flexible software which supports that goal and allows us to customise and grow the product within the business is invaluable.

“It’s not just about being happy with the product now but looking at how we can shape it for the future of the firm, and with Sunrise ITSM we saw that we could do that.”

### Winning performance points

Flexibility in Sunrise’s product means that the firm can define its KPIs and keep its analysts on target, says Lovegrove. For example:

- 90% of calls are answered in six seconds or less
- 75% of calls are logged, the other 25% may be pass-overs or updates to existing incidents
- 80% of calls are resolved at first contact – this means that the call stays within the support team rather than going across to ‘applications’ or infrastructure teams to resolve
- All emails are prioritised within 15 minutes
- 90% of incidents are resolved within the SLA
- 80% of customer surveys receive 5/5.

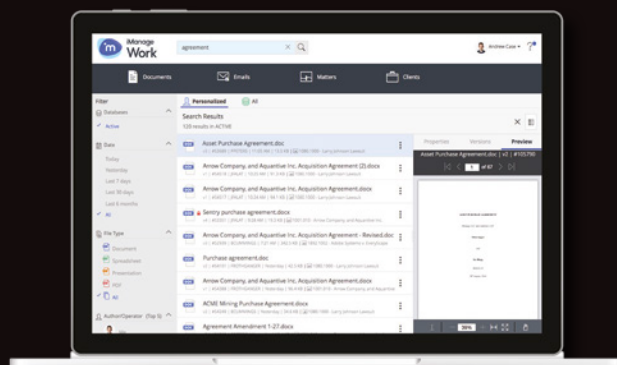


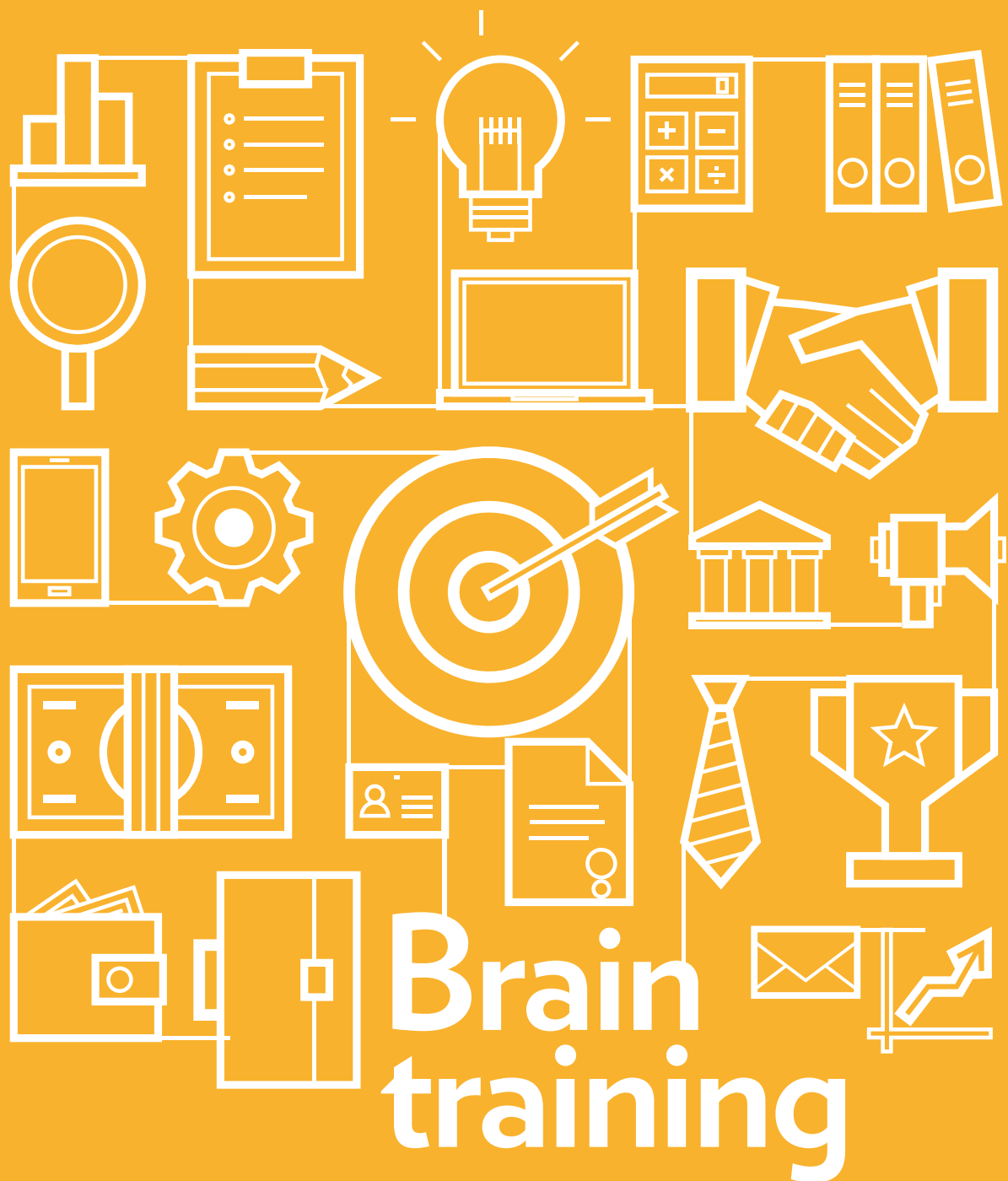
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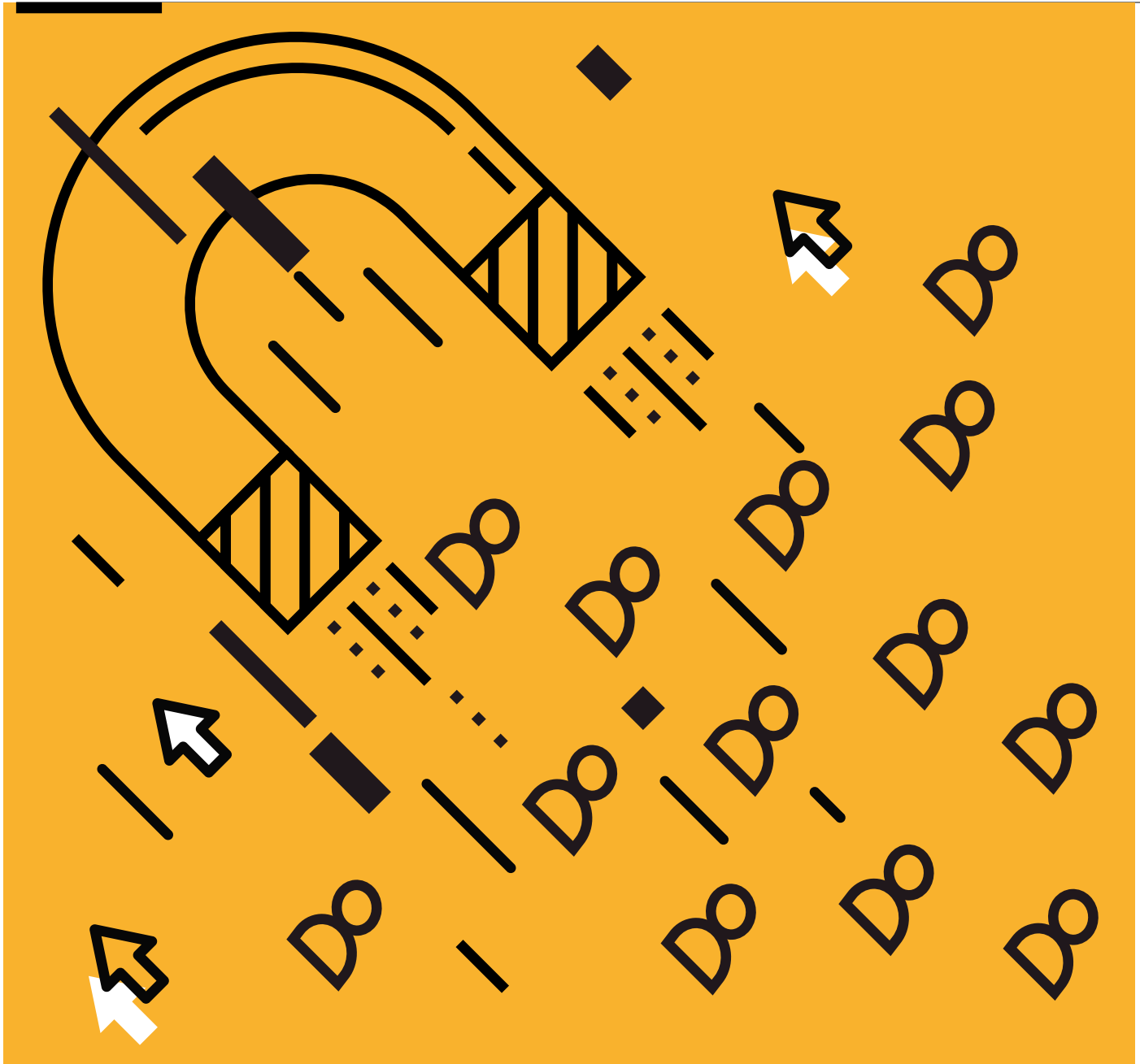




# 36

## *Tech out your talent*

Professor Tomas Chamorro-Premuzic and Dr Reece Akhtar say talent assessment processes are ripe for technological intervention



▶ ESSAY

# Tech out your talent

Tomas Chamorro-Premuzic, professor of business psychology at University College London and CEO of Hogan Assessments, and Dr Reece Akhtar, research fellow at UCL, explain how technology can help firms do better battle in the war for talent

The 'war for talent' has been raging for nearly two decades, and there is no end in sight. The view held by many HR leaders is that the way for organisations to remain competitive, and keep winning, is to identify and develop the most talented people using the most effective tools available. This is because an organisation's strategy, operations and products mean nothing if they aren't supported by the best people to drive them forward.

But who really are the talented employees? A simple rule is the Pareto principle, which states that 20% of employees account for 80% of the organisation's output. That's because they have a specific set of personality traits and cognitive abilities that are perfectly matched to their role. This is known as 'person-organisation fit'. Exceptional

performance can be expected when there is a perfect match between an individual's personality, skills and values, and the organisation's mission, work and culture. So, the clear challenge facing decision-makers is to identify the individuals who have those 'perfect personality' traits, values and skillsets, so that they can be recruited or further developed.

How, then, can technology help organisations achieve this?

The traditional approach to identifying and developing talent has relied on structured interviews, performance appraisals and psychometric assessments. In fact, there's an overwhelming amount of scientific evidence to demonstrate the practical validity and predictive power of these tools. For example, the correlation between personality assessments and job performance is far greater than those held between many mainstream medical procedures and improved health outcomes, with scientific psychometric tests being more reliable than the average dentist's diagnosis.

But in spite of the scientific consensus surrounding these tools, they aren't as widely employed as they should be. Why not? Uninformed HR practitioners, an underwhelming user experience and a general over-reliance on intuition are some of the reasons. Fortunately, however, innovation in computing and psychological science has led to the creation of three emerging technologies that

have the potential to overcome these limitations and help some organisations to battle better in the war for talent:

### **Mining talent with machine learning**

The ubiquity of the web and mobile phones means that humans are producing a vast amount of data, leaving behind a digital footprint that can be decoded to identify typical behaviours, experiences and interests. Traditional psychometric assessments measure characteristics like these using surveys and questionnaires – but by combining big datasets with computer-generated algorithms (machine learning), scientists can draw connections between digital activity and our psychological profile.

For example, in 2015 researchers from Cambridge University found they were able to accurately deduce a user's personality traits based on their Facebook 'likes'. Similarly, technology business Receptiviti has developed algorithms to measure a suite of psychological characteristics through analysing the language an individual uses in emails, social media, and also on their CV.

These technologies open the door for the automation of talent identification and pre-employment screening. Rather than recruiters manually reviewing job applications, wasting time and increasing the chances of biased decisions, algorithms can analyse an

individual's digital footprint and produce a quantitative measure of their talent. As such, not only is the cost of searching for talent drastically reduced, but organisations can also cast a wider net when searching for more diverse and rare talent.

### **Playing games**

If you were to spend more than 20 hours a week doing one particular thing, what would you call it? Most people would say a job. Now, what if we say that this is the average amount of time people spend playing video games? In fact, video game players will often describe their hobby as a job, as they spend up to an additional 11 hours outside of the game, thinking, communicating and organising strategies with fellow players. Given such dedication to what is a recreational activity, is there an opportunity for organisations to use game mechanics and principles to identify, engage and develop the most talented employees?

The domain of gamification seeks to achieve exactly that. Games provide environments for individuals to engage in problem solving, creativity and decision-making. Coincidentally, these three psychological processes are related to 'fluid intelligence' – one of the best single predictors of job performance and career success. Unlike other forms of intelligence, such as emotional (our ability to manage and regulate our emotions) or crystallised (skills and expertise acquired through life

experiences), fluid intelligence enables people to solve novel problems without having any prior experience. This is extremely useful as our professional lives continue to become more complex and ambiguous.

Games, whether virtual or analog, are therefore useful platforms to simulate and observe employee behaviour, and this is a growing area of both research and practice. Startups such as MindX and PsyMetrics, alongside global firms such as Red Bull, are using gamification to measure and grow talent. Similarly, given that games provide near-instant feedback, there are huge opportunities to reinvent the yearly performance review — a lamented HR practice due to considerable variation in its effectiveness and utility. And gamification practices are still very much in their infancy — initial evidence suggests that they have the potential to dramatically change the way work is completed, as well as the way an individual's performance is measured and appraised.

### In touch with emotions

Social psychology has demonstrated that the structure

and diversity of an employee's social network is also positively related to their creativity and performance at work. In other words, an employee's tendency to express their talent can be facilitated or hindered by their social network, due to variation in their ability to access the useful ideas, information and resources that are held by colleagues. Accordingly, relationships should be seen as vehicles for talent, leaving leaders with a responsibility to build effective networks for their people.

Fortunately, the expanding field of 'emotional technology' may offer a potential solution to overcoming difficulties in building and leading high-performance teams. Emotional technology is characterised as human-centred platforms, such as voice-activated artificial assistants and the internet of things. The reason they are labelled 'emotional' is that they have the potential to detect fluctuations in a user's mood and relationships and provide appropriate solutions. Within organisational contexts, the work of Alex Pentland and Daniel Olguin is most notable here. For example, they have developed 'sociometric badges'

that are worn around employee's necks. These badges contain a variety of sensors that can measure the extent to which employees have face-to-face conversations, their physical proximity to colleagues, and a collection of emotional signals through analysis of measures such as pitch and tone of a user's voice.

This can all provide real-time maps of an employee's social network and measure the extent to which they're collaborating with colleagues. Given that such technology can also provide leaders with near-instant feedback on the teams in question, they could develop and deploy data-driven strategies to build on potential and maximise a team's talent. In a hyper-connected world, relationships are one of an employee's greatest resources — and it's critical to use technology to bolster, but not replace, face-to-face relationships if talented employees are to have a demonstrable effect on the organisation's performance.

Although there is still much scientific and practical work to be done in order to ensure the validity and effectiveness of these emerging technologies — as well as ethical and legal concerns to address — our view is that the digital revolution has presented important new opportunities for winning the war for talent. Organisations that are able to leverage and effectively deploy innovations such as these can be expected to have an edge in identifying and retaining the most talented of tomorrow's employees. ▀

**In a hyper-connected world, relationships are one of an employee's greatest resources — and it's critical to use technology to bolster, but not replace, face-to-face relationships if talented employees are to have a demonstrable effect on the organisation's performance.**



# Industry views

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## INDUSTRY INTERVIEW

# Reassuringly extensive

Justin Farmer, senior director of product management at Thomson Reuters Elite, says data is supporting firms to improve project management and productivity – and he's committed to ensuring both can stretch further in future

**U**nder pressure to produce work for clients in a more predictable fashion, law firms have introduced – at least on the surface – a level of project management discipline to the unwieldy world of legal matters.

Some have appointed project-trained businesspeople from a range of other industries to teach, nurture and monitor this new working environment. Some brave business services leaders have even decided to train up the firm's lawyers to find the time to project-manage their own work. But one thing's for certain – there's a role for the technology specialist in ensuring firm-wide success. Project management in any organisation depends on the timely flow of the right amount of accurate information to the next stage of the process.

Justin Farmer, senior director of product management at Thomson Reuters Elite, agrees the landscape has changed since he was last interviewed for Briefing in 2012: "I see a lot more organisational focus on the process of putting together a plan for how any legal matter will be managed – and also on the transparency of that process. Firms are focused on delivering value to the client,

but they know they need to demonstrate that value as well. Where possible, what the client really wants to know is what will be delivered upfront."

## Portal power

For example, Thomson Reuters Elite has seen a significant increase in adoption of client portals that promise this level of insight, and therefore predictability. To different extents, these enable a firm's clients to track matter progress at any time – and in their own time, says Farmer.

"But proactive communication like that with a client is increasingly 'table stakes'. Customers are now telling us it's essential," he says. "It's no longer a differentiator to deliver information about specifically what you've achieved effectively, or how far through a project you are. It's just expected.

"It isn't necessarily that their clients were in the dark before – but now they need to know more detail, and more regularly. They need to be more accurately predictive – particularly of costs – in their own internal management, and that demands clearer information about what's being delivered."

Farmer has a tasty analogy for such reporting – ordering a pizza online. "First



you can order it up on your mobile app – you can even Tweet your order! Then you can clearly see when it's in the queue, getting prepared, safely in the oven, and out for delivery. There's a progress bar to guide you through the process."

Albeit rather more complex than a handful of extra toppings, Farmer's in the business of facilitating this real-time updating on legal matters. "It's milestone reporting," he says. "You can clearly see what has been done so far, and make decisions based on whatever's left to do."

### Ready for actions

The portal infrastructure can also enable clients to approve – and in some cases, even direct – specific actions for completion. "In the corporate world, it isn't unusual for a business to give firms approval for the individuals appointed to work on their engagements," says Farmer. "Or, if a milestone involves a form of documentation, you can link to that as 'evidence' of exactly what was accomplished at that stage."

"Progress is something we all want to know when working on a project with others. But for the law firms that are winning the very high-value work, that's where they really can differentiate. They might bring in extra people – even their best people – for a valued client, and the way they both achieve that and set up the project's parameters can be a key factor in building client relationships. It's their intellectual property."

Thomson Reuters Elite's 3E financial management platform continues to invest in assisting firms to achieve these greater levels of transparency across offices and project teams – and firms are seeing the benefit. In February 2017, Mills & Reeve became the 200th firm to select the platform, building on its investment in the MatterSphere matter and document management

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component. MatterSphere has also since been enhanced for improved visualisation and task flow in a new release.

Of 3E, says Farmer: "In addition to viewing progress against rates or an alternative fee arrangement – checking agreements are adhered to – specific billing process rules can be implemented, monitored and managed. For example, that could concern accurate time entry, or editing the pre-bill before it's sent to the customer. The firm will want to check and make any necessary adjustments so that the bill goes out in the form agreed."

The 3E value proposition is to deliver that checking and balancing reliably using automation, says Farmer. "And there's a quality and customer relationship impact, but also a benefit at the business's back end. In large organisations, with lots of customers – all with different arrangements – it's critical they efficiently capture potential process problems ahead of time and reduce volumes of rework."

### Voice concerns?

But what is Thomson Reuters Elite up to that Farmer is most excited about? That would be its new Workspace product – part of the "Elite Lawyer Experience" tools package – which takes us from the power of collaborative project planning to improving individual productivity. Recognising that too much of a lawyer's time is still lost switching between systems set up for separate business activities, Workspace condenses financial management, time entry, matter management and useful business development knowhow into a single screen view.

The platform can also incorporate third-party products, and is accessible from mobile devices as well as desktops – which, of course, makes for an even more productive day if you're out and about meeting clients.

"We see lawyers becoming much more engaged in the idea of this holistic view of work, and it's exciting because in the past that wasn't really the case," says Farmer. "Increasing talent's engagement with their work is really top of mind for firms today – and therefore it's a key requirement for our technology solutions."

In May 2017 Thomson Reuters Elite also

**"Increasing talent's engagement with their work is really top of mind for firms today – and therefore it's a key requirement for our technology solutions."**



**“Progress is something we all want to know when working on a project with others. But for the law firms that are winning the very high-value work, that’s where they can really differentiate.”**

announced the launch of Workspace Assistant, a new way for lawyers to do their time management (via Workspace) using Amazon’s Echo or another Alexa-enabled device. Users can control and track time entry by voice – for example, starting and stopping a timer with a simple command and questioning how much time has been entered so far that week.

“We are looking at virtual assistance technology in general,” says Farmer. “We started with Amazon because the platform is very extensible, but we’re also looking at Siri, Microsoft and Google Home. You’re now starting to see these technologies being used by people almost anywhere in app form.” At the moment, there’s still some concern to be resolved about the device waiting for anything to be said – as opposed to waiting for somebody to

start a specific conversation with it, he says.

“Would I want to record time by voice command in my car? Perhaps not today. Perhaps never. But you can see that the mobility aspect is attractive, and you can take technology and extend it into new areas, where you accept things take their course and opportunities may or may not materialise as expected. We’ve often said in the past that we don’t necessarily need to know where all these things are going in advance, but rather ensure we have a platform from which we can extend if necessary.”

Farmer says this “extensibility” of its architecture is a core principle in the company’s strategy. It also extends to its roadmap for helping firms to achieve even more flexible project and work management, for lower cost, by moving services into the cloud.

“Workspace Assistant is also a really good example of where we took an internal idea out to customers to see what they thought. Frankly, that’s also the fun part of the challenge.”

But in all seriousness, he says, today’s technology needs to consider staying as flexible as possible, not only for what lawyers’ clients need in the here and now, but also for whatever the future of work may bring. ▴



## INDUSTRY ANALYSIS

# Keeping up with the fraudsters

Alex Grant, managing director, fraud risk management at Barclays, offers some brief advice about highlighting cyber fraud and how to protect your data

**T**he internet has revolutionised business. Companies of all sizes have taken advantage of technology to improve the speed and efficiency of operations, and create more convenient interfaces for customers and clients. But, with these opportunities there also comes an increased risk of cyber fraud attacks.

## Prevention better than cure

Falling victim to a cyber fraud attack can result in major financial losses, while any data breaches can severely damage trust in a firm. Fraudsters can easily monetise stolen information by selling it online, and the impact of this on firms' reputations can be severe.

Individuals have increased anonymity as internet – and email-based transactions have become the norm. Fraud may also cover many different jurisdictions, with victims, beneficiaries and fraudsters potentially all located in different

countries. This makes it difficult to investigate and very hard to recover funds. For this reason, firms must look to prevent fraud, rather than hope to cure its consequences.

## Social engineering activity

The threat of cyber fraud can seem difficult to combat, as the software used by fraudsters can be extremely complex. However, it's important to remember that most cyber fraud attacks depend heavily on human interactions – fraudsters have long identified that the easiest way to breach a firm's defences is to target its employees rather than its systems.

Social engineering is the method by which fraudsters aim to trick people into breaking normal security procedures. They may also trick the victim into carrying out a fraudulent payment themselves. Fraudsters in social engineering cases often have a thorough knowledge of the firm to enable them to build trust with the victim. They may even be

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aware of regular payments that are due, or of the structure of teams within your firm, enabling them to impersonate internal employees.

One type of social engineering is invoice fraud. This involves a fraudster posing as someone else to notify a member of your staff that supplier payment details have changed. They provide alternative payment details in order to defraud you. The fraudster could be claiming to be from your firm's genuine supplier, or even to be a member of your own firm. Funds are often transferred quickly, so recovering money from fraudulent accounts can be extremely difficult.

The fraud may only be discovered when the legitimate supplier follows up on non-payments. And fraudulent letters and emails sent to companies are often well-written, meaning the fraud is difficult to spot without strong operating processes and controls in place.

Email addresses are also easy to spoof – or in the case of malware-infected PCs, criminals can access genuine email addresses. The process of changing the bank details of someone you are paying should always be treated with caution.

So, to protect your firm against invoice fraud:

- First, make your staff aware of the threat of invoice fraud;
- Encourage them to check notifications and invoices carefully to see if they look like a counterfeit;
- Ask them to check the validity of the supplier's email address and to call the supplier using pre-validated contact details to confirm any changes before effecting them;
- Consider adopting dual control procedures for any changes in payment information;
- Regularly conduct audits on your accounts.

### Malware, you ready?

Another popular type of cyber fraud is 'malware', short for 'malicious software', which is used by criminals to disrupt computer operations and access confidential information. Malware can be installed on your computer by clicking a link in an email, opening an attachment, or downloading software from a malicious source.

Trojan programs are a type of malware that enter your computer on the back of other software.

**Fraudulent letters and emails sent to companies are often well-written, meaning the fraud is difficult to spot without strong operating processes and controls in place.**

They act as back doors to the computer, granting a fraudster remote access. Once 'inside' your device, a Trojan can give a stranger access to your personal details by taking screenshots or capturing keystrokes.

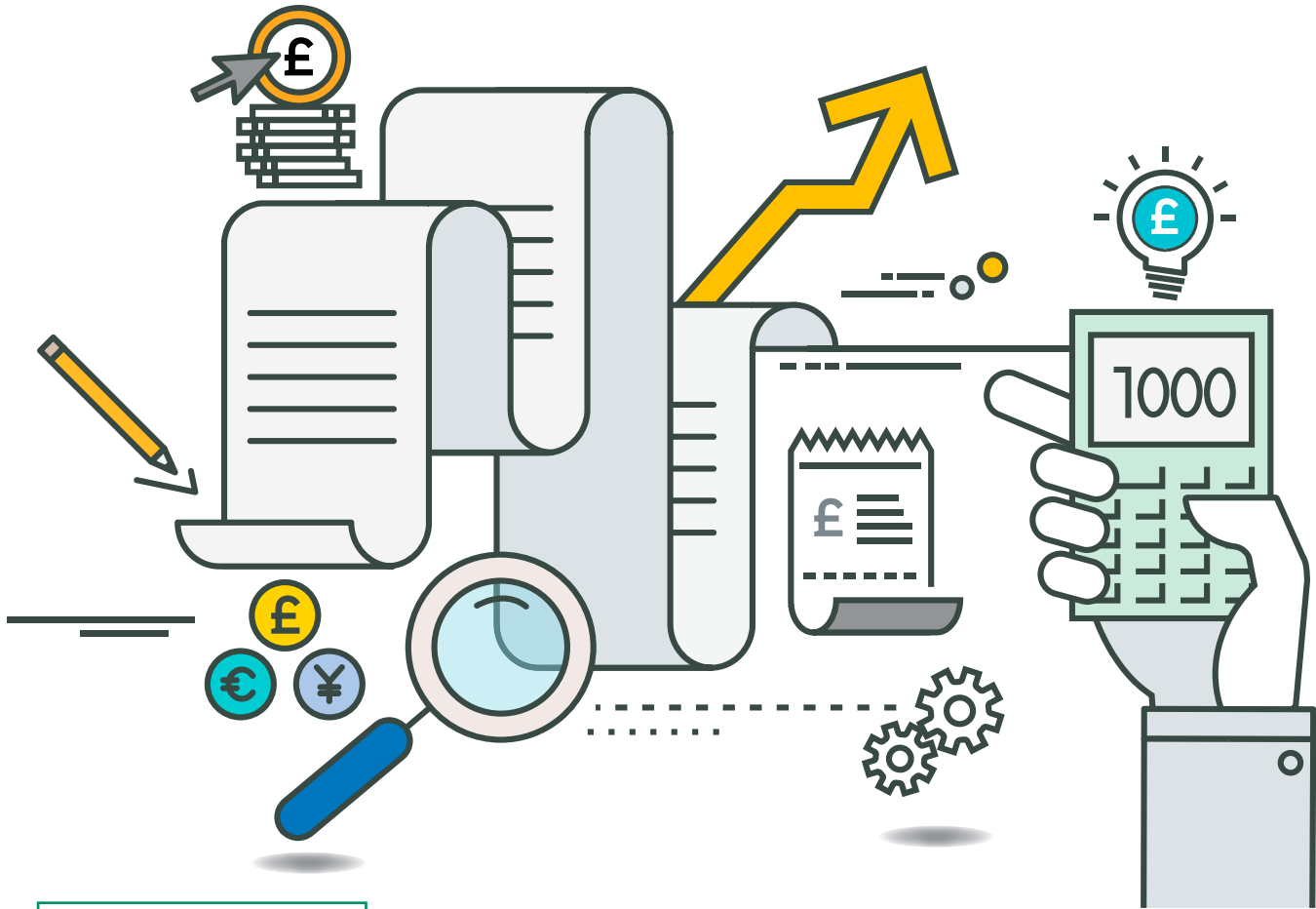
When logging into online banking websites, an unexpected screen might appear, delaying you or asking you to repeatedly input data. While you're delayed by these, a fraudster could be setting up another payment elsewhere, waiting for you to unwittingly authorise it by inputting your PIN.

Trojans are hard to detect, as they remain passive when not in use. Firewalls and antivirus software help to defend against Trojans, but they can't guarantee your protection. You should always be cautious of pop-ups on your screen requesting that you put your card into the reader, input your PIN, or allow a download.

Ransomware enables a fraudster to gain control of your system in order to encrypt your files, and then demanding a fee to unlock them. Without the decryption code, it's very unlikely that you will be able to access your files again. Although in many cases, the criminals will restore files when the ransom is paid, there has been no guarantee this will be the case. Hackers have been known to share stolen private information free of charge on the internet in order to punish a firm for not paying their ransom.

To protect your firm against malware:

- Keep your firewalls and security software updated and install the latest updates for your internet browser and operating system;
- Only download files and software from trustworthy sources;
- Be cautious of emails that ask you to follow a website link or open an attachment;
- If your computer has been infected, disconnect from the network straight away and seek professional assistance. ▴



## INDUSTRY ANALYSIS

# A healthy relationship

Dave Harris, principal consultant at LexisNexis, says a CRM system can help firms to master the art of revenue predictability and still maintain strong relationships with clients

In spite of the fact that law firms are driven by ‘revenue’, anecdotal evidence suggests that the discipline of predicting that revenue is seldom embraced with rigour. This is indeed surprising as commercial entities must be able to envision – with a reasonable degree of certainty – what the organisation’s future revenue stream looks like in the medium term.

This is underpinned by the idea that in a sector where ‘relationships’ rule the roost, the traditional approach of harnessing one-to-one relationships will continue to bring in the revenue. After all, this practice has worked well thus far – abetted by ‘rainmakers’ in law firms.

There is no doubt that relationships are a law firm’s number one asset. However, against a backdrop of Brexit and globalisation, alternative fee arrangements, expanding in-house legal teams

and technology-driven approaches to business such as machine learning and artificial intelligence, it’s imperative that firms adopt a more commercial and targeted approach to building relationships.

In the current environment, the ability to predict revenue accurately is critical. Technology like customer relationship management can facilitate this – but it must be driven by leadership from senior partners and business executives. A change in partner mindset is needed. Revenue predictability is as much about acquiring new business as it is about protecting the existing income stream.

### Buying signals

A common gripe of business development professionals in firms is that the discipline isn’t joined up. The strategy for revenue generation tends to be “get out there.” But, with disparate

## CRM systems can enable partners and business development professionals to focus on the most potentially rewarding relationships by helping them identify the engagements that are likely to yield the best results.

business development efforts and multiple data sources, it becomes impossible to achieve accurate visibility of the new business pipeline. This makes it difficult to track, manage and precisely report on revenue projections. Quantifying the return on investment is also unfeasible.

Technology can help overcome this haphazard approach and enable firms to determine exactly who their buyers are. CRM systems can enable partners and business development professionals to focus on the most potentially rewarding relationships by helping them identify the engagements that are likely to yield the best results. They can also enable firms to horizon scan clients' businesses to proactively determine where those organisations are likely to face challenges. This enables firms to put forward timely solutions. A major litigation law firm adopted this mindset toward new business development – and by combining relationship intelligence with research on prospect organisations, the firm realised a 57% increase in profits in one year.

Similarly, analytics such as why the firm wins business, in which sectors, against which competitors and at what price points and flexible fee arrangements can enable the organisation to predict revenue and new industry trends realistically. This insight is crucial to enabling firms to evolve their business offering in and capitalise on new industry developments for competitive advantage.

### Retaining business

In addition to securing new business, firms need to retain business by 'being there' for clients and

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advancing their offering in tune with clients' changing commercial needs. This is how firms can tangibly demonstrate their value.

Technology can help with nurturing relationships. CRM systems can help firms to move away from a transactional approach to relationships towards a more partnership-led model. For instance, by aggregating information from emails, phone calls and other interactions, firms can quantify the strength of relationships with individuals and their organisations. Such insight is often a key indicator of client satisfaction, which can help predict revenue, and alert firms to take corrective action before it's too late.

### Ensuring accountability

The traditional approach to revenue management and growth means typically there's a lack of accountability for revenue generation in law firms. Business development executives often struggle to get fee earners to volunteer their time. However, CRM systems offer the capability to institute checks to hold fee earners, client teams, business development and indeed senior partners accountable for their commitment to growth objectives.

For example, it's possible to link the business development actions of lawyers to specific outcomes and growth initiatives. In fact, undertaking such an approach can set in motion the first steps toward a 'sales' culture. Similarly, CRM technology allows firms to focus on engagement and outcome analysis – as opposed to the all too simplistic 'more engagement' methodology typically undertaken by firms.

Most law firms deploy some form of technology for CRM. The question is: is it the right technology for their business? In the current business environment, firms need systems that provide the big picture, with the ability to systematically break it down to a granular level, highlighting the potential relationship and business risks. This enables firms to predict revenue and growth and take timely action to mitigate unpleasant surprises. But it's vital to change the behaviour of business leaders. ▀



## INDUSTRY CASE STUDY

# Proof positive

Anthony Vigneron, applications director at Clifford Chance, says the document proofreading process was a key beneficiary of the firm's investment in the principles of continuous improvement

In 2014, Clifford Chance announced that it would be training all its lawyers in the principles of continuous improvement (CI) – an acknowledgement that you can attempt to understand even the most complex pieces of legal work as a process which can be made more efficient over time.

One fairly obvious place to start would be the way documents are quality-stamped as fit for purpose – a source of productivity gains if it can be safely accelerated, but of course also a source of risk if embarrassing (or even case-critical) errors get through undetected.

Clifford Chance applications director Anthony Vigneron says: “Standard document production processes just aren’t all that stable. Poor errors mean at the very least a lot of rework, and sometimes even corrupted and lost documents.”

So, the firm ran “quite an extensive continuous improvement project,” settling on this particular

process as a key one to fix, he says.

“We wanted to investigate how we could avoid that waste of effort. It’s time we were wasting, but in our profession any loss of time immediately hits profitability – and may even mean small additional costs for the client.”

This was all some time before the firm launched its Lean-themed CI training – not to mention the arrival of a range of ‘robots’ on to the market to deal with documents that much faster – but one thing uncovered by Vigneron’s assessment of inefficiencies was that technology would play a part in the transformation.

### Killing time

In the event, this meant the implementation of Contract Companion – the latest in a suite of products from Microsystems focused on improving document quality.

“It’s a tool that helps the lawyer by identifying any mistakes in the first place, but it also fixes those



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errors faster than you would otherwise – editing out common inaccuracies like numbering and cross-references.” Ultimately this means you’re more rapidly passing through the different phases of drafting work.

Rather like the new breed of artificial intelligence systems that are replacing certain phases of due diligence or document review, Vigneron says the Microsystems tool will also scan external information sources to identify possible words or phrases that “just don’t look quite right” by comparison.

“The latest statistics we have show that fee earners are saving around an hour every week, solely in proofreading time. When you multiply that by the number of people who are still working with hourly rates, it’s quite a significant number for us.

“And it isn’t just an internal saving. It has an impact on the turnaround time for sending these documents to clients.” Critically, that’s also work that has now been effectively vetted against a clear threshold of quality, so ought to be good for client satisfaction levels.

As documents are increasingly fired around on a multitude of devices as well as from the desktop, another Microsystems tool – 3BClean Server – strips out unwanted metadata from attachments. There are options for complying with, or overriding, policies such as the removal of tracked changes, for example.

“That’s just sitting there quietly in the background, but it does another important risk management job every time someone sends a client an email,” says Vigneron. “It’s all about getting the cleanest, most professional version of the document possible.”

### All in it together

However, as well as reducing errors and rework, there’s another continuous improvement principle at work in Clifford Chance’s choice of Microsystems as a partner – the avoidance of unnecessary complexity.

“We didn’t want the fee earners to be distracted by new technology,” says Vigneron. “In the past,

you’d need to implement different parts of different products to benefit from different features. But for efficient working you really don’t want to be jumping in and out of applications for the same document or matter and saving work in multiple formats.

“It’s not the only one, but one benefit of the Microsystems solutions is that you effectively have a single ecosystem for anything you might need to do in the document’s lifecycle.

“We ran a proof of concept that put four vendors’ software into the hands of users, and the vast majority picked this product. That must say something for its ease of use. There were no IT people involved.

“Another advantage is that it can do different things for the firm’s different groups of people, such as back office and fee earners. Not everyone needs to go into the same expert analytical depth to benefit from productivity and quality improvements within the scope of their role.”

Indeed, another CI metric is the number of documents lawyers need to refer up for another level of proofreading before passing.

“We can review how many requests the expert team is dealing with each day, or month, and what that amounts to in overall workload,” says Vigneron. “We’re currently putting that measurement process in place, but it should reduce the overall time again quite dramatically.”

Not that this means any more time off for the lawyers, he says. “There’s an obvious saving for the client, but to be frank the internal productivity improvements go back into helping people to meet, or exceed, personal revenue targets.”

But as a result, the usual post-pilot user adoption challenges simply didn’t apply. “As the tools remove lower-value activities from the day job, it has been really easy to get buy in and bed down,” he explains. “These tools are marketed directly at the partners anyway, and there was a really big pull from the end users.

“Unusually, I had users in my own team chasing to ensure we signed the contract as quickly as possible. In document production that isn’t something you see very often.” 

## OUT OF OFFICE

# Ice work

Duncan Eadie, IT and business services director at top 100 firm Foot Anstey, talks about how cooling off outside the office can improve his performance behind the desk



In 1995, I was lucky enough to visit Graham Land in Antarctica. It began a 20-year obsession with the polar regions.

Of course, you research to prepare for the polar regions but there is nothing like actually going out there and experiencing it first hand. How do you prepare for trying to get to sleep in a tent when it's -45°C?

Everyone needs to look after one another – because a small problem unattended can very quickly become a big problem affecting the whole team. All IT directors will recognise that.

One of my most challenging experiences was in the last few hours of a three-week expedition in the Arctic. There were three of us in the team and we had just become the first Britons to cross the remote Penny Icecap. I was crossing a large frozen fjord, when all of a sudden it cracked. I was thrown into the water – and my sledge came in behind me, risking taking me down to the bottom with it.

I knew that it wouldn't be long until the cold water enforces tunnel vision and my hands wouldn't operate. I managed to swim to the side with my skis on and, on my third attempt, luckily, heaved myself out.

I was now soaked to the skin and the air temperature was about -25°C. As we were only four hours from base we kept going – quickly. I could tell I was on the verge of frostbite so I just skied harder until we got to safety.

These experiences all had valuable

learning points for me. On the more positive side, I had the fortune of an incredibly unusual experience – we caught a baby polar bear, yes really, and returned it to its mother.

We had inadvertently scared the mother and her two cubs when we happened upon them on our skidoos, and they ran off in separate directions, leaving one behind. We knew that alone it would die, so we decided we had to do a rescue.

We managed to grab this wild mass of teeth and claws without being injured and took it in the direction the mother ran. Luckily its cries were heard by the mother and they were reunited.

There are so many things I've learned in extreme environments when teams are pushed to the edge that can apply to work life. It's taught me how to deal with challenges – you have to refine, build a team, reduce the risk, know how hard to push, and then make decisions together to achieve your goals.

IT directors will fully understand and be driven by that. When people say it can't be done, you know it just can't be done with that person. The hardest step is often the first one, and

**Everyone needs to look after one another – because a small problem unattended can very quickly become a big problem.**

not being overcome by the apparent enormity of the task ahead – certainly the sort of approach needed when attempting a new PMS project.

Equally, you can analyse until the cows come home, but sometimes you just have to commit to change and lead – that's what IT directors are paid for. The culture at Foot Anstey is to act and be decisive, especially when adopting new technology. When you're soaking wet and it's -25°C you make decisions pretty quickly!

Then there's being aware of the performance of your own body and listening to the subtle signals it sends out. I fell through the ice because I was very tired and wasn't focused enough to read the ice properly. It's important in our working lives to be aware when we are tired and how this affects our decision-making and relationship performance. It's equally important to look for those subtle signs in your team.

Don't let enthusiasm drive you to take unnecessary risks. I once had an argument over a satellite phone with the Canadian authorities for three hours about taking a weapon into a certain area. They wouldn't allow it. We felt it was necessary to protect ourselves from polar bears, but ultimately decided to take a risk and travel unarmed. That was a very risky decision and one where ultimately we relied on luck – not something I would generally advise IT directors to do. ►

*As told to Kayli Olson*

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