

# Briefing

## SECRETS RESOURCE

Firms discuss whether the work allocation concept can weave a little efficiency magic



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# Good work shout?

In its 25th anniversary law firms survey report, PwC pointed to the growing challenge of “spare capacity” in the legal ranks. Although firms had successfully kept control of their partner numbers, some other aspects of business management needed close attention.

“Uncertainty around Brexit” was one thing apparently exacerbating the issue – I think it’s probably safe to say that the dust on that one hasn’t settled down quite yet. And another was firms’ reluctance to invest in efficiency-enhancing new technology, or even the replacement of creaking existing systems in need of an upgrade. And of course, artificial intelligence also made an appearance – but not just for its well-publicised potential to boost productivity, freeing talent to pursue higher-value tasks with extra vigour. A feature of the “successful firms of the future” might be “widespread use of AI”, said PwC, but firms would probably also need to prioritise the work of redefining employee roles to prevent spare capacity from spreading.

Partner David Snell said: “Workforce management and deployment has remained unchanged for many years and we expect the better-performing firms in the future will be those who can improve the agility of their workforce both between practice areas and globally.”

But there’s also the question of how work is handled on a far more micro level. Historically, it was down to many partners to pick and choose who they wanted on a particular job in the pipeline – and of course, they’d probably be mentoring the chosen ones alongside such management, developing close and trusted relationships (a bit like they like to have with their clients). As firms have expanded through ever more complex strategies, however, the potential for inefficiency in purely one-on-one relationships becomes that much more of a problem.

We hear that some good news is your firms are slowly opening up to welcoming in specific resourcing skills – which some other industries and organisations have enjoyed for far longer (including some of ‘traditional’ firms’ biggest-name competition). But of course, you can bet that in law firm land those changes will be no more a walk in the park than an awkward Brexit.

RICHARD BRENT EDITOR

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## FEATURE

# Resource revolution

Law firms are cautiously following other sectors that have long been handing out work projects to their people with an eye on overall business efficiency. Richard Parnham takes a peak into the world of work allocation

**S**lowly, tentatively, a low-key revolution is starting to take place among the UK's largest law firms. This revolution is the work allocation initiative – a process where work is given to fee earners based on an objective assessment of their capabilities and requirements.

One tangible manifestation of this phenomenon is the recruitment of law firm work allocation managers, also known as resource managers. These individuals, often hired from outside the legal profession, have now been recruited by a growing roster of large UK law firms, including Ashurst, CMS, Clifford Chance, Norton Rose Fulbright and Reed Smith. Tellingly, it is anticipated that a September meeting of the newly formed Legal Work Allocation Network will attract around 25 people – a significant increase on the five who attended the network's first event. But, to put this number in its wider professional services context, PwC currently has 170 personnel performing this role in the UK alone – with an approximate ratio of one work allocation manager to every 100 people. Clearly, the UK's leading law firms have a long way to go before their employment of work allocation specialists bears any resemblance to that of their accountancy sector counterparts.

Currently, several other top UK law firms are known to be exploring work allocation initiatives, including Addleshaw Goddard and RPC. But – oddly – many legal practices who are looking into this concept simply refuse to talk about it. At least two top-20 law firms contacted during the research process for this article asked not to be mentioned in connection with work allocation initiatives in any way. It is difficult to think of any other initiative, aimed at improving the working lives of fee earners, that a law firm would ask





**“We do not have a system that allocates work to people – we still prefer the human element of doing resource management.”**

*Lena Kearney, strategy manager,  
Mishcon de Reya*

to be treated as a secret.

One possible reason why firms are so nervous of talking about work allocation schemes is that, when the concept was first discussed in the legal press, it was often described – wrongly – as involving the ‘blind allocation’ of work. This unfortunate phrase gives the false impression that the partner’s role in forming a project team is extinguished, while fee earners are reduced to working on a glorified production line. “The phrase ‘blind allocation’ is horrible, and not true,” says Russ Martin, resource planning lead for Ashurst’s corporate department. Martin explains that he plays an active role in helping partners make their work allocation decisions – but the process is very much a discussion rather than an imposition. Factors that are considered in this discussion, he says, include fee earners’ existing skills, the gaps in their skills, their aspirations, and how many times they have worked with the partner before.

### **Walk before you run**

Lena Kearney, strategy manager at Mishcon de Reya, offers a similar perspective. “We do not have a system that allocates work to people – we still prefer the human element of doing resource management,” she says. “What we’ve done is given the partners the right information they need to have resource conversations, and to make decisions. That’s what people needed, and that’s

what we’ve focused on.”

In light of the recent misunderstandings of how work allocation initiatives work in practice, those who have worked on project rollouts have tended to do so with extreme caution. “We’ve been very restrained, in terms of not going out to everyone at once,” says Michelle Ainsworth, resource manager, strategic planning, at the London office of Reed Smith. “You don’t want it to get too big too quickly. Ultimately, we need to make sure we can prove our approach works, and that it does all the things that we set out to achieve.” Mishcon de Reya’s Kearney says her firm followed a similar approach with regards to its work allocation rollout: “We started off with nine users. A couple of weeks later, we bulked it up to 30 – and then we did the full department, which was 90.” Today, the firm’s work allocation system has 150 users – a respectable number, but far short of the firm’s total complement of fee earners. “We’re progressing very slowly, and at the rate the business wants it,” Kearney explains.

In the case of Mishcon de Reya, the practice group involved in the initial pilot was, perhaps surprisingly, the firm’s private client team. “This may sound like an unusual choice, but it was the department that really identified the use case, and championed the work through the design and conceptual stages,” Kearney explains. “It made sense to go to the stakeholders who were warm and ready for it.” Ashurst’s Martin says his firm took a similar approach. The initial pilot took place in the firm’s London corporate department – essentially because the team’s then head of corporate, Simon Beddow, wanted to cheerlead its trial within his team. Following their initial pilot phases, both firms have since rolled out their work allocation programmes to the vast majority of their London-based practice areas.

In terms of delivering their respective rollouts, neither Mishcon nor Ashurst relied on internal marketing campaigns, or the issuing of top-down diktats, they say. Instead, the process of adoption



was bottom-up and organic. “Associates have been training each other, and instigating rollouts within different teams,” Ashurst’s Martin says. “They’ve also gone to their HR and leadership teams saying ‘why can’t we have this?’ Overall, it’s been a great process. We wanted the business to want it – not for us to force ourselves on it.” Reed Smith’s Ainsworth says her firm has, to date, also refrained from hard-selling the idea. “In the next 12 months, we’ll start to see our initiative expand. That’s when we’ll look to sing about it from the rooftops,” she explains.

### The human touch

Although the rollout of the work allocation programmes at Ashurst, Reed Smith and Mishcon de Reya have followed a similar trajectory, how their systems work on a day-to-day basis differ.

**“In the next 12 months, we’ll start to see our initiative expand. That’s when we’ll look to sing about it from the rooftops.”**

*Michelle Ainsworth, resource manager, Reed Smith*



“The reporting tool doesn’t just produce lists of people – partners can also run queries to find exactly what they’re looking for. For example, they may want to find someone who’s got five years’ plus experience, has some knowledge in a particular area – and perhaps hasn’t hit their targets yet.”

*Nick Hull, head of IT development, Mishcon de Reya*

Most significantly, two of the three firms – Ashurst and Reed Smith – have hired work allocation managers, while Mishcon has not. “Mishcon is a very personal firm, so we are not employing resourcing managers,” says the firm’s Kearney. “The way that resourcing conversations take place here is that the partners reach out to the people in their department or team. Those conversations work well. We don’t want to put another relationship into the mix.”

One reason why Mishcon de Reya has opted not to hire work allocation managers is that the practice is currently rolling out its own bespoke technology, which allows partners to make their own informed decisions about the fee earners to work with. “Partners can see predicted capacity at a firm-wide level, at a department level – even down to the individual level if they want to,” explains Nick Hull, the firm’s head of IT development. “What’s more, the reporting tool doesn’t just produce lists of people – partners can also run queries to find exactly what they’re looking for. For example, they may want to find someone who’s got five years’ plus experience, has some knowledge in a particular area – and perhaps hasn’t hit their targets yet.”

This level of capacity and expertise transparency made possible by the software is useful to the firm’s partners, because it can help them put together project teams. But another notable feature of Mishcon’s software is that the



transparency also extends to fee earners. For example, fee earners are able to monitor their own performance against their annual billing targets, and view data that will be used during their performance reviews. “We also added a ‘request a conversation’ button, which can be used by anyone who feels that their workload is too low or too high,” adds Hull. “It’s probably this type of human touch that’s caused the system to be so well received by fee earners as well as partners. Without this type of feature, there’s always the danger that fee earners will look at it, and say: ‘Well, what’s in it for me?’”

### **Cross-firm traffic**

Of course, work allocation tools only have value if the data stored in them is accurate. In the case of Mishcon de Reya, the firm’s approach to the issue is very straightforward and is essentially based on trust. On a weekly basis, fee earners are expected to submit their current capacity levels, and also their anticipated capacity prediction levels for the coming week, using a straightforward ‘red, yellow, green’ traffic-light system. By contrast, other firms



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**“People will always say to their team managers that they’re busy – but the whole point of our initiative is to manage more by data and less by anecdote.”**

*Stuart Whittle, innovation director,  
Weightmans*

are favouring a more evidence-based approach to capacity predictions. “We’re looking at technology that could perhaps be a little bit smarter around providing capacity forecasts,” says Reed Smith’s Ainsworth. “The idea is that it’ll connect to all our different systems, and be able to give a prediction based on all matters our fee earners are working on, and what that means for the upcoming week.” Ashurst has already gone this route, and has deployed Retain International’s resource planning tool. “We went with this solution because I’d used it heavily when I worked at PwC,” explains Martin. “It’s basically an in-depth spreadsheet that produces forward-looking reports.”

One firm that is experimenting with a novel form of capacity forecasting is Weightmans. The output of the firm’s experimental approach will be familiar to anyone involved in capacity management – that same red, amber and green traffic system. However, the prediction is based on a model, created by two data scientists, which draws on the firm’s historical (and anonymised) matter data. Stuart Whittle, Weightmans’ innovation director, insists the idea is not as odd as it sounds. This approach, he explains, is based on “queueing theory” which, originating in Denmark in the early 20th century, involves the creation of mathematical models to predict queueing behaviours in many real-world scenarios such as in the banking, medical and retail sectors. “People will always say to their team managers that they’re busy – but the point of our initiative is to manage more by data and less by anecdote,” he says.

At present, the reliability of the Weightmans’ capacity prediction model has not yet been validated – the firm is currently working towards a proof of concept. And, assuming the project ultimately receives backing from the firm’s operational leadership team, the model will be subject to extensive testing before it is deployed on



a firm-wide basis. “We’ll be asking ourselves: ‘Is this, in fact, useful? Has it made a difference? Is the effort involved in creating the model worthwhile? Is it accurate?’” Whittle says. “When we created the model, we thought the data that it relied on was reasonably accurate, because we’re currently rolling out uniform task-based management system matter codes. But, like all plans, they never survive first contact with the real world. So it may be a question of refining the model.”

For Whittle, evidence-based workload prediction is not just about matching personnel with tasks to be performed on a day-to-day basis – another intended outcome is to avoid the need for what he calls ‘reactive recruitment’. At present, Whittle says, law firms are often tempted to recruit in response to spikes in demand, which ultimately prove to be short-lived. “If you’ve got team managers being shouted at by people saying ‘we’re too busy, we’re too busy’ – what do you do? You recruit. Then, four weeks later, the work’s fallen off and suddenly you’ve got overcapacity. We’re trying to stop that,” he explains.

The better matching of capacity with demand is in everyone’s interests in law firms, be they junior fee earners or managing partners. And, slowly – and often hesitantly – a growing number of major UK legal practices are waking up to this fact, and putting systems in place to make this outcome possible. Hopefully, the recent launch of Legal Work Allocation Network will encourage more law firms to launch their own work allocation schemes, and also help ensure that those schemes are ultimately successful. ▀

# Briefing<sup>▲</sup>

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## INDUSTRY INTERVIEW

# Guard work

Legal work has traditionally been dished out to hungry associates by partners – but firms are (trially) putting a stop to that. Richard Brent speaks to Dave Cook, founder and CEO of Mason & Cook, about introducing work allocation

**M**uch of the conversation concerning law firm efficiency since the financial crisis a decade ago has centred on the front end: the work of demonstrating greater value to cost-savvier clients. Just one aspect of this is appropriate resourcing. For example, businesses may well question why they're paying top-dollar for partner time on tasks that appear perfectly well suited to someone at an earlier stage in their career. As a result, we know that some clients are requesting much more sight of how their work is sliced up by seniority, and just why that's the case. Some may even seek to influence that internal management process themselves.

But today, some firms are also taking action to resource work more efficiently for entirely internal reasons – although this too may play well with those same clients. Fending off more competition, and with margins under more pressure, they can't afford for even top talent to be as occasionally underutilised as it might have been in the past. Firms need to manage fluctuating demand for their services proactively, and assign people to jobs with much greater awareness of the firm's workload as a whole.

Dave Cook, founder and CEO of Mason & Cook, says: "Historically, it's the partners who've had responsibility for allocating work across their practices. There are some justifiable reasons for that, but unfortunately it also introduces inefficiencies. They're typically making instinctive

judgments about who is busy or available using information about how things have gone in the past. However, what happened last week can look quite different to what needs doing this week. The data shows a historic picture rather than a forward-looking one."

At the same time, resourcing technology hasn't been able to give sufficiently granular data. "Firms might have something like a simple traffic-light system of availability, but what they need is detail on available individuals' skills, experience, client relationships and career progression," says Cook. All of these may factor into the most sensible decision about who in the network to get involved in the next job. And you might think it's unsurprising that partners without reliable information fall back on the barometer of their personal preference for 'safe pairs of hands' – behaviour which can, of course, be seen as bias and unfair career advantage.

Add into the mix that partners are under time pressure to make these decisions very quickly in any case, and it seems pretty clear that firms would benefit from a little more structure.

## Change track

This is the (relatively new) job of 'work allocation', a concept which has been gathering steam in law firms since 2013. Mason & Cook has completed 18 pilots of the initiative with various groups at nine law firms. Its work-planning consultants will pitch up in a practice area for eight or nine months,





“What happened last week can look quite different to what needs doing this week. The data shows a historic picture rather than a forward-looking one.”

gathering the underlying skills, performance and other people data at the same time as demonstrating how more even and judicious distribution works in the firm's favour. “We'll track and forecast individual lawyers' activities, matter by matter, to produce a more accurate view of the world,” explains Cook. “We also help to secure the buy-in for change from all the various internal stakeholders, and only leave them at a point where they can manage the new processes for themselves. Often that's a point where they even see it as a strong selling point for clients.”

By now, he says, firms will usually have measured the business benefit in some way, and decided whether or not they want to make the new resourcing structure a permanent change, and so

hire their own specialist personnel. Then, appropriately, Mason & Cook can also help to resource the firm's new approach to resourcing.

“We've been involved in screening candidates for the new role of resourcing manager, and more recently established a recruitment service to identify people who are the right cultural fit.” Once they're hired, the consultant will effectively onboard the new employee to the methodology and toolset, at which point Mason & Cook will typically take its leave.

### **Power to people**

Firms probably ought to be used to bringing on new management skills that are sometimes the norm elsewhere by now – but attracting the right



“The key skill for work allocation is strong stakeholder engagement. There is a process to follow, but it needs to be reasonably flexible as you’ll be dealing with people all day, every day.”

people to an entirely new role in legal may still be a challenge. And Cook says that while resource management and project management colleagues may be part of the same change picture, the role profiles aren’t the same.

“The key skill for work allocation is strong stakeholder engagement. There is a process to follow, but it needs to be reasonably flexible as you’ll be dealing with people all day, every day. Resource managers will feed into the firm’s legal project management plans, but project managers usually have a more structured working life.”

Although it’s more important they’re effective ‘people people’ than data gurus at the outset, however, the efficiency really takes off when a supportive management information system is also in place.

“Resource managers become more efficient, not only with the more accurate data they can present to management teams, but also because with the right technology the lawyers themselves are more

engaged in the process. They have more visibility of both workload metrics and their own longer-term development, and can potentially take action based on either. They can take more control.

“The impact of work allocation on engagement is especially dramatic. There’s a view that imbalanced distribution of work is tantamount to being treated unfairly, because people aren’t getting access to the work they want and need to progress in their careers.”

As recently as April 2018, Mason & Cook put the finishing touches to its own IT solution to empower both resource manager and his or her human resources. Cook says: “We’ve focused a lot on the lawyer’s information experience, but the resource manager also finds they’re more able to search for capacity, skill and experience levels at speed.

“The right data becomes more important when there are multiple practice groups signed up to the idea, as management can make better decisions in





areas such as hiring, training or retraining.

“For example, firms can ensure they’re only investing time looking for extra capacity externally when they really need it. Flexible-lawyering is a great model for many reasons, including flexible working, but firms will sometimes use their pool for a project before they’ve done a full check of resource internally.” That introduces unnecessary extra cost, he says.

### Seeing results

Firms will often pilot the work allocation methodology in one practice group before wider roll-out. But it isn’t best suited to one particular part of the business, says Cook.

“There’s a little bit of a market myth that a practice needs to be ‘broken’, and this is the fix, but in fact it’s quite the opposite. By operating more efficiently your highest-performing teams can extend their market lead.”

The only difference for practice groups, he says, is the nature of work allocated. “In corporate work there can be very little warning before something lands, and work tends to be shorter in duration, which makes for more volatility. The function needs to be proactive and ready to resource at short notice. In a disputes practice you’ll often have more visibility of the key milestones.”

Of course, success at work allocation is finally measured by the levelling off of what’s typically quite a steep “utilisation curve” at law firms, with far too many associates sitting underutilised. Mason & Cook has seen an average 9% improvement across its pilots, which comes from both smarter planning and an improvement in employee engagement scores.

“Firms find they can better understand pockets of capacity – and plan for returning parents, secondees, even those on sick leave, to get working on matters much sooner. And when you give people more of the work they want to be doing, the

evidence is they also work harder.”

Partners should be more productive too, as they’re handed back that much more time to work on winning new business.

Mason & Cook runs its own engagement survey with partners and associates just before work allocation begins, and then again after three months – as well as tracking that partner time saving to offer something very tangible.

### Diversity delivery

Last, but by no means least, the team will measure work distribution along lines of gender diversity. If the ‘best’ work is weighted toward men, that’s arguably a sure sign something’s amiss in a firm’s diversity and inclusion strategy. An oft-cited obstacle to women’s progression up the legal career ladder remains that they don’t have equal access to career-defining opportunities.

Cook says that the agile working policies many a firm has implemented should also be set to benefit. “We’ve seen quite a dramatic increase in agile working as a result of these interventions. Flexible working is a great move for the sector as a whole, but unfortunately uptake is often low. There’s still a sense among associates that they need to be present in the office when a new piece of work arrives so as not to miss out.

“If work allocation is in place the process is standardised and more transparent – and can occur, and be seen, anywhere. People are more comfortable being away from their desks, and an agile working policy gets closer to being a culture.”

With goals like these, it’s no surprise that the work allocation concept is already spreading from the reprocessing centres of the large global firms to national and regional mid-tier firms, and even clients’ in-house teams. This newest addition to the line-up of business service specialists taking on the legal sector could make its presence very widely felt indeed. ▽

## INDUSTRY ANALYSIS

# Time for technology

Newcastle has one of the fastest-growing tech communities outside London and law firms are using this to their advantage when it comes to optimising resources says Catherine Walker, inward investment director at Invest Newcastle

**T**he issue of ‘spare capacity’ in the legal sector is a growing concern and tough and competitive market conditions have put even more pressure on law firms to create efficiencies.

No matter the sector you operate in, there is always a challenge to ensure you are optimising your resources and getting the best from your people, while still delivering value for your clients. However, the complexity of the legal sector can make this especially difficult says Steve Caughey, director of Newcastle’s £30m National Innovation Centre for Data (NICD).

## Is data the answer?

Based on Newcastle Helix – a 24-acre urban development – NICD is providing an advantage for north-east legal businesses, developing advanced techniques for analysing large quantities of data.

Caughey explains: “There is no getting away from the fact that the legal sector is complex, and this can make resource planning problematic. However, predictive analysis has allowed businesses working on many, often very large-scale, projects to plan for human resource without the expensive cycles of hire and fire.”

For example, this has been achieved in global engineering businesses where projects are highly complicated, involving thousands of tasks utilising hundreds of workers. Expertise in big data is growing in importance for the legal sector – undeniably playing a role in more efficient resource planning.

Caughey adds: “The key to success in these

efforts is access to large quantities of data – both historical and real-time – coupled with ongoing analysis of how changing processes and tooling are impacting on projects. Access to electronic versions of legal documentation, coupled with machine-learning technology, improves not only our ability to automate mundane though time-consuming legal tasks, but also to predict with increasing accuracy the total effort required in completing legal work.”

## Turning to technology and outsourcing expertise

Yerra Solutions is a business that provides technology-enabled managed services to help law firms manage spend, contracts, departmental knowledge and workload. The north-east has been a base for the company since 2014, and it has recently expanded its centre of excellence into a new space in the heart of Newcastle’s city centre.

“Legal work can fluctuate significantly





depending on litigation and regulatory activity,” says Bob Storey, managing director of legal solutions for Yerra Solutions.

“It’s not financially viable to hire full-time resources that will no longer be needed once a busy period ends, and it’s usually not practical to recruit project-based contractors because of time constraints. This is where law firms and their clients have turned to legal service providers who have trained teams ready to support internal staff, leverage technology on their behalf, and provide the expertise they often don’t have in-house. This helps to deliver efficiency, transparency, scalability and, more importantly, richer reporting to inform changing business needs.”

This is another example of tackling law firms’ spare capacity conundrum. The team works with clients on major investigations and eDiscovery projects, managing contracts and reviewing legal and IP invoices. The approach adds efficiency to

**Expertise in big data is growing in importance for the legal sector – undeniably playing a role in more efficient resource planning**

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these processes, while capturing and analysing the data that is critical in helping clients understand how best to resource projects in future.

### Processes or people?

Invest Newcastle has also supported several law firms to expand their operations, including global firm Norton Rose Fulbright, which has more than 4,000 lawyers in more than 50 cities worldwide. There are a number of reasons as to why Newcastle is ideally placed for Norton Rose Fulbright, including access to a strong pool of local talent that is able to support its offices globally, and the city’s strong and growing reputation for innovation and technology.

Norton Rose Fulbright’s legal process hub approaches work in a new way and is developed as a centre of excellence with a range of capabilities – not only to bring new products to market but also to trial emerging technologies, such as AI and machine learning, and working practices (including agile working) in a structured way.

Kiran Radhakrishnan, head of the Newcastle hub says: “Our resource managers work closely with our Newcastle hub to understand developments in process and technology and identify work that leads to greater efficiencies.

“As the hub is a centre for innovation in the use of people, processes and technology in a legal setting, its resource profile has become more complex. Resource management – a delivery mechanism – was introduced to help it to deliver services to clients in more efficient ways.

“We have also adopted this resource-management approach to create a highly flexible workforce. There was a need to maximise the potential and flexibility of our workforce and adapt to new ways of working, while still ensuring clients have access to the best available talent. We now offer flexible employee arrangements and have upskilled our paralegals in several practice areas, meaning we can rapidly and flexibly source highly skilled people for any given matter.”

The legal sector is not only complex, it is changing all the time. People and technology are both at the forefront of initiatives that are helping law firms to manage resources more effectively. Newcastle has a growing reputation for innovation and technology, making it the perfect location to tackle any spare capacity head on. ▴



## INDUSTRY ANALYSIS

# Capacity complex

Karen Skillman, head of business support services at Mitie Document Management, explains how best to maximise utilisation and reduce spare capacity at your firm

Over recent years, we have seen our legal clients react to demands to be more competitive and transparent with their pricing. This has brought about the relatively new trend of law firms moving away from the historical billable hours to fixed (or capped) pricing models. This move has led to the demise of firms billing for each additional back office service that supports the provision of the legal advice they are providing and has presented a challenge for law firms to react to client demands while remaining competitive and retaining those margins.

While law firms have long been adept at measuring fee earners' productivity (and therefore cost) by recording time spent on a matter, the new

pricing models mean it is now also necessary to provide administrative support in a more cost-effective manner, as they are no longer passing on these costs via billing add-ons, but as a package.

Clearly, the optimal way to keep these costs to a minimum is to have maximum utilisation of these administrative services, ensuring that each area of this support is focusing on what they do best and with the appropriate level of expertise applied.

However, with support services often working in silos, it is commonplace to find service departments over-resourced, with frequent pockets of spare capacity. Typically, this has been the preferred model within law firms to ensure that resource is always available to meet demand in peak periods. I recall a director of a firm

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claiming, many years ago, that they “didn’t care if the team sat around knitting or reading, as long as there was resource available when required ...” Clearly not a model that would be effective in today’s market.

Maximising utilisation and reducing spare capacity can be achieved in several ways. With technology, firms are better able to provide agile resources and, in some areas, this can be provided ‘on demand’ from home. In others, it can be done with some creative resourcing or by outsourcing.

### PA empowered

Some of our legal clients have already recognised the need to implement a more cost-effective solution to administrative support and reviews of the PA role have revealed interesting results.

Unlike in years gone by, where a PA was responsible for doing everything aside from giving legal advice, the new generation of lawyers have the technical knowledge and knowhow to be highly self-sufficient. Having come through their education with a keyboard and technology, they are able to work extremely independently. Two examples of this are the Outlook calendar and voicemail, eliminating the need for secretaries to screen phone calls, take messages and manage diaries, except in the most complex of situations.

Reviews show that, with more of their responsibilities increasingly being fulfilled by new technologies, PAs are taking on lower skilled tasks such as scanning, photocopying, and filing. As a result, and following the advice of Richard Branson of having “the right people, in the right place, doing the right thing”, the PA role is being streamlined to allow the secretary to be more client-facing and able to focus on value-added tasks for the client.

This has seen the emergence of business administration teams that take on those lower skilled tasks. Fee earners and PAs alike submit routine tasks to the administration team to process, and the more progressive of those clients have also introduced a workflow tool to facilitate this process. It provides meaningful data to aid work allocation, capacity management and future resourcing decisions. Without this insight, you could be paying individuals for a higher level of expertise than is required for the task or, in fact,

paying for a resource that is not required at all – which ultimately impacts your margins.

We are seeing some amazing workflow tools appear in the market, which takes us a long way in terms of optimal resourcing and work allocation. These tools not only make for simpler work submission and tracking and (in some cases) can direct tasks to the appropriate service area, they also provide valuable data for decisions on resource levels and workflow peaks and troughs.

### Coordination credentials

However, there’s still a need for human intervention when it comes to work allocation. Enter the workflow coordinator role now appearing in the workplace.

Although the workflow coordinator will typically oversee the administration team and the workflow tool to ensure both are working effectively, it also provides a number of other useful and essential elements that even the most superior workflow tool cannot. It can:

- Ensure fair allocation of tasks across the team to:
  - Provide equal exposure and experience
  - Prevent over-allocation to individuals to avoid stress and excessive workload
- Ensure the appropriate allocation of tasks relating to:
  - Skillset
  - Urgency
  - Multi-task requests
- Review the data provided to make decisions on:
  - Resource levels and recruitment
  - Resource allocation to mirror peaks and troughs
  - Maximising utilisation

We can never underestimate the power of human contact, and the workflow coordinator ensures that this is maintained in the day of online booking processes. While we have moved on leaps and bounds in the world of technology, with demanding clients and their frequently unrealistic deadlines, lawyers will often prefer to pick up the phone to speak to someone. No matter how efficient your online tracking tool, busy lawyers need instant responses from an experienced individual rather than an automated system directing them to find their own answers. ▾



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