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Projects, process, transformation, commercial acumen, alternative delivery models. Welcome to legal's next generation

EOPLEISSUE

NOVEMB

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Legal goes DOSTMOCEIN

Business Intake



Efficiently taking on matters is critical to the practice of law. Today, several trends are putting new pressures on law firms to transform the way they evaluate and engage new business:

- Clients expect greater service (and want to pay less for it)
- Lawyers want to start work immediately (sometimes before conflicts are cleared or matter numbers are issued)
- Firms want to more carefully evaluate the clients and matters they accept (to avoid surprises or unpaid bills)
- IT and Conflicts Teams are eager to provide lawyers with easier tools, faster service and a pain-free experience

Thriving in this environment requires an innovative approach to intake and conflicts — one that allows firms to act quickly (while still rigorously evaluating matters), to delight lawyers (especially on mobile devices) and to easily change processes (without outrageous delays). In short, intake must evolve. Intapp Open is the answer. Instead of complicated tools that require expensive, time consuming implementation projects (and ongoing consulting bills), Intapp offers a fresh approach, built specifically to address the diverse and specific needs of firm management, lawyers, risk staff and IT stakeholders.

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It's possible to do this legal game differently – if you have the right people on your side.

We at **Briefing** expect to see sweeping change through legal. As the great William Gibson might have said, projects and process are the future, but they're mightily unevenly distributed. This issue is about the people who will bring it to your firm.

Editor Richard Brent went in search of the roles behind the process/projects revolution – and his interview feature is a great insight into some of the key roles of the future. Also, check out our supplier interviews, from p24.

This is an issue I feel we've been waiting to make for years. I hope you enjoy it as much as we enjoyed making it.

Rupert White, editor-in-chief rupertw@lsn.co.uk

Feature: New roles for new rules

Fresh faces are appearing around the law firm decision-making table to power up innovation and drive change. Richard Brent tracks down his top team from the law firms that are leading the way

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Briefing jobs



Great legal business services jobs on the **Briefing** jobs pages. Pass it on... or perhaps not

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All interview photography this issue: Jonathan Goldberg www.jongoldberg.co.uk



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This month's interviews were transcribed by:

Who we are...

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Feature

New roles for new rules

Richard Brent goes in search of the people reshaping the way legal businesses deliver services, run their operations and find new ways to revenue and growth – and finds a new breed of business person behind the scenes.

Photography: Jonathan Goldberg

Back, from left: Stella Beaumont, NED, Nabarro; Tim Bratton, practice development director, Lawyers On Demand; Oliver Campbell, global director of business transformation, Clifford Chance; Barbara Mendler, managing director of strategic projects and operations, CMS Cameron McKenna Front: Richard Copley, head of change, Addleshaw Goddard; Christine Siler; global legal project manager; Hogan Lovells;

November 2014

This has been the year that law firms – long proud of being people businesses – have learned they must also be product businesses. New delivery models now promise clients a heady cocktail of lower cost and increased convenience, and success in this new game hinges not only on the historic scrabble to attract the best legal minds to your current crop, but also on rethinking how a growing swathe of legal work is managed.

So, for this People edition of **Briefing** we've drawn together what you might call an alternative talent team – the people firms are handpicking to help them fight the gathering forces of new competition, and to build better ways of working. Some are 'process engineers'. Some are charged with leading significant change programmes. Some are 'firsts' for their firms. But all are representative of a commitment to reassessing existing operations and management practices in the interests of greater efficiency. They are the new roles helping legal business play by a new set of rules.

One theme that emerged from our research for this issue was the value of a fresh pair of (non-legal) eyes. The firms represented seem to realise they need to look outside the sector and bring in different skill sets, to get a more distanced perspective and spur process innovation. This is not to say our group knew nothing of lawyering before entering the field – some (whisper it) even know how to do it themselves.

The Continuous Improver

Take Oliver Campbell, global director of business transformation at Clifford Chance. Switching to law after first training as a hospital doctor, Campbell runs a programme of continuous improvement (CI) workshops to apply key process improvement principles to professional services.

His (rather unusual) appointment is certainly an example of Clifford Chance thinking laterally about resourcing. The firm set up a crowdsourcing 'competition' to gather suggestions from any employees about how any processes could be improved. Intrigued, Campbell proposed that standard bound volumes of transaction documents when closing matters could be compiled more efficiently by beginning earlier and reducing printing and duplication. And he won.

Part of his prize was to be on the team that made this happen across the firm – and such was his enthusiasm that he volunteered to be seconded from his fee-earning role to the area as a new function. Three years later he heads a team of six who take on projects to help any practice assess either repeatable tasks or individual client matters for possible efficiency gains.

In both cases, this begins with a process mapping workshop, in which everyone involved in a piece of work sits down to debate and assess possible alternatives. "We basically stick post-it notes up all over the walls until we reach an agreed position," he says. "Quite often you end up with two or three versions, but then you thrash those out to a final representation. What you then have is a map that everyone can access and easily refer to, and which becomes a strong framework [for] policy, guidance or knowledge."

Clients can be involved – perhaps even be in the room as a process is mapped out across Campbell's ideas wall. He explains that a key principle from CI in manufacturing (Six Sigma, and so on) is to "start with the voice of the client". Even for an internal project, the first question will be to identify the client impact. But if a project involves a specific process for

"A project management approach will increasingly be a client expectation."

Oliver Campbell, global head of business transformation, Clifford Chance

a key client, it makes sense to invest face time too, because the outcome will be significant to multiple matters. "Another type of project might hinge on how we improve integration with a client, so a key action would be to

> "In some cases, clients' internal processes could benefit from firm input. In future we will see more firms providing consultancy to clients on aspects of business that aren't strictly law-related."

> > Richard Copley, head of change, Addleshaw Goddard

uncover how they construct their internal team," says Campbell.

The agreed process is then assigned an 'owner' to monitor how it works in practice and whether it can be improved further – gathering feedback from users and incentivising them both to comply and engage. For Clifford Chance, the equivalent will often be a group of senior associates.

Campbell's team also trains people in CI thinking for themselves though. "One of the most valuable questions to ask is why a problem occurs," he says. "Duplication, for example, often arises because people aren't clear on their responsibilities. [After] actively questioning that, it can emerge it's because nobody sat down with them at the outset – so it materialises that the solution is to invest in more onboarding." CI is an idea that comes to professional services courtesy of the manufacturing supply chain, where factors such as ordering stock and human resources are carefully measured and planned. "You don't get one person knowing

> their job is to order raw material, so ordering in lots and allowing it to stack up, costing space," Campbell explains. "Optimising storage space means the business doesn't need to buy as much."

It's easy to see why it might take a bit of time and effort to translate this to the business of law. When does putting in loads of hours and 'going the extra mile' for the client become just plain inefficient? It's the job of roles like Campbell's to find that balance.

But although his team has been assembled to nudge more law firm people to see their

jobs as relating to processes, he thinks they will be doing their own job best when process lies in the background – something of a secret formula perhaps, but well shrouded.

"Applying process thinking to legal work still seems cutting edge, but as in other industries I think a project management approach will increasingly be a client expectation. I can see a point in five years' time where it is much more commonplace, and my team is devolved and disseminated to be a day job like any other."

The Process Expert

Richard Copley has performed a similar change-facilitating role for Addleshaw Goddard – but, unlike Campbell, he was brought in from outside to do it. He was due to move on just after **Briefing** went to press, but as he admits, he is a "career interim manager" who happened to have the right credentials for probing all things process to inform the firm's ongoing 'delivering differently' programme.

The sector experience that helped secure him the role – working for a small firm of debt litigation specialists - was a world away from what he found on his first day at AG. "In a staff of about 150 [in that previous legal business], there might have been 10 lawyers working on contentious matters. Legal executives ran most operations, and the work was very process-oriented. When I arrived at AG, I spent the first week wondering why I hadn't heard anyone talking about a core system, and eventually it dawned on me there wasn't one. There was a practice management system to collect time information and produce bills, but not for guiding work as it moved from team to team or person to person."

In summer 2012 Copley therefore recruited a team of process analysts and set out to map the firm's foremost 40 services through a series of workshops with teams drawn from all the offices and job roles involved.

"We built up a rich picture of each – all knowledge resources, templates, precedents, websites visited – and produced a final process description that was instantly accessible from the lawyer's desktop," he explains. "They could literally follow that process through step by step, picking out the relevant resources as required." Those original 40 processes became 100 by the end of 2013, and Copley's team had given birth to the encyclopaedic 'intelligent operations manual'.

Lawyers won't always need to follow a full process map but, he says, a particular benefit of the centralisation is updating people who need to know as soon as an area of law changes.

"When the employment tribunal process changed, we were quickly able to change the relevant maps in response. That becomes the version everyone sees when they next log on. The same software can then be used to communicate the changes to an interest group of employment lawyers." The maps also take into account how phases can be undertaken by a range of skill levels and seniorities – which can be used to cost and create value pricing propositions for clients.

Copley sees the future of legal process management in taking the conversation even closer to clients, who, he says, expressed regular interest in his project, not so much for the maps themselves, but because it showed the firm was serious about collaboration and innovative pricing. "In some cases, clients' internal processes could benefit from firm input too," he suggests. "In future we will see more firms providing consultancy to clients on aspects of business that aren't strictly law-related."

The Legal Project Manager

Christine Siler, meanwhile, was appointed as one of two global legal project managers at Hogan Lovells as recently as September. An entirely new role for the firm, her perspective is that principles of project management working are second nature to clients in many sectors – and her job, or at least part of it, is to get lawyers reading from the same page.

But the pilot she is joint leading is not so much a change programme as an audit of the project management skills the firm already has – but perhaps doesn't realise it has. All being well, she will then use pockets of best practice in building a training programme that creates a more consistent global approach to project management. "Many of our partners already have strong project management skills, so we are working with them to collect what they



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"Clients have repeatedly told us they want transparency and the certainty of a cost model that clearly reflects value, and project management is pretty much part of their DNA."

Christine Siler, global legal project manager, Hogan Lovells

know, and then will try to make that knowledge more accessible and spread it across the global network.

"As a pilot, the key is obviously to learn as much as you possibly can. I certainly don't have all the answers – and in an organisation as diverse as ours there is unlikely to be a onesize-fits-all [approach]."

Siler was previously contract manager for BLP's ongoing outsourcing deal with Thames Water – taking on and managing the utility company's entire legal function on a fixed-fee basis (until 2018, now) – and she says this experience maps well to her new role.

"As a heavily regulated industry, the client had a very strong focus on improving transparency and cost savings – and GCs in financial services are now facing a huge amount of regulatory change, too. That creates a lot of extra work for them, and they need more help on the efficiency front than ever before."

She says any specific project management practices she introduces at Hogan Lovells will likely vary from practice to practice, however, as well as potentially being culturally sensitive. "What works in Paris might not necessarily be the most effective tool for delivery over in Denver."

In essence, then, the exercise is data gathering. "We're looking at all aspects of legal process management – infrastructure, process mapping, training and knowledge capture – and then hopefully pulling that together to present senior management with something constructive. We will be looking at long matters and hopefully getting data from beginnings, middles and ends. Some won't have ended by the time we report back, but we will continue to follow those through to conclusion

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THE ONLY EVENT FOR CHIEF OPERATING OFFICERS AND OPERATIONAL LEADERS IN LAW FIRMS





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The only event of its kind to specifically target chief operating officers, business managers and others in operational leadership roles from large UK and international law firms, Briefing's Operational Leaders in Legal 2014 event will address the challenges operational leaders face in driving efficiency, productivity and profitability in an increasingly challenging and fast-changing market.

Featuring speakers from Top 100 UK and US professional service firms and senior in-house counsel, Briefing's OLIL 2014 event will showcase the leading firms who are reengineering legal services delivery and driving operational efficiency, innovation and change to secure the future success of their firms in such a dynamic market.

Who Should Attend

Chief operating officers, business managers, chief executives, chief financial officers, business services directors, practice directors, general managers, directors of operations, commercial directors and US law firm directors of administration.

09.00	Registration and coffee	
09.20	Chair's opening remarks Keith Wood, former chief executive, SJ Berwin (now King & Wood Mal	lesons SJ Berwin)
09.30	Presentation The economic outlook and the impact on the legal market	
	Bill Robinson, chairman, economics and regulation, forensic, KPMG	
10.10	Presentation The current and future legal landscape	
	 Moderate growth, increasing competition, consolidation, excess supply How can firms grow market share and drive profitability in a relatively lov Maintaining operational momentum and focus as firms move back into g 	
	Julia Chain, JSC Associates	
10.40	In-house counsel panel discussion Responding to the changing nature of in-house legal teams and the	ir legal service requirements
	 Examining the changing nature of the buyer of legal services with in-hour more of the real expertise Examining the changing role of the in-house lawyers to entrepreneurial, than private practice partners What are these new clients looking for from law firms and how can firms Client facing account managers and better management information Partnering with clients and collaborative working with other firms What will the private practice partner's value-add be in future? Examining the panel process and the restrictions imposed by legal proct Jonathan Beak, chief counsel - legal, UK & Ireland, Thomson Reuters Sarah Spooner, head of legal, Vodafone David Symonds, VP, regional general counsel EMEA, Tyco Internation Angela Williams, head of legal, global cash management and debt adv 	legal-based business advisers who are better at pre-empting problems s better support them? urement teams
11.30	Coffee	
	Delegates may choose to attend one of	of the following two sessions
12.00	STREAM 1 - Presentations	STREAM 2 - Case studies
	ng organisational integration and consistency across borders and enting a globally consistent client service	Building project management capability in law firms Understanding the value for the client and how you can
how cons lnteg platfd Align from every Integ inforr Ensu world Next survi	rms expand internationally through organic growth, merger or alliance, can firms successfully integrate and consolidate to become a truly global istent firm? rating and consolidating all your firm's internal processes, systems and orms ing your firm's external communications and profile; achieving consistency your website through to the letter heads you're sending out to ensure thing has the same look and feel and the same style and opinion rating effectively with other offices or member firms in terms of sharing mation, cross-selling and growing major clients ring clients experience the same level of service wherever they are in the d; achieving greater consistency of quality in multi-jurisdictional work steps for verein structures - moving towards a global single profit pool to ve?	 differentiate your firm from your competitors Law firm case study examples on successfully introducing project managers within legal and non-legal groups and building project management capability What are the lessons learned? How successful have firms been in getting clients to pay for that service? Embedding LPM in your firm, ensuring it's maximised to its full potential and enforcing the change How can you make your firm stand out from the competition? What next for project managers in law firms?
Jason Glo	over, director of administration – Europe, Sidley Austin	

13.00 Lunch sponsored by Aderant

14 00 STREAM 1 - Case studies

Law firm pricing and profitability; client and law firm perspectives

- What is the client's position on pricing? What drives their decisions?
- How do clients monitor spend?
- How can firms defend and improve margins in light of inflationary
- pressures and the demand for lower prices? Law firm case study examples; how do firms scope and cost matters, price jobs and measure profitability? Using tools and technology to best support what law firms do How can firms be more creative in how they price jobs and respond

- better to client needs? What is the value for the client and how are you differentiating your firm from your competitors?
- Calculating the upside and downside risk and sharing in the pain or the gain of the work your firm is doing Pricing structures for local vs international clients; how do you set and
- prove the value of those rates to the client? What next for pricing and the increasing numbers of pricing specialists in
- law firms?

Richard Tapp, company secretary and director of legal services, Carillion Nigel Morland, consultant, Knights Company and former global finance director, Ashurst Ben Winstone, divisional business manager, Ashurst

STREAM 2 - Panel discussion

Creating enterprise value in legal partnerships and driving structural and business change

- Examining the limitations of a traditional partnership structure in regards to sharing profits, decision making, acceptance of change
- Growing, adapting or changing business models while still maintaining a single partnership or business structure; addressing the dynamics and tensions that result from that
- Aligning partnership remuneration to new and changing business models
- Transitioning from a partnership structure to a more corporate model
- Revolutionising law firms, what does the future look like? Preparing for the future and seizing opportunities in an evolving market How did professional services manage the change from being
- traditional partnerships?
- Driving structural and business change in partnerships; specific approaches that make it easier for partners to accept change

na director strat

CMS Cameron McKenna Kate Wolstenholme, UK business services sector leader, PwC Alistair Mitchell, chief operating officer, Holman Fenwick Willan Moderator: John Mullins, former chief operating officer and chief financial officer. Herbert Smith Freehills

Delegates may choose to attend one of the following two sessions

15.00 STREAM 1 - Case studies

Efficient matter delivery; taking a process view of matters

- Law firm case study examples; how are firms leveraging their expensive lawyer time more effectively, how are they using certain methodologies
- using process mapping technology and KM systems such as document automation, document comparison and litigation tools to automate
- routine work and do it better Aligning people and finance systems to understand matter efficiency in real time
- Better resource management; examining different forms of resourcing
- and recruiting resource managers to manage this process Ways to more effectively enable resourcing changing how lawyers operate to ensure fee earners utilise the most appropriate resource and
- What is the resourcing model of the future? Is there a risk that increasing standardisation and lack of autonomy will lead to disempowerment, demotivation or a lack of innovation and entrepreneurialism?

Danielle Nagler, project lead, Berwin Leighton Paisner Rupert Egerton-Smith, head of business management, Linklaters

Attracting, growing and retaining the best business services talent in a rising market

STREAM 2 - Interactive debate

- Examining increasing professional manager movement in the market and bidding up of talent; is inflation looming in the salary pipeline? How do you compete with the corporate world for business services talent without simply matching salary, particularly when there isn't the same level of respect for support people in law How can you continue to improve the quality and performance of your business services people without raising salary? Is there a new organisational model for business services teams in law firms to improve the return on talent costs?

- Firms to improve the return on talent costs? How are firms finding different ways to incentivise talent based on some kind of performance or ability that allows them to track it
- Developing and retaining operational talent such as COOs and business managers when there isn't a clear career path in place Embedding the right culture within a firm to ensure you retain your best
- people

Nick Salmon, chief operating officer, EMEA, White & Cas Richard Singer, chief operating officer, Europe, Dentons Gary Jones, director, Totum Moderator: Clint Evans, director of brand & talent, RPC

16.00 Coffee

Delegates may choose to attend one of the following two sessions

16.30 STREAM 1 - Panel discussion

The internationalisation of law firms

- How can firms be quick to react to international expansion and contraction? And what does international really mean? Following international markets and expanding in a manner that's
- managed, coherent and appropriate for your firm How will globalisation affect law firm differentiation?
- Increasing operating risks for international law firms in different jurisdictions
- Examining international legal trends such as the emergence of Chinese firms and the growth of US firms and the impact on the London legal
- market in terms of market share, talent etc. Why have US firms been far more successful in building profitable businesses in London than the UK firms have been in building profitable businesses in New York? How can UK firms exploit the US egal market more?
- Are transatlantic mergers the next big thing?

James Philpott, director of strategy and corporate develo Andrew Cheung, general counsel - UKMEA, Dentons Moderator: Jenny Jones, consultant, Jomati Consultants lopment. Bird & Bird

STREAM 2 - Panel discussion

Producing actionable and reliable management information (MI) for partners and clients

- Incorporating the latest MI systems and data reporting tools Meeting client's expectations on MI; producing an analysis of what you do for the client
- Managing the MI requests from partners Providing regular actionable data to people so everyone knows what to do and when to do it
- Increasing collaboration between heads of support to produce the information and analysis required to drive firmwide change
- Changing lawyer mindset and behaviour to ensure action is taken beyond obtaining a report Aligning international metrics and data issues
- What are the metrics of the future for a changing legal practice? What should we be tracking, which metrics are the key measures?

Craig Stoehr, group general counsel, Thomas Cook Group Rod Harrington, chief administrative officer, Europe, Latham & Watkins Natalie Griffin, chief operating officer, commercial services, DWF Neil Renfrew, director of product management, LexisNexis Enterprise Solutions Moderator: Daniel Pollick, director of business infrastructure & CIO, DLA Piper

17.30 Chair's closing remarks

17.40 Networking drinks reception sponsored by Don't miss this opportunity to network and share experiences with your peers



with the relevant partners."

The plan as it stands is for Siler's results to go before the international management committee for consideration in 2015. "At the same time, we are working on some scoping documents that are transaction specific. We want to see whether we can make those more widely available, as budgeting and matter escalating is critical for our clients.

"Several clients expressed interest in being involved in the pilot. They have repeatedly told us they want transparency and the certainty of a cost model that clearly reflects value, and project management is pretty much part of their DNA. So our intention is to train all our lawyers to be able to speak the same language."

The Alternative Model Leader

Tim Bratton offers a perspective from the other side of two fences – the client's inhouse team and the new players that firms find themselves not only competing against but also collaborating with.

General counsel at the Financial Times for around 10 years, he had been a keen user of BLP's flexible Lawyers On Demand service as an alternative to recruitment. "The first time I used LOD it was because someone had left. We wanted someone who could slot in quickly and crack on with things while we looked for a permanent replacement." Bratton found he was completely comfortable having that lawyer in front of his internal clients, so began to use them regularly, both for temporary people gaps and a range of projects.

When the opportunity arose to join LOD as the model diversified, he jumped at the chance. As practice development director, his main responsibility is now communicating the value proposition of flexibility and scalability, articulating how the model has evolved and segmenting the prospective clients it should target.

He says: "Particularly interesting to me is the growth in buyers who don't have an immediate need, but want to plan resourcing as proactively as possible. They don't have the budget to grow, but know they may need to flex up for an unforeseen matter. If that happens, they want a relationship that can be switched on quickly."

Flexing further itself, in June last year LOD

"My input will be whether our projects can be slotted into a continuous programme of work. Are projects going to collide? Do we suddenly find we're asking for changes [that] will just be impractical?"

Barbara Mendler, managing director of strategic projects and operations, CMS Cameron McKenna

launched an 'On Call' service as an alternative to seconding. Instead of lawyers joining an in-house team at the office for a number of days a week, they are available remotely when needed. They may be distant geographically, or lawyering as part of a portfolio career. They can signal availability and interest in an assignment through an online tool without so much as a phone call. The lower overheads are reflected in the price – and it sounds remarkably like Axiom's model, as covered in

"This has really been driven by our law firm clients. Firms want to disaggregate, and have asked us to take a slice of a transaction and build a remote team to deliver it."

Tim Bratton, practice development director, Lawyers On Demand

Briefing, September 2014.

"This has really been driven by our law firm clients," Bratton says. "Firms want to disaggregate, and have asked us to take a slice of a transaction and build a remote team to deliver it. I think people often feel alternative legal is about competing with law firms – and of course there is an element of that – but I hope we've helped to prove that it can be as much about collaborating with them."

Over time, and working with BLP, Bratton says LOD has been able to engineer some reasonably set processes – due diligence tasks being the most obvious example.

"Of course, projects won't be identical, but there are elements of consistency that we effectively rehearse, so delivery gets more and more efficient over time."

The Strategic Projects Guru

Barbara Mendler, managing director of strategic projects and operations at CMS Cameron McKenna, is then evidence that project management is a strategic matter.

"The partners vote on a rolling three-year strategic plan, but all directors participate. My input will be whether our projects can be slotted into a continuous programme of work. Are projects going to collide? Do we suddenly find we're asking for five substantial changes from one group of people, which will just be impractical?" She also sits on a 'virtual innovation team' with the business development and HR directors to assess new ideas. "We've got a lot better at planning longer-term research and development spending, [not at the percentage of revenue of] a pharmaceutical company, but a percentage [we] believe is worthwhile to really investigate what's happening in our industry."

She arrived at the firm eight years ago with a background in film finance forged in LA (a CV including Die Hard 3, no less). She followed an employer back to his native Hungary when the Berlin Wall fell and he won major studio distribution rights, became his CFO, and started helping him build multiplex cinemas in eastern Europe. The Canadian law firm the company used later recruited her in the same capacity, and that firm was eventually folded into CMS.

Mendler brought the obvious benefit of experience in a key region for CMS. But her experience of sourcing finance, assembling complex loan agreements and project managing new cinema sites initially made her an obvious fit for modelling and negotiation on the firm's many merger projects - most recently with Scotland's Dundas & Wilson, creating greater choice as to where work is carried out and including a new lower-cost route for some of it. Today she runs a firmwide projects team that still manages mergers, but much more besides – office openings (Oman, Turkey and Dubai in recent years), specific marketing or HR projects, and sector alignment activity.

One of the most headline-grabbing projects on her watch has, of course, been the firm's outsourcing deal with Integreon, but she says her work is about providing clients "an integrated platform of opportunities".

"Integreon might be a preferred provider, but we will work with others if our clients want. Now we also have a 30-strong paralegal team in Scotland, so we will leverage that, for example, if a piece of work doesn't need heavy lawyering but needs a lot of attention to detail." Oh, and she also oversees one of the new breed of pricing teams that scope work to a client's budget. Mendler's remit is a wide one.

The Power Behind The Throne

Finally, as innovation makes the competitive landscape ever more complex, firms are also looking beyond legal to get a broader mix of faces in the boardroom.

Recruiter Edward Drummond reported in August that 24% of top 100 firms now have at least one non-executive director on the board

> "In media, one thing you're not short of is data, but law firms sometimes need to apply more modelling intelligence, interpreting diverse sources to back up or disprove statements of strategic intent."

> > Stella Beaumont, non-executive director, Nabarro

the firm is properly managed, with due regard to succession and risk mitigation, and participating in monthly board meetings. But increasingly there is also a strategic aspect.

"I am keen to see more emphasis on data and external viewpoints. In media, one thing you're not short of is data, but law firms sometimes need to apply more modelling intelligence, interpreting diverse sources to

back up or disprove statements of strategic intent."

She says one good thing about being a true outsider NED (a number of other firms have opted for former managing partners) is being able to ask the questions some may be afraid to. But Beaumont says firms ultimately need to be clear and honest with themselves about what they want from an NED – and then allow them to play that role freely.

"I hope I have constructively challenged aspects of strategy,

and calculated that those firms have grown
 by an average 12%, compared to 9% in firms
 without NEDs.

In April, Nabarro appointed former Guardian News & Media planning and strategy director Stella Beaumont as its first NED. She says her experience adjusting to rapid change in the publishing industry has been a key asset. She is providing input into evolving digital strategy at the firm, an area legal has only really "started to scratch the surface" of. But she is also sitting on strategy review groups considering issues such as international expansion.

"There seems to have been a bit of a shift in thinking about what makes you useful as an NED," she says. "Of course, there is ensuring but there is really no point in a firm saying they want that if the culture just won't allow it. You have to be realistic."

To find all this great – and different – talent, law firms need to cast their hiring nets a bit wider, which might feel challenging (especially to some partners). But the results of a broader view have brought the firms included in this issue of **Briefing** to an arguably more progressive future.

NEDs are just the most obvious example of law firms hiring people precisely because they won't necessarily agree with the way everything has been done to date. If you are serious about rewriting the rulebook, there is little point filling your ranks with people who are willing to conform to the old one

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Business Development Manager

Salary: Dependent upon experient

Location: Office/Field based in Surrey/Berkshire/ Hampshire and Sussex/Kent areas

About us

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Empowering the people

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Briefing Industry Interview Expert Expert Explore

Law firms need to look far and wide within industry to keep their future talent pools topped up to requirement, explains Ambition's Nicky Acuna Ocana

We've dedicated this issue of Briefing to a new breed of law firm business manager – project-focused and process-trained to help firms maximise their profitability. And who better to explain just who those people are than the people paid to find them?

One skill set increasingly important to have on board is pricing, says Nicky Acuna Ocana, director of professional services at boutique recruitment agency Ambition. "For some time larger firms, and now some mid-tier firms, have been bringing in pricing experts to provide more commercial focus. Lawyers sometimes even need to gain commitment and approval from them before they agree to reduce a client's rates."

Typically from an accountancy or analyst background, they are accustomed to assessing the maze of factors affecting overall profitability, and can judge whether a discounted or alternative fee can be justified.

"Historically, lawyers have often approached the end of a piece of work and suddenly thrown lots of people on board to force it through as quickly as possible," says Ocana. "Only then have they carried out more detailed analysis and found they haven't made as much money as they had thought. Many of the pricing experts just aren't allowing these things to happen now."

Pricing effectively also means being able to pass efficiency gains along the chain to the client – but another skill in high demand is communicating that value effectively in the midst of growing competition.

"There's a big increase in firms wanting to get proposal specialists on board," says Ocana. "Firms need the ability to drill past the pricing structure, into what a client is really looking for. Proposal documents must be designed as commercial selling tools. Historically, a lot of firms have traded on their names, but as everything's getting so much more competitive now, they need to think more innovatively about bidding."

But finding these people is challenging, as they won't necessarily have a legal background. For pricing and project management expertise, that means venturing into commerce and industry as well as the more obvious comfort zones of accountancy and consulting – while in the proposals arena firms are increasingly hiring people with a recruitment background to fill what is essentially a void.

"They really don't exist in the legal business development and marketing specialism," Ocana says. "Firms need to open up to exploring other areas. For example, technology and telecommunications businesses can also have parallels in terms of pricing and being more structured in their marketing."

She suggests that HR departments engage a recruitment agency with access to candidates representing a breadth of sectors to find the perfect fit.

The other lesson firms could learn is to forward plan as much as possible, anticipating needs in advance and investing in training and upskilling at an earlier stage. "Some sectors do a lot of talent pooling – running regular intakes of a group of candidates they have targeted in an area," Nicky explains. "Then they already have the succession plan in place in the event someone leaves. There's less risk of having nobody primed.

"We know that when skill vacancies come up, law firms sometimes struggle, and it can take six months to get somebody on board. By then you are behind the curve. If agencies are already looking at these new people and identifying hot candidates, you can almost recruit them in advance."

Find out more about **Ambition**



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Briefing Industry Interview

Creating engagement

The period between offering a strong candidate a job and their first day in the office should be usefully filled, says Dee Caporali of Access Group

Recruitment can often be a rather dry and daunting affair – most likely for those on both sides of the interview table. But a number of law firms are now seizing on Generation Y's appetite for online engagement to reach out to candidates more proactively, create useful connections, and even differentiate themselves as an employer brand. Firms are unlikely to stop using recruiters entirely, but they can certainly compliment these search efforts with their own social media activity, says Dee Caporali, sales director at Access Group. When looking for the perfect fit for a newly created or hard-to-fill role, it also makes sense to use every channel at your disposal.

"You can alert potential candidates to

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roles through social media, and at the same time make the application process more attractive," says Caporali. "They can request more information and apply with a click, and perhaps upload basic data directly from their LinkedIn account."

They can also be alerted to future roles that suit their experience – which may bring them back to you if you've made a good impression. "A more interactive process is more engaging for the candidate, and at the same time you're building yourself a pool of potential talent," says Caporali.

The most forward-thinking are even taking advantage of the blurring lines between work and personal lives, she says. HR departments will encourage employees to share jobs on Twitter or Facebook, thereby tapping into their personal networks. "When a candidate has happily accepted a new offer it is the perfect opportunity to kickstart a continuous process of engagement," says Caporali – and again, this can be usefully underpinned by technology.

"They could read biographies of their new colleagues, read some preliminary notes or look at an interactive organisation chart. There might even be a welcome video from the

> "When a candidate has happily accepted a new offer it is the perfect opportunity to kickstart a continuous process of engagement."

All on board?

But all too often recruitment can be seen as a process that ends the moment a candidate says yes to your offer, says Caporali.

"The number of failed hires is staggering," she says. "Often people decide to leave in their first 30 days – and sometimes they won't arrive. In a highly competitive climate, you could even find your recruit has heard from a firm down the road with a more attractive offer.

"Recruitment is expensive – agency fees, lost productivity and time recruiting and training, which is wasted if the investment isn't repaid."

All of which is not to mention that it just makes business sense to have some contact with your new hire in the interim before arriving. If they are new to a law firm environment you can help make them feel more comfortable, and they can even do some preparatory work to make them more productive from day one. managing partner."

This is in addition to some form of 'self service' onboarding – an employee portal where candidates can access relevant documents, request any holiday, and possibly book times for their own in-person induction training before setting foot in the door.

The idea is to create a smooth and appealing experience from the second a candidate has been attracted to the role you are filling. Regular contact points, with useful and friendly content, helps them to feel they are part of the team before they have arrived.

Learn more about Access www.theaccessgroup.com



Briefing Industry Interview Roce I Book Strategy Strategy

Some firms are successfully turning talent acquisition and management on its head, says Totum's Debbie Gray - but only if they first turn words into action

A combination of massive market change and urgent economic crisis over the past five years has created a world where UK law firms are increasingly alert to how they could, and need to, make themselves more competitive. From the range of alternative fees to outsourcing options, boards are not just building notions of regular analysis and continuous improvement into their processes; they are embedding them within their cultures.

"Firms are recognising a need for people in their ranks who challenge, or even disrupt, the norm," says Totum's Debbie Gray. "With the legal landscape changing so much, it's about acquiring knowledge of how to run a business more like a corporate than a traditional partnership, and keeping a better eye on the numbers and using that management information more effectively to plan ahead."

This certainly supports **Briefing**'s own research. Firms are looking for people with project and process management experience in particular – people to spot the opportunities that create a more efficient organisation.

Or at least that's what they say. But some firms just aren't being "brave enough" to invest in the recruitment of such talent strategically, says Gray. "Law firms can be uncomfortable recruiting people without legal sector knowledge, but they really need to look outside the sector in earnest now."

An option for the cautious is to trial hire first – and she cites Baker & McKenzie as an example of this route. "Some firms have recruited people on an interim basis, trialling a role in a part of the business. Other practice areas then decide they want it too.

"Some of the most innovative firms are even picking up talented individuals and trying to create a role around them, rather than the other way around. They might not fit a role actively being recruited, but the firm wants that talent available somewhere in the business. That can't happen in every case, but talented individuals will do a lot more for your business than someone shoehorned into a role they're not quite right for."

Totum is recruiting more business manager roles with a project management focus too – and firms are increasingly looking to appoint someone whose business background matches the sector in question – perhaps from an insurance company or media group, for example. These candidates won't typically have a law firm on their CV already, but they will often jump at the chance to make their mark at one. "The legal sector is quite attractive at the moment," says Gray. "As a profession going through lots of change, people will see it as a challenge and an opportunity."

But she says firms will definitely need to cast the net a lot wider to secure the ideal candidate – and quite possibly ditch certain assumptions about what makes a career history attractive. Strong candidates might have a lot more jobs listed, for example, as many careers are much more fluid now. "It may be very valuable to their careers for people with these skills to gain experience in a range of environments," she says.

It's important, therefore, to take steps to challenge the management mindset if necessary. "A firm may say they want something, but when the person they are presented with isn't versed enough in 'legal', the default position can be to doubt they were right," says Gray.

In short, firms need to have the courage of their initial convictions. If they want a different outcome, they need to embrace different perspectives.





Briefing Industry Interview

Intuitive Clean Sappey of DocsCorp tells

Briefing about a people-focused revolution in legal software, what that's doing for user engagement – and why consumer-friendly tech is taking over

Legal businesses know that better client service needs better information management. How firms handle information and deliver it to clients is at the heart of service innovation and differentiation, and technology is its life blood. But behind the technology is something perhaps more important: getting people to use the tools they are given. The way for firms to achieve this may be easier than they realise – in fact, it may be staring them in the face. Poor usability is one of the greatest barriers to getting people engaged in using software, and ultimately getting value from it. Legal professionals now benefit from familiar, consumer-style technologies that feed directly through to client value. Software and the processes it runs need to be seamless, ie. become 'invisible' to the user, allowing them to focus on the task rather than grapple with how a company wants them to work.

"Software designers have made similar

mistakes, historically," says Dean Sappey, president and co-founder of document management and productivity specialist DocsCorp. "Software companies designed the interfaces for their software without thinking about the end user experience." But that's no longer the case, he says. DocsCorp, for example, has just finished a three-year rethink on how people want to use and interact with legal technology. "Now it's more focused on the software being familiar and intuitive so that users can be efficient at work, and ultimately more productive," Sappey explains.

Too many law firms buy software that never gets implemented because people won't use it. Sappey says everything DocsCorp does is now aimed at "helping firms avoid this scenario." "We've built our products on the Microsoft Office 2013 model because the look and feel is immediately recognisable and universally familiar. People can install the product and use it intuitively. This reduces the learning curve and gets people using the technology much faster," he says.

"We're probably one of the first in the legal space to have adopted this intuitive design philosophy. We are getting really positive feedback on our design approach from law firms who would have previously spent an enormous amount of money on technology while getting very little in return because it was too complicated to use."

Building on these foundations, he says, firms can work more closely with their clients and more closely with the way they work – particularly as we move more towards project-style working. "Now, when so much information is being communicated on larger projects, it's essential you're able to do that more efficiently and at greater speeds." The upshot of a more consumer-friendly interface on technology is improved productivity and efficiency as well as quality, says Sappey. "The end product you deliver to clients is thus perceived to be much higher value."

"A client judges a law firm on the final product, not on the complex processes and workflows that went into producing it. They don't see them and nor should they. Instead, a product that is produced and presented in a professional, easy-to-understand way will enhance a firm's reputation as well as increase the value perception."

Legal is moving on in more ways than one. Content management is going mobile so the project isn't confined to the office, says Sappey. Doing that securely isn't a problem with the right process and software, he says.

"A big change for fee earners is working on the move, which delivers more immediacy to clients. This is something that clients are increasingly demanding as they too become more mobile."

But firms have to recognise the limitations of mobile technology in its current form and optimise ways of working with what's available. "The right technology for the right time is important. There isn't one perfect device for everything – and there may never be – but if firms can develop the best ways of working with the best tools they have available to them, their clients will see their service in a whole new light."

This is a glimpse of a future legal industry that can, like its technology, deliver a valuedriven, client-focused service that delivers value to both client and firm alike – simply by making IT easier to use.

Learn more about
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Briefing Industry Interview

Securing an edge

Quentyn Taylor from Canon talks turning information security into competitive advantage – and how that will bring firms closer to clients

Stronger client relations mean better business – and through innovation, legal businesses are forging closer ties. Firms are seeing that a better understanding of how clients work can create value and real competitive advantage. One area where that's happening is information security – an area long seen only as a cost, rather than an opportunity.

How firms handle confidential and client information has always been central to best practice, but with the digital revolution has come greater vulnerability. Now, as clients also seek to improve their data defences and processes, forward-thinking firms have a unique opportunity to collaborate, using information security as a differentiator, and one that will bring them closer to their clients.

Solid cyber security can be a client value-add, says Quentyn Taylor, director of information security at Canon – and one that can bind firms to client ways of working. "Client security teams don't often have the opportunity to say 'yes,' but they do have a lot of opportunity to say 'no.' And those client teams can clearly identify those firms making it easier for them to work together." Rather than giving clients' security people a reason to foresee a problem, he says, firms need to treat information security as a way to grow the relationship.

There can be numerous benefits as firms hone in on their processes to get more efficient, says Taylor. "That means not just making sure your security is the best it ever could be, but also understanding the way in which you interact with clients and understand their needs."

Firms can meet and exceed client expectations by collaborating on the best approach, he says, making firms the catalyst for new and better security solutions. "Being proactive in information security gives firms a stronger grounding in the eyes of their clients. Customer data is your client's lifeblood, and it's no different for firms. It's what revenue depends on."

When it comes to working with larger corporate clients, for example, firms must meet a range of specific data requirements. To win that work, data needs to be demonstrably secure. Taylor says rather than waiting to be quizzed on how you're storing data type X or Y, firms should offer that level of detail upfront.

"Legal businesses need to be at a point where they can explain to potential clients what they're doing and how what they're doing makes the data better secured.

"If firms do talk to the client's security team, making sure it's a meeting of equals and being confident they have ticked all the boxes allows them to move on and find other areas to work on." That's where any kind of services firm wants to reach, says Taylor, "because that's right at the competitive edge and growing the relationship".

Information security should take its place as part of the normal armoury in achieving strategic objectives. But, he says, businesses need to stay on top of shifting regulations and pay close attention to the details. "The law is changing with respect to privacy and potentially around mandatory security controls and data breach notifications. Client conversations should reflect that. It's down to firms to shape their position – and to verify that it's the best for the business."

Security is a concern for legal businesses moving data to the cloud and for those considering software as a service. But Taylor doesn't subscribe to the opinion that "the world is falling down". "It's a very easy position to take – that everything is worse than it was last year. While there are more concerns and considerations, it's plain to see what the risks are.

"It's easy for firms to ignore the real business benefits of moving data into the cloud. It may seem a lot of work at first, but offsetting the risks once you nail down the contracts, exit clauses and location of data can provide huge benefits around flexibility and cost."

Those benefits are mounting as cloud solutions become more intuitive and userfriendly. There's little difference now between enterprise cloud services and what people are more used to working on outside of work, through Google and Microsoft, in all areas of legal, says Taylor.

"The boundaries between enterprise and consumer cloud services have almost disappeared. People expect the same high quality, no matter what they're using."

The advantages far outweigh the problems firms can face, says Taylor. And as leveraging everything at firms' fingertips becomes crucial to a more flexible, effective and efficient service, information security may be a very safe bet for delivering on value.

Learn more about **Canon** www.canon.co.uk

