

SHAKE, DO AND MEND Everything was change at Briefing Transformation conference 2018 SELECTION KNOCKS Procurement and project management at work as one for Ince & Co FOLLOW THE FOUR Pinnacle sticks its stake in the ground on combining powers



## Leadership shapes

From artificial intelligence to the multigenerational workforce, which forces are exerting most pressure on today's legal business leader?

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## Editor's letter



eadership is always one of the trickiest strategic subjects to be objective about in **Briefing**. While you can have some processes and policies around it I'm sure, unlike its natural partner in business progress – management – there are aspects of the job that seem quite a lot harder to pin down. How do you put together a business case for building a vision and uniting your

a business case for building a vision and uniting your workforce? You'd probably say it's just blindingly obvious that it needs to be done – and quickly – but at what cost exactly?

My dad would probably disagree with them, but some say that's also harder 'these days'. The arrival of a generation with different personal drivers and expectations – while that discussion inevitably involves a degree of generalisation –

How do you put together a business case for building a vision and uniting your workforce? You'd probably say it's just blindingly obvious that it needs to be done – and quickly cannot be ignored. Helpfully, they've also come along at the same time as pretty fundamental questions and debate about the future of professional services, choices galore about which functions or services to 'AI' or appify (and when), and just why for all these impressive advances in technology we're still stuck (in the UK at least) with a 'productivity puzzle'. They probably ought to get in some of those data scientists for that last one, right? I'm

sure that takes no time at all to sort out ...

In this issue, we ask a handful of leaders from firms of different sizes (and one who teaches leadership) about where they see the big shifts and pressures in the field.

Elsewhere, we've a lot on the subject of leadership through business change journeys in particular. We pick out personal highlights from our recent **Briefing** Transformation conference, we've a 'hands on' piece on the potential role of procurement in project leadership, and our super issue sponsors Pinnacle and Allied Irish Bank provide very welcome perspectives from the worlds of technology change and financing that change respectively.

Whether you're new to a big role yourself, whether your world is changing before your very eyes, or even if you're looking to step down some time soon, I hope we've got something for the great leader in you.

#### RICHARD BRENT EDITOR



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Constructive conversation

The art of smart collaboration towered high on the agenda at Briefing Transformation 2018



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#### ROUNDUP

## **Consult and result**

n the last issue of **Briefing**, we covered law firms launching new service lines. Happily, that coincided with another flurry making such moves.

Take HFW for example. HFW Consulting has just launched with a broad offering indeed, encompassing talent management, training and assessment design, team building and executive coaching, as well as organisational development, cybersecurity, risk and PR. It's all being led by director of learning and development at the firm

## \( )( )|

#### Ring-fenced investment fund for TLT's Future Law initiative, for rapid testing and scoping of ideas

Chris O'Callaghan, who said in the press release: "We have been providing ad hoc consulting services to several clients for more than a year, so thought it was time to formalise our offering.

"We will always help clients wherever and in whatever way they require, but we recognise that the consulting market in Europe and North America is already very mature and competitive. We see greater opportunity in the Middle East, Asia and Australia, where we think adding consulting services to our strong legal practices in those markets gives us a unique proposition."

Back in September 2018, TLT hired Stuart Murray, former director of regulatory affairs at BT Consumer, to launch it a new service that helped digital businesses prepare for challenges in areas such as public policy, government affairs, regulatory finance and disputes.

Murray said: "This is a new service for companies in highly regulated sectors like telecoms. While some enterprises have access to high-quality public policy and regulatory affairs consultancy in-house, others need to look

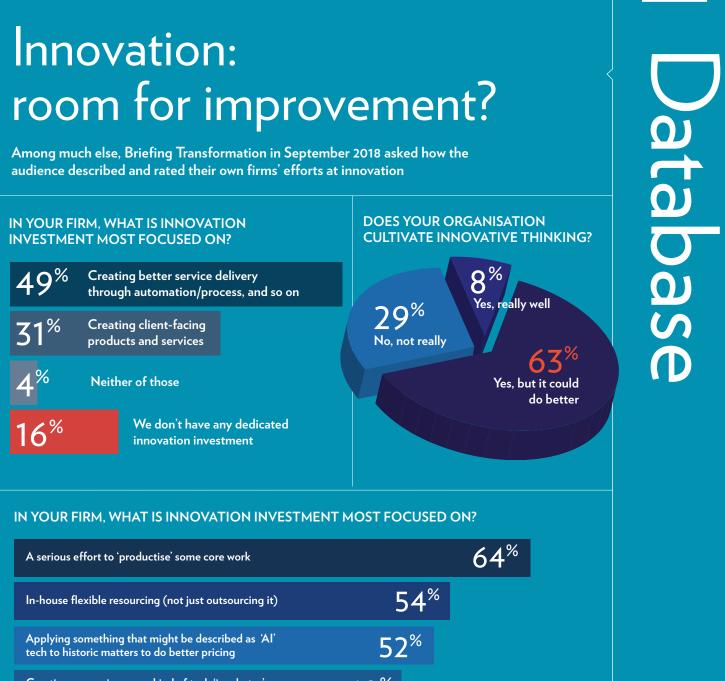
externally for a breadth of affordable professional services in order to compete. By curating this pool of specialist and complementary expertise, we are giving clients an opportunity to better influence policy makers and regulators, and anticipate and commercially react to new legislation.

James Touzel, TLT head of digital, added: "The role of law firms and lawyers is changing and we are working hard to proactively recognise the challenges they face and develop the right solutions to address those needs - using our existing resources or bringing in new skills and technologies."

It has been a busy strategic month for TLT, which also announced the ring-fencing of a £500,000 innovation investment fund as part of its 'Future Law initiative'. Touzel is in charge of that one too. "Transforming how we approach and solve the challenges our clients face is not a new thing at TLT," he said. "What is new is the speed at which we now want to evolve our services and the approach and financing that we have put in place to drive that forwards."

In other news ... some things in the legal sector really are like those bright red buses, aren't they? **Cripps** announced it was merging with **Pemberton Greenish**, boosting the presence of both in London in particular (and coverage of commercial, real estate and private wealth work). But the legal thunder was promptly stolen by Gordon Dadds Group plc, with confirmation of its eve-popping acquisition of Ince & Co, including international LLP.

With aggregated revenue of over £110m, Ince Gordon Dadds as it will then be known will officially become the UK's largest listed law firm by revenue. HQ will be the existing agile-friendly Ince office in Aldgate Tower, London - while the managing partner and CEO job goes to Adrian Biles of Gordon Dadds, supported by Ince's chairman Peter Rogan. The latter enthused: "I'm proud that the Ince name will continue and am very excited to be moving forward together as part of this innovative new structure, with access to new capital allowing us to gain greater competitive advantage in the market."



A serious effort to 'productise' some core work		64%
In-house flexible resourcing (not just outsourcing it)	54 <sup>%</sup>	
Applying something that might be described as 'Al' tech to historic matters to do better pricing	<b>52</b> %	
Creating or running some kind of tech 'incubator', even just for internal projects	<b>48</b> %	
Creating a project management and pricing team, with a dedicated leader	<b>44</b> <sup>%</sup>	
Shifting some fee earners to 'legal engineer' $36^{\%}$ or other legal tech roles		
Large-scale digitisation $34^{\%}$		



Turn to p18 for more of a lowdown on the day's key sessions and learnings. Our next full-day conference is Briefing Strategic Leaders on 5 March 2019. Book now www.briefing.co.uk/events/ briefing-strategic-leaders-2019

Source: Audience polled at Briefing Transformation on 20 September 2018 (range of business services roles, 50 responses)





### WHAT'S ON YOUR WHITEBOARD?



Christina Blacklaws, president of the Law Society, gets down to business, outlining where top law firms most need support, and how they should help to foster better inclusivity and wellbeing themselves

What have you learned throughout your career that aids your role as president? Previous experience informs how you approach a new role. I've been fortunate in that I have a career where I've done a bit of everything in legal – I was a case lawyer, higher rights advocate, mediator, chief operating officer and director of innovation, and I've worked in the business of law throughout. I've also had experience setting up one of the first virtual law firms and the first ABS, the Co-op Legal Servces. I know how hard it can be to set change in motion from my time as COO and leading strategic change management in a large firm.

What's the thinking behind Barclays Eagle Labs? l'm a passionate believer in consensus and bringing people together. It's particularly important to build conversations and ideas around something that's new and challenging, such as disruptive technologies. As a membership body, the Law Society needs to focus on the practical support it can give to members, hence our relationship with Barclays EagleLabs. We need to demystify lawtech for the profession, so that everyone can make informed decisions about their careers and their businesses, and be better equipped to advise their clients. It's the convening power of the Law Society that's really relevant here. It's

so easy for different organisations to be spinning around the same orbit, doing the same things for their own organisations, in isolation. But if we can come together and ensure the work we're doing is aligned, we can achieve much more.

#### How could firms get more involved with diversity and inclusion initiatives?

A big priority for the Law A Society is to ensure we level the playing field for all. The last 30 years have seen a predominantly female talent pipeline, and yet we see under 15% ownership in most large law firms. We need to understand why, so we've conducted the largest ever global survey on women in law, and have hosted over 160 roundtables for women both domestically and internationally. We're also now holding men's roundtables to discuss diversity and identify male champions for change. We hope they will make commitments about what they as individuals, and within their businesses, will do to bring about gender equality.

#### What is one area that the legal sector is particularly behind the curve?

A People in the legal sector are finally recognising the need to be mindful and aware of mental health. Training for line managers in recognising indicators, and supporting those experiencing

difficulties, is helpful - as is clear signposting of how all workers can get support elsewhere. The Law Society supports Law Care, which promotes and supports good mental health and wellbeing in the legal community. There are good business reasons for building a culture that recognises the importance of good mental health. Those that can see work-life balance is valued are not only happier, and therefore more productive, they're much more likely to stay. And although it's less of a gender issue and more of a social one, I believe it's particularly helpful for men to see other men take time off for family duties and personal mental health. This of course benefits women as well.

#### What big things do you see in store for top 100 law firms in 2019?

Brexit will affect all our members and their clients in one way or another. The stakes are particularly high for firms that work for clients in Europe. We're working with government to represent the profession, and will provide support and information for the sector once a deal is agreed. There are also other regulatory consultations where decisions are pending, from proposals to create two tiers of solicitors to others seeking to reduce minimum professional indemnity cover - both of which we've opposed in the interests of client protection.



Damien Behan IT director Brodies

오 @damienbehan

#### SPEAK UP

## Redesigner clothing

nmovate or die! Disrupt, or be disrupted! The language of Silicon Valley has permeated the business world, and 'innovation' seems to be the latest buzzword for the legal sector. But does innovation necessitate the disruption of all that's gone before?

Law firms have always had to innovate and evolve to survive. In spite of the old saw that lawyers are stuck in the past and resistant to change, the legal sector has gone through huge changes in the last 30 years, and it continues to roll with the punches. But that may be seen as reacting to change rather than actively pursuing it. The current focus on innovation is about shaping the law firm of the future to withstand the slings and arrows of a rapidly changing business environment.

We're accustomed to thinking of innovation as being 'disruptive' (think Uber or Amazon), with technology being used to upend traditional business models and blast the legacy providers out of the water. But while there are certainly those who are focusing on disrupting legal services, improved ways of working don't

Moonshots are exciting, and when they succeed they do so dramatically. They are potentially game changing. But they are also expensive when they fail, and may distract from the job at hand necessarily need to be disruptive. They can also complement and enhance what lawyers do best. In fact, 'sustaining' rather than disruptive, innovation is crucial to ensure businesses change to meet the needs of the modern business world.

At its most basic, innovation is doing something in a new way that provides some sort of value. It doesn't have to mean creating a completely new product or service – it may just mean redesigning an internal process to save time. It may be something that clients can see – whether in terms of faster delivery or improved service – or it may improve efficiency, reduce bottlenecks or remove obstacles internally from the daily working lives of lawyers. Fundamentally, it can, and should, be about identifying problems or challenges and then finding solutions to them.

Moonshots are exciting, and when they succeed they do so dramatically. They are potentially game changing. But they are also expensive when they fail, and may distract from the job at hand. With limited time and resources, firms need to focus on achievable wins that will drive efficiencies in the firm, provide value to clients and support the firm's strategy. The answer might not be something revolutionary or expensive, or even based on new technology. It may just mean using the tools already at our disposal in a more effective way.



SPEAK UP

### The seasons alter

B uzzwords come and go so frequently we often don't even recognise their demise. Remember when big data was all the rage? Yeah ... me neither. Or how about SaaS ? That seems to have morphed into the cloud ... which I'm sure will be a foggy memory before long too. Personally, I'm anxiously awaiting the death of 'innovation' – one of the most overused but least understood concepts of recent years.

But there's one buzzword that has continued – and I predict will continue to continue – to stand the test of time. Living up to the age-old axiom is our good friend 'change'. As in the only constant is ...

Change management, leading through change, change champion, change ready, organisational change: there are all sorts of variations on the core concept, with job titles, conferences, publications, graduate degrees and entire industry offshoots devoted to change.

"Change is hard," we are regularly told by the experts..

"It doesn't matter how good the technology is – if you don't have the right change management strategy in place," is something I have told many a client myself.

We utter these change aphorisms all the time. None of them are groundbreaking. Everyone believes them already. But still: Change. Is. Hard.

As Woodrow Wilson allegedly once said: "If you want to make enemies, try to change something."

I'm in the business of change. 3E, our flagship practice management product, is something most of our clients implement when replacing a legacy system that has been in place for 15, 20, sometimes even more than 25 years. There are always employees at our clients who have been looking at – and using – those same screens for more than 25 years. Do you think they are remotely excited by the prospect of new screens, new processes, and new ways of doing things? And no matter how perfect the implementation – on time, on budget, no major issues, tons of efficiencies and new capabilities realised – at best there will always be some residual grumblings along the lines of 'I hate the new system'.

Have any of you ever had to lead or be one of the change champions of an office move? Wow. Talk about bringing out the most primal, least evolved emotions and behaviours that our fine species has to offer, usually buried deep inside.

And yet, time after time, in spite of the fact that we all go through so many different types of changes in both our business and personal lives, we never quite master the next change without some level of trepidation or resistance.

I'm writing this just as the seasons are changing – leaves are turning, days are getting shorter and crisper. Even this most basic, regular and familiar change brings with it those feelings of trepidation (I'm dreading the day when the clocks turn back an hour!) and resistance (I refuse to start wearing my overcoat yet!).

So, what have all these musings led me to conclude? Nothing new, I'm afraid: that would involve some change. I have, however, finally decided what I should get as a tattoo, emblazoned on my chest – and which I will take to my grave: It's not the technology – it's the change management!



Patrick Hurley Vice president, customer advocacy Thomson Reuters Elite

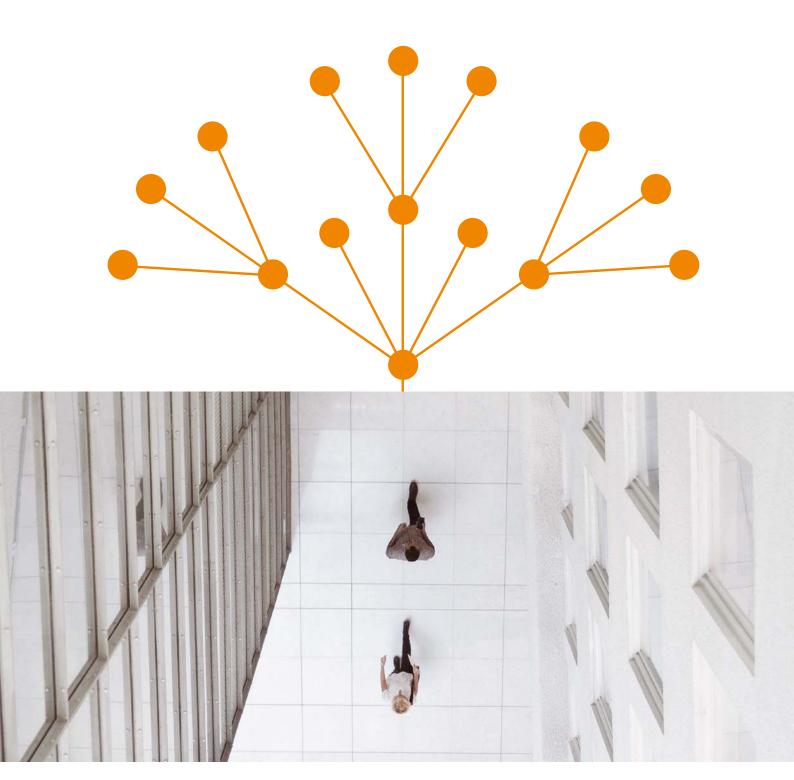
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No matter how perfect the implementation – on time, on budget, no major issues, tons of efficiencies and new capabilities realised – at best there will always be some residual grumblings along the lines of 'I hate the new system'

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*Leading edges* We know that the world of work is changing. Does that change what's required for your leader to work? 18

*Event report* Collaboration powered the engines of innovation humming at **Briefing** Transformation 2018

#### **THE BIG IDEA**

## Leading edges

A lot is written about the impact of a generation of millennials on traditional professions and workplaces like legal. But are business leaders really changing their ways in response? By Richard Brent

n October 2018, some nine leading law firms joined banks in signing up to a new 'Mindful Business Charter' – pledging them to a set of principles that include taking steps to improve communication, respect the requirement for rest periods, and being appropriately 'mindful' of pressure when delegating tasks. Of course, it's all connected to the idea of wellbeing at work receiving greater recognition – important for individual health, but also increasingly recognised as building a more

Emma Mamo, head of workplace wellbeing at charity Mind – also backing the initiative – said: "Things like long working hours, excessive workload and challenging relationships with colleagues and clients come up time and time again as sources of stress that could be reduced.

productive business in the long run.

"Those that put in place measures such as flexible working hours, generous annual leave, subsidised exercise classes and regular catch-ups with colleagues will see greater staff morale, productivity and reduced sickness absence."

Some would probably say not before time – and yet greater consideration of mental health is just one way the above examples demonstrate how the dial on what matters at work has moved. Flexible – or 'agile' – working arrangements are also a tool that can be deployed to help tackle the diversity of talent developing through your business. Offices are more social environments, for better or worse. And investing in new forms or styles of communication isn't just a possible route to lower stress levels – it may also be the difference between keeping talented people relatively happy and accidentally sending them packing.

#### Leading factors

It's almost impossible for a business leader today not to factor the challenges of such changes into the way they operate.

Marco Bolognini, president of the international legal network Globalaw (and a partner at MAOI), says: "A new generation of lawyers is looking for a working environment that places the right emphasis on so-called 'softer' skills. It's no longer about being an aggressive, tough lawyer, or even just having the strongest legal skills. There are other qualities you need."

Clint Evans, until recently director of brand and talent at law firm RPC, explains: "It's certainly incumbent on today's leaders to avoid getting caught in a time-trap. They need to be sufficiently aware that they don't forever assume that 'this is how people are, this is how they want to work'."

However, he points out that it's not quite as simple as saying that the 'millennials', or the emerging talent of the future, have all their needs met, whatever that constitutes. Leaders can "over-invest" energy in all sorts of things to the detriment of efficiency, even relationship-building.

"It's important to engage fully with talent, of course," says Evans. "However, if people intend only to stay at the business for a year or two, even that's worth embracing – but the people management needs to be fairly transactional.

"Another challenge is that you still need to allow for some separation of people in their working lives and beyond their working lives – even when it comes to mental health. Employees will choose what they disclose and what they bring to work or not. At the same time as being aware and promoting a safe and open working environment, managers and leaders have to allow their people to



draw that privacy line for themselves."

#### **Change of directions**

Then there's any friction between those muchanalysed multiple generations at work. Although differences can be overstated, it may well be a source of annoyance for the senior business manager supporting a top-billing partner that their team is no longer ready for action at all hours. Frustration feeds stress further. Evans continues: "The mindset of some of my own generation could remain they have essentially signed a contract to be a workaholic. Firms' investments in communication really need to consider the stress points and triggers of each generational group, in so far as such groups can be distinguished."

Bolognini adds: "One soft skill of the future is definitely practising empathy – understanding different situations, understanding that mistakes perhaps can occur – albeit managing that in a professional way, with appropriate limits."

One firm initiative to gain some traction in

recent years is 'reverse mentoring' – bringing a senior figure together with somebody more junior in the organisation to foster more flow of understanding in both directions. Of course, that's not necessarily borne of any great intergenerational anger – but it's clear firms are embracing the idea that a little more (structured) conversation may be good for them.

Eversheds Sutherland introduced reverse mentoring for its executive team – partners and business services – in May 2018. CEO Lee Ranson says: "One thing that's increasingly important for a leader today is to accept feedback that isn't necessarily validation of what you're doing. We can all find that a difficult process, but taking constructive criticism onboard, and amending behaviours – or the business where appropriate – makes you more effective."

He says there have also been some immediate business benefits – for example, insight into how nuances of a new policy or process (perhaps even reverse mentoring itself) are understood by people whose lives are in a very different place. Ranson says: "One of the most interesting things has been testing for any difference between how the senior team thinks an idea is conveyed, and how it's really received. We are getting much more exposure to different viewpoints, and can take steps to clarify any expectations or address concerns."

It's also important, he says, that reverse mentoring is connected to diversity and inclusion strategy. Several reverse mentors are from the firm's networks, such as LGBT+ and BAME. "Exposure to a breadth of perspectives and thought processes isn't only helpful to the business, it's absolutely essential," he says. For that reason, the 90-minute to two-hour sessions (three spread over six months, initially) are also relatively structured, with current workload and longerterm strategy both up for discussion, alongside that matter of generational buy-in to ideas.

"We've also ensured that points of interest and feedback are a standing item on the executive agenda, so we have a fixed time to discuss the learnings and implications as a senior group."

And at Kingsley Napley – top-ranked law firm in the 2018 Sunday Times 100 Best Companies to Work For list (15th overall, and 13th for 'leadership') – managing partner Linda Woolley has overseen a number of initiatives to increase operational transparency.

"Unless there's a really big reason not to, my general principle is to share everything about the business, including any disappointment," she says. "We trust people with client information, so why not with firm information?" For example, any employee can log into a portal for a monthly summary of the firm's financial performance – "utilisation, work value, billing, recovery and cash collection against budget."

There's also a firm AGM, which effectively closes the entire business for an afternoon. "If anyone say they're too busy to come, I cajole and tell them to prioritise it over other commitments," says Woolley, "And I make a point of delivering any difficult messages there in person."

More recently, special 'interest groups' in the firm have also formed their own committees, and Woolley makes time to meet separately with both the committee and the group they represent. Everyone is allocated to a group on joining and, as at Eversheds, the process is designed with efficiently structured (but frank) dialogue in mind.

Woolley continues: "A junior finance role

#### "Exposure to a breadth of perspectives and thought processes isn't only helpful to the business, it's absolutely essential."

#### Lee Ranson, CEO, Eversheds Sutherland

obviously has a very different relationship with the firm from that of our FD, but we try not to divide purely along hierarchical lines. And outcomes from the committee meeting tend to inform my conversation with the wider group.

"It's a policy that requires quite a lot of trust to be effective though. They trust me enough to ask me questions and challenge me, and I trust them to be constructive as well as open."

In future, more such engaged management conversations at work could also be underpinned by a rapidly growing collection of data, says Amir Qureshi, CEO of Thomas International, a global provider of people and psychometric assessment tools. "Instead of being isolated, through the addition of psychometrics, a manager might look at his or her management dashboard and assess not just workload and performance, but also the compatibility of colleagues starting on a piece of work. They will have the insights to be able to step into a potentially challenging situation, where workers are perhaps not getting on."

And 'emotional intelligence' could literally become a management tool. "We have millions of records about the emotional behaviour of different types of people. Allowing managers to use it to make better decisions and develop stronger skillsets has to be a good thing. It's a mantra for me that you should empower people to be who they are at work – you get more and better things out of them in return. But in another 10 years, advances in AI and biometrics will be at a point where a manager could automatically gauge an employee's state of mind on any given day."

#### Powers that be

Back to 2018, and Clint Evans has noticed business leadership moving more toward his own preferred "collaborative, coaching style". However, he says leaders are now also more likely to need to shift styles to fit the specific business scenario. "A decade ago, you'd often see the leadership style preferred by the individual applied in almost all their circumstances; if they were a collaborator, they'd always be collaborative.

"Today, flexibility is key – you need it. Reaching fast decisions, in a direct, even authoritarian style, can be appropriate if it suits the situation. If you need really fresh thinking or higher creativity, and perhaps there's more shared investment in the outcome, that calls for something more collaborative to take place."

A topical example where the former might prevail is navigating the maze of options surrounding artificial intelligence, he says. "The paths for leaders on questions of technology used to be a lot clearer. Today you have to invest in understanding so many more developments, but that means there are times where you also need to close conversations down sooner than you would have done, on the grounds of saving time as well as money. It can sound counterintuitive when everyone's saying, 'here's the future of work', but it's areas like that where, at times, you may want less group exploration – or 'shared leadership'."

However, it's very important leaders take the time to understand the extent to which they share power with other powerful people. In her 2017 book Leading Professionals: Power, Politics and Prima Donnas, Professor Laura Empson of Cass Business School draws attention to the complex 'leadership constellations' at play in professional services firms – the manner in which all sorts of relationships weaving through can ultimately lead to a good or bad decision (and of course, affect your level of personal success as a leader).

"Don't simply take the formal leadership structure at face value," she says. "Natural inclination is to focus on the operation of committees, the remits of roles, but there's also a shadow informal structure behind the scenes."

In this context, new leaders, or those transitioning to a new role, should perhaps actually

#### "Don't simply take the formal leadership structure at face value ... Begin to ask questions."

Professor Laura Empson, professor in the management of professional services firms, Cass Business School behave a bit more like journalists. "Begin to ask questions, and triangulate your observations," advises Professor Empson. "Don't focus solely on the decisions taken, but really seek to understand from people how they've been reached, and sense-check your findings with others. Try to trace some decision-making processes."

If a 'shadow' network sounds a touch unsettling, it isn't necessarily, says Empson. "Wherever you have extensive autonomy co-existing with contingent authority – like a partnership – you will have politics. If you don't want politics, you need much clearer lines of control, but the risk is lawyers experience that as overly bureaucratic. And actually, the 'social embeddedness' of a group who have informally learned the rules of the game over some time forms an organisational glue."

It can pose more of a problem for any "outsiders" in your structure though, however that word is defined, she says – potentially lateral hires, or people in practices or offices a long way from the centre of power. "Business services leaders are more often lateral hires than other players in a partnership's leadership constellation. It's also incredibly important you have a coherent and collaborative business services group, but it mustn't become cut off from the partner group."

Moreover, investment in relationships and alliances is needed at all seniorities. "Certainly, don't assume the strong support of a managing or senior partner is enough on its own. Especially where you're attempting to innovate – as business services often do – it helps to have understanding and support at all levels."

However, Woolley at Kingsley Napley says: "There's much less 'them and us' in firms today anyway – partly because what it means to be a lawyer is so different. We're all concerned with applying the power of process and technology to advising clients more efficiently and profitably, which needs much greater breadth of input."

And if machines take on even more of the work in future, of course there may be workplace scenarios where the power of more empathic leadership to problem-solve is still to be tested.

Marco Bolognini concludes: "The legal market will increasingly be led by advances in technology, but that progress won't replace human beings entirely. When it comes to investing in tomorrow's skills – including leadership – growing strength in technology needs to be balanced with strength of character."

## on conundrum.

#### BRIEFING EVENTS

## Lego and listen

**Briefing** Transformation 2018 heard that collaboration is critical to success. While cutting through the jargon of the age with a bit of buzzword bingo, there was something of business management substance for anyone who cared to join in, writes Andrew Muir



aking it from the top of the day – as Jonathan Patterson, managing director and head of development at DWF Ventures, said: "You can't do innovation these days without

Lego." In a simple ice-breaker, therefore, our Transformation tables were first asked to build the highest Lego tower that wouldn't topple.

Innovation was clearly the order of the morning already – or is that cheating? – as several groups of delegates used glassware, number card stands and even the odd piece of cutlery to send their efforts skyward. But hey, the important thing is they quickly got down to business as a team.

#### Tip on the shoulder

Dr Nicola Millard, head of customer insight and futures at BT, gave the first keynote of the day. Drawing on global research from BT, she said that companies want to enable and increase productivity throughout their business, and are frequently turning to digital solutions. For that world of work to thrive, however, understanding the human drivers and collaboration between staff is crucial. People need a "reason" to use collaboration technology, Millard said – which might require an overall culture change. That's never easy – and luckily for firms present, she expanded.

First, employees today are increasingly "shoulder-bag workers". As agile and remote working becomes more popular, we're fortunately no longer tied down with as many files and piles of paper. Workers can often fit all they need to work smart into a bag. But to turbo-boost collaboration, the tools workers use need to change too. Millard described how working practices might be 'appified' to rid the world of so much email (which is better for information than collaboration).

But firms should also focus on the physical for optimising collaboration, with the rise of awareness of so-called 'activity-based' working. One office space no longer fits all. Areas of a space can be designed for collaboration, concentration and everything in between. And staff can potentially walk through the door and decide what suits their workload best on the day itself.

Some things may have surprised. For example, BT discovered that people are more collaborative when they use audio rather than videoconferencing, so the company specifically sought to improve sound quality to help listeners distinguish between different voices. And although technology has brought many benefits, where workers once needed to connect more, there may now be some danger that they fail to 'disconnect'. If work and life lines blur too much, there is some evidence that worsening wellbeing actually lowers the productivity levels collaboration tools are designed to create.

#### CMS into the future

However, once you've given workers a good



FROM LEFT TO **RIGHT: Delegates** get busy building connections; Dr Nicola Millard, head of customer insight and futures, global innovation team, BT; GC roundtable chats, here with Natalie Abou-Alwan, senior counsel, BP Legal, Global Oil Europe; Jonathan Patterson, managing director and head of development, DWF; Trevor Faure, former global GC and leader of legal services, EY, and former GC, Tyco

environment to collaborate in, how to measure whether it's working? Dr Heidi Gardner, distinguished fellow at Harvard Law School, and Jennifer Emery, director of strategy and integration at CMS, explored how to use "collaboration for revenue growth" in the next session.

When approaching the 2016 CMS, Nabarro and Olswang three-way merger, Emery turned to Gardner's work on 'smart collaboration' – a lot more than mere cross-selling or "meetings for meetings' sake". It is instead a type of collaboration that is intentional and deliberate, with a clearly defined purpose behind it.

Gardner's research identified two trends that mean this type of collaboration will become more important. First, people are becoming more specialised in their chosen fields - so they need to tap into the specialisms of others effectively. Second, clients' environments are increasingly volatile, uncertain, complex and ambiguous (or VUCA). When firms enable 'smart' collaboration, Gardner found, they win higher revenues and profits, better client retention - and can even attract, onboard and retain a more talented workforce for longer. Emery, therefore, put collaboration at the heart of the CMS merger, sharing the findings with all partners at the firm. She made the case for collaboration very clear by drawing most attention to partner metrics that supported collaboration the most. Teaching people how to recognise different types of collaboration was also important, as people understood the cause and effect when they were being productive.

#### What a to-do?

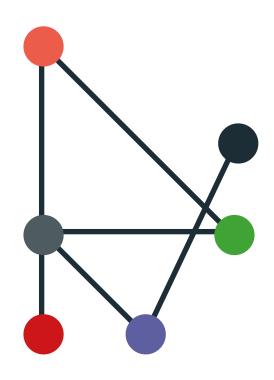
There was much else to enjoy and inspire, including the winner of our call for innovation case study papers – the agile and paper-lighter working of Browne Jacobson – some demystification of those two little letters AI with Thomson Reuters Labs and KPMG, and our roundtables with leading GCs from across industries. We also heard from several startups who have legal in their sights, and delegates pinned their tales of transformation objectives to the wall of our innovation room. The 'i' word is one buzzword that certainly wasn't bingo-banned and indeed, the dynamics of innovation were carefully dissected. DLA Piper's Jana Blount and Lizzy Morgan, innovation manager and innovation analyst respectively, facilitated discussion of how firms should actually go about 'doing' innovation.

It transpired there were four areas firms should be focusing on to get innovation working as productively as people – internal efficiencies, new products, collaborative cultures and improved service offerings. But innovation initiatives need to be targeted and tailored to the people they're designed to help, said Blount. For example, the firms may need to identify what the future lawyer looks like in terms of skills. Leaders certainly need to take advantage of the new skillsets that future, potentially more tech-savvy, generations will bring. And most importantly, they need to connect these skills across the firm to achieve Dr Gardner's vision of smart collaboration.

Finally, our innovation initiatives will not be effective without adequate buy in from lawyers and business service staff alike, said Blount and Morgan. You need to both secure this before they begin, and keep it up throughout the process – a theme that Trevor Faure, former leader of legal services at EY, picked up in his passionate closing presentation on enforcing behavioural change.

**Briefing** Transformation 2018 reminded us that innovation doesn't need to be a revolutionary product, or necessarily even an immensely exciting experience – far more important is that it concerns itself with continuous improvement toward some specific, well-defined ends. Some collaboration and conversation goes a long way though. You could even try a little lego play.

## Briefing strategic leaders 2019



#### what

Build your legal business blueprint at the only event designed to engage and inspire forward-thinking, strategyfocused senior leaders

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#### when

5 March 2019 8am-5pm

#### speakers include





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Karen Kerrigan, chief legal officer, Seedrs



Laurence Milsted, chief financial officer EMEA, Baker McKenzie

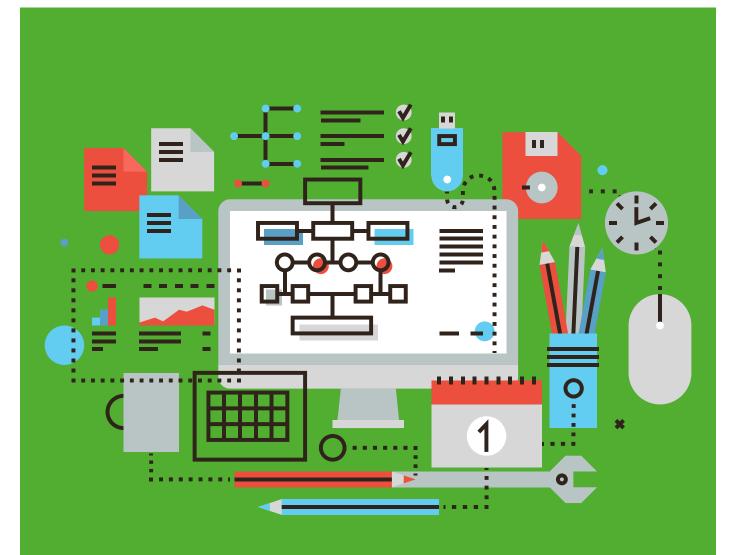
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## Brain training

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#### Choose wisely

Simon Muir, former head of procurement, **Ince & Co**, says procurement and project management make great change partners



📐 HANDS ON

## Choose wisely

Simon Muir, former head of procurement at Ince & Co, explains why the function has a much larger role to play than simply saving the pennies on projects



e live in an ever-changing world, and in the workplace, technology and

working practices continue to evolve. For many law firms, managing this change presents a challenge. For example, the transition from an analogue world of paper and physical documentation to a digital and highly mobile screen-based environment is a challenge for an 'industry' with a legacy of processes built around paperbased documents. And as cellular offices and traditional ways of working give way to open-plan spaces and flexible work practices, the cultural shift is particularly acute in the legal sector. But if your firm is embarking on a change

programme, consider the role of procurement within the team that is leading the effort. The role of procurement is often perceived as being focused on cost reduction – when in fact this is just one measure of its effectiveness. Procurement can also be a powerful catalyst for change and a means of ensuring objectives are delivered.

#### Scene change

Three years ago, I joined Ince & Co to head up a newly created procurement function within business services. The firm was embarking on a major change programme, which included upgraded technology to enable 'paper-light' working practices within an open-plan working environment. The vision was to go live on day one after a London HQ relocation, which was scheduled for nine months after my start date. It was an ideal opportunity to demonstrate the value of procurement as an agent for change.

The scale of the challenge the leadership team faced was made real once the broad-brush vision of the future was broken down to specific deliverables. An 'open-plan flexible workspace' became a series of tasks such as choose the furniture, select the desktop technology, describe future facilities service requirements, design a training programme, and so on. The resulting shopping list of interdependent items included numerous elements, which required the engagement of a third-party supplier contracted for the provision of goods or services. In other words, we needed a procurement-led supplier selection exercise.

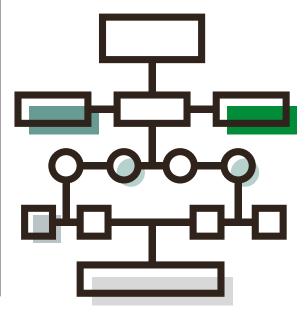
The good news is that the disciplines of a supplier selection and contracting exercise are highly complementary to change management methodologies, and if procurement is embedded in the change programme leadership team, the function can act as the catalyst to fulfil many of the objectives of the programme.

Consider the three key steps in a supplier selection process, sometimes labelled as a request for presentation (RFP) or a tender:

**Define your requirements.** Just as a programme management office will break the programme's vision down to a shopping list of requirements, the procurement function takes that process to the next level of The disciplines of a supplier selection and contracting exercise are highly complementary to change management methodologies

> detail to produce the detailed requirements for an RFP/tender process. If the procurement function is involved early in the planning process, the supplier selection work can be initiated in parallel with the overall planning process and enable the RFP/ tender process to kick off much more rapidly once that planning process moves on to the implementation phase.

> **2** Identify and measure potential suppliers. During the procurement exercise, the definition of requirements in your tender/RFP document will be used as the measuring tool against which responses are judged. This maps directly to fulfilling the requirements of the

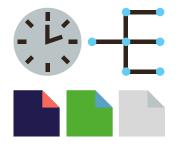


change programme, and keeping procurement close to the leadership team allows the procurement professional to ensure the goods or services provided by the contracted supplier meet the overall requirements of the programme. The cost and risk of late changes to requirements can also be mitigated. For example, if the procurement lead is aware that there is a chance of, for example, a late-in-the-day change of mind on the colour of the office chairs, the draft contract and pricing can be structured to prevent the supplier applying punitive pricing.

**3** Negotiate the detail. With the supplier contracted, the definition of requirements will translate into a service level agreement (SLA) or statement of work – and one item on the shopping list is ticked off.

#### Into dependencies

Sounds simple, but no battle plan survives first contact with the enemy. Apart from the risk of changes to requirements, most items on the shopping list will carry dependencies relating to the other items on the list. Keeping procurement fully involved and informed throughout the programme allows these dependencies to be managed. An example of how the procurement and programme management effort worked in tandem and managed these dependencies at Ince & Co was the implementation of new office print, reprographic and print-room services, and the simultaneous introduction of a cashless payment system within the firm's restaurant.



The move to an open-plan environment allowed for the implementation of follow-me print technology so that once any user had clicked print, they could collect the output from any device in the building after first identifying themselves by scanning a contactless ID card.

The same card was to be used for building access (which was landlord managed), and for cashless payment within the staff restaurant and at vending machines. So, there were two dependencies related to providing a 'one card for everything' solution. In addition to these dependencies, the fact that the stakeholder community was dispersed between technology, facilities and the building landlord, suggested the use of a project manager to help manage these complexities.

However, rather than overcomplicate the governance structure, and because I happened to have some project management experience, it made more sense to combine the project management function with my own procurement role. The programme management team was still able to perform a 'project assurance' role to ensure things staved on track - and although my reporting line was to the firm's general manager and head of facilities, it was important that my role had

oversight across all functions, with a brief to pursue objectives that were best for the firm and not just one particular silo.

Applying the three-step supplier selection process, a detailed set of print and reprographic service requirements consistent with the paper-light vision was documented. The move to an entirely new open-plan space combined with follow-me print technology allowed for a reduction in total print devices from 200 to 10. These new devices - along with the print room and reprographic services - were specified to allow a high volume of scanning of legacy documents to support the conversion of lever-arch files to digital document form. And by bundling these requirements into one tender/RFP process, a single managed service supplier could be contracted to provide the hardware, software, consumables and device servicing. This replaced the multiple suppliers previously used, enabling a streamlined supplier management process to be established and transitioned to the facilities team.

In parallel with the print and reprographics exercise, a supplier of cashless payment technology was also selected with the 'must have' requirement of a card-reading technology consistent with that used by the landlord for building access, as well as by the print devices. On day one in the new building, I started breathing again when staff and partners successfully accessed the building, printed, scanned, and purchased their lunches seamlessly ...

#### THE DEBRIEF

A large-scale change project like a move to new ways of working (perhaps 'agile' or open-plan) is likely to involve some procurement activity.

And when Ince & Co moved office HQ and went open-plan at once, it demanded a supplier selection exercise that negotiated several dependencies (such as introducing a new contactless ID card that could be used alongside both a new 'follow me' print regime, for entry to the building and for payment at the staff restaurant).

The project management and procurement aspects of the change workload were therefore arguably even more closely connected than might otherwise be the case. Bringing the disciplines together, with appropriate reporting lines, gave procurement greater insight into the range of needs within different functions across the firm.

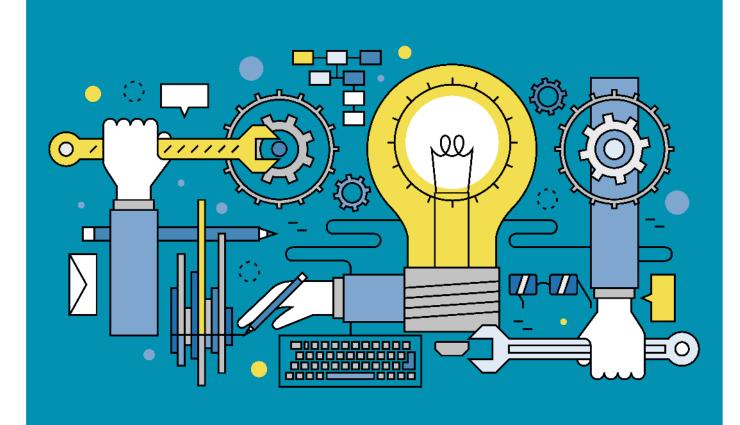
So, when embarking on a change programme:

1 Include a procurement role in the project leadership team. Involve them early, and keep them involved and informed throughout the process

2 If the completion of a project is heavily procurement lead, consider combining the project management with the procurement function

**3** Regardless of reporting lines, give the procurement function oversight across all functions, with a brief to recommend solutions that are best for the firm as a whole.

The procurement function is about so much more than simply driving cost savings. If the role is correctly implemented, it can truly act as a catalyst for change and ensure multiple objectives are delivered.



## Industry views

**Issue sponsors:** 





**Pinnacle of powers** The four principals of **Pinnacle** explain why they're better for you together

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#### All together now

Paul Domnick a**t Litera Microsystems** says keep IT together where you can

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**TEAM PROFILE** 

## Pinnacle of powers

Briefing speaks to the four principals of Pinnacle about why the ideal law firm and consultancy partnership combines system specialisation and broad coverage of the complete business change journey



hen law firms merge they look to exploit a set of strategic synergies, such as complementary geographies, subject specialisms or other aspects

of service delivery – but they can often find that joining up the IT systems involved throws up big change challenges to navigate.

Pinnacle is also the product of a merger (in early 2018, between Pinnacle, Opes and Athenian). Like many a law firm combination, it was a move presenting the allure of specific high-quality specialisms that complement one another.

Fortunately, this is also a merger full to the brim with consulting expertise. Indeed, the 65 consultants have an average of 16 years of legal sector experience each. Combined, they support firms with financial and practice management systems, risk management, business intelligence and managed services, as law firms' strategic leaders seek to drive out efficiencies, launch new client delivery models, and everything in between.

#### Lifecycle change

Managing director Mike Bailey says the biggest benefit of the merger for law firms – which includes many with global scale (HQs in both the US and Europe) and three of the magic circle – is the deep experience of such a wide range of complex, but connected technical challenges. They are now invited to get involved right at the beginning of a project, and have the opportunity to follow it through, adding value at each stage. It makes for more integrated, long-term planning, and fewer project management mistakes.

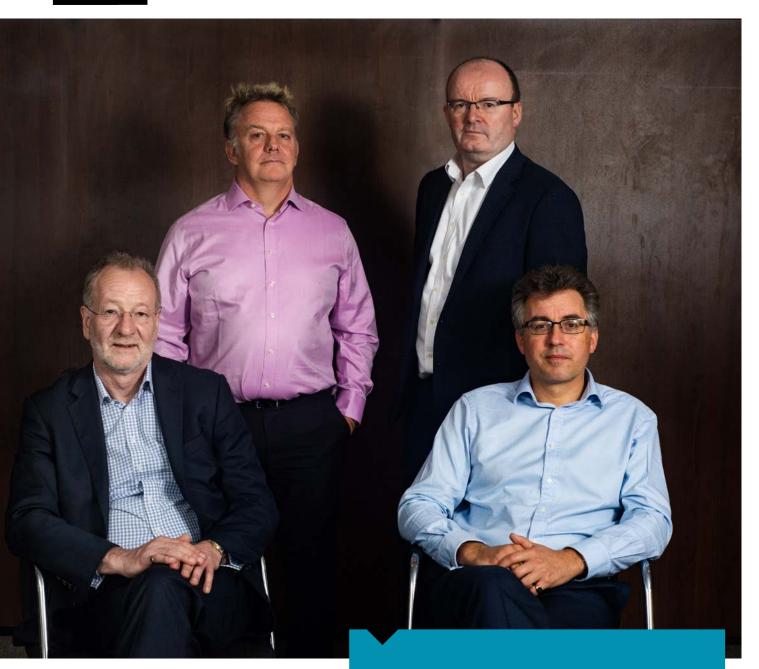
"Previously, our clients' projects would often

already have started," he says. "That means important decisions had already been made, where we might have advised another more efficient or realistic course. Firms would get further down the project roadmap and run out of resources." Then one of them would get the urgent phone call.

"Our greater scale by combining has deepened our relationships, and given us the credibility to be invited to join the conversation right at the start – when people are still strategising and deciding how to approach a project. By bringing each highly focused practice together, firms can trust us to help them to decide where they want to go."

Operations director Kevin Smith explains: "The nature of projects is also changing. We have plenty of experienced application consultants, who know how to implement core business systems. However, the products are now mature, and the challenge now is how to deliver change successfully. Firms often underestimate the impact of introducing new products, and how effective change management can minimise disruption to the business and realisation of the full benefit. This is clearly going to need to be a major focus as the number of firms running transformation projects is set to dramatically increase in the foreseeable future."

Christopher Young, who is leader of the risk and new business intake practice and business development director, adds: "We can now partner right through the lifecycle –implement standard projects, offer ongoing support for them, and also strategically optimise tools. For example, we work with both Thomson Reuters Elite 3E and Intapp clients to tweak configuration and setup to firms' specific and changing circumstances." CLOCKWISE, FROM LEFT TO RIGHT: Neil Renfrew, chairman; Kevin Smith, operations director; Mike Bailey, managing director; Christopher Young, business development director, Pinnacle



Moreover, an increased service spectrum offers an immediate risk advantage for Pinnacle's clients, says Bailey. Dealing with a single supplier is a lot more efficient. "Whether it's caution following the arrival of GDPR this year, or information security risk more generally, firms show signs of wanting fewer supplier relationships to manage.

"How many people do they really want dialling into their systems every day?" The Pinnacle combination avoids this situation as well. "It ideally positions the company as a close strategic partner," says Bailey.

Chairman and director of product development and managed services Neil Renfrew adds: "These aren't skills that need to be applied every week, so firms want fewer, deeper and trusted specialists that they turn to when the time is right," he says.

#### TOMORROW'S TALENT

Although Pinnacle provides its knowledge to clients via specialism, it's aware the next generation of talent needs a suitable breadth of knowledge before reaching that point.

In 2018, it launched the Pinnacle Academy, which rotates recruits around each 'practice area' – and some client placements – combining class-style learning, work shadowing and one-to-one mentoring.

Kevin Smith, who heads up the programme, say: "We don't have formal qualifying criteria for a start, or any expectation around age or background. What we want to see is a genuine interest in working with law firms and helping them manage change, process and people more effectively, and some indicative competencies that will ensure a good fit with the academy's fast-track, immersive curriculum. We've drawn from management consultancy, law firms, IT, accountancy and college ranks in the first intake and hope to attract a similarly strong spread for additional places."



#### WHO'S WHO? PROJECT PINNACLE IN PRINCIPALS:



KEVIN SMITH is operations director and leads technical services – having worked with Thomson Reuters Elite products dating back to 1997 (including as its operations director for UK and EMEA delivery).

Core, he says, are firms' strategies surrounding the exit of Elite Enterprise come 2022. "We like to think we're keeping people working comfortably on Enterprise while they reach the right decision about their next PMS."

But it cuts both ways – the team has also converted data from 3E into Enterprise, such as occurred during the CMS-Nabarro-Olswang merger. "Conversion is a big part of our business, and we get a significant amount of work from TRE directly."

The other very big deal is "data readiness," he says – prepping for a 3E migration, for example. "Bad data is one of the biggest causes of project delays. It's a bit like a test match – you won't win it on the first day, but you can certainly lose it. The overall project can fail if you don't do the first day's preparatory work well."



CHRISTOPHER YOUNG is business development director, and leads the risk and new

business intake practice – comprising business analysts and technical services.

"There are two principle markers of success," he says – increasing efficiency and ensuring

compliance. "We can build certain things in such a way that we reduce the size of project cutover, and also leverage our depth of understanding of global regulation and compliance.

"People might reasonably assume a single regulatory regime across Europe, but the interpretation of rules in different countries is really quite different – and in law firms, it's different again. So, understanding of potential cultural differences is another important piece in managing projects and change."



MIKE BAILEY is managing director. In 2010, he founded Pinnacle in its previous incarnation – prior to the current team coming together. He started in the sector working for Aderant and is now focused on the Thomson Reuters 3E toolset, having worked with law firm finance systems for a

total of 20 years. "Having worked for many major global firms we have people that are leading thinking in global compliance around tax, accounting standards and templates," he says. "Also, assisting the vendors to develop the products, and combining this with our thinking and experience, means that we are helping clients to take advantage of their systems' flexibility as the business and strategy changes. This is working particularly well in our BI team."



NEIL RENFREW is chairman and director with responsibility for product development and managed services. He has worked for law firms and legal technology companies for 40 years. The product development and managed services teams in the Hampshire office have worked with,

and created, law firm systems for over 30 years. Renfrew says: "Combining our development capabilities with deep product expertise is allowing us to create high value connectors; joining products we know well. For example, we have created datacleansing tools which work across the 3E and Intapp data models, and are working on a tool to improve the integration between Intapp and iManage. Using experience gained in-house, key to any managed services offering is proactive as well as reactive advice. We will advise on upgrade policies and strategic planning, as well as providing firms with 'just-in-time' resources that would cost a fortune if they maintained in-house resources on a 'just-in-case' basis. Our larger clients are liberated to use their in-house resources to focus on new projects because we look after the 'business-as-usual' stuff."

#### Ultimate experience – specialist delivery

The fact that each of the four principals has responsibility for developing their own focused practice (see box, p28) both keeps industry knowledge fresh and provides valuable perspective on the long legacies of implementation challenges. Neil Renfrew explains: "Another business might have just the one principal who's highly experienced, with several team members below them – whereas the four of us are probably slightly unusual in having comfortably more than a combined 100 years' legal sector experience."

And below these practice leaders, Pinnacle has

invested in developing groups of true specialists in product area teams, he says – financial system management, business intelligence, risk management, and managed services/new product development.

To some extent, work is also driven by the strategies of software suppliers – and Pinnacle has long-term, collaborative partnerships in place with both Thomson Reuters Elite and Intapp.

Kevin Smith highlights the management challenges associated with the approaching retirement of Elite's Enterprise practice management system, with potential migration of For more information, visit: www.pinnacle-oa.com

those users to successor 3E – as well as how the team has collaborated with its partners on both new products and improvements to marketleading existing ones. Just one example is Elite's new 3E Data Insights solution, which uses Microsoft Power BI analytics to offer self-service reporting and new visualisation options for forecasting business development performance. "We've become well trusted because we're not competing with our own products – and we know the solutions inside out as we've worked with them since before they were released," says Smith. "We also invest a lot of energy in our partnerships. We've had people seconded into suppliers to help develop the products and thinking."

Christopher Young says: "Intapp regularly brings new products to market, and it really helps our clients that we get such early insight. We can be there at the earliest point of implementation, and we often support suppliers in the pre-sales process."

Bailey adds that each practice has skills that could be useful in other areas. But specialisation has proved the business-winning formula.

#### Keeping pace with all change

Another issue for Pinnacle's legal clients is coping with the frequency of external change – from updates to the solicitor's rulebook to the common one that may or may not apply to any future UK-EU trading arrangements. However, the big challenge here – and Pinnacle value-add – is only changing as much as you really need to.

Christopher Young says: "Global law firms today need to respond to smaller, more regular regulatory changes. If a tax rule or the business climate in just one country changes, global firms must move quickly, and adapt the configuration of core business systems to continue to monitor risk and remain compliant. We often find the reason firms are implementing new systems is that the legacy products have failed to evolve with the external landscape, growing less and less fit for purpose. However, from client due diligence to money laundering checks, we can help firms to comply without repeatedly needing to rebuild."

Pinnacle's structure of specialisation helps with this aspect of change management too, he says. His new business intake team can draw upon – for

#### PUT IN PRACTICE: THE HFW STORY

Law firm HFW turned to Pinnacle when it needed a partner to work on replacing its business intake system.

Paul Jenkins, head of IT projects and change, says: "We already knew them by reputation, but we do our due diligence. We interviewed quite a number that could potentially do the work – but also spoke to a number of law firms with, frankly, quite a few general consultancy horror stories.

"What we really liked about Pinnacle was the way they were absolutely prepared to tell us if they thought we were being stupid. We could build rapport and have an honest conversation. In my experience, some will do anything you ask for, so long as they can bill you for it later!

"Of course, we want to know something is optimally configured, reflects how others are working and best practice, and complies with any regulations. But when something isn't right, they will tell us that.

"If there's a problem, they come over, we can thrash it out and move forwards. There are difficult times during any big implementation, and if you don't have a good and open relationship with a supplier at those times, you're in trouble."

As just one example, HFW originally wanted a system launch date six months earlier, but Jenkins says Pinnacle immediately came back to question the viability of that plan. "It was clearly going to take longer. Now we're just about on track to deliver on time.

"Equally, it might be something surrounding workflow, how rates are transferred between systems, or a matter of client compliance. They can take us through line by line, explaining why it won't work based on experience and recommending an alternative approach."

The relationship was first struck in 2016, and Pinnacle is now involved in implementing and upgrading the firm's other Intapp products, such as Walls and Time.

example – a number of Thomson Reuters Elite 3E specialists, who in turn include experts in tax.

Large or small-scale, the final piece of the puzzle is post-project change managament – which is where all players need to up their game, says Bailey. "Firms need the depth of knowledge at hand to execute change as quickly as practically possible, minimising business disruption and moving on to maximise competitive advantage just as fast. Ultimately, the goal of a software supplier is still to deliver the client project and get them 'live'. However, managing the impact the solution has on the business has to be just as important."

It's early days to assess the impact on the market of this project that is Pinnacle's combined specialist powers, but we're confident we'll be able to update you on the scope and scale of sure-fire progress soon.



#### INDUSTRY INTERVIEW

## Models in motion

Firms have a plethora of financial options that may suit their growth strategies – but excellent management remains non-negotiable, say Mary Daly and Lee Pearce at Allied Irish Bank (GB)



he latest quarterly economic survey from the British Chambers of Commerce sees the percentage of services firms attempting to recruit

talent at a 25-year low, as the uncertainty surrounding Brexit negotiations continues to cloud strategic decision-making for many.

But it isn't just the politicians who are responsible for businesses hitting the pause button. Law firms, for example, are simultaneously struggling to identify both the specific pieces of technology they need to shore up future profitability, and the volume of skills they'll need to work with those systems effectively.

Not that there's any shortage of candidates for your firm's next cutting-edge solution, say Mary Daly, head of professional practices, and Lee Pearce, senior relationship manager, at Allied Irish Bank (GB) (AIB).

"There seems to be quite a lot of watching and waiting in the market," says Daly. "Everybody we speak to recognises the need to invest, but it's such a huge investment – for the mid-tier firms certainly – that they seem to be waiting to see what the market standards turn out to be. Firms may not see returns on these decisions for several years, and for the time being they don't yet know which system to back."

More positively, she says that the bank finds firms are increasingly open to sharing their dreams and fears with peers in the market – and striking some more innovative relationships, at least. "We know that a number are sharing knowledge and offering demos to others. We even have one



Lee Pearce, senior relationship manager, and Mary Daly, head of professional practices, Allied Irish Bank (GB) customer that's helping a developer to design a practice management system for a discount," she says. "It's quite a niche practice, but once implemented they can then roll the system out to firms with a similar focus."

#### The shape of things

So, it's less a question of lack of finance than strategic risk management (or perhaps risk aversion) – although law firms also have more financial options available to them than ever before. A short string of firms showing muchscrutinised interest in an IPO in the last year might suggest more will be willing to welcome external investment in 2019.

The view from AIB on that one is mixed, however. "The question is, who will invest – and why," explains Pearce. "At present, the investors are largely focused on commoditised businesses, where you see a faster return – but that is a finite pool. The vast majority of firms we see feel the LLP structure will suit them for the foreseeable future."

On the other hand, firms that are solidly in that commoditised camp may well feel compelled to act. "The alternative structures suit firms that do need those substantial IT investments sooner rather than later," he continues. "For example, we know of some in the higher-volume, lower-value space that have taken the private equity route to secure a competitive advantage – it enables them to do things they feel it would just take them too long to do organically."

Meanwhile, another strategic area where more



"We do still place a lot of emphasis on the strength of the finance director – the knowledge that the firm is in a safe pair of hands."

Lee Pearce, senior relationship manager, Allied Irish Bank (GB)

law firms might need a cash injection in future is managing succession, as working lives get both longer and more fragmented. Daly adds: "Those who've watched their practice grow and increase in value naturally want something to take with them to show for that if they retire. But to pay that out, traditionally you also needed somebody new to buy in at the bottom. The younger generations are now less inclined to take on risk such as personal debt, especially if returns are less predictable. So, firms might look externally for that money for retirees instead."

Or perhaps firms might consider the employee ownership trust (EOT) model more seriously – to the same end – she says. It's currently being most comprehensively tested in the architectural market, Daly finds, but is expected to expand to other sectors, like legal, in time.

#### **Date expectations**

How is AIB itself responding to the movement in market forces?

"We've funded IT projects for a number of customers purely with normal bank debt – but we're open to the new emerging structures as well," says Daly. "I think you really have to be ready and flexible, as and when the market moves in that direction. We were involved in funding one of those law firm IPOs, and we also have PE and EOT deals in the pipeline."

Pearce adds: "The bank is really looking at each individual opportunity on the deal's specific merit.

For more information, visit: www.aibgb.co.uk

#### "Younger generations are now less inclined to take on risk such as personal debt, especially if returns are less predictable."

Mary Daly, head of professional practices, Allied Irish Bank (GB)

However, one thing we know our customers don't want is to be handed to a separate private equity team if that's within their strategy. We can tap into that extra expertise here to form a team internally, but the client wants professional practices to stay the main point of contact for its breadth of market knowledge."

And what does a bank expect from a 2019 law firm in return? Here there's rather less change than in the way the market's moving overall, he says. "We do still place a lot of emphasis on the strength of the finance director – the knowledge that the firm is in a safe pair of hands. Management of lockup remains one of the most important hygiene factors.

"And as the competition grows, fixed fees become more prevalent and margins are eroded, firms must also be savvy at evaluating their transactions – and working out which areas of work are most profitable for them." That should inform them how and where they transform and invest, he says.

"Conditional fee arrangements can bring the best margins, but they are also challenging to fund. It can take many years to collect fees, and standard bank funding can be quickly exhausted. Therefore, those firms may be among the ones to explore other financial routes."

#### Pay attention to retention

In a faster-moving market, meanwhile, a common challenge for all firms is the protection of the talent pipeline from the talons of ever more diverse competition. Of course, this too has financial implications. Daly says: "Regional players can struggle to retain their younger staff, who are attracted by the City." However, the tables may then be turned if those people have families, and the bargaining shifts in favour of a better work-life balance. "They want out of the daily commute, and businesses can often attract that talent back again." However, firms on both sides can try to get more creative with their employee offers to steal the edge.

Indeed, that's the destination for much of the IT investment firms will commit to, she explains. "While firms may bide their time on issues like artificial intelligence, they're facilitating agile working and remote access to help with retention. That technology won't be going obsolete and the return is very tangible."

Whether or not Brexit does anything to the talent situation for professional services in 2019 remains to be seen.

Pearce says: "We see some firms are expanding their European operations to different extents, some are targeting work that's less Brexitdependent and some had contingency plans they fortunately haven't yet needed to implement.

"There have also been tie-ups with European firms. However, if you open a new office you either need a national head, or you need to manage to persuade an existing leader to move. Neither is without its challenges, but it's hard to control an overseas office from afar."

As firms wait for the political posturing of recent months to make way for some more investment-friendly clarity, they should probably apply some extra vigour to those levers of financial management they can manage to control.



## Skill to succeed

At a time of great uncertainty, well managed law firms are focused on cost control, creativity and collaboration, says Adam Groves, head of professional services at Barclays

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aw firms are passing through times of change, possibly without precedent. Arguably, it's a good time to redouble efforts on points of business planning

that should be more predictable than the macroeconomic picture.

Adam Groves, recently appointed head of professional services at Barclays, says: "We've seen an accelerating flow of new entrants to the legal market through alternative business structures, most notably the Big Four accountancies. Firms will certainly need to factor those drivers and differences into their strategies."

And if they manage to negotiate the threat posed by their new competitors, then there's Brexit to bring to the table. "We understand that firms are analysing and planning for a series of options based on the various potential outcomes," he says. "But

until those variables begin to reduce in number, the climate of business uncertainty looks set to continue."

"Against that uncertain backdrop, almost every business is challenged to plan, to predict and to forecast revenue accurately," he continues. "So, I think smart law firms are focusing on areas such as cost control and preserving margins, rather than 'absolute profitability'. They should assess and take action on those aspects of business that are potentially more manageable."

For example, he points to a positive push to improve lockup – while the move to a world of more agile working is another trend clearly tied to the efficiency agenda.

"Open-plan working is an increasingly popular way of optimising space and the working environment, especially when you also consider For more information, visit: www.barclayscorporate.com

the cultural benefits, such as driving collaboration," says Groves. "The workplace of today is very different from that of even 10 years ago. It's likely to retain some fluidity as the cost and people pieces of strategy continue to converge in future."

#### **Tighten security**

Another point of basic business hygiene in such a time of change is information security – a particular priority for Barclays when it comes to clients, says Groves. "Any business can proactively manage this critical aspect of their business by ensuring that all its people – not just those in finance – are aware of the risk factors involved in cyber fraud. There is a clear potential impact on profitability from something like a piece of malware bringing business disruption – and the bank is very keen to help clients to equip themselves with the knowledge they need.

"Technology helps to advance our industries, but also brings elements of heightened risk as we rely on it more."

He says that Barclays holds a programme of seminars on industry developments with cybersecurity experts, and also publishes thought leadership pieces that collate key learning points to help firms spot common problems.

"Security is also a key agenda item whenever one of our relationship directors sits down with clients for a tailored relationship review.

#### Thrills and skills

Barclays has recently grown significantly closer to the tech options open to firms with the launch of its LawTech Eagle Lab incubator in Notting Hill. Housed in a former Barclays bank branch, legal business and new legal tech businesses can come together to share and develop ideas.

Groves explains: "There has long been a gap to bridge between the mature legal industry and the latest opportunities for business and service innovation. This partnership with the Law Society and a number of law firms and educational institutions offers a collaborative and creative space that facilitates co-created solutions to benefit end users both in firms and their clients.

"Ultimately, any firm that successfully fosters a more open, inclusive culture and experience is likely to see the business benefit from more diverse, innovative and positive thinking." "The firm that successfully fosters a more open, inclusive culture and experience is likely to see the business benefit from more diverse, innovative and positive thinking."

Adam Groves, head of professional services, Barclays

But more generally, he recommends that firms analyse their investments in any new technology with care. "The specific requirements and scale should determine whether it's a case of buying a new solution or developing something in-house, for example – a system should always be fit for purpose.

"Once that decision has been reached, it's important that senior leaders both embrace the project and drive its implementation."

However, tech-savviness is only one of the "broader enterprise skills" needed by today's legal leader, he says. "After all, technical legal advice is now almost taken as read."

Workforce planning and management is another area that could do with some attention. "The 'right people' must be doing the 'right work' for true productivity to flourish. For example, fee-earning partners need to utilise finance and other support teams to the fullest extent possible, freeing themselves for the highest-value activity, such as new business development and innovation.

"Firms should also establish and cultivate client relationships across multiple touchpoints, from innovation activity to workforce diversity. Instead of one-to-one contact in individual practice or product areas, they must manage to create deeper business relationships and relationship development plans on both sides."

In times of great uncertainty, it makes even less sense to face your problems or challenges in isolation. From sharing best-practice insight gained from other sectors on high-risk subjects like cybersecurity, to physically bringing parties together in new neutral spaces for discussing ideas, Barclays is helping firms to collaborate their way to both efficiency and prosperity. NUSTRY ANALYSIS

## Benefit from the basics

Sweating the small stuff is an undervalued discipline in the legal industry. You should re-invest in tools that focus fully on the efficiency of the legal work itself, says Samantha Jefferies, VP, EMEA, at DocsCorp

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hat is the point of being an early adopter of AI and blockchain if your existing systems aren't delivering to their full potential? Lawyers and

support staff still need tools that help them to do their job efficiently, so firms should help to bring the focus back to the tasks that land on desks every day of the week, and with tried-and-tested strategies. Spreading some efficiency on top of your bread and butter of legal work can save time, reduce risk, and increase productivity. Look for strategies that enhance – and don't interfere with – the natural course of work.

#### What is to sweat the small stuff?

Sweating the small stuff is a counter-proverb to the traditional 'don't sweat the small stuff'. It's meant to remind us to focus on the small picture if we want the bigger picture to succeed.

Sweating the small stuff is a reminder that there's a reason why some tools have been around for a long time. These products are valuable, but they could be undervalued by the organisation. Sweating the small stuff means asking 'could I be doing this workflow or using this product smarter?' Often, the answer is yes.

Sweating the small stuff also reminds CIOs that innovation isn't just found in AI and blockchain. There's also innovation in improving the traditional software applications that lawyers and support staff rely on every day. You just have to recognise the opportunities for improvement.

#### Small-scale focus, large-scale benefits

Unsure if you've been sweating the small stuff? Consider the last 12 months, and where the majority of the firm's technology budget was spent. If the firm added new products, it's possible that

For more information, visit: www.docscorp.com

existing solutions aren't getting the attention they deserve because the focus is on something shiny and new. Before adding more technology, consider whether the current provider has added more features and functionality that could help fit your brief? Has the firm kept up to date with the latest product versions? Could more time and money be invested in staff training, so the end user is getting the most out of the technology? Has the product kept up with developments in other vital systems like Windows 10 or your document management system (DMS)? If integration, maintenance and support have fallen behind, it's likely that your ROI has dropped off too.

#### **Crucial integrations and workflows**

How much time could DMS and Microsoft Office integration save you? How about one less pop-up window in Outlook? Could you cut back on the time you spend manually reviewing, editing, or compiling documents?

Invest time and effort in improving everyday workflows – like bundling pdfs to create electronic binders, or comparing document versions for changes – and reap the benefits time and time again. Shaving hours off a process like bundling pdfs won't just pay off once: it pays every time an electronic binder is created to finalise a transaction.

When Swedish firm Delphi updated to a pdf solution that automated the creation of electronic binders, it recouped the cost after the very first binder, as what previously took hours now only took minutes. Head of IT Henrik Järnberg saw an instant improvement in the firm's workflows, saying: "To use a farming analogy, we have moved from ploughing the land with a horse to ploughing it with a tractor. Creating electronic binders is now a routine task at the firm, not a massive undertaking."

#### **Compare and contrast**

Other firms find efficiency by looking more closely at the features in their document comparison solution. Switching from traditional redline reports to working from a live document marked

## There's innovation in improving the traditional applications that lawyers and support staff rely on every day

up with Track Changes can make the review process 25% faster. An application that compares files in their native formats – without conversion to pdf – spares staff the pain of having to fix broken formatting.

Improving document comparison saved a significant amount of time each day at Pierce Atwood. Director of IT at the firm Lee Cullivan recognised its old comparison application wasn't adding value because users found it too slow and complicated. The result of finding one with a better user experience? "We saved 15 to 30 minutes a day. With 100 to 150 people using the application daily, that's a significant saving," he says.

How much time do lawyers and support staff spend looking for non-discoverable documents in a DMS? It's a big waste of resources for most firms, as up to 30% of records can be non-searchable. Having a system that searches and applies optical character recognition (OCR) to all repositories - not just the DMS - can reduce how long it takes staff to find a file. Staff at Australian firm Makinson d'Apice were losing too much time trawling through file systems to find critical information. "It was difficult for people to find documents in the system," said IT and knowledge manager Asitha Udumalagala. "Most of the time they had to go into the actual matter folders and their document worklist history, and scroll through hundreds of documents to find what they wanted." Not only are staff now more efficient, the firm is better equipped to be compliant with freedom of information requests and e-disclosure.

Don't get swept up in AI and blockchain when there's so much efficiency to be gained from the tools legal professionals already use to get the job done. Bring the focus back to the most basic tasks and add some efficiency every day.



In a world of widening competition for clients, there's value in simply bringing people and their processes closer together, says Litera Microsystems president Paul Domnick

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ergers are usually a challenging time of change in and of themselves. However, it took Litera Microsystems hardly any time following its four-way

combination in 2017 to come up with a new flagship product to show for it.

Litera Desktop – recently picked up by none other than Clifford Chance for lawyers across the board globally – is a single ribbon in Microsoft Word. It promises to take lawyers through the full document drafting lifecycle (tapping into multiple existing products such as Change-Pro Premier, Clause Companion, Contract Companion and Secure Collaboration Suite). And even better, it absolutely encapsulates the company's ethos, says president Paul Domnick.

"The concept is to allow our customers to extract maximum value from our full set of products. Some of those products have AI embedded, some just have very good algorithms behind them. However, no firm wants a lawyer to have to remember the name of a software product in order to be able to use it effectively and productively. They want their lawyers to have easy access to the capability within applications that they use every day – and just at the time they really need it."

It was the merger that brought more stages of the document drafting lifecycle together – and Litera Desktop literally embodies that, says Domnick. "From creation or reuse of content, through the proofreading process, quality checking, introducing standard clauses, metadata cleaning and into secure document collaboration, we can now present that journey in a single place where lawyers will spend most of their time. The tools are immediately available in their logical order and exactly at the right moment in the cycle."

The time saving from not popping in and out of separate products for all of that work is pretty

obvious. However, there are other efficiencies too – less time spent 'training' people to adopt working with separate products (as proximity breeds familiarity), and simplifying vendor relationships as firms replace multiple suppliers.

#### What's the use?

And if the past decade has taught us anything, it's that firms' clients love a bit of enforced efficiency.

Domnick continues: "Another outcome of the merger is that we've done some work exploring the 'changing lawyer' more generally. However, it's not just about what lawyers want. You need to find the right combination of technology, process and people support to put in front of clients – both understanding and delivering what adds to their value. We see clients happy to pay for lawyers' advice if it's at the right level. What they don't want to pay for is needless effort on document manipulation or workflow processing."

Nevertheless, Domnick really expected Litera Desktop to be his team's "experimental" project of the post-merger era – instead, the fairly simple idea of a single interface (simplicity is, after all, the whole point) has surprised by rapidly becoming "the main event," he says. And while firms add value to their clients, the early adopters are adding value to Litera itself in the form of product improvement.

"We've seen a self-reinforcing positive feedback loop," he explains. For example, as well as providing the tools, the business will track their usage within firms. "There's value to firms in collecting insight about how specific applications are being used, and how much – not necessarily for every mundane

"There's value to firms in collecting insight about how specific applications are being used, and how much ... particularly when it comes to comparing the different parts of a large business." For more information, visit: www.litera.com

task, but particularly when it comes to comparing the different parts of a large business, such as practice groups or international offices."

Litera can issue a monthly usage report to firms, for example. "They can use that data to uncover a need for any additional training or education, or indeed for feedback into improving the performance of our products themselves."

#### Integration effort

The firms also have new-found flexibility when it comes to implementing the drafting toolset. "They can now commit to the whole thing at once if it suits their current point in the change cycle," says Domnick. Or of course, they can introduce the tools incrementally as they would have before.

Meanwhile, while some other vendors are pushed out of the picture, much of his team's focus now is also on integration – which comes in two basic flavours. "Some integrations will enhance legal workflow, but are frankly table stakes – such as email," explains Domnick. "For example, you can easily select a part of an email and compare it to part of a Word document."

However, then there's the almost inevitable application of some form of AI to the great efficiency journey. "We work on a lot of natural language processing," says Domnick. "Proofreading can pick up errors that are shared in the background to be picked up at other points in the document process – while in future we'll look to leverage content from KM or team-based communications. That's moving into a world of more context-relevant integration."

"We don't do quite as much Big Data work – as lawyers don't want to be waiting around for a big piece of analysis when they're trying to get a task completed right now. However, analysis in the background does surface some interesting things for future consideration."

Whether it's an entirely new product, or simply another level of process efficiency that comes next – when it appears, you'll probably know where to find it. INDUSTRY ANALYSIS

## Lead to know

With so much focus on efficiency, James Gilding, managing director, Mitie Document Management, reminds us that leaders also need to nurture and demonstrate empathy



s a leader of some great people myself, I think leadership is a topic that we don't put enough focus on, not only as

an industry but as an economy overall. It is an area of strategy where we could all benefit from being more honed and finely tuned in.

The word leadership often refers to a common set of areas of work, such as:

- · Problem solving and decision-making
- Time management
- Planning
- Delegation
- Budget and financial management
- Internal communications
- Motivation
- · Running a meeting
- Managing yourself.

These all have great merit, and attention to them will help to develop leadership capability. However, I think there's another set of leadership skills that not only benefit those in your organisation, but also help to build crucial relationships with other organisations that help your business to thrive (not to mention building strong client relationships as well).

Leaders who have good 'people' skills know that it's not just about who you manage, it's also about everyone those people interact with – from other staff to customers, from line manager to supply partners.

How we interact with people establishes an opinion about us that will inform decisions and very likely be the subject of conversations with others. Therefore, it is crucial that we embrace this ÷

For more information, visit: www.mitie.com/services/ document-management

area of development. More specifically, there are two areas which I feel are key to relationships and which I have found to be critical in my own role at Mitie over the last 14 years.

#### On trust

Developing how we build trust with the people we interact with can be a very tricky skill (it needs their buy in, not just yours), but at the same time can be very rewarding.

My own experience is that most people want to work with someone who is genuinely trustworthy. They are looking for consistency in behaviours and a reliable person.

To build trust you must:

Do what you have said you will do – building a history of reliability and commitment over time
Be genuine and open. Share your honest opinions on situations, so that people know what you stand for. Do a bit of 'wearing your heart on your sleeve'

• **Be consistent**. We all know people who constantly change their views on given subjects, or people who are inconsistent in their approach to solving problems. It's difficult to build a foundation of trust on shifting sands

• **Tell the truth.** This isn't always as easy as it sounds. Honesty can come across as very direct feedback, and sometimes people see it as a risk. But building sustainable relationships means having the ability to take the good with the bad. That foundation of honesty is so valuable, yet it costs nothing

• **Show integrity and loyalty.** Support views and people you are aligned with, even when it's in a challenging situation. Keep confidential information shared with you as just that.

Trusted relationships lead to open conversations, which in turn often lead to realising

#### You must also be a leader of your peers, your customers and your combined supply partners

common goals and objectives. That is how personal and business partnerships grow in the long term.

#### Introducing empathy

Empathy could be the most important skill a leader can ever develop in either their working or personal life.

If we can see things from the other person's point of view, and truly understand the impact or perceived impact a given situation will have on them, we will be better equipped to manage the process and evaluate the best outcome for everyone involved.

Being empathetic allows us to understand how to motivate people better and how to communicate more clearly – and it also gives us a point of focus in high-pressure situations. Empathy lets us show a deeper level of respect to our peers and colleagues, proving that we care about them in the situation we are addressing.

This is a powerful skill, which great leaders work hard to refine. Empathy makes others view you as a person with whom they can work – someone who values people as individuals and enjoys working with others to solve problems.

#### Leading time

So for me, trust and empathy are key elements in the toolbox of skills that combine to make you a great leader.

Remember, you are not just a leader to your direct reports. On occasion, you must also be a leader of your peers, your customers and your combined supply partners. You also have to be a leader to your line managers, as they will look to you for advice when deciding on areas of strategy and direction for the wider business.

In closing, good leadership isn't a single skill, but a combination of skills that are required to help motivate people and drive the business forward together. Strong leaders also recognise their own weaknesses, and skilfully compensate for them through building an effective team around themselves.

#### **DAY IN THE LIFE**

## Slice of PIE

Shilpa Bhandarkar returns to Linklaters as the firm's first head of innovation. She gives us an early break down of the role and her big lessons from work in the outside world



L eading the central team responsible for catalysing innovation across all Linklaters offices and practices, Shilpa Bhandarkar says there are three key responsibilities within her role.

"The first is around creating the right culture. How do we foster a culture of innovation and entrepreneurship in the firm? This includes making sure we have the right organisational structure to allow ideas from everyone to come through, as well as designing a process to manage these ideas. We need an effective way of collecting, prioritising and executing ideas so that people can see the best ideas come to fruition. Most importantly, we want to ensure we are executing those ideas that add the greatest value to the practices and the firm." For example, she explains, in every practice there's a core group of lawyers and business team members in a practice innovation and efficiency (PIE) team. "They're best placed to identify the greatest opportunities to do things differently. Our role is to facilitate conversations and initiatives within the teams and pass learning from one PIE team to the others."

The second area is to lead and coordinate the firm's strategy on emerging market trends. "We've identified three particular areas that we're focused on: artificial intelligence, use of data, and blockchain and smart contracts. We want to understand how these technologies are impacting our clients and how we can helpfully respond, as well as how they impact the way we run our own business."

"Thirdly, there is how we engage with legal startups and academia to stay at the forefront of legal sector developments and thought leadership."

But Bhandarkar says leaders of innovation must recognise how the changing landscape impacts on their role. "There's no typical day in innovation and I don't think there ever will be," she says.

"We have a long-term business plan and a six-month rolling shorter-term plan that individual initiatives flow from. However, if there's energy and enthusiasm in a particular part of the firm, you don't want to stifle that because it doesn't fit 'the plan'. You need a structured business plan, but with enough flexibility built in to take advantage of ideas and opportunities that come your way."

The use of flexibility isn't something Bhandarkar learned solely in the legal sector. After three years in the startup space, she sees aspects of managing a

If there's energy and enthusiasm in a particular part of the firm, you don't want to stifle that because it doesn't fit 'the plan' startup business as relevant to her current role as well.

"Startups are very data-driven in a way larger organisations often aren't. When startups invest in growth plans or pivot, it's based on hard data. Nobody cares what your business plan said, what you predicted, or thought would work. If the numbers tell you it's working, it is; if the numbers tell you it's not working, it's not. You learn to measure everything.

"I'm always amazed at how much startups achieve with scarce resources. It ultimately comes back to the team. As a leader, it's your job to set the vision, communicate the goalposts so people know how to channel their energies, and then empower them to achieve that."

And how she works personally? "I work between two very different offices. In London I work out of our Innovation Lab, which by its very design, is perfect for ideation. My office in Amsterdam feels very quiet in comparison! So, I partly design my schedule to suit my location – using my time in London for meetings and in Amsterdam for quiet deliberation."

"I'm also very lucky to work in an organisation that genuinely supports agile working, allowing me to balance my professional commitments with personal circumstances. Technology is important to that, but open communication even more so."















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