

TEAM TRIUMPHS Alex Hatchman, chief operating officer at Fletchers, on successfully keeping score PLATFORM AND SUBSTANCE Christie Guimond from Bird & Bird cracks open a new network for women BOOKING THE COOKS DWF on the process of helping people discover the inner innovator



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Editor's letter





t's probably a bit too soon to be talking about the 'rise' of legal operations within law firms. As far as we know it's only a couple of **Briefing** firms that have formally badged departments this way in almost as many

months.

The world of the in-

house legal function

- in many cases, taking

on and managing a lot

becoming a lot more

complex than in the

days of client service

more work for itself - is

On the other hand, perhaps it's a little late. After all, while the financial crisis may have led never-hasty legal to make a gearchange, firms have been talking about getting 'closer to their clients' for as long as ... well, as long as I've been writing about it. Your basic client service led to client listening, to key client programmes – via client relationship management, of course – to client value programmes, client collaboration, client collaboration hubs, and moves into a fairly broad

spectrum of client consultancy.

You might think that the bridge between offer and expectation ought to have been built a long time ago. Of course, the idea of legal ops specifically is responding to the rather more remarkable rise of that particular phrase on the buy-side. The world of the in-house legal function – in many cases, taking on and manging a lot more work for itself – is becoming a lot more

complicated than in the days of humdrum client service. GCs are being asked to do 'more with less' too, to reorganise how work gets done into something more efficient, and to provide measurable proof of the value they're providing. Another turn of phrase often used is that firms must now manage to be an 'extension' of what their clients do. There was a flavour of this, at least, when Herbert Smith Freehills launched its global legal operations function into the market in October 2018. CEO Mark Rigotti explained: "By forming our own legal operations function, we are able to sing from the same hymn sheet as our clients and work with them in a more streamlined and innovative way, ultimately providing them with even better service."

That's the press release; now, what about the practicalities? That's what this issue sets out to unpack.

RICHARD BRENT EDITOR-IN-CHIEF

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TECHNOLOGY







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Grow your boat

"Firms talk about client care a great deal. I hear the talk, but I don't always see the walk."

Alex Hatchman, chief operating officer, Fletchers





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

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ROUNDUP



Target practices

A s the wheel of the seasons turns again, April sees legal looking at some regulation and transparency landmarks – well, it's nice to have a bit of certainty in some quarters. First is 4 April, the deadline for year two of gender pay gap reporting. Thus far, firms seem keen to go the extra mile when championing their diversity committments.

An early mover among UK law firms was **Bird & Bird**, which has refined its reporting this year by publishing detail of its partner pay gap. The snapshot included a 'surprise' difference in favour of women in both the median and mean metrics, at 0.9% and 20.6%, respectively. However, when looking at the combined statistic, partners and employees, the median pay gap was 43.5% and the mean 44.9%, both in favour of men.

TwoBirds says in its accompanying report: "Our gender pay gap is largely due to a greater proportion of female employees within our support roles at a more junior level."

Pay gap analysis from the **BBC** back in February found that the differences are very far from being addressed, across all sectors. The Beeb said 40% of private companies had reported a wider pay gap than in 2018. Sam Smethers, chief executive of **The Fawcett Society**, said: "The pressure is on for employers to demonstrate progress in closing their pay gaps, but initial findings look worrying."

Law firms well know there is work to do. Shortly before publishing its pay gap figures (median 45.7%, mean 68.9%, in favour of men – employees and partners), **Clifford Chance** also created a new role – global head of inclusion. Tiernan Brady, formerly executive director of the **Equality Campaign**, which campaigned for equal marriage rights in Australia in 2017, said in the press release: "My experience of campaigning in both Ireland and Australia showed how influential global firms can be, and equally importantly the staff in those firms, can be when they take a leadership position on diversity and inclusion."

Firms, including CC, have also expanded their reporting beyond gender. **Baker McKenzie** has published its BAME pay gap figures, and has declared a target of 14% BAME London partners and senior leaders, which it will review "on an annual basis". Currently, the London office is 18% BAME across the board, although a spokesperson for the firm said that this "thins out at the most senior levels".

Baker McKenzie also intends to reach a 30% target for female partnership and leadership roles, firm-wide – although no target date is specified.

In other news, the **Solicitors Regulation Authority** (SRA) has announced that new "shorter and more targeted rules" will come into effect on 25 November 2019. These include the creation of separate codes of conduct for firms and solicitors, "simpler" Account Rules, and freeing solicitors both to carry out 'non-reserved' legal work from an unregulated business and to provide reserved services on a freelance basis.

The SRA Digital Badge, confirming to website visitors that a firm is regulated, will become a mandatory requirement for all such firms, including a "firm-specific link to information on the protections that this status provides".

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65 SECONDS WITH ... CHRISTIE GUIMOND



Christie Guimond, corporate development manager at Bird & Bird, wants to bring more 'disruptive' women together. She explains new network She Breaks the Law, which officially launches in late April

Where does your role fit into the Bird & Bird business structure?

No one really knows – it's very nebulous! Loosely, it's what you would call strategy and innovation. Currently I work with our CEO, looking at the legal services landscape and where we should be going. I also work closely with the executive and strategy committees, as well as other members of the firm on areas that are being heavily disrupted – like legal technology.

What do you hope to achieve with She Breaks the Law?

My two co-founders, Priya Lele from Herbert Smith Freehills and Nicky Leijtens from NautaDutilh, and I met after a conference last spring. We all have experience in innovation and, in spite of coming from three different continents and speaking three different native languages, we found we had many of the same challenges. We want to create a platform that brings the entire community of disruptive women together.

O business services women know enough about how to reach leadership-level positions?

A The challenge isn't necessarily around women knowing how to reach those roles. Oddly enough, if you look at the ratios, less senior female lawyers have far more opportunities than women in business services. That's because non-lawyer leadership roles in law firms are genuinely few and far between, compared with the number of partnership roles. The solution is to help women maximise their skills, be creative, develop ideas and learn from others' experiences. The more connections you make, the more opportunities you uncover.

What qualities do you think are most important for driving innovation in law? The ability to operate in an environment of uncertainty is key to resilience – that's probably the toughest skill to master. Creativity is also important, but the person responsible for overseeing innovation may be more of a facilitator. Change is fundamentally about people – so empathy is also crucial.

And what's the hardest thing about actually getting it done?

A Innovation is difficult, because you don't know what you're creating. Often, the person who's responsible for innovation is a team of one, so it's both exciting and challenging but requires support. Fortunately for me, Bird & Bird has always been very open to innovation - they have a very creative environment. There are a lot of parallels with knowledge management 15 to 20 years ago. Innovation will also crystallise over time, but it means something different to everyone. Change is very personal. It might appear to make some people's lives worse, or it might have no impact whatsoever. You have to be sensitive to the individual.

What's next for She Breaks the Law immediately? A In January, we put a teaser video on Crafty Counsel, the online video hub for lawyers; now we're very busy planning our official launch on 25 April. It will be a live, 'She connects' plenary networking event, but with a twist – we'll have 'networking circles' dedicated to specific topics, collated in advance through social media. We're very keen to learn what's important to women in the industry, so that we can use the network to cater to that.

Did you expect to end up in a role like yours at the beginning of your career? Absolutely not. I've had a very indirect route: I wanted to be a journalist, then went to law school, decided not to practice and still ended up in the legal industry. This role didn't exist when I was planning my career – I just ended up in the right place at the right time, but I love it. That's what She Breaks the Law is for – helping other women be the right people, in the right place, with the right skills.





Kerry Westland Head of innovation and legal technology Addleshaw Goddard

S@kerry_westland

A better integrated suite of solutions that further streamlines process, while still allowing us to provide astute advice to external and internal clients, is a must this year.

Integrate expectations

F righteningly, we're now a quarter of the way through 2019 – hopefully those resolutions of a few months ago remain on a reasonably focused track. But what will the rest of the year bring for legal technology? Here are my thoughts and predictions for the space this year and the impact I believe it will continue to have.

SPEAK UP

The year 2018 didn't seem to have quite the legal tech 'big bang' of other years. Some may disagree, but it seemed that the market focus was on developing portfolios of products and consolidating solutions into more efficient and effective platforms. There was also a surge in legal tech startups, seeking funding from law firms themselves as well as other investors.

For me, it was also a year of growth and taking stock. After launching Addleshaw Goddard's innovation and legal technology team in 2017 with just three people – we've now grown to 20 – supporting clients on the delivery of large-scale mandates, but also looking at how both the firm and our clients can continue to make internal efficiencies and deliver better outcomes through the use of legal technology.

So, what can we expect from the year ahead?

I think the buzzword for 2019 will be integration. The market has already seen some legal tech businesses and firms start to provide more commercially focused systems, but this year it will be about how these platforms integrate together, as well as how they integrate with software and systems firms already have in place. A better integrated suite of solutions that further streamlines process, while still allowing us to provide astute advice to external and internal clients, is a must this year.

Technology-enabled services will also become more mainstream over the course of the rest of 2019. A lot of what has been successful so far has been bespoke developed solutions – which have been great. There will always be a place for that, but over the next year we will see more pre-defined solutions that are readily available for specific work types, which can easily be spun up when required.

I also think we will see more mainstream adoption across legal work types. Resistance to change is always mentioned when it comes to legal tech adoption – I think we will now finally see some of those barriers start to be stripped away as legal professionals start to truly understand the power it brings to their work.



📐 SPEAK UP

Iransparency time

n 6 December 2018, the Solicitors Regulation Authority (SRA) issued new rules around pricing transparency. This was driven, in part, by over 25% of complaints received concerning fees and costs charged, and to give you and me – potential customers – the opportunity to make more informed choices.

At first glance, the new rules are relatively limited in scope, applying to areas such as residential conveyancing, and certain immigration, employment tribunal, debt recovery and licensing applications. Information required to be made available includes the nature of services offered and average cost of these (including any VAT and disbursements) if no precise number can be provided. So far, so good – and all part of good client and matter management.

According to Paragraph 1.6 of the Transparency rules, this information "must be clear and accessible, and in a prominent place" on the firm's website. However, there is opportunity here for firms to embrace the broader theme addressed as well as the immediate practicalities.

Pricing – done well – helps to strengthen client relationships. It should

For a client, receiving a law firm invoice higher than expected is never a pleasant surprise. The mantra 'no surprises' will serve us well. Invoicing is one of the most intimate, yet poorly executed, touchpoints in any client relationship. It is the 'L'Oréal moment'. Is your firm worth it? be viewed as a process, starting with a conversation with the prospective client and continuing throughout the duration of the matter (and potentially beyond). At the outset of any potential matter, firms should be striving to align goals and objectives with those of the client, and against as clearly defined a scope as possible, whether this is a major M&A transaction (not covered by the new rules) or a debt recovery (which is). This means active engagement with clients, to understand what is of most value to them and how we can best structure the work accordingly, while making an appropriate level of return. This is what we expect everyone else to do, so why not us? Also, resist the temptation to add a list of extensive assumptions and caveats to any pricing provided. Good practice is no more than three to four key (and substantive) assumptions, rather than the legal equivalent of War and Peace.

Once the matter commences, there should be regular, clear client communication throughout, covering status of the matter, costs incurred to date, next steps and estimated future costs (in other words, good matter management).

Finally, for a client, receiving a law firm invoice higher than expected is never a pleasant surprise. The mantra 'no surprises' will serve us well. Invoicing is one of the most intimate, yet poorly executed, touchpoints in any client relationship. It is the 'L'Oréal moment'. Is your firm worth it? Unfortunately, we often see invoicing as an administrative burden rather than another client relationship opportunity.

Whether you provide the legal services covered by the new rules or not, the concept of greater pricing transparency simply makes more business sense. Doesn't it?



Stuart Dodds Principal Positive Pricing

Former director of global pricing and legal project management, Baker McKenzie

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Always be closing in Why do law firms need to

why do law nrms need to reach out to clients in new ways? Josh Adcock reports on the rise of legal ops and collaboration with in-house 16

Briefing people Alex Hatchman, chief operating officer at **Fletchers**, on data, the client value difference and the journey of diversity

📐 THE BIG IDEA

Always be closing in

It would be a foolish firm indeed that didn't describe itself as 'client-focused', or similar, somewhere on its website. But many are now pursuing that value into a world of tangible activities that get right under clients' skin (in a good way). Josh Adcock reports

S

everal firms have recently launched new initiatives that purport to enhance their client relationships. Although these vary in the degree of their changes,

there are some common themes to decipher. Many recognise the need for more 'valuable' client solutions, as well as the importance of collaboration, both with clients and tech suppliers. And one way to do that, they say, is to have better, more inclusive discussions.

"We felt we needed to give both our lawyers and clients the framework in which to have those conversations," says Kathryn Pearson, head of knowledge and client service solutions at Bird & Bird. Approximately two years ago, the firm launched twoBirds Client Solutions, to consolidate tech solutions and services into a single, recognisable brand.

In order to facilitate this, the firm got flexible. Karen Jacks, IT director at Bird & Bird, explains that Pearson's role, in addition to serving knowledge management, now takes advantage of the expertise and abilities of her team to help develop client solutions and better facilitate discussions, both internally and externally. "Kathryn has extended her team's portfolio, so it now includes how we're using machine learning around our due diligence, so she can tell partners exactly what products we can offer, and what they can do for clients."

Stop of the ops

A number of law firms have gone further and begun mirroring their clients' own structures, incorporating formerly disparate teams into one unit – the legal operations function. Ian Gilbert, recently appointed global director of legal operations at Herbert Smith Freehills, says that the driver for its new structure was both client satisfaction and, as at Bird & Bird, internal simplicity. "We thought there was a real opportunity to drive efficiency – and to mirror the in-house functions," he says. The unit brings together smaller teams that previously worked on areas as diverse as legal project management, pricing, process improvement, innovation and automation.

The goal was to get closer to the multidisciplinary processes that clients also go through, and to translate that across to 'better ways of working'. "We were asking ourselves questions like, 'Who do I need to speak to?' and 'What's the correct entry point for this problem?' Now that we've consolidated, working is much simpler, both internally and for our clients."

Another firm stands to benefit from the experience of its transatlantic professionals in different areas. Chris Emerson, newly appointed chief of legal operations solutions at Bryan Cave Leighton Paisner, was formerly at the helm of BCXponent, Bryan Cave's legal operations



consultancy, since rebranded under the merged firm as Cantilever. Part of the motivation for its current incarnation was efficiency. "For each client that came along we were essentially creating a brand-new, bespoke solution. We were perpetually innovating," says Emerson. The firm realised it could productise its offerings, addressing common client issues: "Every company is struggling with contract management in some form and most are still trying to figure out matter management – we're helping many clients with GDPR, too."

A numbers game

At Capita, GDPR is one area in which the company is seeking legal support, but GC Claire Chapman says she wants solutions, not just regulatory advice. She says the Big Four's consultancy-style approach can offer a broader discussion: "PwC, for instance, discusses tools, systems and processes which will make your life easier." Self-service is one example of a potential differentiator: "Like PwC, Baker McKenzie also has fantastic online resources for clients around GDPR," she says.

Bringing technology startups and clients together into one network, Slaughter and May has recently launched its initiative Collaborate; a legal tech programme, through which it's directly asking clients about their needs and desires. "We have an industry expert panel, which includes people from the Faculty of Laws at UCL and consultancy BamLegal, as well as a client panel, with in-house legal professionals from Standard Chartered, Santander, GSK, John Lewis and Vodafone," says Natalie Donovan, senior technology lawyer at the firm.

"It's a great opportunity for us to involve our clients, so that we can help to develop legal tech products which work for them and us," she continues. While the programme is a way to help clients' in-house teams determine what is a good product and what isn't, she says it's also a way of learning about the problems they want legal tech to solve. Alexandra Woods, head of knowledge, says: "By including our clients, and getting it from the horse's mouth as it were, we can ask: 'What kind of things would be useful to your legal and wider business teams when working with us?""

Like TwoBirds, Slaughter and May wants to help create a network among clients, to foster mutually beneficial discussions and, like BCLP, feels that clients face many of the same challenges. "I think it's very important to let them hear from one another, too," says Woods. Through Collaborate, they hope to get more insight into clients' existing wishlists, including collaboration tools, social features and self-service tools.

Over at HSF, Gilbert is encouraging his new function not to begin with a solution in mind. "We're trying to start by looking first at the underlying business need and then working out what potential solutions there could be. Technology can be transformational, but it's not a silver bullet." For example, in one case HSF built a customised client portal which provided an interactive fee dashboard, information repository and collaboration space, but only in order to answer the client's specific needs.

Chapman welcomes the fact that firms are starting to look at what she calls the "So what?" factor when it comes to legal technology. She wants firms to ask: "How is this actually going to deliver a better outcome? I want firms to be thinking about the end-user client and what technology can do to advance that outcome."

Helping clients navigate tech is one way to do this. Although Bird & Bird doesn't intend to establish a full legal operations consultancy any time soon, it has (informally) advised clients on bringing in external pieces of software. Pearson "We're trying to start by looking first at the underlying business need and then working out what potential solutions there could be. Technology can be transformational, but it's not a silver bullet."

lan Gilbert, global director of legal operations, Herbert Smith Freehills

says: "We had one occasion where we were conducting a relationship-building session – not necessarily selling a piece of our own tech but trying to broker relationships to develop a contract management product. We're cementing our position as a trusted adviser and fostering 'sensible conversations'."

Slaughter and May is looking for a truly collaborative approach and feels clients will get most out of the programme if it's a genuine two-way street: Woods says: "We want to learn from clients that have deployed technology in their wider business, not necessarily within their legal functions, and see how we could gain valuable insights." This kind of sharing, Woods says, should be a no-brainer: "Why wouldn't you share your own experiences with your clients and vice versa, for mutual benefit?"

Jacks hopes that twoBirds Client Solutions can be the bridge that not only delivers a solution, but helps their clients themselves to better understand what the problem is. "They think they want one tool, but when you start having a conversation you realise that's not the solution; it's actually about process or a different tool," she says.

HSF is finding that actively sharing expertise is popular with clients. "A really booming area is clients working with us on process design and improvement projects. We've also had a number of clients asking us about our experience of using Agile project management, and we've been able to share the actual training and methodologies that we would use," says Gilbert.

Chapman would seem to be looking for exactly this kind of thinking. "Don't sell me legal advice – help me solve the broader problem, which could be things I'm not thinking of or I don't have the skills to understand." She reiterates: "I get inundated with tech offers that do X, Y and Z, but if firms can't demonstrate the positive benefit then there's no point in having it."

Multidisciplinary magic

There's much variety in these new team structures, which blend professionals of many backgrounds together. Gilbert says he's a big believer in multidisciplinary teams, having come from a pricing background, which previously sat within business development. "Within the team, we have people who come from data analytics and technology, as well as qualified lawyers who are now using their skills in a different way, all as part of the same function." The team is focusing on "the business of law", he says, rather than one particular legal need.

Of course, the firm wants to use all its internal expertise to best advantage for itself and its clients. "If we've got someone with a specialist capability, we can also bring that into the relationship. Combining process, technology and data analytics has proven to be very effective, especially being able to have the different skillsets working together." Although the legal operations function at HSF has been in existence for only a short time, Gilbert says the firm had underestimated the synergies of working in a multidisciplinary, more

"Why wouldn't you get the expert in front of the client? Clients don't always need a lawyer in front of them; they just want the person who can answer their questions."

Kathryn Pearson, head of knowledge and client service solutions, Bird & Bird

collaborative manner, which has culminated in better results, delivered faster.

Emerson says in one case legal work was only around 20% of the solution, and Cantilever was able to provide a 'hub' for all the relevant services to make the project happen. "By collaborating we can get projects done faster. We're working in a more holistic way, elbow to elbow with our lawyers but not compartmentalising within a specific legal function."

Woods says Slaughter and May also has more engagement. "We're increasingly talking to clients about process improvement for matter types and processes we run with clients directly." She also feels Collaborate will be a great conduit for framing discussions and further contact between clients and business services staff, in the future.

Emerson says that this is happening at his firm already. "On my last trip, I brought along my product development manager – I didn't hesitate to bring her, as one of our projects is very technically complex, and none of our partners in London batted an eyelid at that." He also says that demonstrating expertise and capability in a broader way is likely to increase the all-important 'stickiness' of relationships.

What clients want, Pearson believes, is knowhow. "Why wouldn't you get the expert in front of the client? Clients don't always need a lawyer in front of them; they just want the person who can answer their questions," she says.

So, clients want broader conversations, and law firms would be wise to take heed – so why don't we let a GC have the last word? In Chapman's experience, many firms are still keeping business service professionals away from the client relationship. "I typically get access to those areas of a law firm through the lawyers – not directly." Investing more in those connections and conversations could yield considerable benefits.

If there's one thing Chapman never wants to have a conversation about again, however, it's that billable hour. "Everybody is watching the clock. Being nickel-and-dime on everything means you can't have these wider-ranging conversations."



Sport in the act

Alex Hatchman, chief operating officer at Fletchers, tells Richard Brent about her commitment to continuous improvement, from data-backed productivity gains to the customer mindset and empowering workforce diversity





placing it firmly in the **Briefing** market for the first time. And, just weeks after, chief operating officer Alex Hatchman was rewarded with the Law Society's first ever award for 'excellence in practice management' in its annual round of recognition.

The legal profession has not always been known for the happiest of work/life balances. However, Hatchman – previously a non-executive director for the business – is pleased that she has been able to take a particular love from the latter side of the scales, and use it to influence a big business improvement.

A new layer of top-level leadership was one of the first things she introduced to the firm as part of its latest growth strategy. "I've always had a real passion for sport, and our CEO Ed Fletcher has a passion for rugby, so we call those directors the First XV," she laughs. "Then, there's a layer called the Lions squad that sits just under that. "I see lessons for business in sport, and also vice versa – but even if you aren't a rugby fan, people quickly understand the principle. People need to go out there as a team, and be aware of who they have to call on for support in situations.

"I also think you need the right tone in your leadership. I always say that I look for three qualities in the best leaders of people – a wise head, a kind heart and a strong backbone."

Data basis

Swiftly moving on, lest I'm drawn into any juicy geopolitical parallels, Hatchman says that when she arrived at Fletchers there were no more than a handful of leaders for 350 to 400 employees. "That's a really, really concentrated power base, whereas the firm now has 35 in place to steer an organisation of 430."

Of course, team spirit-based success can't be taken for granted – a few cold, hard facts are needed too.

"Business leaders also need to display commercial acumen – and as an engineer by background, I'll always love my datasets. You have to plan vigorously, and then manage vigorously. I don't believe you can be sustainably successful by accident.

"We've embedded a lot of short, medium and long-term strategy work within the firm – supported by financial year planning, which is broken down into detailed objectives, and managed by a very detailed weekly management information pack, as well as monthly through the board.

"That level of detail is so important, especially when an industry is set to go through a period of such significant transformation. Changes in the external environment also need to be continually integrated into operations."

Prior to trying her hand at legal process improvement, Hatchman had worked on transformation of the retail sector – including as head of food logistics and supply chain at Marks & Spencer.

"Retail is all about running large, complex operations that are often very time-critical – thousands of people in supply chains making decisions and taking different actions. That's quite relevant with respect to our people management – but perhaps most transferable of all is how you approach the business of serving customers."

"Law firms talk about client care a great deal. I hear the talk, but I haven't always seen the walk. At Fletchers, 'customer' is now a core value. For example, we will now mystery-shop, and learning from that feeds directly back into the business to help us all improve our game."

This is another area of operations where the business needs to see dependable, joined-up data, she says. "You want to go on the individual customer's journey with them, but there are also some things you can only see when you effectively group them. If one individual's bad experience is replicated elsewhere in the client population, you may need to address it faster than you'd thought."

Tomorrow's talents

Today, of course, that response may well involve an element of technology change. "There's still a long way for law to go here," says Hatchman – at Fletchers included. "However, that also offers a competitive opportunity to change."

One factor mentioned in her award win, she says, was the firm's significant increase in productivity per employee. "That will be driven by both leadership and technology, making processes slicker and more efficient, rather than painful and protracted. Also, mobile working is an increasingly

"We have to do more, including to encourage women to empower themselves to rise."

Alex Hatchman, chief operating officer, Fletchers

essential ingredient, including for work/life balance – we're buying more laptops than desktops these days.

"In addition, we've recently invested a lot in cybersecurity to protect what is quite sensitive data from the attacks that can often assume firms are less well protected than other businesses."

And then there's the question of the next generation of technology talent. Fletchers has opened its doors to legal apprentices as an alternative route into careers. "It's often said that we aren't training lawyers well enough for the future, or even for how much more is involved in being successful at the job today, and I think we do need to actively explore all the alternatives that are out there," she says. "One great thing about our apprentices is how well they get to know the functioning of the entire business, by immersing themselves in so many elements of it."

Finally, speaking about all of this on International Women's Day as we are, where does diversity sit in Hatchman's line up for change and strategic goals?

It's another particular passion, she says. "We're around 62% female overall, but we have to do more, including to encourage women to empower themselves to rise. Senior women like me also have a duty to enable others. I have nine mentees personally, mainly women, and I'd very much like to short-circuit some of their learning as I wish others had been able to do for me.

"As an optimist, I think #MeToo has also helped to spark an energy, which is moving things on more widely than the movement's origins. Men also have a hugely important role to play here, and I'm genuinely encouraged by progress on that front in recent years," she says. "Our own CEO is one example of a vocal male champion for change in the market."

That said, if diversity targets just aren't working – just like in other areas of business – something needs to done. In those circumstances, she can certainly see the case for considering a quota within the top team. ►

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Recipe for innovation Jonathan Patterson, managing director and head of development, **DWF Ventures**, offers a taste of work in the innovation kitchen



HANDS ON

Recipe for innovation

Jonathan Patterson, managing director and head of development, DWF Ventures, explains how the firm encourages employees to roll up their sleeves and gain the confidence to contribute to more creative problem-solving

t started with a chance encounter. In late 2016, a DWF team was

lucky enough to spend an afternoon at IDEO in London. For those who haven't come across IDEO, it is one of the world's most creative businesses; brings together disciplines as diverse as behavioural science, digital design, electrical engineering and food science; and is credited with contributing significantly to the rise of design thinking as a recognised innovation method. As you might expect from a business with its roots in the West Coast of the USA, the office was very vibrant and dynamic, and in the middle was a bustling kitchen. The story goes that the office kitchen was a central source of creativity because it was where people took time away from the intense focus of their everyday activities to congregate and talk informally to colleagues. As part of the development of the DWF Ventures business model, this was one of several visits that a DWF team made to businesses in a range of different sectors, in the hunt to learn how successful organisations embed a culture of creativity and develop the skills

required for effective innovation. This objective took us from meetings with some of the biggest businesses in the world to speaking to entrepreneurs who had just set up or sold a business. As we took on the various lessons learned and thought about how we could apply them at DWF - and thought in particular about innovation in action at IDEO the idea for the DWF Innovation Kitchen was born. Working with the fantastic online learning team behind DWF Advantage (specialist in online legal and business management learning), we wanted to demystify the idea of creativity in legal services and create an easy way for everyone across DWF to begin to understand and learn more about the skills and methods that underpin a culture of innovation. Critically, we wanted them to be able to do it without it feeling like a major exercise that sat away from their existing focus and 'day job'.

Experiencing the DWF Innovation Kitchen

The kitchen is purposely available to everyone at DWF, from the most junior to the most senior roles, and it doesn't require any previous experience. It is an open learning programme in DWF's global learning academy and links directly to an individual's personal development plan. The aim of the kitchen is to give people a gentle immersion into some of the richest and most interesting content that is available on subjects like creativity, design, innovation, technology and problem solving.

We wanted to demystify the idea of creativity in legal services and create an easy way for everyone across DWF to begin to understand and learn more about the skills and methods that underpin a culture of innovation

A typical user would go through the following experience:

Level one

Start in the DWF academy, and with one click you enter the Innovation Kitchen. With a little instruction from a friendly robot, you can take your time to look around and just click on the content that catches your eye. The format looks very much like TED or YouTube, so is easy to navigate, and the content comes in three main formats - audio and video, papers and articles, infographics and drawings - so there is something to match everyone's preferred style. The idea is that you can spend time in the kitchen at whatever time works for you and go at your own pace. Once you have spent time looking at over 65% of the content, you will get a pop-up message asking if you want to progress to the next level.

Level two

If you answer yes, you are then added to the list for the next available innovation webinar. The aim of the webinar is to take the basic content from the kitchen and ground it in some of the key theory, methods and



real-life DWF examples. The webinar runs for 40 minutes and covers the DWF innovation strategy and some of the creative problem-solving techniques we have developed. This is where you'll be introduced to the Engine one and Engine two innovation strategy that is core to the DWF approach and also an 'innovation style indicator', which helps you to understand your natural innovation style are you an improver or an inventor? It also brings innovation to life through case studies on successful DWF innovations.

Take the test

Following the webinar, you will receive a message asking if you want to 'take the test'. The objective of the test is to see whether you have picked up the key concepts and theories, but also to challenge you to bring out your creative side. The test requires you to produce a one-minute video that articulates what innovation is and the top three things you have learned in the Innovation Kitchen. There are no rules or guidance, and people have done all kinds of different things. We have had people sitting at home at their kitchen table talking informally to the camera, and very polished 'News at 10' style broadcasts, right the way through to one person who made an animated film using Lego characters.



Level three

Once you have taken on the video challenge, you are automatically invited to the next and final level, which is a full-day creative problemsolving workshop with the DWF Ventures team. This is much more hands-on and aims to show people the benefit of diversity and teamwork in the innovation process. The session uses a mix of design thinking and other techniques, with people split into teams to go through an everyday challenge (for example, how to make an aeroplane flight more relaxing) and then to tackle a specific DWF challenge that they face in their everyday roles. More recently, we have tweaked the workshops so that people can also learn about the DWF Ideas Centre and get hands-on with some of the creativity techniques we have developed with some of our clients. Either way, the goal



of level three is to enable people to gain practical experience and the confidence to be creative.

Creating confident creatives

Those who complete all three levels become confident creatives, and we then ask them to join a group within the firm that is earmarked to be added to the project teams that work with DWF Ventures, to explore new ideas or work on an R&D concept. They are also encouraged to take a lead role in 'Local Idea Groups', which are the grassroots level of innovation at DWF. From these

Innovation at DWF

The Innovation Kitchen is part of a five-year roadmap for innovation that supports DWF's strategic goal of 'doing things differently'. Driven on and supported by DWF Ventures, this approach aims to encourage, deliver and sustain innovation through nine core elements:

Culture	Structure	Inspiration
Idea generation	ldea management	R&D outcomes
Capability	Methods	Toolbox

groups we have seen new ideas grow into some of the most successful R&D projects, the identification of new opportunities for our Connected Services division, and new use cases for experiments with emerging legal technology tools.

Food for the future

Progressing from an initial concept to a full-blown programme, we have seen the DWF Innovation Kitchen capture the creativity of numerous teams and individuals across the firm. It is a concept that will keep developing, with new content added on a regular basis, and we hope to see our work with the University of Manchester and the University of Sheffield informing more of the tools and techniques. We also see huge potential in translating more of the DWF Ideas Centre masterclass work we have been doing with clients into a series of new workshop formats, as well as creating an innovation competition, with unique experiences to be awarded as prizes, to keep pushing the 'super innovator' population onwards and upwards, to the next level.



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Stickiness situations Mike Walker at **Peppermint Technology** says IT choices lead straight to client retention

A clearer client view Elisabet Hardy and Emily Colbert at **Thomson Reuters** unveil a brand new vision of client collaboration

Come the evolution Adam Munns, head of business applications at **RPC**, on building better solutions with the help of **Blue Car Technologies**

Speak law like a human

Candice Witton at **Propero Partners** says the age of tech-enabled service still requires a discernibly human touch

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Allen says to factor client feedback into the business of process improvement



INDUSTRY INTERVIEW

Stickiness situations

Mike Walker, chief technology officer, Peppermint Technology, says differentiating the delivery of their data can help law firms form longer-lasting client relationships



aw firms have long had the objective of forming stronger bonds with their clients, but today the pressure to successfully differentiate your firm

as the one with whom the client should really be doing business is huge. The Big Four have both re-entered and started to disrupt the legal market, and the largest firms have launched entire innovation departments to show just how seriously they take the need to 'do things differently'. One consequence of this must be that firms – innovative or otherwise – take steps to retain those clients they have already won over.

Mike Walker, the chief technology officer of Peppermint Technology, says that enabling that mission is at the centre of his company's own business vision and strategy. "Empowering our customers to be more agile in how they decide to go to market – making changes that achieve better understanding, more engagement and loyalty in their customers – is critical to success." He highlights, for example, the developments in alternative fee arrangements (AFAs), which clearly demonstrate greater willingness to meet clients in the middle: to negotiate, share and collaborate. "The technology to produce and monitor those AFAs isn't just about doing the work better; it's about embracing the needs of the client.

"Moreover, the big names in consumer market disruption – Uber, Netflix and Amazon – have all transformed something to make user experience more convenient. From mobile access generally, to developing secure 'self-service' portals, any increase in convenience can make customers more likely to want to work with you. Technology isn't out to replace human interaction – to make it robotic – but leveraged correctly, convenience can create significant brand goodwill, which also spreads to prospective and potential clients."

In some cases, steps to improve client service don't even hinge on faster, more predictable or more successful delivery of a legal service. They could address another business problem entirely.

"For example, we have a customer that has used our technology to create new employee training programme solutions for its clients," explains Walker. Here, the business in question was out to serve its clients better by allowing them to solve a costly and often repetitive process. "It was disruptive and expensive to send everyone needing training offsite for a day. So, the law firm quickly developed a dashboard for booking courses, completing the training using an online provider, measuring results and managing the whole process." Not only did the business save time and



money, but the employees also achieved higher scores in their assessments.

"It's actually a very simple thing, but the key is that the law firm used technology to change the client's experience and remove a problem," says Walker. The win for the firm is that the client relationship is now that much "stickier" than it would have been.

Relationship refinement

It's for a company like Peppermint to help its law firm customers to create other, similarly 'sticky' experiences – and it's doing that in a number of different ways, says Walker. "Technology isn't out to replace human interaction – to make it robotic – but leveraged correctly, convenience can create significant brand goodwill, which also spreads to prospective and potential clients."



"There are cognitive features, such as sentiment analysis, enabling firms to rapidly review emails and other communications from a riskmanagement perspective. The system might alert the practice to certain negative signals."

"We've invested heavily in product advisory boards and feature focus groups – where we interview users to help improve our ability to digest raw business problems in the market and 'switch on' the right solution faster."

But there's also the matter of helping firms to understand their clients' changing businesses better – which may well involve a Peppermint product. It has just launched Peppermint Business Development – which joins practice management, matter management, document and knowledge management solutions in the cloud.

One common problem for firms is a particular employee not personally knowing the most relevant individual at a client organisation to unlock the next piece of added value. "To change that we're making the data that firms already have about a client or potential client more consumable, enrichable and shareable, to help them in their individual engagements," says Walker. "Artificial intelligence can effectively organise the firm's collective knowledge into user-friendly features such as newsfeeds, and even leverage relationship insight from a separate platform such as LinkedIn." The partner, fee earner, or anybody else involved in the relationship - perhaps about to attend a review meeting, for example - is empowered to adjust their client conversation accordingly, making the engagement a more personalised one. "They can surface new potential routes to the right people, as well as approaching the situation with more knowledge," he says. "Importantly, changes in personnel detected at the client can automatically generate actionable insight for partners and fee earners." Peppermint

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

has also created 'personas', to help firms tailor the visualisation of client data to different business requirements and contexts.

Of course, ultimately it's still for the human to manage the firm's relationship with a client and make it 'stick'. However, AI can also play its part in ensuring that the firm starts a new conversation before it's too late. "There are cognitive features, such as sentiment analysis, enabling firms to rapidly review emails and other communications from a risk-management perspective," says Walker. "The system might alert the practice to certain negative signals coming through, again suggesting a different direction for the next client conversation."

More granular still, machine learning can mine systems or materials for the specific tasks where a client is expecting progress, but which are still incomplete. It can produce this insight just in time before a catchup telephone call to manage expectations more effectively. Walker explains: "That's what I'd call 'transparent AI' – something that helps with a situation only just coming into your field of view – and it's a really good use of it."

Cloud capital

More creative client relationship management is only one part of the Peppermint proposition. The bottom line is the ability to host all of a firm's information, process and document management needs in the cloud through Peppermint – a platform built on Microsoft Dynamics and SharePoint that integrates with other applications such as iManage. Here, systems, firm collaboration and content tools co-exist, accessible on all devices and connecting one common source of data. In January 2019, Peppermint announced it had secured £7m of further funding from its original backer and Silicon Valley-based AKKR to support further product development and to scale.

Walker says: "The biggest priority for investment is ensuring our clients see the ROI from Microsoft Dynamics quickly; that they're really prepared for the pace of change we're seeing in technology. And for firms to get value out of a product, first their employees need to see the



value in it – that's what drives me personally."

As an increasing amount of legal work is done on the move, he says another goal is to facilitate tighter collaboration across the increasingly dispersed legal business – something that, again, goes to the heart of a better client relationship.

"Positive, proactive knowledge-sharing has long been critical, but we're also bringing all relevant data streams together into one team view. For example, using cognitive services to search and summarise information, a client question or concern can be addressed 24/7. Previously, it might have waited until the next day.

"The next place I see team-based collaboration going is to seamlessly and securely invite thirdparties for co-authoring and editing, and even searchable in-person conversations. We use this in-house already, and have seen huge benefits. This all has the potential to hugely streamline law firm productivity."

And his job, he says, is to introduce all this, such that it "seamlessly arrives for consumption within the natural lifecycle of the products". That way, the "With cloud, you pay your subscription, the innovations keep coming, and you can consistently build the value over time."

firm doesn't need to focus as much on physically introducing its next IT-based innovation in client service – it can focus that much more energy on the client.

"You get accelerated value," says Walker, simply. "Firms dealing with upgrade decisions can easily become stuck in older ways of doing things for too long, or with problems that aren't solved. With cloud, you pay your subscription, the innovations keep coming, and you can consistently build the value over time."

And if that transformation makes the difference between a client relationship that sticks and one that's severed, it should certainly get the attention of law firm management.



INDUSTRY INTERVIEW

A clearer client view

Elisabet Hardy and Emily Colbert of Thomson Reuters explain why combining the expertise of the Practical Law team and the 3E financial management system in a new single solution, Panoramic, helps firms to improve the quality of their client interactions



t has now been over a decade since the pace of conversation surrounding what constitutes good

value to law firm clients really picked up. The triggering of the 2008 recession gave rise to renewed calls for 'more for less' in many quarters, and firms responded with measures including a range of alternative fees to the hourly rate, resourcing changes such as through shared-service centres, and more creative 'client listening' exercises.

Of course, some would contend the hourly rate is an incentive to inefficiency that continues to burden the profession to this very day. Elsewhere, however, new functions that now involve clients in collaborative exercises such as continuousimprovement feedback loops and legal process mapping certainly point to progress connecting the dots in some respects.

Elisabet Hardy, vice president of financial and practice product management at Thomson Reuters, says: "Talking to our customers, we hear that the business challenges for firms – from more efficient working, to improving knowledge transfer and innovating around pricing – haven't really changed that much. The biggest change of all appears to be that law firms are now making serious, tangible efforts at trying to change."

There's a growing recognition that this requires strategic investment in efficiency-enhancing technology, she says; a new pricing solution perhaps? However, that process introduces a number of new challenges while attempting to overcome the old ones. "If your lawyers aren't truly working to the budget the technology's tracking, it's wholly ineffective," says Hardy.

"In addition, the setup of legal software hasn't necessarily helped firms in their efforts to collaborate more efficiently and transparently with their clients. Historically, there have been multiple disparate systems to integrate and navigate. Even now it can be very difficult to follow a single workflow fully, end-to-end."

Map your hands

2019 is the year that Thomson Reuters has set out to make huge inroads into solving this paradox in the legal process, she says. Launching in April 2019, the new cloud-based solution Panoramic brings the knowhow and knowledge resources of the Practical Law offering together with real-time budget and matter progress data, managed and delivered through the 3E financial management system. The team of legal editors at Practical Law



Left to right: Elisabet Hardy, vice president of financial and practice product management, Thomson Reuters; and Emily Colbert, vice president of product management, Practical Law, Thomson Reuters will manage a new set of dynamic and customisable matter maps, which not only present phase and task information, but also proactively guide lawyers through the specific sequence of tasks required to keep their matters within scope. Dashboards display progress alongside what has earlier been agreed with the client.

And while this is all to the good of day-to-day operational efficiency – and ideally profitability – it's also strategically important for building out the broader firm/client relationship.

Hardy continues: "Firms will often have great client partnership programmes in place already, but Panoramic is designed to position them as an even better overall business partner by demonstrating value more clearly, executing on matters more confidently, and facilitating a more transparent and holistic conversation."

Emily Colbert, vice president of product management for Practical Law, explains: "One of the biggest challenges for lawyers has always been initially scoping and communicating a matter plan with confidence, and then sharing the right updates at the right times to avoid really unpleasant surprises for clients later on. With the integration of Practical Law, the financial data generated is presented in the context of the legal work and in a language lawyers can more readily understand." That can help them to improve the quality of their commercial conversations with clients, she explains. "The practical guidance fed to fee earners can be used to customise a complex matter plan upfront, but also to prompt any conversations about work or price adjustments



"Clients want the value from their firm relationship to accumulate; for example, by avoiding the inefficient repetition of work."

Emily Colbert, vice president of product management, Practical Law

that much more proactively."

There may even be more productive internal conversations about value for firms, says Hardy, as there are elements, such as data analytics, to support the work of finance, pricing and project management professionals, as well as the fee earner who is following the specific matter map through to completion. Indeed, all the management data in Panoramic can be kept to support future pricing strategy and improve client relationship-nurturing efforts. Colbert continues: "The partners can consider whether particular pieces of work have been priced as well as possible to achieve the desired profit – while clients don't just want to be sold a solution to a legal problem; they also want firms to help them to avoid similar problems in future." Technology that might produce that outcome is increasingly being involved in the pitch for client work or a panel place, she says.

"Clients want the value from their firm relationship to accumulate, for example, by avoiding the inefficient repetition of work. However, larger firms in particular can be challenged to successfully institutionalise all knowledge gained from historic matters. The exact same team can't necessarily be reassembled for a client, but the plan, data, documents and resources can all be captured to inform a similar piece of work in future."

That's before you even begin to consider the impact on a relationship of a lawyer's 'well-timed'

For more information, visit: www.elite.com/panoramic

lateral move – something that can hardly be ruled out, however collaborative your culture. "Firms need to be in a position where they can persuade clients that valuable knowledge stays with them, even when the star lawyer leaves."

Clients first in future

The joining of the two 'sides' of legal work – the business of law through the 3E financial management system and the practice of law through the Practical Law application – in this new product is also mirrored in some recent organisational changes for Thomson Reuters.

Hardy explains: "As a business, we've moved from organising ourselves around our products to organising by what makes most sense for each of our clients." This has led to new segments and sub-segments, not least a division now encompassing all products (including Panoramic) for the whole of the Europe region, and another specifically for the largest global clients.

This is enabling Thomson Reuters to pursue more holistic customer conversations around the value of legal technology, just as they plan for Panoramic to facilitate between those customers and their clients about legal strategy.

Indeed, Colbert points out that it's very much part of a broader trend for technology and professional advice to 'go into battle' together. "It's no longer enough to have a great system for teams of finance specialists – lawyers need to be able to participate as well. Part of the mandate for a new system can be to drive lawyers toward working in different ways, and for that you need buy-in from the very beginning."

Panoramic will, of course, need that allpowerful fee-earner buy-in factor too – something Thomson Reuters will hope to attract through a combination of time-saving on tasks and just-intime relevant content. Underpinning this is a renewed focus on bringing together data, insights and technology in order to drive lawyer and law firm decision-making. "If you want lawyers to get really excited about adopting a new piece of technology, you need to introduce something that really makes it worth their while.

"Project management isn't new in itself, but what we do believe is new is pulling all of this together into a single experience. The lawyer isn't forced to spend time searching for information; instead, guidance about the next task in the chain finds them when they need it."

It continues a journey for the Practical Law business that has already introduced scalable efficiency gains from document automation with Contract Express. Now, with Panoramic, it's out to improve the efficiency of even the most complex legal matters, such as the mighty M&A transaction.

"The truth is that we've really found project management approaches too rigid for that complexity of work until now," says Hardy. "It needed the new flexibility built in first, to help lawyers change course if risk levels or other facts of their matter changed."

Meanwhile, steady investment in the Practical Law knowledge bank is bound to continue as well, adds Colbert – fuel for the Panoramic matter maps of the future. "From the uncertainty of Brexit, through to impacts of moving jurisdictions and charting big changes to disputes procedures, keeping the content really current is of course key."

And finally, **Briefing** readers will be pleased to hear that Thomson Reuters will keep listening to its own clients. Panoramic was, after all, born of collaboration with two law firm 'co-design partners' and more than 20 'innovation advisers'.

"The approach is to be as close to our clients as possible to understand what's most taking up people's time, and act to change that," concludes Hardy. "If we can automate to remove unnecessary steps from the workflow of their day-to-day lives, that's a win for both of us." And, we often hear, the more perspectives you can get involved in the decision-making, the more efficient the eventual machine. INDUSTRY CASE STUDY

Come the evolution

The support of Blue Car Technologies keeps legacy software running smoothly at the same time as introducing bespoke enhancements to internal efficiency, says RPC head of business applications Adam Munns



here is so much excitement surrounding 'innovation' in the legal market in 2019 (often linked to – although not exclusively a question of

 new technology), that it can be easy to underestimate how much work goes into maintaining systems, many years in the less glamorous updating and evolving.

For example, law firm RPC has been supporting its legacy case management system (CMS) for some 15 years, says head of business applications Adam Munns.

"This is an internally developed solution that's critical to a large part of our business – it manages both the process and the complex financial aspects of the insurance work we undertake on behalf of our clients.

"It's widely used, and in many ways highly regarded, even when compared to some more modern applications. However, business requirements, such as for regulations and compliance, will inevitably change over the years – never enough to warrant a full rebuild, but the system still needs adapting."

Then the challenge becomes recruiting and retaining people who will happily do that technical

work – or even people with the knowledge to do it. "Sometimes the skills necessary for technology that has been around for longer aren't even taught today, so the talent pool is quite limited," explains Munns.

The solution in his case is still a very human one – its now four-year relationship with an external provider that specialises in such an area of work, Blue Car Technologies. "Effectively, we have a trusted outsourced relationship, which means that we don't need to keep recruiting and retaining people from that challenging, limited pool. Blue Car takes on full responsibility for an IT project instead."

Building bespoke

But this is also a relationship where the value to RPC has expanded over the years, he says. "In addition, the Blue Car team has the available resource and skills to manage an entire bespoke development as an engagement," explains Munns. Two examples of that are efficiency-enhancing applications for a number of its intranet sites, such as helping to search the staff directory, and updating document templates in line with either changing business needs or brand requirements.



"Many of the systems that Blue Car supports are specific point solutions to explicit business needs," he says. "For example, there's a lot of .NET web development and document management integration work, as well as a number of internally written Word templates, which require updates to aspects such as headers and footers."

Other examples include: managing the end-toend billing process, from requesting a billing guide to providing access to the final bill and credit control; creating and managing purchase order approval; bank statement conversion for system

"Whenever anything like a red flag has been raised, the team has always been very responsive, got straight onto the problem, and resolved it very swiftly."

For more information, visit:

www.bluecartechnologies.com

reconciliation; and an online application to capture court filings and alert users to them based on requested criteria.

"The bottom line here is that we are a law firm, not a specialist software house. At the same time, however, there are also a lot of fairly dramatic peaks and troughs in our development workload." This again can be a challenge for the recruitment and retention of high-quality employees.

All about the experience

The arrangement clearly frees Munns's teams to focus on other, perhaps otherwise competing, priorities – perhaps client-facing technology or supporting fee earners in work more directly.

Less well supported, however, and the firm's proud legacy CMS could present more of a business risk than a long-invested-in asset. "You could find yourself in a position where a businesscritical process wasn't working. At the most fundamental level, Blue Car is ensuring that the system remains available at all times," he says.

"And whenever anything like a red flag has been raised, the team has always been very responsive, got straight onto the problem, and resolved it very swiftly."

Of course, RPC has a stringent testing procedure of its own designing. But he says that Blue Car has also brought some of their long-developed best practices to the table, as well as industry-standard ones such as OWASP (Open Web Application Security Project) for application security. "In some cases, they have presented certain ideas to us and we have passed them on to our own clients in turn," says Munns.

But most valuable of all, he says, is the ease of the arrangement with a partner that also has decades of experience seeing legal technology evolve, with all its pivots and pain points.

"They have experience right across the full range of technologies and disciplines that have evolved over many years in law firms, from practice management to document management. It's just like having your development team onsite, but with none of the pain of training people up to productive familiarity with the products." INDUSTRY ANALYSIS

Speak law like a human

Candice Witton, senior marketing strategist, Propero Partners, says firms need to be able to capture clients' key concerns as well as any algorithm, but still treat them like human beings

S

ince the early days of House of Cards, Netflix has consistently and comprehensively accumulated its audience data, and used it to create tailored shows predicting viewers' tastes.

As marketers for law firms, we don't have access to quite the same level of data as Netflix, Amazon or Spotify. So, how do we reach potential clients on a similar level to these platforms? How do we get closer to clients and potential clients alike?

If there's one thing Netflix proves, it's that creative content is king. While some firms have caught on to the value and importance of creating and disseminating thought leadership pieces, engaging blogs, and other important content to their target audiences, very few understand how to speak human to their prospective clients.

And while on average a person views 40 to 50 titles on Netflix before they pick what they're going to watch, the average decision-maker reads 10 pieces of content before finalising their purchase decision. So, you had better make sure it speaks to them.

Human2Human

The marketing world is traditionally divided into two camps - B2C (business to consumer) and B2B (business to business). They can be viewed as different tribes, speaking different languages, and never the twain shall meet. However, the recipients of the smoke signals sent out via various mediums - social media, traditional print, email, and so on - are by and large the same: humans.

Instead of marketing different messages to different humans, B2B marketers often market directly to businesses, creating a foreign and often incomprehensible language, primarily consisting of buzzwords like 'innovation' and 'agile' strung together. However, it's the humans in these businesses you need to reach, humans who make decisions based on emotions.

It's often considered easier to create content for B2C audiences than for B2B audiences. From the outside looking in, this makes sense. It's a significantly more direct journey for a customer to purchase a product than it is for a client to approach, or engage with, a firm. In the latter case, we have a longer sales cycle, often involving multiple decision-makers. And in the former, messaging tends to be generalised, full of jargon and not tailored to their problems and needs.

For fee earners and firms alike, the adage is 'know your client'. This mirrors the marketing mantra of 'know your audience'. Identify your target audience. This increases the levels of engagement you're going to receive from each piece of content. The seemingly simple act of knowing your client and focusing your messaging on their problems can give your firm a significant advantage in the market when compared to the number of firms that don't appear to cater to clients' needs.

If services aren't clearly defined for clients, and

The seemingly simple act of knowing your client and focusing your messaging on their problems can give your firm a significant advantage in the market



if your content doesn't connect with them on a human level, they will simply take their business elsewhere.

Power of personalisation

In the fourth industrial revolution, Netflix's recommendation algorithm is the veritable holy grail of personalisation and is glorified by marketers globally. More than 80 percent of the titles people watch are discovered through the algorithm.

Using AI and algorithms for personalisation is becoming more and more common across a wide range of industries – just think of the number of unnervingly accurate Facebook advertisements you see every day through targeted advertising.

When content is personalised, we immediately feel a connection. If it's tailored, relevant, and delivered to us at the right time, the experience is memorable, and the impact is huge.

For more information, visit: www.properopartners.com Personalisation has the potential to deliver five to eight times the return on investment for marketing spend and can lift sales by 10% or more, according to Harvard Business Review. One size fits all is no longer an option.

Be emotive – be specific

'Show, don't tell' is the best rule to remember when creating client-centric content. Show your clients why your firm is the best fit for them, don't just tell them.

Your potential clients are not likely to be lawyers, so avoid jargon and legalese at all costs. Write in a relatable tone. Keep it human – use humour, opinion, topical subjects. Show personality. Nobody is going to read or engage with something that they feel is above them, or – heaven forbid – boring. You need to think about why they should care about this.

The legal industry is changing, and B2B marketing as a whole will need to evolve quickly to catch up with advances in technology, such as artificial intelligence, data, and personalisation – all the while remembering to keep your human client right at the heart of all you do.



INDUSTRY ANALYSIS

The client quid pro quo

Michael Warren, vice president, business development practice, Wilson Allen, says to derive value from clients, make sure that you're first delivering it



o your clients believe your firm's services are good value given the cost? If you don't know the answer to that question, how can you be sure your

clients will call on you the next time they have a need? I would argue that the next imperative facing business developers is how to connect the dots between their client feedback data and their other client development intelligence.

At an individual or team level, it's likely that you understand the needs of your clients. The problem is that this deep understanding is siloed. It is not understood at a level that can inform corporate strategy. Without a systematic approach to understanding customer value and a commitment to act based on this understanding, it's of little benefit to the firm. In fact, it puts your firm at genuine risk of hurting relationships and losing clients.

In today's highly competitive environment, law firms can't afford to be blasé about the value they deliver. There are just too many other options available. Top performing law firms, therefore, need to get better at meeting client expectations of value.

The rise of client value management

There's a temptation with professional services firms to conclude that clients measure value from the outcome of a matter or job. But industry research indicates that clients choose firms for reasons much more closely aligned with the overall experience of the work than within the outcome itself.

For more information, visit: www.wilsonallen.com

For example:

• Understanding your client's needs, goals and objectives

• Being well-informed

• Sharing information with your colleagues so that everyone understands what's happening

• Anticipating issues and being proactive.

Business-to-consumer companies are well versed in the importance of providing value. But it's measured little and understood less in the legal industry. Almost every firm has programmes for managing strategic accounts and client feedback. But often the goals and the outputs of these programmes are not related. Key account programmes are almost always defined based on the value firms derive from clients without explicitly identifying the value firms deliver. That has to change.

Look through your customers' eyes

Ensuring that your firm is meeting client expectations begins with measuring its performance. For example, you could use a system developed by Bain & Company consultant and author Frederick Reichheld to see what clients think, resulting in a Net Promoter Score (NPS) (see www.netpromotersystem.com). This methodology asks your clients how likely they are to recommend your firm to a friend or colleague on a scale of 0 to 10. Respondents are then divided into three categories, depending on the score they give. They may be:

Promoters: The firm's strongest allies, who are most likely to promote the firm to others
Passives: Those that are likely to be satisfied with the firm but don't actively promote it

• **Detractors**: Those that are likely to be unsatisfied and may even be looking to switch to a new firm.

Based on the insights resulting from this effort, you can implement programmes and initiatives to maximise the value you deliver. Why do it? Bain analysis shows that companies that achieve long-term profitable growth have an NPS twice as high as the average company and NPS leaders on average grow at more than twice the rate of their competitors.

What our clients told us

Wilson Allen sees the value in this approach and has embarked on a value-management initiative. We recently completed an NPS study with ClearlyRated. It has given us incredibly useful insights – not just a benchmark about our performance, but also how we compare to peers and other providers in similar industries.

In going through the findings from the study, it was encouraging to see answers such as:

- We could not function without them
- Our experience has been excellent

• I have confidence in the work being performed and trust them completely

• They go above and beyond and they're fun to work with.

Our egos were collectively stroked to earn 'world-class' status across several practice areas, including our CRM practice and our Proforma Tracker software. But there was some feedback for areas where we need to improve. Interestingly, two clients that differ in their scoring – one was a promoter and one was passive – both said the same thing. What they said wasn't a surprise to us. It's in the back of your mind. But it isn't until people you trust and respect say it that it really hits home. To achieve the growth we have projected, we need to listen and are incorporating the feedback into our process-improvement efforts.

Give your clients a platform, then listen

If you have a great personal relationship with a client, they may refrain from giving feedback that's perceived as negative. That's why it's vital to give your clients a platform to tell you what's really important to them.

But the critical part in all of this is that you have to commit to doing something about what you learn. The real challenge is to make cultural and process changes that ultimately engineer the issue out of your business. This begins with including client feedback in your regular performance measurement activities and elevating its importance and visibility firmwide – but in particular – to those at the front of your business development efforts. After all, rinsing and repeating what you do well to delight clients is one of the fastest paths to business growth.

OUT AND ABOUT

Turn over a new belief

The Changeboard Future Talent conference 2019 focused on first acknowledging – and then challenging – our beliefs at work. Richard Brent reports in with a few final thoughts for the difficult days ahead

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n March 2019, **Briefing** attended the Changeboard

Future Talent conference. The official title for the day was Future Talent Conference 2019: Humanity and Technology – so we knew it would contain at least one of our favourite things. We'll leave you to guess which one, readers ...

The presentations and debates take place in the auditorium at the Royal Geographical Society – where Charles Darwin gave his Origin of the Species lecture – so, a suitably thoughtprovoking space already for the range of both business and philosophical perspectives forthcoming.

Many of these drew on the way the world of work as we approach 2020 can appear, at least, to mirror, at the micro-level, some of the turmoil that typically spills out when we switch on the nightly news. That's if, with the proliferation of tech options, 'we' even do that anymore. Perhaps I'm showing my age.

The first speaker was Lucy Winkett, rector of St James's Church, Piccadilly – the first female priest to join the clergy of St Paul's Cathedral. But she is perhaps best known for being a regular contributor to BBC Radio 4's Thought for the Day segment.

She highlighted how so much of what feeds into so-called 'process' at work is "informed by our beliefs about how the world fundamentally works".

Note: we're definitely not just

talking about religious beliefs here. "What do we believe about both ourselves and other people?" questioned Winkett. "Are people benign, or do we see them more as challenges, even to be beaten and overcome?"

At the same time, "unacknowledged beliefs" are well-known for leading to harm, she added – and particularly striking to me, that for all "the standing meetings, ping pong tables and dressing down" brought in to energise and engage, is 'work' really doing its bit to address the situation in wider society that spurred the government to launch its first ever "loneliness strategy" in 2018?

The process and benefits of challenging our established thinking was a persistent theme in the presentations. Anne Scoular, for example, co-founder of Meyler Campbell, highlighted how fear and anxiety place organisations' leaders into "survival state". That means their regular thinking about business challenges gets "boxed in," when, to be

"What do we believe about both ourselves and other people? Are people benign, or do we see them more as challenges?"



effective at improving productivity and growth, it in fact needs to "get out" more. The point of effective leadership coaching is to embed a set of three potentially "transformational" skills, she said – active listening, questioning that's designed to do more than justify already-held beliefs, and 'structuring' rather than avoiding hard conversations. "We can still potentially shape things that we can't entirely control."

By the way, how many **Briefing** firms have something which certainly sounded like a good idea to us: leaders reverse-mentoring people who do a "dramatically different job" within the business? No, that doesn't mean an equity partner mentoring a much younger associate.

Much debate also plugged straight into what we know professional services firms are grappling with in terms of both planning and adapting for future careers. For example, Dr Nigel Spencer, senior client director at Saïd Business School, University of Oxford, said there should be a core emphasis within learning and development programmes on helping employees to "manage transitions" as they are only going to experience more of them (certainly not fewer). "Rather than a narrow set of courses, create a range of learning experiences people can access throughout their careers. Professionals need to act their ways into new ways of thinking ... it doesn't work the other way around."



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