

# Briefing

May 2020

SMARTER LEGAL BUSINESS MANAGEMENT

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# Briefing

May 2020

SMARTER LEGAL BUSINESS MANAGEMENT

SPECIAL REPORT  
SUPPORT FOR AGILITY

DIGITAL UNITE  
The faces of a new multi-disciplinary  
group at work for Herbert Smith Freehills

REMOTE CHANCES  
Dan Taylor at Fletchers on the  
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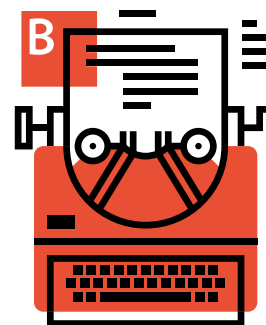


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# Editor's letter



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**W**hen we carried out our annual Legal IT landscapes research in November/December 2019, the section on agile working and hotdesking made for some slightly puzzling reading. We've long tracked how firms are doing in terms of having 'significantly' (over 10%) more employees than desks in the office for them all – and have generally found increased appetite for the arrangement year after year. More firm leaders say they are already doing it; and of those that aren't, more expect to get there sooner than said as much the year before.

Nothing very surprising there – office space is expensive, so it's good if you don't need to fill quite so much of it up with boring desks. You may simply need less space – or you might want to get more creative with those break-out spaces and client-facing areas instead. And after all, people quite like to work from home, right? When they really need to get their

**This issue was planned to focus on how far agile working had come long before lockdown began to loom**

heads down. Or when it suits to have some flexibility to discharge other responsibilities or do other things. Or on Friday.

But last year, quite a surprise: a higher proportion than the year before said no, they would 'never' in fact go there (the desk reduction) and three-quarters felt they might just reach that 10% mark in between five and 10 years' time.

I can accept that some of the people businesses want to retain may simply like having a desk (some, maybe even an office) to call their own – but looked at in light of what legal has had to make happen by hook or by crook in a few weeks, that's pretty staggering. I do wonder if folks will ever be able to sigh and say 'fear of change' at a conference in quite the same way again ...

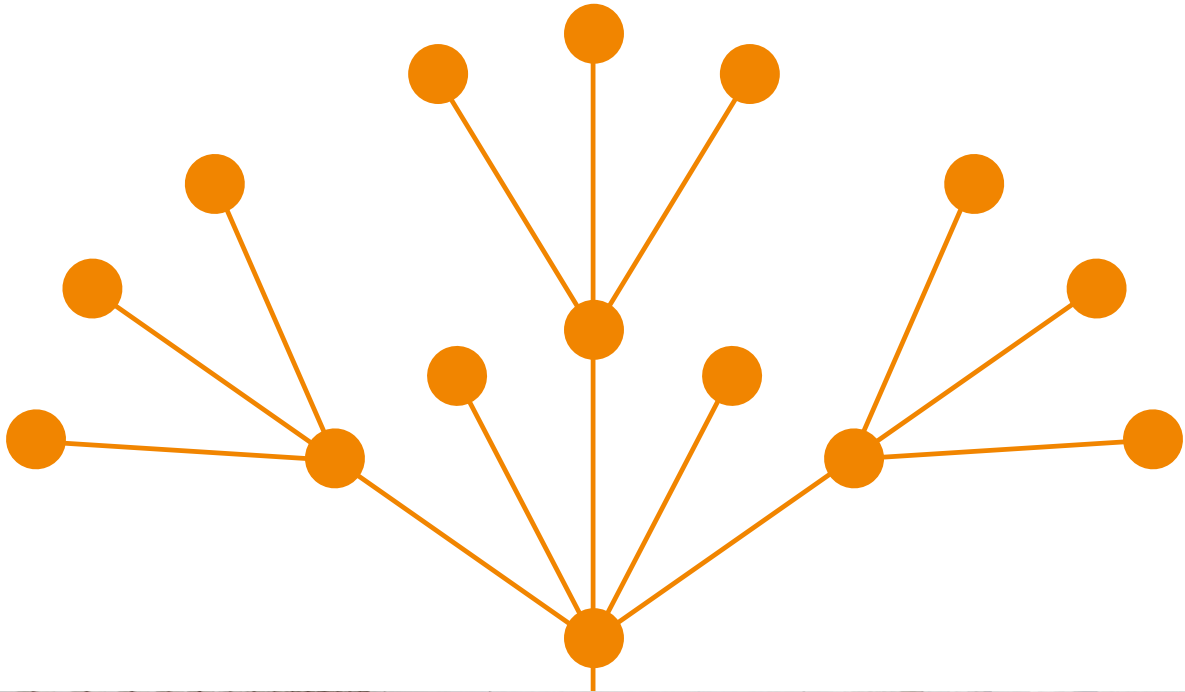
As it happens, this issue was planned to focus on how far agile (or 'smart') working had come long before lockdown began to loom. Perhaps it's unreasonable to expect people to believe that now – but read on for plenty of insight into what was top of mind for those managing this working transition in 2020 like no other (p15). Some, though by no means all, of this naturally involves choices about technology (and see much more on that theme from p29). Certainly, firms that have carefully invested in systems to help their people be more efficient, productive and collaborative over the years should be in a somewhat better place to meet this latest challenge.

**RICHARD BRENT** EDITOR-IN-CHIEF

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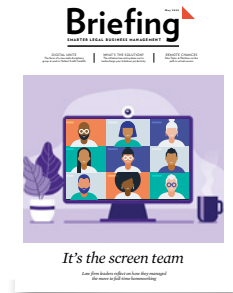
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*“Lawyers shouldn’t shy away from grappling with new tools”*

Charlie Morgan, joint digital law lead, Herbert Smith Freehills



**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

# Tech it onboard

In this issue, as you'd surely expect, the hot topic is how everyone has been rubbing along with the whole homeworking thing. It comes as the **Solicitors Regulation Authority** issues a warning – which bears repeating – that cybercriminals are seeking to take advantage of lower levels of security being observed, owing either to technical IT challenges or the “different mindset” that may arise. In one instance, the regulator says, criminals sought to create a standing order for £4,000 a month from a firm's client account. So the SRA has produced specific coronavirus cybersecurity information, which draws on **National Cyber Security Centre** (NCSC) advice, including updates on how phishing scams have changed and risk factors with remote-meeting systems.

But then – among big decisions about pay, working hours, promotions, deferrals, and of course some widespread furloughing, there are stories of tech rising to client-facing, as well as internal, challenges.

Examples include **Travers Smith** developing a free ‘force majeure app’, which harnesses automation to identify key terms and phrases in business-to-business contracts – designed to help clients identify which ones they ought to address in greater detail first. The contracts can be fired off to a centralised mailbox in bulk, which produces replies and summary reports once the automation has done its job. Head of legal technology Shaw Curran said in a press release that the process involves machine-learning capabilities developed internally, but “no messing about with portal logins and the question of ‘where is my data going’? We expect to reuse this delivery mechanism across many review processes.”

**Gowling WLG** has brought forward the release of GoXL, a new platform for IP owners and advisers, which hosts interactive video tutorials running users through the stages of the IP lifecycle. Intended for release in winter 2020, the firm stresses that it is an “early iteration” of the resource, and will also enable feedback about the product.

And **Bryan Cave Leighton Paisner's** volume delivery

arm BCLP Cubed has struck a partnership with **Siemens** ‘low code’ business **Mendix**. The team had already integrated its solutions with other technologies it uses such as document automation and expert systems, and deployed the results on projects such as large-scale contract reviews, employee settlement agreements after a large-scale reorganisation, and loan agreements for financial organisations.

Neville Eisberg, the firm's senior partner and CEO of BCLP Cubed, said the combination was enabling it to produce platforms for clients “within days or weeks, something which could have taken months using traditional methods.”

Chief technology officer Jody Jansen added that it was an example of embracing platforms that haven't just been designed for legal, and the firm also benefited from Mendix's use of agile software-development methodologies to collaborate more effectively.

A subject **Briefing** has often covered, resource management is another surely right up there on the agenda in terms of managing a more distributed workforce for uncertain duration.

**HFW** has formally announced implementation of a new global resource management system after a six-month pilot within its aerospace group that saw utilisation up by 20% in London (7.5% worldwide) over three months. The system includes software that monitors utilisation “in real time” from **Mason and Cook**. Chief operating officer Sid Welham said: “Despite much of the firm switching to remote working as a result of lockdowns, we have been able to quickly and effectively respond to urgent client enquiries and help them through this challenging period.”

Earlier in April, this firm also carried out some research with litigation analytics company **Solomonic**, which found new claims brought to English courts in the week commencing 30 March were down by 56% on the previous year. At ease, litigators – HFW predicts that this is very much just a “temporary lull,” with recent growth in litigation funding set to bring forward the bounce-back. ▴



2,000

Online scams related to coronavirus taken down by the National Cyber Security Centre in April 2020

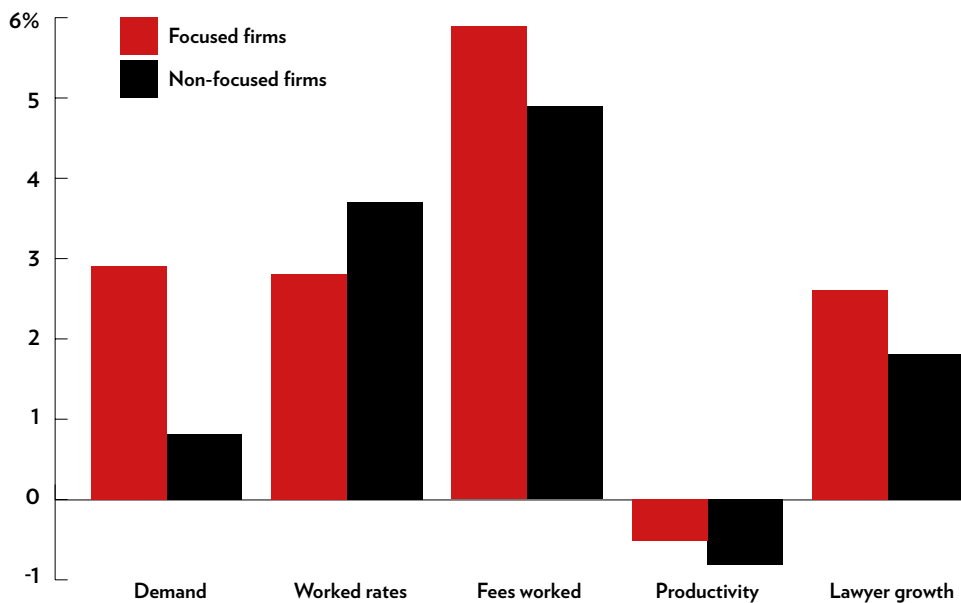
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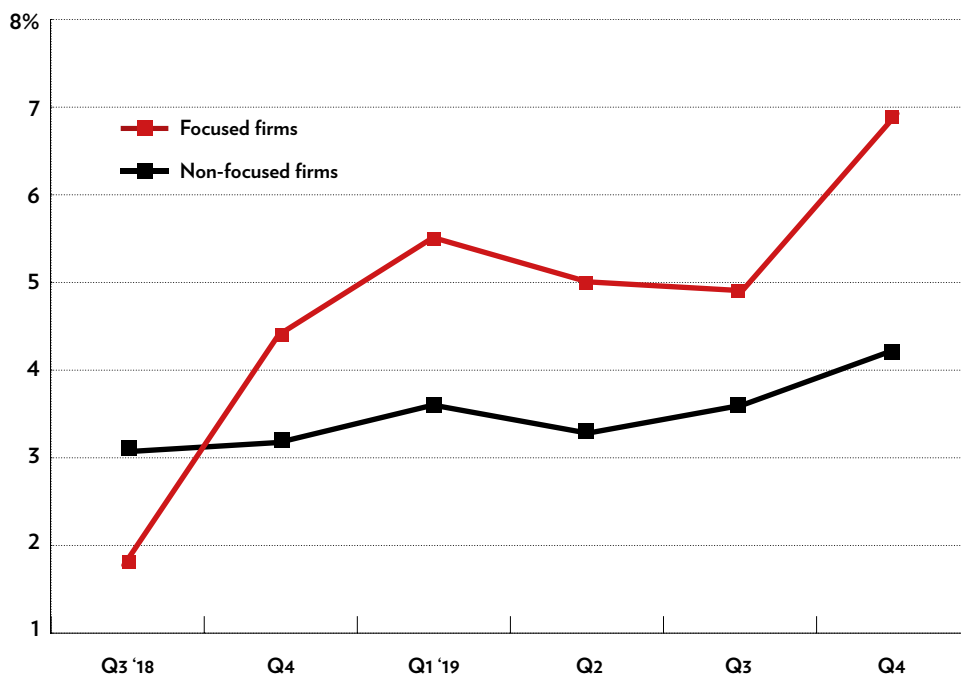
Law firms that choose to specialise more are managing to outperform others in the market in terms of some key metrics, but they experience higher overheads, according to latest data from Peer Monitor

## FOCUSED V NON-FOCUSED FIRM CHANGE IN KEY METRICS - FY 2019 V FY 2018



## OVERHEADS ARE RISING FAST AMONG THE MORE 'FOCUSED' FIRMS

YEAR-ON-YEAR CHANGE OVER 12 MONTHS



## PEER MONITOR® PERSPECTIVE

The growth of boutique firms continues across the legal market. For these 'focused firms' – meaning that they have at least 50% of their total hours worked consolidated in a single practice – demand growth averaged 2.9% in 2019, significantly outpacing the 0.8% growth seen by the rest of the firms in the Peer Monitor database. Average worked rate growth was lower among the focused firms group, but the average fees worked outpaced all other firms and productivity declines were down due to higher demand.

Overhead expenses are growing faster, however. In fact, overhead growth at these firms has only dipped below 5% once, and only bottomed out at 4.9% among focused firms over the last year. By contrast, non-focused firms have only recently surpassed the 4% average growth mark, reaching 4.2% growth on average in the fourth quarter. Notably, focused firms are also increasing their recruiting and technology expenses at faster rates than the non-focused group.

*Thomson Reuters Peer Monitor data is based on data from 35 US firms classified as 'focused firms', meaning that they have at least 50% of their total hours worked consolidated in a single practice. For more information, please visit: <https://www.legalexecutiveinstitute.com/topics/focused-firms/>*



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Diane Belford  
Head of clients and markets  
DMH Stallard

@DianeMBelford

**Some services will be in huge demand right now, and others less so ... Which are the services to focus on now? Which areas will grow, and be needed the most, next?**

**SPEAK UP**

# Lock down the lessons

**P**rofessional services marketing is adapting to the crisis. After just a few weeks, we're seeing all pitches now done by video-calls only, web traffic and webinars increasing exponentially, and teams working from home all the time. So, what observations can we make at this stage of a situation that has escalated so rapidly already and where the future trajectory is uncertain?

The firms that have stood out from the crowd for me in the early stages of the crisis all shared a focus on:

- **People** We're relationship-based businesses, and prioritising the safety and needs of our people, clients, contacts, suppliers, and our wider communities where possible, along with delivering continuity of client service, has to be the starting point.

- **Speed** The speed of external change needs to be matched by internal agility and responsiveness, with law firm leaders taking early decisive action to protect people and the firm for the future.

- **Communication** internally and externally. People want information to help them make sense of the uncertainty and give clarity around what it means for them. Firms that can give clear messages and explanations, keep in regular contact, and are authentic, will bring both their people and their clients with them.

So, what comes next? Exactly what will happen next, and when, are unknowns – but we have been adapting core BD principles to provide a (flexible) framework for the next 18 months or so.

- **Anticipating client needs** Our next stage of business planning starts with

what we know about our markets, and our clients and their businesses, and includes speaking to our clients and contacts to validate that. Assuming we can know everything they need without asking is unlikely to give the full picture.

- **Satisfying these needs** What do we need to be doing now/next to be ready for this? I'd highlight three of the '7Ps' from the services marketing framework that seem to have come to the fore:

1. **Product (services)** Some services will be in huge demand right now, and others less so, depending in part on your client base and sectors you're active in. Which are the services to focus on now? Which areas will grow, and be needed the most, next?
2. **Promotion (communications)** is currently focused around digital – web, social media and webinars – to help clients navigate new challenges. How will communications remain relevant as clients' needs change?
3. **Place** With almost everything virtual right now, what impact will this have on clients' expectations of how firms deliver their services in the future? Will buying local become more important?

For completeness of the 7Ps, price, people, physical evidence and process of course all have a part to play too.

When we emerge, how we have all adapted and performed in these times will impact our future success. To quote from Simon Sinek's 2019 book *The Infinite Game*: "We cannot choose the game. We cannot choose the rules. We can only choose how we play."



Dana Denis-Smith  
CEO  
Obelisk Support

@ddenissmith

**We're all contending with the necessary limitations of nationwide lockdown, so it's fair to say that the current crisis does not show homeworking at its best**

▲ SPEAK UP

## At home with a flexible future?

**B**efore the Covid-19 crisis, the legal profession was already grappling with how best to create flexible work environments. At different points in their working lives, employees need, and are coming to expect, greater flexibility in their working lives, but many have been met with resistance from employers.

In the wider business world, few organisations truly embrace flexible working – over a one-year period, just 17 of the FTSE 100 companies advertising roles made it clear in job advertisements that specific flexible working practices were available.

The pandemic, however, has led to enforced homeworking for most of us. Once the immediate shock of current events dulls and we return to our workplaces, it's unlikely we'll see a return to the old ways of working.

We've seen how our systems and practices behave without the spaces and structures of office life. In the main, our industry has been doing an outstanding job in difficult circumstances. As we all adapt to this new Zoom-dominated world it's clear how well remote and flexible working could work long term.

We're all contending with the necessary limitations of nationwide lockdown, so it's fair to say that the current crisis does not show homeworking at its best. Parents are forced to take on the additional burden of childcare; and the younger generation, living in flats and shared accommodation, may struggle to find the space to work

effectively. Situations where face-to-face interaction really would be preferable are prohibited.

There's a concern that if remote working is seen not to have worked well during this period, there will be a backlash once it's over. I hope this is not the case and that the legal profession instead learns the right lessons – recognising the benefits of flexible working done properly without these additional pressures.

Just as employers used to talk about 'total reward', building in pensions, gym membership, onsite cafés and more to make work attractive, they should think the same way about flexibility. The best leaders don't just value their team for the hours they put in; they reward them for values and behaviours. Organisations that facilitate bespoke solutions to allow people to combine their work and lifestyle aspirations will find they are better able to attract and retain the best talent. They can also expect higher levels of employee satisfaction and productivity and lower levels of sickness absence and stress.

Our industry can now move forward, with some of the old prejudices against non-traditional ways of working laid to rest. There is an opportunity to emerge from the Covid-19 crisis thinking differently about our work and making lasting, positive changes.

*Obelisk Support recently published a report on future-proofing legal teams: See [www.obelisksupport.com/reports](http://www.obelisksupport.com/reports) ▲*



Trevor Sterling  
Partner and head of major trauma  
Moore Barlow

 @trevorsterl

**A diverse board means 'group think' is avoided, corporate culture improved, brand value boosted, and complex supply chains more sensitively approached**

 **SPEAK UP**

# Boardroom to improve

**B**ritish FTSE 100 boardrooms do not reflect the ethnic diversity of modern Britain and are being too slow in making much-needed changes, an update report to the Parker Review recently found. Unfortunately, this isn't a problem limited to FTSE 100 companies. The legal industry, although improving, needs to be doing much more in this area. BAME lawyers are still heavily underrepresented in City firms and BAME partners represent only 5% of all partners in the UK. Alongside its overall conclusion, the original report contained some interesting facts about boardroom composition: at the time it was written, 51 of the FTSE 100 companies had no BAME representation on their boards. The update identified that 37% of the FTSE 100 companies surveyed (31 out of 83) still did not have any ethnic minority representation on their boards.

Law firms see this too. Far too often in the legal industry we find BAME faces on the brochure, but not in the boardroom. This means that organisations can present themselves as progressive while getting away with doing nothing to address actual problems of systemic inequality at work.

Thankfully, we're now getting to the point where senior executives are being convinced of the financial benefits of a diverse workforce. A diverse board means 'group think' is avoided, corporate culture improved, brand value boosted, and complex supply chains more sensitively approached.

A diverse workforce is one thing, however a diverse boardroom is another. This is where the 'inclusion' part comes in. What's the good of championing diversity in the workplace if BAME

people cannot get up the ladder?

At Moore Barlow, we recognise that action is necessary. We've implemented initiatives like compulsory BAME representation on the pay and promotions committee, which means important decisions that affect progression are made by a diverse group. We also run compulsory unconscious bias training, which allows staff to be more self-reflective, raising consciousness of the types of thinking that can lead to discrimination and bias. We believe this training has created a much more inclusive working environment.

I've been encouraged to see the profession talking about adopting other changes such as 'blind' recruitment, diversity events focused on minorities, and forums for anonymised feedback. Initiatives like these across FTSE 100 companies and law firms would mean that the careers of early or mid-career BAME people are less hindered by discrimination, however subtle or unintended. In turn, this will lead to better representation in the boardroom.

I'm mindful that I'm one of the few black equity partners in the country. With this comes an awareness that, by being visible in this role, I can hopefully encourage other BAME employees to see themselves at this level. As well as creating a fair path to the boardroom in terms of opportunity, it is crucial that we build an environment where people from BAME backgrounds actually have the confidence to apply for leadership positions. As the Parker Review makes clear, a diverse boardroom yields a significant return on investment, as well as a better, more inclusive industry. Law firms must act now. 



Michael Warren  
Vice president – CRM practice  
Wilson Allen

 @WilsonAllenTeam

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**Often firms are in reactionary mode, which is risky business. The time to identify your go-to people is when everything is running smoothly, not when your system is down**

 COMMENT

# Preparing for every contingency


In our daily lives, we're so accustomed to technology, we barely give it a second thought. That is unless our systems stop working, or they're working slower than we'd like. Then it gets our attention. Beyond the personal aggravation you may feel from this inconvenience, system disruptions or slowdowns can take a real toll on overall productivity, especially if it happens regularly. These facts are especially true now, as the lines between work and home are not only blurred, they're nonexistent.

To be as productive as possible, the systems that professional services firms rely on to support operations must run at peak performance. Some firms are proactive and establish relationships with service providers that can come to the rescue when things go awry. But just as often firms are in reactionary mode, which is risky business.

The time to identify your go-to people is when everything is running smoothly, not when your system is down. This preparedness is not only a question of identifying technical experts to help with unplanned IT support services. It also includes identifying resources who have broad systems expertise to help ensure your environment runs optimally throughout the lifecycle of your entire solution landscape – and who can respond to rapid changes in needs.

For example, we can all now relate to

the sudden need to be able to work from home. But other examples could include your practice management system malfunctioning and your firm not being able to do the work it wants. Or, you need to restore your system after it has been compromised due to a security intrusion. Or perhaps you need to get your systems up and running after a planned system restart, but the system won't come back online. Resolving these types of problems requires broad knowledge across software and systems, but also deep application, infrastructure and programming knowledge. Firms often have in-house resources with specific domain expertise, but few have direct experience across applications in addition to in-depth technical knowledge. They may be able to troubleshoot a particular technical problem, but might have little to no understanding of the specific applications in your solution landscape.

Anything can happen when it comes to IT. As there's an unplanned nature to it, you need to draw upon people with a skillset that can handle the unexpected to help make sure your firm's systems can deliver on the performance expected of them. If recent events have taught us anything, it should be that your firm needs to identify resources with not only deep expertise, but also expertise across systems, to make sure your people can be productive whenever and wherever they need to be. 

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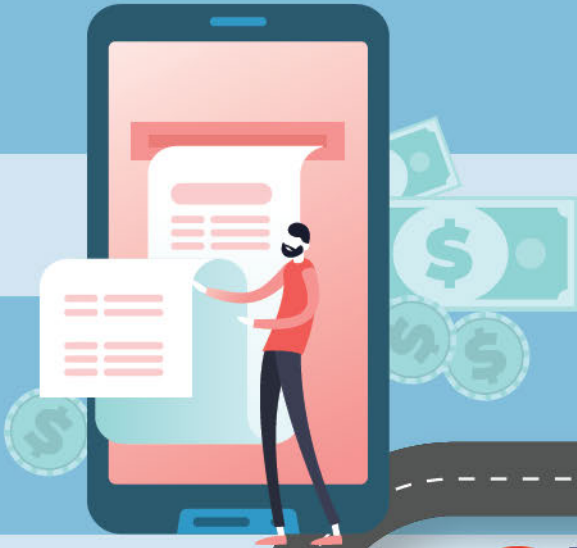


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**5** Improved Realisation





# Features

## 15

### *Homework for all*

How did law firms manage to get their people working from home full-time for the first time? Richard Brent reports

## 24

### *Team profile*

Jem Sandhu hears about the varied workload of the new digital law group that has been formed at **Herbert Smith Freehills**

## THE BIG IDEA



# Homework for all

How have law firms handled the process of establishing remote business-as-usual in such unusual times? Richard Brent reports

Of all the findings in our publication's annual flagship piece of research, **Briefing** Frontiers Legal IT landscapes 2020, one of the very simplest data points to analyse could also be considered one of the oddest outcomes.

In the closing moments of 2019, law firm leaders reported they believed 42% of their people then regularly worked from home – but they'd like to see over three-quarters enabled with the technology to do that. The arguments about enabling more flexible working leading to improved engagement, retention, and even productivity, were exceptionally well-rehearsed. So, what on earth was stopping them? It turns out one possible answer was not needing to respond to a situation where the alternative was simply impossible.

Of course, firms had certain agile-working policies and processes in place for years before

Covid-19. It was not unusual to hear remarks that the trains had become significantly less crowded on a Friday. Many had also gone quite a way down the 'culturally flexible' route – a day or even two working from home likely didn't raise an eyebrow. Perhaps some teams even encouraged it. Office layouts were increasingly designed to make them increasingly 'drop in and out' places. And legal tech on offer was said to be nothing if not 'mobile-friendly', helpful for all those taxis nipping across town to catch up with clients.

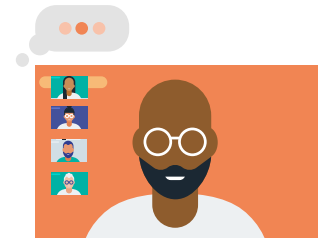
## Business continuity as usual?

LOD (formerly Lawyers on Demand) has become something of a poster child for any flexible-working revolution in legal that may have been on the horizon until now. Service development director Nigel Rea says it's somewhat fortunate that around half its global workforce of lawyers have been working remotely since it first appeared on the scene as a division of then Berwin Leighton



## “Five-year plans for agile working and hotdesking may have suddenly been sucked into something like a six- or 12-month horizon.”

*Darren Mitchell, chief operating officer, Hogan Lovells*



Paisner back in 2007. “Teams are also geared for it from the HQ perspective, and it has been a regular fixture of office life. That said, we’ve never had the whole office working from home at any one time. But after some tweaks to operating processes and shifting some of our day-to day meetings – like the office standup to a digital Kanban board – we were good to go.”

But what about firms that have evolved toward agile in the rather more ‘traditional’ way? Nathan Hayes, IT director at Osborne Clarke, says: “We already had the core technology to meet this challenge in place, and the strategy was designed for it to scale up as needed.”

But although pandemics have long been on the outside edge of organisations’ risk registers, it was thought the firm’s business-continuity plan (BCP) was far more likely to be triggered by an extreme weather-related situation, he says.

Damien Behan, IT director at Brodies, adds: “In terms of planning for any pandemic, we’d also focused most on the potential impact of the numbers falling ill. Firms won’t necessarily have workshopped scenarios such as all people being housebound and all the schools shutting.”

And Daniel Pollick, chief information officer at DWF, says: “We already had business continuity plans in place that we were able to action immediately: we use the classic gold-silver-bronze structure for crisis and business continuity management. However, because our BCP did not explicitly consider the closure of absolutely all offices, we needed to revise our plans to manage physical logistics like post handling, and to provide for all staff to work from home.”

Darren Mitchell, chief operating officer at Hogan Lovells, explains: “Most of what’s involved in organisations’ business continuity plans is about how to respond to keep things running in the relatively short term. The playbooks are for weeks of disruption. It’s less about the longer-term consequences in a situation such as this, where so much is outside our ability to control and it’s still

very hard to call the ultimate business impact.

“So, this human tragedy is at the same time turbocharging some things for firms that were happening over a much longer timeframe. Five-year plans for agile working and hotdesking, for example, may have suddenly been sucked into something like a six- or 12-month horizon.”

### Remotely possible?

Pollick at DWF says: “We already had a strong culture of agile working, meaning a large percentage of our staff were already able to work from home using a DWF laptop. We extended this remote-working capability through the provision of approximately 300 further laptops, and by providing access to our web-based cloud desktop for several hundred more staff.”

But as firms worked out how they would respond in the face of unknowns, there was also an element of not letting the perfect be the enemy of the good.

Behan says Brodies conducted “trial runs,” and there were frequent reminders to take laptops home before that week of social shutdown arrived.

“Taking action early was a help. We sent PCs out to some colleagues, as that was easier in the immediate short term.” Over 200 people who didn’t already have laptops as part of his earlier agile roll-outs across two offices were offered a way to work remotely, he says.

People at Osborne Clarke without a laptop could also use their own PCs initially, says Hayes. “But that wouldn’t be productive long-term. Locations around the world also have different laptop penetrations, as agile working is more or less common.”

And then there was planning for what people might need over different time horizons. “We couldn’t know whether everyone would be able to access our offices again at the same time.”

Mitchell at Hogan Lovells agrees that acting fast was a crucial factor. “It wasn’t possible to do exactly the same thing for everyone at the drop of

a hat – we had to work through solutions for individuals. We bought some extra laptops ‘off the shelf’, just to get people up and running – and although we ran a series of test days to get people prepared, that’s a simpler exercise for some roles than for others.”

For all there were the additional licences, bandwidth, and extra pressure on backend infrastructure to consider to keep things moving. But then, it was onto the matter of addressing productivity challenges over a sustained period of uncertain duration. Behan says: “For example, people ideally need a comfortable place to sit. The firm isn’t a furniture provider, but we give advice on desk assessment, and of course health and safety. Also, would network firewalls cope with all that extra traffic at the same time?”

Hayes adds: “There was work in terms of thinking about what people really need during this time, such as dual screens or printers. We also needed to ensure we were doing all the correct things from an information-security perspective.”

Indeed, Behan says it’s clear that cybercriminals have already sought to take advantage of a time when people and organisations have so much on their plates, coupled with some likely anxiety. “You can see a surge in phishing attempts, and attacks with domains connected to Covid-19, as well as more misinformation appearing. People are naturally less on their guard at home, so firms need to match that with increased comms and sharing what’s happening. All too often comms can be the first thing to go in a crisis, but they’re the most important thing.”

And perhaps firms will also see good cause here to travel further on their paper-light journeys? Mitchell at Hogan Lovells says: “In the office, people will think nothing of sending something to the printer; you can do a bit of pushing back as to whether they really need one.” Behan adds: “Paper isn’t the enemy, but it should be appreciated that it’s a risk and that people should shred it afterwards if they need to print.”




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**“People are naturally less on their guard at home, so firms need to match that with increased comms and sharing what’s happening.”**

*Damien Behan, IT director, Brodies*

Pollick at DWF says document and case management systems were already being used to “ensure a paper-light mode of operation” – and the move to homeworking has certainly magnified the value of those investment decisions. “We increased capacity of our secure VPN to support the increased remote workload, and we also made two other significant investments. We’ve accelerated our rollout of Microsoft Teams to make it available across our business, achieving enormous collaboration and communication benefits, and implemented an incoming post-scanning solution, which automatically routes paper post to systems, and has allowed us to reduce the number of staff who have to attend sites during this period.”

Hayes says: “Priority number one was to ensure that people could operate at all within these constraints. Then there was a second focus – whether we could actually improve certain process and operating arrangements.”

For example, he highlights a surge in demand for the option of e-signing documents. The firm is now providing lawyers training in that. “We’ve been forced to do some things differently, which has helped us to re-evaluate what other improvements might be possible.”

Behan agrees: “Change is now being forced on the legal profession, but it could pave the way for a bigger step change in process digitisation.”

Rea at LOD points out that firms doing certain types of work may find it harder to adapt than others, however. “This will not come naturally to some businesses and they will struggle, especially if handling huge documents, dealing in hard copies, or managing the trickier end of deal completion and signing. All these things feel like legal process problems and we may see this period kickstarting a lot of much needed innovation in our sector. We’re also seeing, and supporting, our in-house clients as they use this period to turbocharge some plans for digital transformation.”

Interestingly, when Rosenblatt (part of RBG



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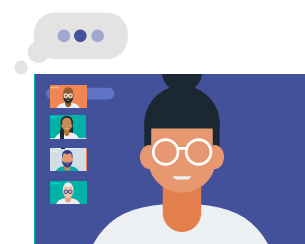
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## “Law firms could help their staff to establish ‘virtual corridors’ of colleagues to call upon, both for work- and non-work-related advice and conversation.”

*Nigel Rea, service development director, LOD*



Holdings) announced it had postponed the decision on its interim dividend payment in March 2020, it also said the process of moving everyone over to homeworking owed much to the significantly increased investment in IT made since its initial public offering in 2018.

The firm’s CEO, Nicola Foulston, explains: “The initial phase saw 100% of staff able to relocate and work from home using either corporate or personal devices, and securely access business systems. A secondary phase improved the homeworking environments of employees by adding additional screens and providing access to better quality printing.”

As part of wider digital transformation plans, she says desktops had already been replaced by a small form factor with dual screens, supporting a “paper-light approach,” and systems, including email, had migrated to the cloud for “greater resilience, performance and security.” A new firewall and VPN concentrator was installed, and remote access secured with “strong dual-factor authentication via a push challenge method to staff mobile devices.”

She continues: “We were already a virtual office environment. Now it’s just the same from home.” However, she worries for other firms in her part of the market in this crisis – and beyond – because of some rather more longstanding challenges. “Investment in IT in the legal sector can be atrocious, and there also some very, very poor software choices in the market. Six months ago we decided to bring our IT team in-house because the matter of our practice management system was so difficult to settle. They’re cherry-picking from what’s available and having to tie it all together for themselves.”

### In touch points

Then, have you caught up with colleagues for ‘voffee’, ‘vrunch’ or some jolly after-work ‘vinks down the vub’ yet? All new words we’ve genuinely encountered (ok, I just made the last

up). The more serious point though: Covid-19 won’t only be testing firms’ technology choices. Lockdown also calls for all that recent commitment to supporting mental health to be real and visible.

Loneliness is clearly an increasing concern at the moment – and videoconferencing technology can go some way to helping there, as well as being the necessary conduit for aspects of ‘harder’ business to continue of course.

LOD’s Rea says: “That cosy home office you’ve got, you’re probably now sharing that with your other half and two hyperactive kids. The other end of the spectrum is a flatshare, where your home office is at the end of your bed or a communal kitchen table. I think the biggest challenge will revolve around ensuring the continued wellbeing of employees – whether that’s to do with providing advice on how to set up an ergonomically-effective home workspace, or if you are like me, how to juggle your work responsibilities while home-schooling or caring for family members. Tips on a postcard please.

“Then there’s the question of the social advantages working in an office environment provides. Sometimes it can be isolating when you work from home, particularly if you’re a person who likes to bounce ideas off people. Law firms could help their staff to establish ‘virtual corridors’ of colleagues to call upon, both for work- and non-work-related advice and conversation. We’ve done this through a buddy system.”

Hayes at Osborne Clarke says: “The intranet has really come into its own to signpost what’s available – guidance on areas such as mental health, as well as training on the technology that’s helping to connect people.” Osborne Clarke employees who are perhaps less used to being so ‘agile’ can also have short coaching sessions via Skype. And Brodies has produced bite-size 60-second videos about how to do various things on the collaboration/unified comms front.

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Foulston says Rosenblatt has also create video content, published on its intranet using Microsoft Stream. Hogan Lovells has even made video shorts on subjects such as sharing that workplace with your kids.

Cathy Mattis, head of legal operations – client solutions, at Herbert Smith Freehills, says: “We have had feedback from the team that they feel closer to their colleagues now, as we have all taken care to deliberately plan time to feel connected – online face-to-face coffees, virtual team drinks, and chatrooms where we can either connect live or respond at a time that suits us. In our team there’s always someone awake and online somewhere. By planning time online with those with whom you would otherwise share a space, you can recreate the advantages of being in open-plan.”

Her own team is well accustomed to remote-working patterns and processes, she says – several having worked two days a week from home for years – and they also flex their time along global reporting lines. “We arrange remote access to every meeting. Now we can use this experience to support those for whom all this is new – both clients and colleagues.

“We’ve developed certain tricks like using video and microphones only when speaking to maintain quality during online meetings. We get up early to have global team meetings with 60 people that still manage to feel intimate – for large meetings we use a rapid series of planned presentations, with online banter appearing in the chat as we go, and for meetings of fewer than 20, interactive meetings with an agenda. We have also developed online multi-jurisdictional workshop formats with virtual Post-it notes.

“And we’re constantly learning from what works and what doesn’t – which we see as a positive. It’s a question of listening and together spotting opportunities – managing the tension between providing




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**“We’re constantly learning from what works and what doesn’t – which we see as a positive. It’s a question of listening and together spotting opportunities.”**

*Cathy Mattis, head of legal operations – client solutions,  
Herbert Smith Freehills*

immediate responses to a huge number of individual questions and taking a step back to reflect and decide how best to formulate a response that will work for many.”

Rea at LOD echoes this last point: “I don’t think this is a change management exercise any more. We’ve all changed how we work. Learn from how your teams are working now, ask them about it, and share what’s working and what isn’t. They’ll definitely have very strong views and use this for continuous improvement.”

### Lightening the lockdown load

Unsurprisingly, like us at **Briefing**, many of the firms are using Microsoft Teams to address the collaboration challenge. However, Jens Nasstrom, an occupational psychologist and head researcher at the Lawyer Performance Project, says it’s also important to think about how different ‘types’ of people at your firm may react as this unprecedented situation unfolds.

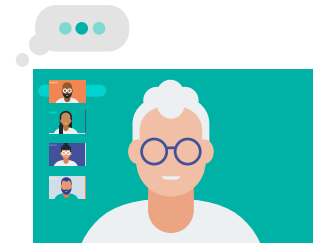
He was recently brought in by international law firm Mannheimer Swartling (main market Sweden). This firm’s managing partner was quick to shut the office even though Sweden was then in a so-called ‘soft lockdown’, and he wanted some research and insight into how his people were adapting.

“Consider the typical talent profile in a law firm – the Type A personality, a perfectionist, working in a high-performance culture. They may be either adaptive or maladaptive, and the latter will be at risk of things like second-guessing themselves with negative self-talk,” says Nasstrom.

He also draws that earlier distinction we heard between the immediate reorientation to homeworking in the first couple of weeks and something more sustainable. After several months there may well be a “demoralisation phase” to this journey that wasn’t necessarily anticipated, he says – when people don’t have close social support

**“As we are all seen on the screen as individuals, not in groups, people seem to speak up and contribute more. Knowledge-sharing has become more active.”**

*Karen Battersby, director of knowledge, Freeths*



(perhaps neither familial), and there’s a risk they receive less work feedback or time as well. “Leadership may also suffer, but in fact you need to check in with people even more frequently than in the office. Without feedback, it’s harder to adapt,” says Nasstrom. Mannheimer’s managing partner made it a policy point for everyone to receive an email from him every day of the week, with some personal reflections about what was happening as well as important business updates.

There might even be a case for some senior people switching responsibilities for managing, leading, or other duties, based on how they can realistically respond to the people-management pressures, he suggests.

And sharing more usefully and/or frequently is also the domain of the knowledge management expert. With 13 offices around the UK, Freeths director of knowledge Karen Battersby says plenty of her firm’s training activity (among other interactions) have happened by videoconference for a while now. She has even seen the odd positive point flow from the fact that everyone is now logging on from somewhere different. “As we are all seen on the screen as individuals, not in groups, people seem to speak up and contribute more. Knowledge sharing has become more active.”

And although her department’s “flat out” responding to the new guidance coming out all the time – producing up-to-date information, rapidly changing across most practice areas, for fee earners and clients alike – she also made time for her team to feature in new publication ‘FreethsSpirit’: “It’s designed to be a window on how different people at the firm are managing in order to inspire or help others.”

That includes small things like sharing recipe ideas – an idea Hogan Lovells has in fact taken one step further, with a simple photo competition run through a private Instagram account. “That’s a move we probably wouldn’t have considered before coronavirus, and is also a channel for us to hear from colleagues in countries such as China

and Italy about what they’ve already experienced in lockdown. There’s a lot more emphasis on connecting as teams in more creative ways,” says Mitchell.

Pollick says different teams at DWF are setting up their own activities – a Sunday brunch option, particularly aimed at those seeing even fewer faces at the weekend; Friday night drinks of course (with family and pet presence encouraged); and then a #dailyanochallenge to get people smiling about something at least once a day. “The challenge involves taking a picture of something at home you’re proud of. It allows people to converse about something other than work, albeit via Yammer,” he says.

Finally then, what of the suggestion that homeworking on such a scale will be our ‘new normal’? Jens Nasstrom believes it’s unlikely to be quite so dramatic once these next however many months have passed, but he’s optimistic about the outcome. “There will probably be quite some variation in how productive different people can genuinely be. The ‘psychological contract’ involved will be important.”

But if firms get it right, the business of ‘trust’ that may have acted as a break on the transition in better times ought to be released, he says. “People have long wanted the freedom to work from home. Some now won’t want it long-term, but there should be a double-boost to support and satisfaction through the ability to make a more informed choice.”

Rea at LOD has the final word: “As one of my colleagues said to me the other day, ‘I’m really enjoying this. I don’t think you’re going to get me back in the office – except for end-of-week drinks!’” A non-virtual round there, one assumes.

“While we hopefully won’t be trapped in our houses for months on end, there’s a strong chance our working lives will never be the same again. Once we emerge from the cocoon, we might look at that Northern Line commute and decide we’d rather start the day at home with Joe Wicks.” ▀

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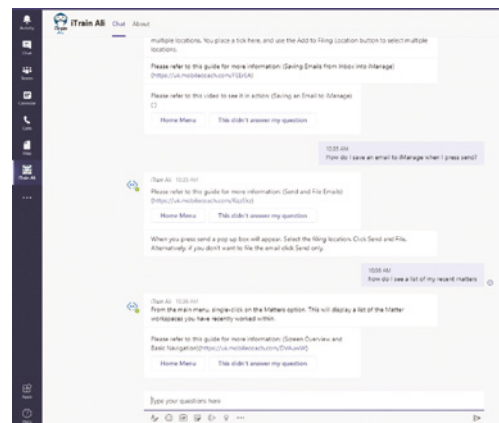
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 BRIEFING PEOPLE

# Tech-in together

Jem Sandhu speaks to some of the key players with a part in the new digital law group launched by Herbert Smith Freehills

**T**ransformation has never been easy, with digital transformation having an even lower success rate than the traditional variety. Nevertheless, the competitive benefits promised by capitalising on emerging technologies has elevated digital to the board level.

“Technological innovation is providing clients with opportunities to generate revenue, increase cost savings, and create new sources of value and new business models,” says Alex Cravero, an IT and sourcing lawyer at Herbert Smith Freehills.

**“Technological innovation is providing clients with opportunities to generate revenue, increase cost savings, and create new sources of value and new business models.”**

*Alex Cravero, joint digital law lead,  
Herbert Smith Freehills*

But he has also seen this trend create new technical, operational and regulatory risks.

### Team in formation

Clearly, clients increasingly need their lawyers to go beyond providing traditional legal advice. And this was precisely the thinking behind his firm's new digital law group (DLG) – formally launched in November 2019. Currently at 28 members across eight global offices, the DLG works hand in hand with HSF's lawyers across the business to advise clients on their digital transformation initiatives – from digitisation to data analytics, blockchain and smart legal contracts.

The UK team is co-headed by Cravero and Charlie Morgan (an international arbitration lawyer) as joint digital law leads. The DLG also works very closely with Cathy Mattis (head of legal operations, client solutions) and Fleur Kitchingman (head of client and technology solutions, ALT [alternative legal services]) in its work. Cravero describes a closely knit, cohesive, unit: with three distinct functions – the digital law group, alternative legal services, and legal operations – working together to solve the legal, technical, operational and strategic elements of a client problem.

“From the client perspective, there are a lot of things to be considered in addition to the legal problem – such as legal project management and technology. But it's difficult for client teams to know which of those things you need to solve your particular problem. This group helps to solve that problem for them,” says Kitchingman. The ALT team at HSF was formed in 2011 to deliver both project-based and business-as-usual work for clients – and specialises in developing legal service delivery solutions.

And taking a client focus is nothing new for Mattis's legal operations group either. In 2018, the function moved to align itself with how HSF's

**“I shopped for legal services regularly – and was highly focused on legal service delivery and adding value.”**

*Fleur Kitchingman, head of client and technology solutions, ALT, Herbert Smith Freehills*

clients were organising themselves. “Legal project management, pricing, process, innovation, automation, data analysis, strategic research – it was all pulled together under legal operations,” says Mattis, identifying some of the essentials of a joined-up approach to advising on digital transformation.

### Working together

On top of the roles they play in their respective functions, a key factor for the success of the digital law group and its work with HSF's ALT and legal operations teams is undoubtedly the range of backgrounds each person brings to the work they all do.

Cravero's background enables him to take the perspective not only of law firms and clients, but also disruptors. “I trained as a lawyer and then moved in-house for a scale-up that was breaking down barriers within e-commerce – learning a lot about the other side of digital disruption and the challenges that innovators face,” he says.

“I quickly learned those challenges were not unique to scale-ups either. That was during a later stint at an IT management consultancy as a lawyer for some of its most transformative global projects.”

Kitchingman's previous experience as general counsel for a construction services business – with that sector's characteristically low margins – enables her to understand the pain points of clients' legal departments, she says. “I shopped for legal services regularly – and was highly focused on legal service delivery and adding value for the business.”

Similarly, Morgan says that as a politics, philosophy and economics undergraduate, he studied advanced logic and statistics – which, when he got into a legal context, lay behind his interest in looking more closely at some of the firm's products. “I started kicking the tyres on



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some of the products we were using – to understand how they worked and how their outputs were reached,” he says.

Although they’re all based at HSF’s London offices, the members of their teams sit in different offices. This necessitates regular catch-ups – both formally and informally. They also set aside half or full days to explore particular themes – with a distinctly startup vibe, says Mattis. “We have plenty of Post-its, and standing up, and drawing of pictures,” she laughs.

And information is also kept flowing informally – enabled in part by sitting together on a regular basis in open-plan layout. “Fleur is in and out every five minutes. The digital law group secondees come and share the space at least once a week. We overhear conversations and bounce ideas off each other. And the lawyers get to know the business services teams better – otherwise they don’t always bump into legal operational people unless they are working on a specific project,” says Mattis.

Of course, as the digital law group they also have lots of tech to enable them to connect and otherwise further the team’s goals: “We get our lawyers across all practice groups to test and play with all the toys, to help spot and develop new opportunities,” she says.

Morgan adds: “HSF invests in a lot of technology, so we get the chance to pilot a lot of the new tech the firm is implementing.”

### Working with clients

The team’s work across the emerging technology spectrum is broad. “We regularly help our clients with a range of things, from advising on moving core real estate and banking business functions onto digital platforms, to implementing and licensing blockchain solutions in the energy and logistics sectors,” says Cravero.

Mattis gives an example of how they would

**“We determine what they should be focusing on, which strategic projects they should be supporting, and whether we can get low-value, low-risk, work off their desks.”**

*Cathy Mattis, head of legal operations – client solutions, Herbert Smith Freehills*

engage in an operational conversation with a client GC or head of legal operations, whose team might have the capacity and skills to solve a problem but be overwhelmed by the challenges. “We go through a portfolio of work with them, and the legal services that they are expected to deliver to their business. We determine what they should be focusing on, which strategic projects they should be supporting, and whether we can get low-value, low-risk, work off their desks. We look at how senior lawyers can collaborate with them more effectively on high-risk, high-value work – so we are seen as an extension of their team that helps them to cope with peaks in demand,” she says.

As Mattis points out, there was a time when law firms would only have these conversations with a client’s legal department – but now it involves speaking to transformation teams, technology teams, developers, and even COOs – “so there’s a deeper and wider connection with the clients.”

Cravero adds: “The best conversations we’ve had are where Cathy, Charlie, Fleur and I are in a room with the client – who will have their comparable functions present – and everyone thrashes out ideas and explores the right team to put together.”

In spite of the tech focus, the group also helps clients to figure out when to hold back from rushing into using technology. Mattis says: “One client had a list of the work they did, and the available technology. They wanted us to apply that technology to that work. We said that we would first like to get people in a room together to understand the problem – what the experienced pain is from a human perspective. Then we would work through their current process and ask them to reimagine it and support that with just enough technology.”

In addition to being a former corporate finance lawyer, Mattis brings a wealth of critical process-improvement experience to the team – including a

**“In the past, a lot of lawyers might have been heard saying ‘that’s not me’ about technology or numbers.”**

*Charlie Morgan, joint digital law lead,  
Herbert Smith Freehills*

stint running a process improvement consultancy for clients at another firm. “I’ve mapped hundreds of processes in every practice group, so I’m an expert translator of client need. I also bring a management perspective to client-centred problem-solving,” she says.

### Regulatory change

Then there are the tech and delivery aspects related to the massive increase in regulation that has accompanied the digital age, says Cravero. “Against a backdrop of public concern that regulation is failing to keep pace, as we look forward we anticipate more regulation of tech and social media, with regulatory alternatives like ethical frameworks filling the gaps. That is something at the forefront of our clients’ minds, so we work closely with practice groups, including ALT, and our legal ops teams, to help our clients plan for, and address, the challenges that arise from this rapidly evolving regulatory landscape.”

From the point of view of operations, Mattis explains: “We often sit with the client in a workshop, with the lawyers and the ALT team, and look at it practically – as a project. ALT might be doing re-papering or similar exercises as a result of whatever advice we have given. So it’s about helping clients to figure out where to start in terms of priorities; how we will deliver it and how we are going to support that with tech.”

Kitchingman adds: “With regulatory change, the legal advisory piece informs where the focus needs to be in terms of the tasks to be done.”

The ALT angle is to help facilitate client delivery. “Working out how to do what needs to be done in the most cost-effective way using people and processes enabled by technology.”

The team also develops new service offerings and product lines that harness process improvement and technology – for example, DLT Co (formerly known as the Australian National

Blockchain). This is a collaboration between HSF, IBM and the Commonwealth Scientific and Industrial Research Organisation (CSIRO) data innovation group Data61 to build smart legal contract infrastructure in Australia and, eventually, globally. “DLT Co is building the infrastructure on which smart legal contracts can run in a secure, business-ready environment,” says Morgan.

### Futur-proofing

However, it’s not just about client service either. The team’s practice of rotating in expertise from other areas of the firm aligns with another part of the vision – improving lawyers’ digital literacy. “Senior lawyers are seconded to the team, part-time, for six months or more. As they understand legal processes, and their clients’ needs, they are best placed to advise on these complex areas, spot new opportunities and drive the design and implementation of new tools,” says Cravero.

In addition to learning about digital transformation, Morgan points out that such future-proofing of lawyers helps to protect the firm’s financials by generating new business models and sources of value. It also results in more effective advice. “Lawyers shouldn’t shy away from grappling with new tools and delivering service more efficiently and cost-effectively. In the past, a lot of lawyers might have been heard saying ‘that’s not me’ about technology or numbers – but that type of approach is no longer consistent with the way we need to support our clients,” he says.

Happily, it’s clear that interest in digital transformation is by no means confined to our digital law group – certainly if the amount in the team’s UK rotations is any indication (five times more applicants than spaces). “There’s a real drive from our lawyers here to help our industry, and our clients, do things in a different way,” says Cravero. ▀

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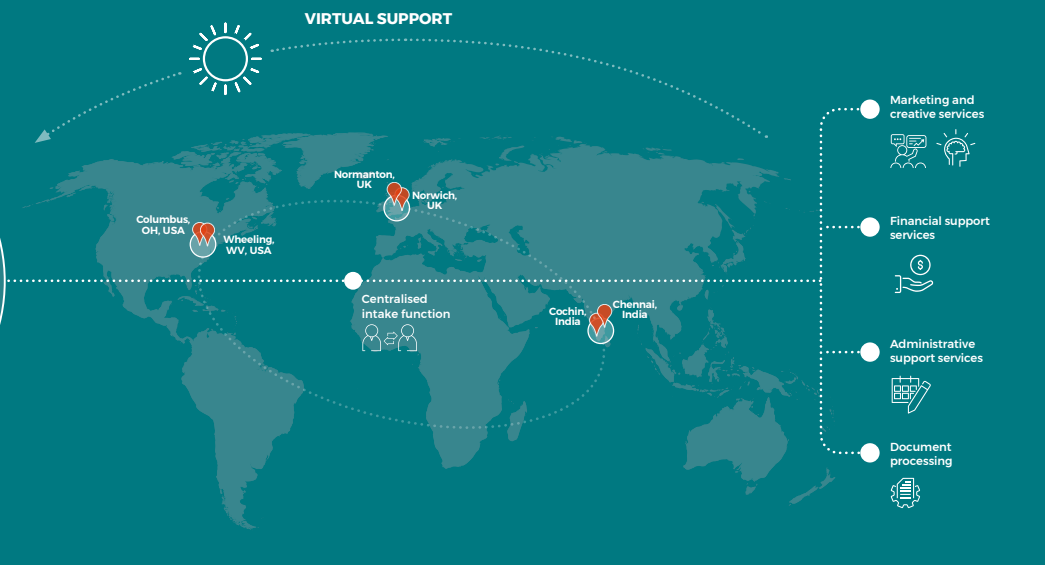
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**L**ike so many businesses, law firms are facing an intensely challenging time for the remainder of 2020, and likely beyond. The reality is it remains to be seen how well technology projects and investment from years previous can help them to drive the all-important engines of efficiency, productivity, engagement and service quality in this period of prolonged quarantine and isolation.

Meanwhile, communication and collaboration are clear themes for us in these troubling times – and firms need to have a network of specialist partners and suppliers supporting them who are also in regular contact to support and understand one another. Lessons should be shared. Mindsets, as well as systems, need some integration. That is what the Legal Supplier Alliance – whose members here outline the parts each of them have to play in making a success of the current remote working world – has as its overriding aim.

**Firms need to have a network of specialist partners and suppliers supporting them**

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# CTS: Empowering your agile workforce with cloud

**A**lthough we have worked in partnership with law firms for over 12 years, we had not truly experienced how business-critical our services were to the sector until now: secure and immediate access to data and applications from any device, anywhere, at any time, has been a game changer for our clients.

Law firms are currently reviewing their business models, cost bases and working structures. Post-Covid-19, how will firms automate collaboration, processes and communications while continuing to engage staff and deliver an excellent client service?

Cloud-enabled firms have the advantage of remote access to desktops and business-critical software, from practice management to dictation, putting them ahead of less agile competitors; and increasing the likelihood they will come through this period hitting the ground running.

Having the right infrastructure is key to enabling remote working. This is where CTS has seen our cloud-enabled clients make the transition to a remote working model effortlessly. “Our partnership with CTS has meant that our technology perfectly aligned with our business-continuity plan, resulting in a seamless transition to remote working for nearly 200 staff members,” said CTS client Napthens Solicitors.

As a cloud and managed IT provider, our primary role is to empower firms with the right technology and a secure, high-performance platform that drives excellent client service. The flexibility of a subscription-based cloud model has also enabled firms to be hugely responsive to changing circumstances, which has never been more important.

Seddens Solicitors’ migration to the cloud, in 2019, improved staff performance, cost savings and flexibility.

And leveraging CTS’s Managed Cloud service allowed them to spend more time analysing how people work and finding appropriate solutions to drive efficiency and improve their processes, which has been a huge advantage to their business-continuity plan over the last few weeks.

Working from home has several proven benefits, including reduced overheads, higher productivity and boosted morale – under normal circumstances. However, communication between teams and departments throughout the firm can be a challenge.

Cloud collaboration tools, such as Microsoft’s Office 365 and Teams, can eliminate the barriers created by physical distance, enabling users to communicate effectively and work on shared documents in real time, increasing efficiency and streamlining workflows.

The sector can already take away some very real insights from this crisis; some elements of firms’ technology will have transitioned well to remote working, whereas others have caused significant issues.

As we transition to a ‘business as usual’ state in the new world post-Covid-19, we expect IT departments to move their focus away from day-to-day management of IT infrastructure to end-to-end digitisation of processes and operations, taking on a strategic role that adds value for the firm, and outsourcing more of the operational running to a sector-specific cloud provider. Cloud-enabled law firms will be able to implement new technology faster, enable innovation, and attract and retain talent by providing a superior platform that enables staff to work more flexibly, productively and efficiently.

Whatever the next few months bring, the crisis will undoubtedly further drive the adoption of cloud-based services to enable remote and intelligent working. ▶

Nigel Wright  
CEO  
CTS

🐦 @CTS\_Cloud\_IT

For more information, visit:  
[www.cts.co.uk](http://www.cts.co.uk)

**Cloud-enabled firms have the advantage of remote access to desktops and business-critical software, from practice management to dictation, putting them ahead of less agile competitors**



# DMC Canotec: Are you agile enough?

**A**s the full implications of Covid-19 start to be felt across the legal industry, and as we take our first tentative steps to reopening offices, the need for greater resilience and agility in our business model and service delivery has become paramount. And it has brought two important questions to the fore: just how agile is your firm, and is it enough?

This last couple of months have been the biggest experiment in agile working the world has ever seen, challenging the status quo, potentially for ever, and making us look even closer at how we do business, how we enable and support our staff, and how we serve and support the clients. What have we learned, what has to change, how do we make our firm stronger as we exit?

Is this the Rubicon moment for agile working and the agile law firm? With the challenges of social distancing rules, travel restrictions, staff wellbeing and safety guidelines all adding to the mix, longlasting change is inevitable, but with it comes opportunity. To paraphrase Darwin, it is not the strongest that survive, nor the most intelligent, but the ones most responsive to change.

For the last five years DMC Canotec has been driving the agile agenda with our popular AgileFirm events sharing best practice and customer insights on embracing change. Over 200 firms attended this year. For now these events are virtual, such as the launch of our forthcoming AgileExpo series and regular AgileToolkit webinars, but the advice, insight and experience gained from partnering with over 100 of the UK's leading firms, allows us to share a proven path to enabling effective digital transformation and the agile law firm.

Our latest seven-step guide, The New Workplace, offers practical tips for a safe and secure return to the workplace,

supporting a hybrid workforce, where many will still, for now, be working from home as the new norm.

## Agile in action

We recently worked with two top firms on their agile/digital transformation strategies.

### Weightmans – Digital Mailroom, MatterSphere workflow

“The solution has enabled Weightmans to deliver documents directly into digital workflows to support our users, wherever they are – a secure, agile, collaborative and efficient service supporting the continuity of service to our clients, despite the challenges we all face right now. DMC Canotec, Paper River and Weightmans worked really well together and developed a real camaraderie. From 85% of our firm being in an office on any given day we had fewer than 15 people across eight offices within a week, with everyone supported and working effectively from home” – Stuart Whittle, partner and head of IS and operations

### Withers Worldwide – Digital Mailroom, iManage workflow and Managed Print Service

“Our Paperlite Document Solutions from DMC Canotec have been a game changer for agile working, especially right now during these most challenging of times, enabling us to deliver documents and information quickly and efficiently in an electronic format so our lawyers, secretaries and other support staff are able to work remotely from anywhere. This proved to be extremely helpful at the start of the crisis and helped Withers move to full remote working far quicker than would have been the case without the technology” – Peter Gibbons, global head of facilities

David Newman  
Director  
DMC Canotec

 @dmc\_canotec

  
For more information, visit:  
[www.dmcplc.co.uk](http://www.dmcplc.co.uk)

**What have we learned, what has to change, how do we make our firm stronger as we exit? Is this the Rubicon moment for agile working and the agile law firm?**

# ComXo: More efficient operations from home

**C**omXo is a legal sector specialist providing agile, remote working and ‘workplace of the future’ managed communication solutions for top-tier law firms.

The Covid-19 crisis and lockdown have seen customers successfully squeeze a three-year agile workplace roadmap into three weeks. While it has been a very busy time, it has also given insight to many ambitious firms as to what the future operational structure of their business will look like.

Here are four things our clients are considering, and how we are enabling them:

## Maintaining exceptional client experience, no matter what

In a crisis you need your trusted advisers on hand, and giving easy access to that help, 24/7, helps clients to be fast and responsive as a situation changes. ComXo’s 21st Century-managed legal switchboard enables firms to offsite their entire workforce while guaranteeing an exceptional client experience when they call into a firm. Combining 30 years’ experience and the very best technology, process and people, ComXo guarantees an unrivalled first impression that will mean you never lose a new business opportunity or frustrate an existing client.

## Cutting unnecessary costs quickly

The last few weeks have put the spotlight on ‘old workplace’ things that are not necessary to run an efficient firm. Examples include in-house telephone switch, desk phones and direct dial-in numbers; an in-house switchboard function; in-house videoconferencing suites; inefficient use of expensive office space and meeting rooms; travel and expenses of course; and oversized onsite

IT and facilities teams. ComXo’s clients outsource all or part of these functions, delivering a better internal client experience and massive savings on overheads. The challenger firms of the future will offer clients more value because their overheads are a fraction of those at a traditional firm.

## Driving fee earner productivity

There can be more time doing client work and less time lost to the frustration of getting things done. Every six minutes saved sends earnings straight to the bottom line. ComXo’s Gateway is an integrated, managed, business services app, giving access to all business services on every remote worker’s mobile phone. No matter where you are, or the time of day, if you need to be transferred, an FAQ answered, helpdesk support, or a service booked, you simply press a button and your ComXo Virtual Personal Assistant will get it done. ComXo clients turn non-productive time into client billing time, driving profits into partner pockets.

## BCP is now BAU

Sadly, the post Covid-19 world will never be the same. Firms do need to be ready to react to similar threats, potentially on a regular basis. Structuring global offices to be always ready to react means supporting remote working as business as usual. The key to being ready is centralised data sources, integrated services, a 24/7 global managed capability, and an ‘always on’ support function that enables a seamless switch from office to remote. The ComXo Global Communications disaster recovery solution provides the world’s largest most complex law firms with this capability. It meant the recent move to a fully remote workforce was easy to invoke and one major hassle they did not have to manage. ▴

Andrew Try  
Managing director  
ComXo

🐦 @ComXoLtd

For more information, visit:  
[www.comxo.co.uk](http://www.comxo.co.uk)

**Structuring global offices to be always ready to react means supporting remote working as business-as-usual. The key to being ready is centralised data sources, integrated services, a 24/7 global managed capability, and an ‘always on’ support function**

# DocsCorp: Stay productive and secure during the Covid-19 crisis

**W**e appreciate that while it isn't business as usual, many firms want to maintain essential services for their clients and local communities. We are here to help.

Our software makes legal document workflows more accurate, efficient and secure for remote workers. Many of our desktop applications are also available either in the cloud or on-premise, making it easier to find the right solution for your environment.

## pdfDocs for paperless pdf workflows, digital signatures and more

Staff working from home won't always have the same access to hardware like printers and scanners. That's why efficient, paperless workflows are more important than ever. With pdfDocs, users can complete essential document workflows without needing to print or scan. They can apply redactions, digital signatures, Bates numbering, stamps, annotations, and more, to single documents or document sets.

pdfDocs binder enables quick and paperless pdf binder and closing book creation. Rather than printing and scanning multiple copies, add new or amended documents as you go, and output to a single file when you're done.

## compareDocs for accurate legal document comparison

Small changes in legal documents can make a big difference, so it's essential that users have reliable access to precise comparison technology while working remotely. DocsCorp's compareDocs makes it quick and easy to compare up to five versions of a document for changes, while support for track changes makes reviewing the changes a straightforward task.

Moreover, compareDocs cloud delivers the same comparison capabilities to mobile users. It's accessible in Microsoft Word on any device, including Mac, iPad and tablet. And, to support firms during the Covid-19 crisis, it's available to use free for 90 days.

## cleanDocs for secure emailing

Legal documents are full of sensitive metadata. In order to prevent unintentional data breaches, cleanDocs scrubs email attachments before they are sent outside the firm. And cleanDocs desktop also offers an email recipient checking functionality that ensures emails are sent to the right person and with the correct information.

Then, cleanDocs server works in tandem with cleanDocs desktop to scrub metadata in emails sent from mobile devices, or it can function as a standalone solution. Cleaning is automatic and can be customised to suit enterprise security policies. And to help firms protect users while they are working from home, cleanDocs server is also now available to use free for 90 days.

## Training and support

Adjusting to remote working can stretch the resources of any organisation a little thin. So, to help make working from home more manageable, multiple new training resources are now available. These include on-demand training webinars for all applications; quick training videos for users who need to learn how to use a new feature or a new application at home; and quick training guides, with step-by-step instructions on essential workflows, like converting from pdf to Word in pdfDocs, comparing Excel files with compareDocs, or cleaning metadata with cleanDocs. ▶

Samantha Jefferies  
Vice president - EMEA  
DocsCorp

🐦 @DocsCorp

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

**Rather than printing and scanning multiple copies, add new or amended documents as you go, and output to a single file when you're done**

# iTrain Legal: Socially distanced learning for your implementation

**W**e're now living and working in a world that has changed forever. No one knows what is going to happen, what the macroeconomic impact will be, or how long it will last. These are challenging times to be implementing new systems in a law firm.

Given the pace that firms have needed to use to migrate to remote working, lawyers have quickly adapted to using technologies such as Microsoft Teams and Zoom, and become more self-sufficient in their working practices. In the provision of legal services, some new norms are already starting to manifest themselves. Longstanding views that lawyers had to work in an office environment, that law courts couldn't be online, or that lawyers could not function without large business support teams to assist in service delivery have been debunked in just a few days.

For the legal sector, the genie is now out of the bottle and it will never go back in.

How law firms manage IT system implementations and upgrades is very much up for debate, and one of the key areas where face-to-face is seen as an imperative is training. Do we have to accept that these projects must go on hold because of the current restrictions?

iTrain Legal, a specialist legal IT training solutions provider, believes that carefully planned remote learning programmes can be as effective as face-to-face training, and that firms may also even look to these methods in the longer term.

The constraints of remote working can lead to great learning experiences when designed thoughtfully with the person at the centre.

Training delivery is already now seen as being only a part of a change programme that law firms undertake,

meaning that there is flexibility to deliver training, blended with communications. Customised bite-size videos and e-learning can be interspersed with interactive training, webinar delivery and collaborative sessions. These solutions are time-efficient, so enable more training activities to be spread out, culminating in a learner feeling ready and confident in tackling the new system.

Even floor support can be delivered remotely, with clever systems employed to ensure that every person is virtually visited by a trainer.

Perhaps the most important innovation is the AI chatbot technology in support of training needs that we have introduced to the legal tech industry. The chatbot delivers instant answers to 'how do I?' questions that feature so heavily in the first weeks of rollout, and can refer to a real floor support trainer if required.

Furthermore, our chatbot can proactively contact people, checking knowledge and confidence levels with the system, and crucially then respond with the right support where needs are identified. It's accessed through Microsoft Teams and continues to provide training support long after the physical trainers have gone.

We would therefore urge firms that, if training is your only barrier to change, to think again, as new ways of training will be part of the new norm.

Wherever the legal sector ends up in the next few years, law firms will need to innovate, to think differently and to accept new ways of working. Those who start this process sooner are likely to do better overall. ▲

Dorigen Sykes  
Managing director  
iTrain Legal

 @iTrainUK

For more information, visit:  
[www.itrainlegal.co.uk](http://www.itrainlegal.co.uk)

**How law firms manage IT system implementations and upgrades is very much up for debate, and one of the key areas where face-to-face is seen as an imperative is training. Do we have to accept that these projects must go on hold because of the current restrictions?**

# Hubshare: Improving client service productivity from home

**H**ubshare is a secure digital workplace portal that enhances client engagement through collaborative working, secure file sharing and project management. Businesses can quickly and easily tailor each portal to their client or project needs and provide users and external parties with a branded and customised platform.

With the move to mass homeworking Hubshare is an ideal platform to aid productivity within internal teams, but even more so in terms of improving client service.

## Teamwork

With your teams working remotely it is paramount you are all moving in the same direction to deliver the best client service. No longer can you go to the paper file, or turn to the person next to you, for an update. Having a centralised client area where you all work is key to keeping the whole team up-to-date and avoiding duplicating work.

## Anytime, anywhere

Each centralised portal is where sensitive documents can be shared, stored and accessed, anytime, anywhere. In addition to the file-sharing element, users of Hubshare can track project progress, ensuring targets and deadlines are met, as well as having an overview of their project. This dynamic and optimised interface means you can easily visualise and manage your workload, view progress and assign additional tasks to users.

Keeping your clients continually informed of the latest document versions, a task's status, or matter spend, can waste valuable time and resources. Being able to proactively provide an online service that delivers all this seamlessly by integrating with your

internal systems is key.

## Integration

Integration is at the heart of Hubshare, be that with your document management system (DMS), practice management system, Office or digital signature. Having a platform that has integrations with many legal-specific solutions is paramount for delivering exceptional client service.

With options for one- or two-way synchronised integrations with your DMS, it is effortless to transfer your files straight from the DMS into specific client portals. Our automation process can build a client portal from a company template, syncing files and users as a matter is created in the DMS without you needing to lift a finger.

Within each client portal the dashboard allows you to present a full overview of a matter or project, including presenting financial data that is pulled directly from your financial systems – a great way to keep clients up to date with budgeting and current spend.

## Security

Depending on company preference and data compliance regulations, Hubshare can be hosted in a multitude of locations, meaning you have control over where your data resides, whether this is in the cloud, on one of our five secure Microsoft Azure data centres, on-premises, or even in your own data centre. In addition, with two-factor authentication, single sign-on and high-grade encryption, your documents and data are always secure.

Maximise your company's productivity, stay connected and stay secure. ▲

Damian Jeal  
Co-founder  
Hubshare

 @HubShare

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

**Having a centralised client area where you all work is key to keeping the whole team up-to-date and avoiding duplicating work**

# Paper River: Better ways of agile working in the new normal

**F**or some law firms, the Covid-19 pandemic and ensuing lockdown have finally and forcibly broken the paper chains that used to bind secretaries and fee earners to their desks. For these firms, this tiny virus has finally achieved something no end of strategic recommendations, nor the marketing of tech companies like us, ever could. Firms have been forced to enable agile homeworking practically overnight. At Paper River we have seen many firms struggling with new ways of working, and the challenge of even just getting paper documents and post distributed as digital documents to the appropriate legal teams and fee earners. That struggle is also reciprocated on the output side, where print room services and office printing are no longer accessible.

For other firms this has been much less of a bumpy ride, merely accelerating the adoption of specific technologies and agile ways of working that were already in place. We have now seen many of our clients reaping unexpected benefits from their prior investments in fluid workplace technologies.

Paper River has long advocated agile, flexible working and joined-up 'smart' business processes. Fear of change no longer matters, and the implementation of new automated digital process adoption has now been mandated by influences beyond the status quo stance of the most resistive legal firm.

Whether it is digital mail room, multi-channel information ingestion, collaborative document-bundle creation, e-ticket requests for office services, or a digital outbound mail review and approval process ... it can be done. It has been done by many firms already and they are reaping additional benefits now over and above the original business case.

Once an organisation begins to get a

taste for better ways of working and the benefits of enabling technologies, that is often a prompt to review all their assumptions about ways of working and what could be working better.

One small practical Covid-19-induced example of this was with one of our international clients, where we transformed their process from physically printing draft bills out of Elite to a digital process that captures the print stream and sends the document as a pdf attachment by email to the relevant secretary or fee earner. This solution has proved enormously beneficial.

Coming out of this crisis we are expecting to face a whole new set of questions and challenges from our customers. The post-lockdown world will definitely not be the same as the pre-lockdown world. The changes will permanently impact the way lawyers work and the way that law firms are structured. They will want to know how technology can support and ensure compliance within the organisation. This will be especially true of those firms without suitable digitising solutions, who have effectively waived their security and General Data Protection Regulation (GDPR) policies to be able to continue to work at all during the lockdown. Finally, we predict that law firms will increasingly appreciate the role of technology as an enabler and driver of value and profitability.

The storm clouds of this pandemic have not yet passed, but maybe there are some silver linings on the distant horizon. It turns out that the benefits of solutions that enable agile work also provide crucial operational resilience. A physical disaster recovery office would be hopeless in the current situation, but a 'work from anywhere' technology capability is saving the day for many firms. ▀

Eric Gee  
Managing director  
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🐦 @frompapertodata

For more information, visit:  
[www.paper-river.com](http://www.paper-river.com)

**Whether it is digital mail room, multi-channel information ingestion, collaborative document-bundle creation, e-ticket requests for office services, or a digital outbound mail review and approval process ... it can be done**

# Ten10: Remote service provision, in testing times

In today's remote working climate, most organisations are having to adapt to new ways of working, collaborating and communicating when delivering IT change. This presents very significant challenges to delivery dates and evolving business priorities.

## What can we do for you?

- Industry-leading functional and non-functional testing
- Highly technical test automation and performance-engineering services
- Strategic advice and planning
- High-quality software testing and quality engineering resources to complement your teams.

## How can we do it?

Our UK- and US-based permanent workforce of software testers and quality engineers are vetted to industry standards.

- Our consultancy, services and people are supported by 'Tenology', our internal delivery, management and governance framework.
- Critically, we can deliver our full range of consultancy and software-testing services remotely, utilising a wide range of collaboration and videoconferencing platforms, connecting to customer environments using laptops encrypted to the highest security standards.
- We provide free-of-charge initial planning and familiarisation as part of our commitment to demonstrating effective capability and services and building trust.

## Our experience

- Over 50% of our engagements have traditionally been delivered remotely, so we know what works, and more importantly what doesn't.
- Regardless of your delivery environment, we have the capacity, expertise and knowledge in leverage tools and techniques to mobilise and provide effective offsite delivery, be this collaborative, agile teams or standalone test phases.

We bring with us in-depth, sector-specific knowledge of typical technology platforms, applications and integration requirements. Through our dedicated legal sector team, we can provide you with strategic advice on these technical challenges and your future roadmap.

## Consultancy

Our talent, expertise and pragmatic approach will give you the confidence to fully embrace technological change. We will effectively plan and incorporate testing into your software development lifecycle and long-term product roadmap.

Project-based test consultancy will ensure the right approach, tools and resources are selected, and in place, to achieve a smooth and successful test delivery. The Ten10 legal sector consultant team meets clients' exact requirements, from sector-specific experience through to proficiency across particular technologies and tools.

## Managed services

Project-based and ongoing managed test solutions are delivered through our permanent, talented UK- and US-based remote delivery teams.

Our expert-led blended teams enable the necessary skills and capabilities to be employed while remaining a cost-effective solution. ▶

Chris Ash  
Associate director – client services  
Ten10

🌐 @Ten10\_UK

For more information, visit:  
[www.ten10.com](http://www.ten10.com)

**Project-based test consultancy will ensure the right approach, tools and resources are selected, and in place, to achieve a smooth and successful test delivery**

# Thomson Reuters: Cloud-based legal tech has its day

**A**s the world reels from the challenges of slowing the transmission of Covid-19, law firms across the globe need to both connect virtually and continue to meet client needs – all while addressing a new set of legal issues tied to the virus.

Every law firm is likely to feel the strain to one degree or another, but some are unquestionably better equipped for the current reality. The day-to-day aspects of matter management and financial workflows have become a challenge for firms unprepared for a workforce separated by distance and distraction.

In the spectre of a pandemic, remote collaboration tools are having their day.

## Now more than ever, firms must manage their legal processes and business performance

With so much time apart, it's important to capture and share the vitals of the workplace, ensuring that important tasks and responsibilities don't fall through the cracks.

Take, for example, a single legal matter. Law firms without a standardised workflow and cloud-based project management system may suddenly find themselves unable to answer even the 'five Ws':

1. What matters are being worked?
2. Who is working on them?
3. When was the last task executed?
4. Where are the documents relevant to the matter?
5. Why were certain actions taken?

The need to access the facts of your firm's work and business easily, in real time and from anywhere, has always been deemed critical. This is truer today than ever before as law firms across the

globe need to balance the ongoing needs of their clients with the immediate financial health of their business.

## When your workforce is dispersed, find connections. Enable collaboration

Now probably isn't the perfect time to swap out everyone's technology or processes. But if your firm has an unusually dispersed workforce, look to cloud-based legal technology to help – 3E Cloud from Thomson Reuters provides firms with the technology they need in this fast-moving atmosphere through a streamlined implementation, and its remote capabilities for fee earners make it a double-win.

## For the lawyers

Matter maps, included within Thomson Reuters Panoramic, combine the know-how of Practical Law with an orderly, customisable workflow. Not only are lawyers able to see the preferred processes their firm follows, users can copy existing matters as a basis for their work. Think of it as a kickstart – in precisely the right direction.

## For the ledger

For law firms navigating uncertain waters during volatile times, up-to-date financial data is key. Firm leadership needs detailed, accurate and immediate information to measure daily business metrics and to effectively model and make changes quickly. Advanced financial reporting solutions from Thomson Reuters support firms with budgeting, forecasting, reporting, accounting, and more.

Your team can adjust to the new normal. Thomson Reuters can help. Contact us today. ▶

Patrick Hurley  
Vice president – customer advocacy  
Thomson Reuters

🐦 @EliteLink

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

**With so much time apart, it's important to capture and share the vitals of the workplace, ensuring that important tasks and responsibilities don't fall through the cracks**



# Wilson Allen: Time to transition to digital billing – top five reasons

**H**as there ever been a time when the pain of paper-based proforma management processes was more evident? Unlikely. Law firms that have made the transition to digital are experiencing little to no disruption as a result of working from home. Those who are still transitioning are feeling the impact in spades, driving many to conclude that now's the time to prioritise digital billing. Here are the top reasons why:

## Greater speed and accuracy of bill preparation

Collecting input from timekeepers on a timely basis can be difficult, leading to delays in billing and inaccurate invoices that are rejected by clients. With Wilson Proforma Tracker, for example, firms gain a controlled workflow and a simplified user interface to enable the timely and accurate preparation and validation of proformas. The software integrates with Elite Enterprise and 3E to provide access to real-time time and billing data, reducing manual input and minimising the inaccuracies caused by the re-keying of information by multiple users.

## Lower shipping and labour costs and billing service improvements

A digital proforma management process speeds up the bill generation, distribution and review process by enabling finance teams to track and manage all stages of the billing lifecycle. Lawyers can quickly review and mark up proformas from their desktop or mobile devices, eliminating the need to print, collate, ship and recollect paper. Billing teams can focus on higher-value tasks such as improved client delivery and service for invoices and collections.

## Timelier billing

Billing delays lead to increased write-downs. Therefore, firms can significantly improve financial health and performance by simply streamlining the work-to-bill lifecycle. There is less work in progress at the end of the month, and more time included in each proforma. Plus, digital proforma collaboration improves visibility into the overall status of the firm-wide billing lifecycle. That means finance teams can take appropriate action when necessary to identify and remove bottlenecks and get bills out the door more quickly.

## Better compliance with clients' billing rules

Many clients have complex billing requirements, which can be difficult for lawyers and staff to follow. Additionally, with increasing use of e-billing, firms have to follow more rigorous rules. Manually reconciling a high volume of draft bills can significantly complicate and extend billing cycles. Software that natively integrates with your firm's financial management system and external validation systems makes it easier for your firm to adhere to client guidelines.

## Improved realisation

What's the bottom-line benefit of making the transition to digital – literally and figuratively? Clients appreciate the timelier delivery of accurate invoices that comply with billing rules, which should translate to quicker cash collection and improved realisation rates for your firm.

Making the transition to paperless processes can be challenging without the right technology and a realistic change management plan. ▴

Lindsay Barthram  
Director of consulting services, EMEA  
Wilson Allen

 @WilsonAllenTeam

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

**A digital proforma management process speeds up the bill generation, distribution and review process by enabling finance teams to track and manage all stages of the billing lifecycle**



The key ways to succeed with remote working  
Visit: [www.comxo.co.uk/remoteworking](http://www.comxo.co.uk/remoteworking)



Managed Cloud  
Visit: [www.cts.co.uk](http://www.cts.co.uk)



Agile toolkit  
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# Brain training

## 44

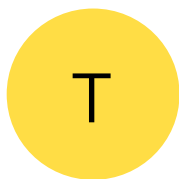
### *Virtually possible?*

Dan Taylor, director of systems and security at **Fletchers**, offers some tips for a smoother switch to remote working

HANDS ON

# Virtually possible?

Is technology ready to truly enable lawyers to work remotely long-term, asks Dan Taylor, director of systems and security at Fletchers Solicitors



The demand for homeworking has been on the increase for some time, and in the legal sector – a profession known for its long hours at a desk, working late into the night, and dealing with clients’ most

private of matters – there has been the desire to make it work.

However, whether it be culturally, practically – or just from a technological adoption perspective – there has always been a reticence in the law to engage remote working practices more widely.

Within the space of two weeks, all those obstacles had to be overcome to make working from home possible. The coronavirus pandemic pressed the fast-forward button for everyone.

It has brought huge changes in all walks of life, but one of the

things it has really thrust into the spotlight for businesses is their ability to enable their people to work from home efficiently and productively.

In 2019, of 32.6 million employed people, around 1.7 million people reported working mainly from home (according to the Office of National Statistics). Once people are eventually allowed to return to the physical workplace, that figure is likely to rise significantly as many companies will have adapted their systems to facilitate remote working.

This pandemic will have created a huge shift in the mindset of many companies regarding remote working, because they have seen that it can work.

### The client considerations

At Fletchers, we already had around 15 team members working remotely on a regular basis, with a number more doing so for one or two days a week. We knew that there was a desire for more people to be working from home, and before the pandemic began we already had a project looking at implementing it for more of the team.

At the beginning of March we started planning for the 'what ifs' and began testing our systems. Within days, we then had to fast-forward our plans and get hundreds of our team members working from home as quickly as possible.

But what does all this mean for clients? Covid-19 has acted as a reset button for the profession to consider its offering to employees, but also externally.

Virtual law firms already

**Even as a private client firm, at Fletchers we rarely meet face to face with our clients. The work is done by post, over the phone and digitally, so effectively we have been offering a virtual service for some time**

exist, and have traditionally worked best for corporate law. In the B2B sector, companies are already used to transacting business online. For private client legal work it can be difficult because you are dealing with individuals. However, even as a private client firm, at Fletchers we rarely meet face to face with the majority of our clients. The work is done by post, over the phone and digitally, so effectively we have been offering a virtual service for some time.

To enable this virtual service, we use a combination of internal systems and software to manage the claims process, and hold paperwork relating to the claim.

This is supported by our work toward becoming a fully paperless office, which means that the majority of our work is done digitally.

Other players in the legal sector are catching up, and some parts of the process can't be done virtually. The court system will take a while to catch up. Even though courtrooms are opening their doors to new technology, there are reams and reams of paper and medical records that need to be processed in a physical place. These barriers are out of our control, but they don't prevent us from being able to offer a virtual service to our clients.

Advances in technology also allow us to be much more sophisticated in our support offering, which enables fee earners to focus on remunerated work. While there are already virtual law firms in existence, and that is not what we want to be, this shows that we have the ability to serve clients anytime, from anywhere.

Of course, there also have to be systems in place to ensure





that information is shared securely and our clients' privacy is incredibly important to us. We have to be diligent with client confidentiality and we have stringent measures in place, such as extremely strict adherence to the General Data Protection Regulation (GDPR), to ensure this is the case.

### Support for flexibility

In order to attract the best talent, and to offer a more agile way of working to help with people's work-life balance, law firms have been working hard to be flexible. It makes business sense. A more agile way of working makes the business more attractive and competitive; people can be hired from further away, meaning a bigger talent pool.

However, although people are becoming more digital in their personal lives, they often have less confidence dealing

**Employers could look to support their staff by ensuring that they can replicate their office working setup as closely as possible at home**

with work matters digitally at home – it's time for professional digital services to catch up with personal ones. For example, professional systems are often difficult to log into remotely, with multiple passwords and various platforms often needing to be enabled at once, so steps to make this easier for staff would go a long way toward making remote working a more viable option long-term.

Employers could also look to support their staff by ensuring that they can replicate their office working setup as closely

as possible at home. One pertinent example of how this could be achieved would be to provide additional monitors to team members who have had to move from a dual-screen setup at work, to a single at home, which they are unused to working on.

Technology infrastructure is improving all the time. 5G home broadband will mean faster connections and better quality videoconferencing – but it's not just about technology. There are also issues such as supervision, remote monitoring, checking productivity statistics and providing support.

A more flexible way of working, with opportunities to work remotely, can be a way of attracting young lawyers who expect a different way of working, at the same time as retaining employees with dependents and attracting talent from a wider recruitment pool. Our head office is in Southport, a small town in the North West, so if we could have people working further afield, we increase our chance of recruiting great talent.

People have had to learn how to deal with the technology offsite very quickly, and also how to adapt and manage their teams remotely, as well as ensuring customers continue to receive the best possible service.

There needs to be a proper road to virtual working mapped out, but this is certainly going to act as the catalyst for many businesses. This has been forced on everyone and the learning 'curve' has been more like a vertical line. But people are managing really well and it will certainly change remote-working policies for many people in the future. ▀



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INDUSTRY CASE STUDY

# Express delivery

Baker McKenzie chief knowledge officer, Mark Ford, and director of global knowledge operations, Sarah Pullin, outline how Contract Express from Thomson Reuters has made managing document drafting a significantly more efficient process right around the world

**A**s hugely challenging economic times seem an inevitable outcome of the pandemic that has swept the world in the space of a few months, it's just as likely that legal will have the landscape that emerged from the last downturn on its mind in the months ahead. The available apparatus for 'agile' working has of course come on leaps and bounds since the dark days of 2008 – but firms will almost certainly also double down on their work to embed scalable efficiencies in many of their resourcing patterns and business processes.

And no doubt the approach already taken to drive certain IT projects to value in recent years will be a factor to consider as the work continues. Take, for example, the document automation journey at Baker McKenzie. Chief knowledge officer Mark Ford says the firm had been using Thomson Reuters' Contract Express solution for several years before he arrived in 2015, but it was a piece of technology in need of a strategy.

"The drivers were reducing cost, and improving efficiency and client service, but the real key is to look closely at where it can make the biggest impact and you can see the biggest return on investment," says Ford. It wouldn't be efficient to

attempt to automate everything automatable; certainly not all at once (although Contract Express is in fact now used widely across practices, countries and languages).

"We've done several pieces of analysis of the best opportunities, and in short they tend to be documents that are used most often, or the ones with the most moving parts," says Ford. "Focusing there can help you to save significant time quickly and easily."

Sarah Pullin, director of global knowledge operations, adds: "The degree to which any document is automated is also very deliberate. The way we tend to describe Contract Express is that it's producing a best first draft of the document. It can do more of course, but in our more complex legal scenarios the goal is to use lawyers' time better rather than trying to replace them."

The firm wants to free lawyers from tasks that are time-consuming, but aren't adding much value to the outcome for the client, explains Ford. "A classic example would be changes between singulars and plurals, which can be needed hundreds of times throughout a document. It can't be done with a simple search/replace, and by automating responses to 15 or 20 questions you can

produce a good, advanced first draft of quite a complex document in a couple of minutes.”

Clearly, automatically changing terms or phrases hundreds of times throughout a document is also less risky than doing so manually – there is simply less room for human error in the process. Efficiency, however, is very much the name of the game.

Pullin says: “We compare pre- and post-automation production times to calculate savings, and also track those completion times over time.” Savings can be as high as 60-80%, she says.

“We also track the number of documents being automated in different parts of the business, and their usage – and qualitative feedback is that automation has also provided greater consistency across products.” Data on many of these points is open to view through dashboards, driving awareness of the depth of return on investment that can be achieved.

### Feet on the ground

That’s important because, as so often, a firm needs not only to direct this sort of change but also to inspire it. The tool is only as good as the number of times it’s effectively used. Ford explains: “You can take a strategic approach, but you do also need to be driven by certain practical considerations on the ground. You need some enthusiasts prepared to invest the time upfront.”

And these people are likely to have their own particular challenge they want to address, he says. “There may be an area with lots of potential in theory, but if the team’s too busy, or there just isn’t the buy-in, it can be a better idea to look elsewhere and perhaps revisit later.”

Pullin recommends finding some people who are “naturally inquisitive” about firms’ innovation-focused work; lawyers who are likely also to be keen to see how their personal output could be made more efficient. “Start with something relatively straightforward, produce the case studies and stories about what has changed, and then it starts to sell itself.”

When people can see the benefit for themselves, they’re more willing to step up and be your unofficial “champions” of the technology, she says.

But Ford says building up a critical mass of buy-in can also be swift. The larger challenge today is resourcing and managing the demand. “People are asking us

to automate more, and more quickly,” he says.

The central team leading that work has also expanded in line with activity, and the firm encourages and trains people to automate documents for themselves. A suite of Chinese documents is among the most heavily-used automated documents at the firm, says Pullin, and projects like that of course require somebody who speaks the language in question to be involved.

### Flexible future

Both agree the adaptability of Contract Express is a particular plus point – from transactional areas, Ford says interest and applications have spread into less expected ones such as tax and intellectual property. He sees potential for further gains in property and finance practices as well. Pullin adds that alongside the ability to easily maintain and update automated documents, an additional benefit is that the firm can keep hold of its intellectual property.

“We also take advantage of workflow capability that allows a client to carry out the interview behind the automation for themselves. The software can then decide whether each document is a straightforward case, ready to sign, or one that needs further review by the in-house legal team or ourselves. In the simpler cases, the client may allow others in the business access to the tool, freeing up the legal team as it does us.”

And Pullin says that having the technology can start new conversations with clients about how they might operate some aspect of their business more efficiently, while she is also exploring options for integration with other technology internally. “There’s a piece of work to formalise Contract Express as a service in a more consistent way across the globe,” she adds.

Finally, there’s the fact you can automate “without having to know anything even approaching coding,” explains Ford – a significant saving in itself.

“With many other products on the market you really need either a very technically-minded lawyer, or to pair the lawyer up with a more technical person – which has its own challenges. The most revolutionary thing from the outset was that Contract Express is user-friendly enough to allow lawyers to do these things for themselves.”

Before, that is, they go on to add better value for money elsewhere. ▀

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INDUSTRY ANALYSIS

# Homeworking hero

Andy Bevan, cloud sales specialist at Pulsant, says homeworking can certainly work for a law firm, but it brings with it a number of important compliance matters to consider

**N**ever have the concepts of working from home and mobile working been as important as they are now. The world is working from coffee tables, makeshift desks and breakfast counters. While the traditional office landscape may have changed, traded for views of the living room, the importance of the work remains the same, especially in the legal sector.

Maintaining a business-as-usual approach can be a challenge. However, with the right technology and processes in place, issues can be overcome.

Of course, mobile working isn't new to the industry. In the last few years, many law firms have embraced it to one degree or another. The benefits are easy to see: staff can be as productive outside of the office as they are in it. With connectivity, they can also have secure access to documents and applications from wherever they are working.

One of the reasons mobile working has become so much more effective is the increased use of cloud computing and its strong focus on security and ubiquitous networking. As mentioned, staff can access the systems and documents remotely,

but more than that, software-as-a-service and thin-client solutions mean that work can be done effectively in the cloud. Documents and information don't reside on an individual device, so minimising the risk of data loss if the device is compromised or lost.

In addition, the use of any number of collaboration platforms, such as Skype for Business, Slack, Google Hangouts, Zoom or Microsoft Teams, also makes it simpler for colleagues to stay in touch with one another; whether that's through email, video, voice or instant messaging.

## Policy points

But regardless of the reason for it, the same rules apply when mobile working as they do in the office. Firms have an obligation to stay compliant, and therefore they must maintain focus on access, data and information security. Again, this is especially important in the legal sector, where a lot is at stake for firms. Any breach of compliance or security could very easily lead to fines, loss of customer trust, loss of revenue, or all three.

This means maintaining best practice is crucial, such as keeping antivirus programmes, software



and firmware up to date, using multi-factor authentication, and securing confidential data. Ultimately, it's about mitigating risk of data loss or cyberattacks, keeping client data confidential and giving employees the right tools to help them maintain that confidentiality.

Typically, law firms should have three key policies in place to help govern all this, which doesn't change on the move to mobile working. They are:

- **An email usage policy** governing how emails are used, what data can be included, and what needs to be encrypted.
- **An internet usage policy**, including technical controls to protect against the spread of malware and accessing questionable sites.
- **A data protection policy** which will be specific to the different types of data used within the firm, how they are stored, and how they can be transmitted.

The same approach applies to maintaining support. With such a large portion of mobile workers at present, law firm IT teams need to ensure they have the resources to support users, both in-house and externally. Whether they're working from home or from the office, issues will arise that need to be handled. This also extends further down the supply chain; making sure suppliers, such as hosting or cloud providers, have the right infrastructure in place to support and have engineers to address any problems.

Beyond getting the technical elements of working from home right, there is a significant human element too. Staff need the tools to be able to be as effective when they are working from home or other locations. They also need to be aware that the same best practices around compliance and information security apply wherever their 'office' might be based.

Then there is engagement and motivation. Working from home can be isolating and lonely, especially for staff members who are not used to it. Firms need to find a way to translate the company culture and instil it in these new models of working. Messaging and video software is useful for keeping in touch with both colleagues and clients. It can also be used to unify dispersed colleagues, to recreate the company culture, and to boost engagement and morale. Team meetings, informal chats or after-work drinks can just as easily be hosted online as in person.

While it might be unlikely that we will see the same scope of homeworking again in the near future, compliance, security and employee motivation remain important topics to address. Business-as-usual is about more than giving staff the motivation, tools and technologies to work effectively out of the office. It's also about maintaining compliance, ensuring the business protects its clients and keeps their data confidential, regardless of staff location. ▀

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## Firms need to find a way to translate the company culture and instil it in these new models of working

*Andy Bevan, cloud sales specialist, Pulsant*

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## INDUSTRY ANALYSIS

# Shifting paradigms

Phil Muller, director of legal services at Williams Lea, says that the Covid-19 pandemic is breaking down resistance to change and forcing faster action towards becoming more agile, reducing operational costs and staying competitive

The year 2019 was one of the strongest years in fee income growth for law firms and many had their most profitable years in recent history. In spite of this, political uncertainty (remember Brexit?), concerns over an economic downturn, rising operational costs, increasing pressure from client demands, and the growing number of millennials and generation Z in the workforce, were already driving firms to look at improving the way they worked. However, progress was hampered by a culture that was firmly entrenched in traditional ways of working. Resistance to change from partners, data and cybersecurity concerns, and loyalty to long-tenured staff, drove a resistance to virtual support models and more agile ways of working, while slowing down the pace of forward change. The Covid-19 crisis has challenged the status quo, rendered the concerns unfounded, and forced the legal sector to react immediately and drastically to its impact.

## Easing the tension between traditional and new ways of working

Meeting the challenge of social distancing and

office closures has paved the way for the legal sector to upskill in areas that have been lagging for the past few years, particularly with skills related to information security, agile working, digital platforms, and efficient resource management.

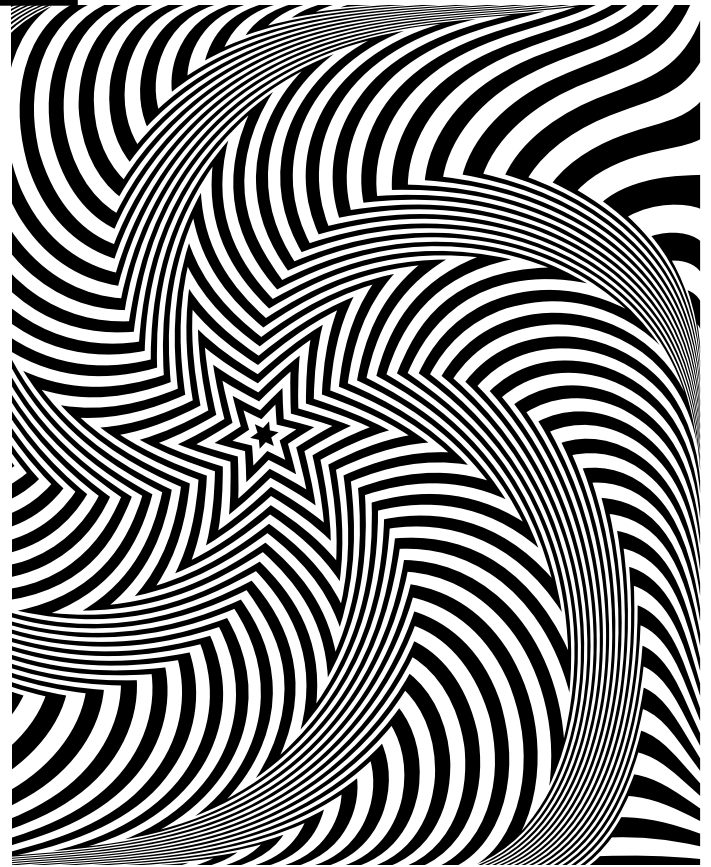
- **Dispelling information security fears** – Before the pandemic, concerns regarding security, confidentiality and data breaches underpinned a reliance on traditional ways of working. Now necessity has become the mother of invention, and many of the restrictions placed on lawyers, staff, suppliers, and third parties, who touch sensitive firm information, have been relaxed. It remains to be seen if a post-pandemic workplace prioritises onsite working, but firms that will successfully maintain information security will do so with robust process management and strong workflow tools that provide a clear audit trail and chain of custody information]
- **The rise of agile working** – As the crisis hit, law firms quickly had to ensure that their lawyers and support staff were able to work from home: not standard practice, as it weighs on an industry culture built on relationships

and face-to-face interactions. Now, a couple of months in, there's growing trust that many legal activities can be performed remotely. From matter management and deal closing to virtual collaboration with secretarial and administrative support staff; those resistant to agile-working practices were forced into new ways of working, and to their surprise are quickly adapting to it

- **Moving towards a 'digital first' mindset** – Traditional law firm models are heavily paper-based. As physical offices were forced to close, firms needed ways to share documents without offices, printers and mailrooms. They had to quickly find digital mail and matter-ingestion solutions to support a remote workforce. Again, any concerns over data security and quickly implementing new processes were overcome by necessity. Given that digital mail rooms can be set up in a short space of time (sometimes within a matter of days), it would be difficult to justify completely reverting back to the old model.
- **Doing more with less through structured process** – The crisis has driven a swift reaction to manage cash and protect the financial health of the firm. Many firms reacted with salary reductions, furloughs and even layoffs. Although rightsizing and scaling back may be a necessity, firms that already outsourced support functions were much more nimble in expanding and contracting support levels in response to the crisis. Additionally, law firms that outsourced key service lines had a partner to help them respond optimally to the economic challenge, so less emotion and management time was required to respond. A global partner that already has the right processes and software

**A global partner that already has the right processes and software firmly in place can deploy staff around the globe efficiently so that no team is bearing too much or too little demand**

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firmly in place can deploy staff around the globe efficiently so that no team is bearing too much or too little demand.

### Reimagining the law firm office

Real estate needs will evolve as firms align office space requirements to the reality of a more dispersed and mobile workforce. We will most likely see a movement towards real estate space allocated for fee earners and their clients in prime locations, and other front office and support staff allocated to captives or third parties away from high-cost locations.

### Driving success with agility and flexibility

Once the dust settles on a post-Covid-19 world we will know which new ways of working will endure and which processes will revert to traditional models. However, every law firm I have spoken to has said they don't want to go back to the old ways of working. The commercial pressures that have been building for law firms will be exacerbated by the economic fallout from this crisis. With predicted significant revenue decline, the shift to agile-working models to reduce costs will become just as urgent. What we've learned is that, when forced, we can break down cultural barriers and traditions to make our businesses more efficient, agile and resilient than ever before, and that there is expertise in the market to help you. ▴



James Macrae, director of professional services at Peppermint, reflects on lessons he learned needing to kickstart a recent strategic IT project remotely

**A**s we reached the end of the fifth week of lockdown I found myself reflecting on the way everyone I've spoken to appears to have largely adapted to this strange situation as best they could. As a cloud software business, we are extremely fortunate our team can readily work from home – so our thoughts are naturally with those continuing to go out to work to care for us all.

But I'm also aware of how my colleagues have found new ways to keep the wheels turning with, in some cases, adaptations that were intended to be short-term workarounds proving to be a more effective way of working. This was brought into sharp relief for me as, just before the start of the formal lockdown, Peppermint was about to kick off a project under a strategic programme of work for top-tier law firm Irwin Mitchell.

We had agreed the scope and approach and were about to embark upon the initial roundtable, all-stakeholder kickoff meeting when the Covid-19 lockdown struck. The original plan for the first half of the day was for the Irwin Mitchell team to walk us through the requirements-gathering and customer journeys they had collected to date. Now, unless the entire programme was to be stalled, we had to find a way to initiate the project and bring the combined team up to speed without being in the same room.

Now imagine a 15ft x 5ft wall of Post-it notes. The Irwin Mitchell team had already shared

some good photos with us, but zooming in to read the script on one note left you 'lost' in terms of where they were on the whole map. This is the kind of thing you want to be able to stand back from to get perspective and context and lean into for detail. I confess I had serious doubts about whether a remote session was going to work.

Come the day of the workshop, we had the inevitable challenges of getting the presentation laptop to display the correct window at the right time. And while these issues were fixed well before the start of the session, they subconsciously added to my nervousness.

But then the meeting got underway and, after the normal round of introductions and expectation-setting, we switched screen sharing across to the senior UX designer, who would be leading us through the customer journey, and it was nothing short of brilliant.

The person leading us through knew the material inside out. He explained the process Irwin Mitchell had gone through to gather the feedback, the structure of the layout, colour coding and shorthand references – and then stepped us through topic by topic, checking understanding as we went. Everyone on the call participated and remained engaged.

Don't get me wrong, I'm sure nothing compares to being in the room when feedback like this is initially voiced, captured and stuck up on the wall, but we came away with a really solid

understanding and a clear way forward.

Covid-19 has still had an impact. The need to concentrate on business continuity means things are moving slower than we would like, but the critical thing is they have not completely stopped. Collectively we changed our approach. Here's what I learned:

### 1 Tenacity

The difference between success and failure often comes down to the simple determination not to give up. Just because the only method available isn't the optimum method, it doesn't mean it can't be made to work. Sometimes the fact you have never tried executing a project task in a particular and different way is the very reason you should give it a go.

### 2 Planning

While it's fine to always hope for the best, it's a good idea to stack the odds in your favour by eliminating as many unknowns as possible. Rehearse your material, test the technology beforehand, brief your audience, follow an agenda and allow enough time for Q&A and follow up.

### 3 Who knows best?

The most important point – during project delivery it is easy to forget that a key part of your job is to determine how best to use the resources available to you. When a group of business stakeholders, analysts, technical architects, software designers, and internal or external service providers, are brought together to solve a problem, it's important to recognise that all the questions that need answering, and all the answers, are already in the room. It's just a matter of working out who has the appropriate questions and the best answers. When a supplier facilitates a requirements-gathering workshop it can all too easily turn into an opportunity for the facilitator to voice and then reinforce opinions. I confess there have been times when I've run such sessions, and gone in so convinced I already knew where we needed to get to (or maybe was too focused on a deadline) that I've steered the discussion around a topic, which later turned out to be absolutely critical to success, requiring us to 'back up' and take the other road. This experience demonstrated that if you really, actively listen and make the effort to involve everyone, you have a much greater chance of correctly matching questions and answers early in the process.

## It raises interesting questions about efficiency gains and how project delivery can be accelerated. It all depends on how much of the rulebook you are prepared to tear up

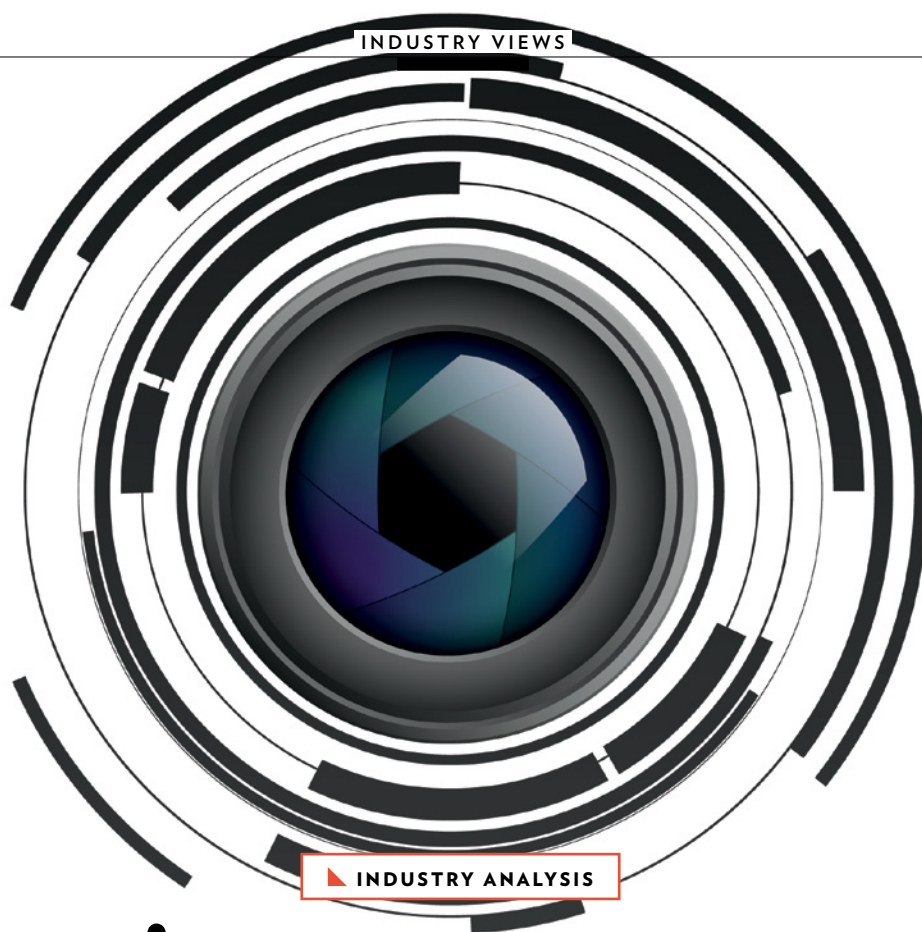
And I have a hunch, it is precisely because we were not all in the same room that things went so well. You might assume that if all participants in a meeting like this are remote, the risk of viewpoints being suppressed will increase. But because everyone was remote, I believe the playing field was levelled, with participants making allowances – perhaps subconsciously – for the fact there were far fewer non-verbal communication advantages available. The approach fostered a truly collaborative team dynamic. For me it raises interesting questions about efficiency gains and how project delivery can be accelerated. It all depends on how much of the rulebook you are prepared to tear up.

Going into this whole process, Irwin Mitchell's lead for this strategic programme had already voiced insightful questions to me about why we routinely make people put on business suits, climb into cars/taxis/trains and travel for hours in the 'normal' course of project execution. Here at Peppermint we already use Microsoft Teams extensively during project delivery, relying on it for collaboration on documents, project status meetings, task allocation/tracking and overall project governance. Our training delivery partners are likewise fully geared up to run end-user training courses remotely. Data migration is performed remotely anyway, and we have recently confirmed that Microsoft cloud and Azure-based administration tools, plus screen sharing, videoconferencing and instant messaging all mean that even cutover and go-live can be executed without any physical site presence. Remote project startup was for me the last piece of the puzzle.

In light of the lessons learned, and by revising our processes and methods, we now have the capability to deliver our case and matter management and our client engagement modules without ever having to meet face to face with our customer – something we simply would not have contemplated before. ▶

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# Meeting a new normal

Rob Jardine, chief marketing officer of LoopUp, explains why the legal profession deserves remote-meeting technology designed with its specific needs in mind

**T**he remote meeting has become symbolic of life under the coronavirus lockdown for many. For legal professionals, conference calls may already have been commonplace, but they have become more frequent, more important, and used for more things.

The potential for remote meetings to replace many face-to-face meetings has been highlighted, but the shortcomings of much of today's technology has been exposed. Use of VoIP over the public internet has led to audio quality issues, while new users have struggled to get to grips with the technology. And security issues with some widely-used conferencing solutions have been widely reported.

Even before coronavirus, analysts were forecasting rapid growth in the use of remote meetings. Changing workplace demographics, increased remote working, and pressure to reduce business travel as a response to climate change as well as efficiency, are all driving demand; as are improvements in conferencing technology itself. And as social-distancing rules are eventually

relaxed, and workers return to their offices, we think the shift from face-to-face to remote meetings will continue to accelerate.

This potential benefit to law firms is considerable – meeting remotely can improve productivity and reduce costs by eliminating the need for business travel, as well as increasing the frequency of client engagement. But in order to do this effectively, law firms need remote-meeting technology that meets their specific needs.

## Today's requirements

Remote-meeting technology has advanced significantly since the days of dial-in audio conferencing. Participants can share their screens to view things together in real time, and videoconferencing can increase engagement.

This technology has democratised the remote meeting by making it more effective. It has evolved from a specialist tool, used mostly by professional services firms and senior executives, and is now used by a wide range of workers across many industries. But this can be problematic for law firms. As the technology has evolved, it has

become increasingly focused on the needs of the general enterprise, rather than the specific needs of law firms.

At general enterprises, the majority of remote meetings occur internally between colleagues. Consequently, meeting guests are familiar with a particular solution. Any software required is already installed on their devices. And VoIP audio stays within the corporate network, where quality of service can be managed.

By contrast, law firms need conferencing technology for important meetings with clients and other external guests. These calls really matter – all of them. Participants are typically senior executives, and many will be using the software for the first time.

At LoopUp, we understand that a simple, intuitive experience is essential for law firms – there's just no room for time wasted while guests struggle to join the meeting. And security and reliable audio quality are non-negotiable. Our technology promotes client engagement, reflects well on the firm, and drives better business outcomes. The requirements of law firms are best met with a specialist solution, rather than technology that was developed for the mainstream.

### Increasing effectiveness and productivity

While the right remote-meeting technology can already generate a competitive advantage for law firms today, we believe it has the potential to be transformational in the future. At LoopUp, we see a number of opportunities to make remote meetings more efficient and productive. They include:

- **Helping legal professionals to generate more value from meetings** – at present, the effectiveness of a meeting is dependent on the way it is managed – setting an agenda, sharing content, taking notes and agreeing next steps. Some meeting hosts are naturally better at this than others, and everyone does it differently. Technology can be used to standardise and automate these processes to make meetings more consistent and effective, and to reduce manual effort.
- **More effective and secure capture and sharing of information** – similarly, many pieces of the information and the 'artefacts' from a remote meeting – attendees, minutes, content, meeting recording, action items – are not used

effectively after the meeting. With artificial intelligence technology, this information can be analysed, indexed and stored to make it accessible and useful. And access by internal and external users can be managed and tracked to maintain data security.

- **Deeper integration with commonly-used workflows and tools** – law firms share many common processes and solutions, from scheduling and time recording to case management and practice management. Thoughtful integration of remote-meeting technology with these solutions can make processes more efficient and aid the flow of information, as well as making it more secure.

To deliver these benefits, law firms will need remote-meeting technology designed specifically for their industry – with the audio reliability, ease of use and security required for important meetings with external guests, and advanced features that integrate with their workflows and tools. The large collaboration software goliaths are (rightly) focused on the bigger prizes – more generic tools targeted at general enterprise use – creating an opportunity for specialist technology providers to the legal sector.

### Looking to the future

LoopUp is partnering with **Briefing** to conduct research into the attitudes to remote meetings of big law firms – how they use technology today, how they expect their needs to evolve over the next three to five years, and what they expect from technology vendors. This will be published with the June edition. ▲

## Technology can be used to standardise and automate processes to make meetings more consistent and effective, and to reduce manual effort

*Rob Jardine, chief marketing officer, LoopUp*



To sign up for a free trial of LoopUp, visit: [www.loopup.com/briefing](http://www.loopup.com/briefing)



INDUSTRY ANALYSIS

# Prioritise process

Russell Wood, commercial manager, Infographics (developer of the FloSuite professional service delivery platform), says a working transformation like no other is surely upon us

**W**ith the global health crisis heralding an overhaul in working practices, law firms have been forced to find new ways of operating. Established tools like videoconferencing, collaboration platforms and web applications have allowed many areas to continue remotely. But where corporate networks and VPNs offer the only access route to back-office platforms, these have creaked under increased load from homeworkers. Plus, managing client-facing and administrative processes that have never been fully digitised has piled another level of challenge on top.

## The new normal

As remote working becomes a necessity, law firms are having to find new ways of managing processes they'd never anticipated enacting completely out of the office. The digitisation of such areas involves not only providing secure access to remote or cloud-enabled technologies, but also re-engineering business processes to suit this radically different working environment. That's a major undertaking at any time, never mind in the middle of a global crisis.

As a specialist legal supplier, we've seen major

change over the years, delivering many bespoke requirements for a variety of legal work types. We've also implemented existing solutions across areas like client/matter intake, regulatory processes, case management, financial forecasting and billing.

But the transformation ahead of us now feels bigger than anything that's come before.

## Cloud technologies and going 'paperless'

At the core of this transformation are 'paperless' solutions, ideally in the cloud. Law firms have perhaps been reluctant to adopt a workflow-driven, cloud-based approach. They have therefore not benefited fully from accessible, agile case and process management platforms, which can be available 24/7.

So, the very sudden requirement to switch to today's 'new normal' has exposed critical gaps – both in existing business processes, and the technologies required to underpin them within a remote-working environment that avoids overloading internal networks.

Due to the current situation, there's now increased interest in digitising legal case and process-management solutions, and accessing

## All the cloud-enabled technology in the world can't solve your problems unless you are process-ready

*Russell Wood, commercial manager, Infographics*

those via our cloud-managed service – rather than traditional ‘on premise’ deployments.

It's being sharply recognised that standard disaster-recovery plans are not enough; law firms need anytime, anywhere access to workflow-driven processes and live, user-targeted performance data, to support agile working and increased resilience. So, particularly in the current climate, law firms are finding the benefits of cloud delivery outweigh perceived concern around key data and systems security. As well as 24/7 access to professional services delivery solutions from any location, FloSuite Cloud, for example, also enables a rounded, fully-managed application service, underpinned by a reliable, secure Microsoft Azure platform.

As this model eliminates the need to access cloud-enabled services via the corporate network and VPNs, it solves the current overload problem many firms are grappling with due to high volumes of home workers.

With cloud solutions, all the user needs is reliable internet access. But there are, of course, other essential parts of the jigsaw.

### Process readiness and capture

Process readiness and capture is one of those. All the cloud-enabled technology in the world can't solve your problems unless you are process-ready.

Infographics has a lot of experience of helping clients to capture and deploy business processes across multiple case management and internal administrative workflows. Often these processes have remained the same for many years – perhaps because systems are deemed too complex and high-risk to allow users to make direct changes.

So, underpinning transformation projects with solutions like FloSuite can help to de-risk their digitisation, ensuring the right tasks are distributed to the right people both front and back-office.

Law firms that have undergone this cultural and technological transformation are now in a strong place in the current crisis – they're

‘process-ready’, and able to work remotely and efficiently. This is further strengthened where they have flexible, cloud-based access.

That said, reliance on established ways of doing things, particularly where change involves certain user roles taking ownership for new tasks and data input, can still prove a tough barrier to break through.

But this change is now essential, and not just a matter of choice – so change is happening, and happening quickly.

### Digitising proforma billing and forecasting

One area where there has historically been cultural resistance to change is within finance – specifically proforma billing and forecasting.

The established way of doing things can be an arcane hybrid of printed documents, passing along of handwritten notes and manual sign-off. While this makes change difficult, it also means there are big gains to be achieved in process efficiency.

As this is clearly not a function that can be left on pause during a switch to homeworking, it has come under increased focus.

Some of our larger global clients, who were already in the deployment phase with our FloSuite proforma workflow-driven solution, have responded to the Covid-19 crisis by elevating the standing of their projects.

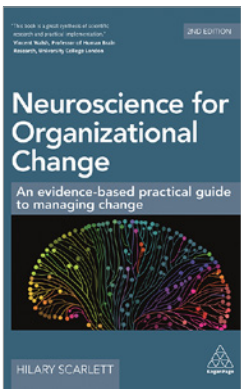
They are expediting and increasing the importance of implementations in this area; hastening their roll-out across multiple geographies, so they can benefit from operations continuing to run smoothly with a remote workforce.

### The future

It's hard to know what the future will look like post-Covid-19, but one thing seems certain: the ability to support mass homeworking across all areas of the legal business, at an instant's notice, should be something everyone is getting fully prepared for.

Until now, this was not the case for many. Perhaps law firms will use this ‘new normal’ as an opportunity to explore and digitise their more neglected front and back-office processes, and embrace the idea of the agile workforce. ▀

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



## READING LIST

# All change

Laura Kind, global head of culture and change at Hogan Lovells, finds the second edition of Hilary Scarlett's *Neuroscience for Organizational Change* a useful guide to better understanding both the science and art of leading people through especially challenging periods of time for a business

If change is the new normal and a constant in our organisations, and the critical factor in our ability to succeed is our people, then surely understanding how people's brains respond to change is essential if we are to continue to perform at the highest levels? Whether the changes we seek to implement relate to the launch of a new IT system, trying to increase collaboration across the business, or simply updating the office space we occupy, we ultimately need our people to engage with, and adapt to, these changes for the benefits to be truly realised. And herein lies the challenge. We are social creatures, often emotionally led, and we can be highly unpredictable, making even the seemingly simple small changes still difficult to drive forward.

Lynda Gratton, professor of management practice at London Business School, describes managing change as "part science, part art, with the need for a serious dose of wisdom and experience. When it works well it can make a significant and lasting impact on organisational health and wellbeing. When it fails to work it can leave cynicism and despondency in its wake."

*Neuroscience for Organizational Change* offers insights that address the 'part science and part art' aspects in equal measure, synthesising scientific research with practical advice. The book presents compelling studies, and related evidence, in short digestible chapters, with a focus

on practical application in the 'What can we do?' summaries.

For me, while part one, which includes an introduction to neuroscience, was interesting, part two is where the science and art really come together, in particular the chapters on 'Performing at our best during change', 'Our social brains; the role of leaders and managers' and 'Changing behaviour'. Collaboration is an increasingly important and highly-valued skill, and our ability to navigate the social networks we operate in is essential. However our need for belonging is often threatened during periods of change, and Scarlett illustrates how our brains will process social pain in the same way that they process physical pain. When there is a threat to our wellbeing (social or physical), our brains tell us that we need to act, leading to some of the emotionally led and unpredictable behaviours our seemingly simple organisational changes can trigger. This book offers insights about how to minimise the more unproductive human responses, with ideas for how to manage and embed change more effectively.

In short, I would describe *Neuroscience for Organizational Change* as an easy-to-read introduction to many of the important aspects of how to better understand how people deal with change, with practical tips for what we can do to lead through change more successfully. ▀

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