

Briefing

SMARTER LEGAL BUSINESS MANAGEMENT

MEETING NEEDS

What does legal business require from a remote meeting tool today, tomorrow, and into the future?

REMOTE
CONTROL





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of remote
meetings

EXECUTIVE SUMMARY

We began our research into how law firms feel about the capabilities of remote-meeting solutions before remote working became the biggest business management story around following lockdown. Suddenly, firms had to keep everyone working effectively, productively and collaboratively in physical isolation, and experience of that is the inevitable partial backdrop to this narrative.

The questions behind the data we present here were drawn up before that business-critical shift. In the event, we received responses from 60 technology and other operational and/or management leaders at 49 law firms with annual revenues of £18m or above. There is a broad spectrum of firms represented, by size, specialism/sectors and business model. Our interviews were conducted after lockdown began though, so we've also captured the post-lockdown perspective on this most important of capabilities.

A clear consensus that emerges among these leaders is that they expect to be managing even more remote and dispersed working as the hoped-for recovery from the pandemic situation now progresses – that is to say, more than the significant increase they expected would be necessary in any case, propelled by certain drivers of change in 'normal' times (demand for work/life balance, appeal to younger generations of talent, and so on). For example, leaders now expect to hold fewer in-person meetings, not only among teams internally, but also with strategically important clients. Business travel, domestic as well as international, is expected to significantly reduce, even as more time is in fact spent working remotely.

This potentially throws a whole lot more weight behind several of the views discussed in the report – for example the feeling that remote-meeting solutions really need to be simple and intuitive to join/use (88% strongly agree with that) and that "clear reliable audio" is viewed as a more vital component of the potential remote-meeting toolkit today than anything else. Those of us currently spending every minute of the day in remote meetings know deeply how bad audio is the true ruin of the experience. Then, looking ahead, will less travel to and from meetings also see faster development and uptake of new functionality such as more sophisticated automated meeting information capture, transcription and translation? As one individual comments, remote note capture is a particularly challenging task with tools as they stand – while 50% and 41% of our respondents expect these to become more important capabilities in the next three to five years, respectively (higher proportions than said as much about any of the other features we listed).

A final observation: demand for these and other ideas discussed – more integration with other management systems, for example, and more useful meeting metadata – are productivity- as much as client service-focused. Firms clearly don't want to waste clients' valuable time with meetings that are longer than necessary for any number of reasons. But they want to be able to give their own people the gift of time better spent too. ▶

BRIEFING PEOPLE



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COMMENT

This research confirms just how important remote meeting technology is to major law firms. An overwhelming 95% of survey respondents report that audio, video or web conferencing is important for internal and external communication. It also highlights the specific needs of the legal sector and how these are likely to evolve. They differ from those of other industries, where remote meeting technology is used primarily for internal collaboration.

By contrast, law firms use conference calls for important interactions with clients, and these calls need to go perfectly – every time. There's simply no room for a bad experience because a guest was unable to join, or because audio quality was poor. For this reason, conference calls for law firms need to be simple for clients to join – 88% of survey respondents strongly agree. And while this may seem obvious, many of today's solutions aren't simple to use. They are crammed with features, making them complex to use. Guests are often required to download software to join a meeting. This is fine for frequent users, but problematic for guests (who may not be able to add software to their devices at all).

For this reason many law firms have been reluctant to move away from traditional dial-in conferencing, and that means they're missing out on basic features that can improve meetings like screen sharing or video. Law firms need these to be available in a simple tool that clients can access by web browser, without any software to download.

Given such straightforward requirements, it's surprising that so many firms are underwhelmed by their current remote meeting solution – just 6% of respondents said their needs were completely met, and addressing this should be a priority for IT teams. Three-quarters of survey respondents expect it to become even more critical for client communications over the next three to five years, and many factors are driving this. For example, a younger generation of 'digital native' professionals want a better technology experience, and pressure to reduce business travel is growing.

Looking to the future, technology has the potential to transform remote meetings. It can help participants to capture more information from meetings with features like virtual assistants and automated transcription. Respondents said this functionality would grow in importance over time. Remote meeting tools could integrate more effectively with other common systems and workflows. Some 85% of firms have integrated their remote meeting platform with a scheduling tool, but other integrations are rare. However, 75% would like to use data about their remote meetings to improve time recording, and more than 30% would like their case management system to pull in meeting information. Attendee lists, call transcripts and action items could be indexed and made available to everyone associated with a case.

At LoopUp, we're focused on the needs of law firms and other professional services sectors. Our solution is optimised for mission-critical conference calls with clients and other important external guests, where a simple join experience and reliable audio quality are paramount. We believe remote meetings will become increasingly important to law firms, and this trend is likely to be accelerated by the recent Covid-19 lockdown, which has shown how remote meetings can replace interactions that would previously have occurred in person. Technology that makes meetings more effective, and integrates with important workflows and systems, can be a source of competitive advantage for law firms navigating changing times ahead. ▀



Rob Jardine
Chief marketing officer
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www.loopup.com/briefing





01

Meeting the most critical of comms goals

Words

Richard Brent, editor-in-chief, Burlington Media Group

Research and interviews

Sarah Butler, data team leader, and Kayli Olson, assistant editor, Burlington Media Group

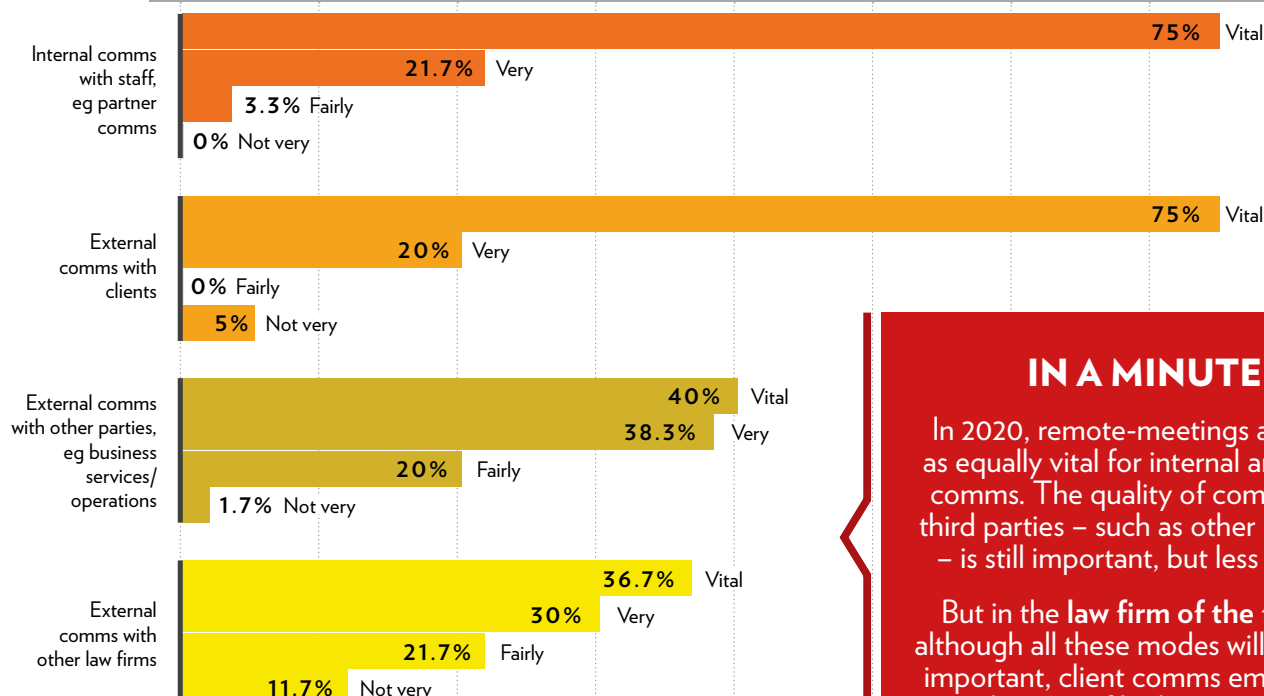
At the time of writing, it's clear that we find ourselves in the age of the remote meeting. In the space of a few weeks in March 2020, law firm workforces everywhere needed to pick up, and find their way around, some business-critical communication and collaboration tools. Some will have been using them for smarter mobile or homeworking purposes for some time. For others, however, even if they had long been available, they were by no means the major mode of the working day. The question now, of course, is whether we are looking at a temporary

response to an unprecedented hiatus, or a much longer-term shift to a new operational norm.

David Aird, IT director at DAC Beachcroft, says his firm had long been on a trajectory of encouraging more agile working, with office layout changes and policies around hotdesking that in some cases meant a ratio of a desk to every 10 people.

"Law firms would definitely be struggling to stay in business without remote-meeting systems at the moment, and although there will still be a balance

HOW BUSINESS-CRITICAL ARE REMOTE MEETINGS FOR EACH FORM OF COMMS?

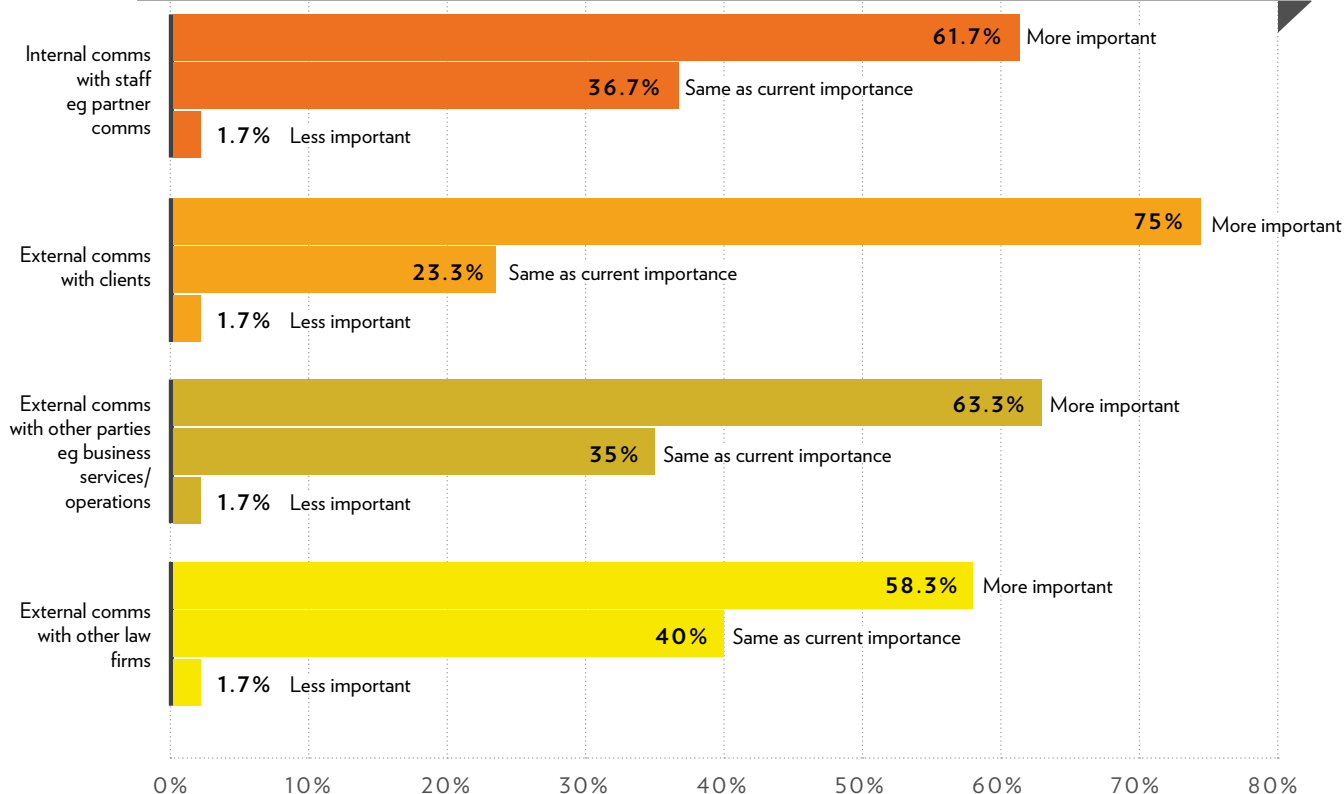


IN A MINUTE

In 2020, remote-meetings are seen as equally vital for internal and client comms. The quality of comms with third parties – such as other law firms – is still important, but less critical.

But in the law firm of the future, although all these modes will be more important, client comms emerges as the area of highest priority.

WILL THESE COMMS BE MORE OR LESS BUSINESS-CRITICAL IN THREE TO FIVE YEARS' TIME?



between remote and face-to-face, I believe they will remain more important than they have been in the recent past.

“Ultimately, that is probably no bad thing. There’s the impact on the environment, as well as the cost of travel, especially to and for clients. I think lockdown experiences will have opened people’s eyes to what is possible.” You already find businesses with policies such as refraining from travel if the meeting is shorter than the travel time, he says. “People internally, as well as clients, are also seeing the power and value of video calls, for example, for reading body language and improved communication – even compared to using a meeting room-based videoconferencing systems.”

Matt Haynes, IT director at Kennedys, adds: “The attitudes of clients previously reluctant to have anything other than face-to-face meetings do seem to be changing, as they see the barriers coming down.”

This **Briefing** research on law firm attitudes to the subject carried out in March and April 2020 finds that, although three-quarters of respondents say remote-meeting functionality is already “vital” for both internal and client comms, the area that will increase in significance most significantly between now and 2025 is for conversations firms have with their clients (75%, p6).

Stephen Allen, head of innovation and digital at Hogan Lovells, agrees that we’ll see a lot more (although not completely) virtual client service. “I do think people are going to travel less and work more flexibly, as we’ve now proved that you can indeed get the deal done that way.”

Mark Parr, global director of IT at HFW, highlights that more irregular working hours may also be here to stay – whether you’re formally flexible working or not. “People can get up early to work, and then disappear for a few hours – in the lockdown, that may have been to deliver a maths lesson! That means the focus must be more on output than hours worked, and all communication tools need to be really on the ball to support people to do that. Patterns will require less email, for example, and more real-time instant messaging and social media-style communication.”



“The focus must be more on output than hours worked, and all communication tools need to be really on the ball to support people to do that.”

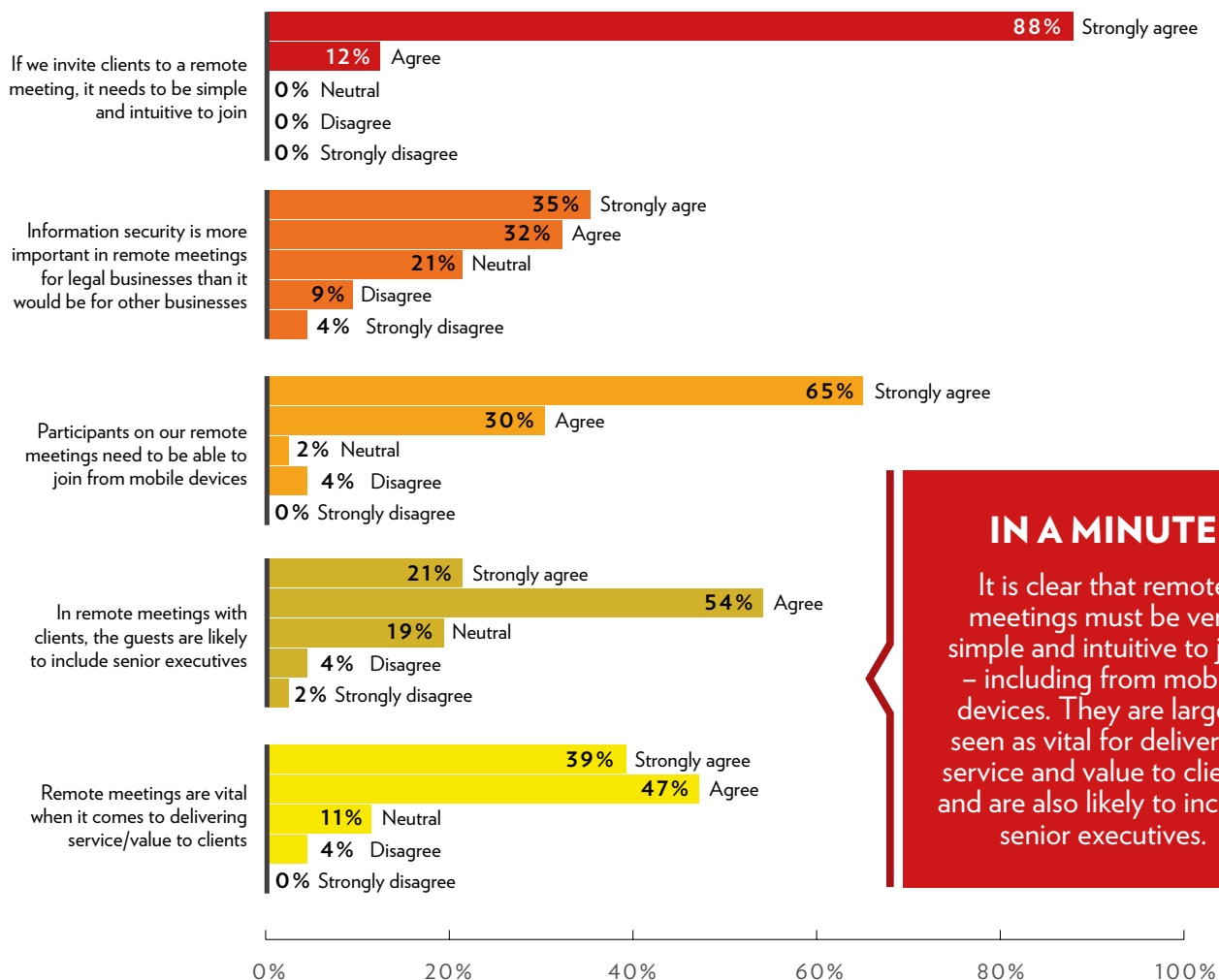
Mark Parr, global director of IT, HFW

Karen Jacks, chief technology officer at Bird & Bird agrees. “People will now be a lot more comfortable with pulling up a quick screen share, and you have to adjust how you work, or you risk simply emailing thousands of things everywhere, and waiting – and hoping – that people will find them.”

Law firms, of course, need to stay highly alert to the experience their clients have when invited to join any remote meetings – whether audio, video, or in chat/writing. Everyone polled agreed with the statement these meetings needed to be “simple and intuitive to join” (perhaps unsurprisingly in times of widespread remote working, 95% also agreeing including from a mobile device) – and 86% agreed with the statement “remote meetings are vital to delivering client service and value” (p8).

Anthony Stables, chief information officer at Forsters, explains that it had been on his radar to find a better solution for speaking to a growing client base on the other side of the world (China) before Covid-19 inevitably brought the issue into sharper focus.

WHAT ARE THE MOST IMPORTANT ELEMENTS OF REMOTE MEETINGS?



“Videoconferencing has been quite alien to a lot of people for some time, so being easy to join, and a seamless experience once you do, are certainly crucial to adoption.”

Anthony Stables, chief information officer, Forsters

“More generally, business videoconferencing has been quite alien to a lot of people. Being easy to join, and a seamless experience once you do, are certainly crucial to adoption.”

Parr at HFW agrees. “My top factor would be ease of use,” he says – and that’s for internal as well as client-facing reasons. “I want our people to be less reliant on the IT support structure, and our clients to know they will get the same level of service wherever those people happen to be sat. For a law firm in our space, the technology has to be a differentiator – and that can be a more engaging and collaborative experience for our clients.” ▴



02

Is your remote meeting a security risk?

One point to consider is whether large law firms have requirements of their remote-meeting technology that are different to those of the more general enterprise. There is perhaps the quality of the aforementioned client conversation and experience of course, and firms can also be entrusted with extremely sensitive client information in the course of those conversations.

However, only just over a third (35%) polled by **Briefing** strongly agreed with the idea that ‘information security is more important in remote meetings for legal businesses than it would be for other businesses’ (p8). A fifth were neutral on that, and over a tenth actively disagreed. Furthermore, only a quarter told us that their clients always, often or regularly include insight into remote-meeting security features, policies or practices in their security questionnaires or audit requests (p10).

Karen Jacks at Bird & Bird says: “We have to have a high level of security certainly. If you

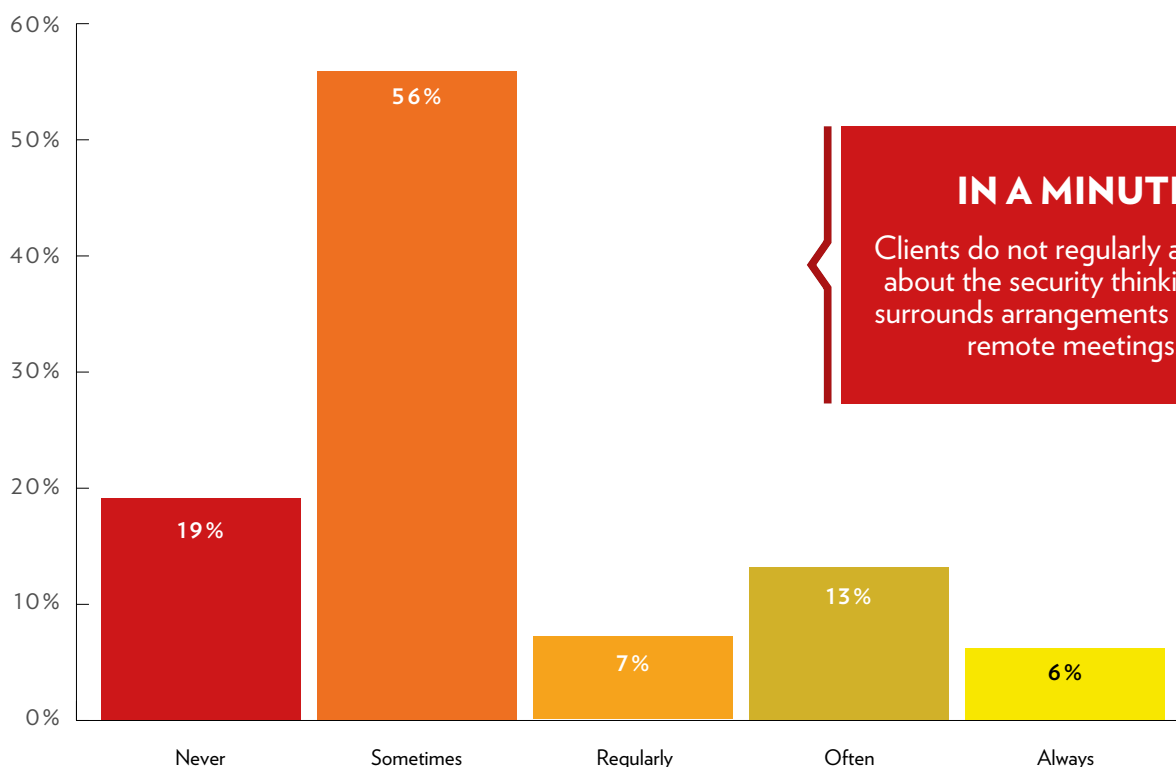
go to all the effort of securing the documents and workspaces, you have to extend that to the platforms you use to communicate. I just see that as quite a natural extension of what we apply elsewhere to meet our duty of care.”

David Aird at DAC Beachcroft adds: “Security possibly should be more front of mind for law firms than in some other businesses, depending what it is those other businesses are selling.”

However, the reason clients aren’t asking much about the choice of platform, at least, may be as straightforward as the fact they’re requesting that firms use their own preferred one, he explains. “It’s usually easier for the law firm’s IT team to make things as smooth as possible for the client.” And they do – a recent meeting of IT heads he attended discovered they’d been asked to use as many as 27 different systems.

In part, it comes back to the ease-of-use point. Matt Haynes at Kennedys says: “Simplicity is also

DO YOUR CLIENTS' SECURITY QUESTIONNAIRES OR AUDITS COVER CONFERENCE CALLING/REMOTE MEETING SECURITY?



IN A MINUTE

Clients do not regularly ask firms about the security thinking that surrounds arrangements for their remote meetings.

about familiarity. We try to be as flexible as possible so our clients are comfortable, rather than stick to one solution rigidly. It doesn't really work like that."

Anthony Stables at Forsters adds: "I wouldn't say information security is any more or less important for law firms – it's just always important". He adds that the lion's share of security issues stem from how people use technology rather than the flaws in it. "It extends right through to points like not having confidential information lying around that may be exposed through your laptop camera!"

He is another who doesn't see many client questions concerning remote-meeting security, and

neither does Haynes at Kennedys. "As an insurance law firm, we have some of the keenest clients when it comes to audits, so this should possibly feature. However, another nuance is that we are seeing increased federating with clients, as it increases the bond, and we have engaged with clients' security teams to make that work."

Some firms have also implemented policy changes on platforms since agile working necessarily became so much more business-critical. Stuart Whittle, business services and innovation director at Weightmans, for example, has overseen restrictions on screen sharing and recording and mandatory password adoption for meetings. Andrew Edginton, chief operating officer at Gowling WLG, says the firm has taken steps to "lock meetings once the attendees are in there."

Parr at HFW, previously in a security role for one of the Big Four, says: "Sectors such as financial services are all over this, and at KPMG we were regularly audited by our clients. I do think the legal sector can be a pace or two off security generally, but now people are really thinking about it." ▀

"We are seeing increased federating with clients, as it increases the bond, and we have engaged with clients' security teams to make that work."

Matt Haynes, IT director, Kennedys



03

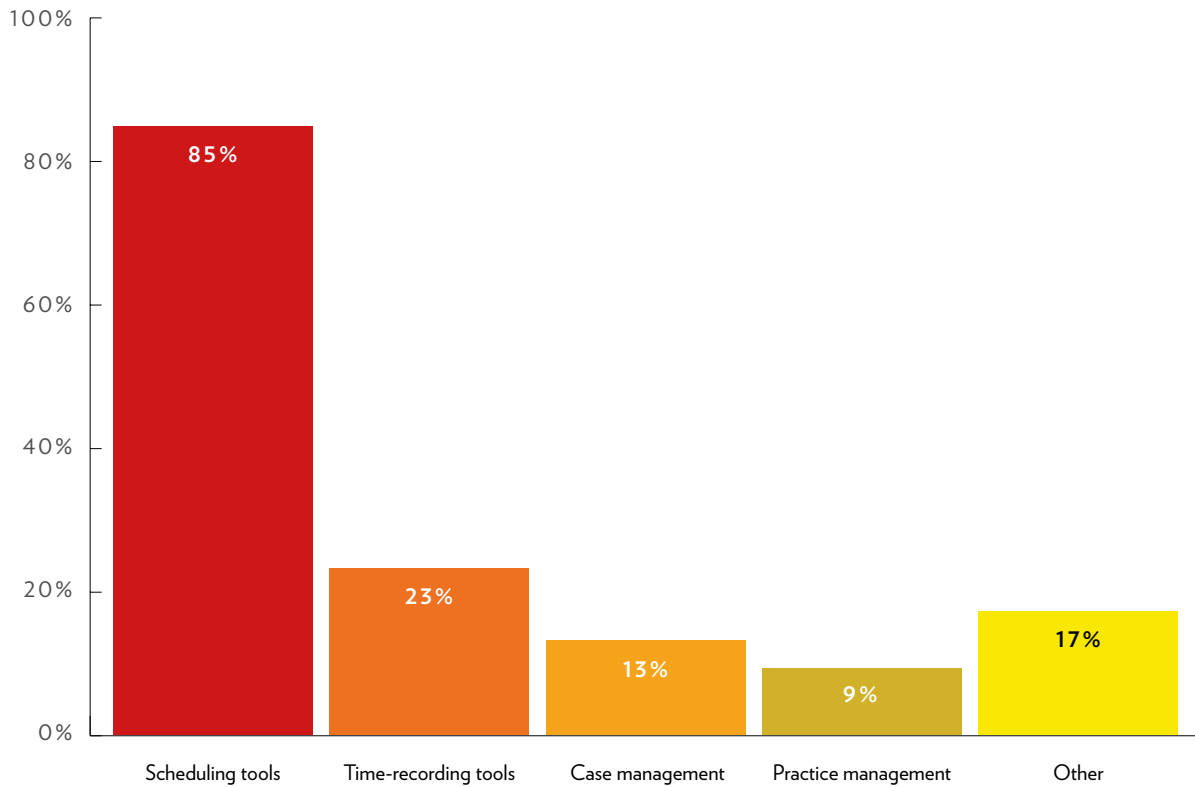
A vision of integrated work in the future

Another aspect of legal's approach to technology that's often remarked upon is an IT ecosystem that errs toward the fragmented – multiple systems for different business processes which, it's often lamented, just can't 'speak to one another' sufficiently. This is inefficient at the best of times, as people must search for and then question the data. One option is to try to introduce better integration between systems, and this research finds considerable appetite for integration of remote-meeting technology with other sets of management information (p12). By far the most common integration in place today is with 'scheduling tools', according to respondents (85% already have this in place). Others are fairly rare, however – time recording coming second at 23%, with case and practice management on 13% and 9% respectively.

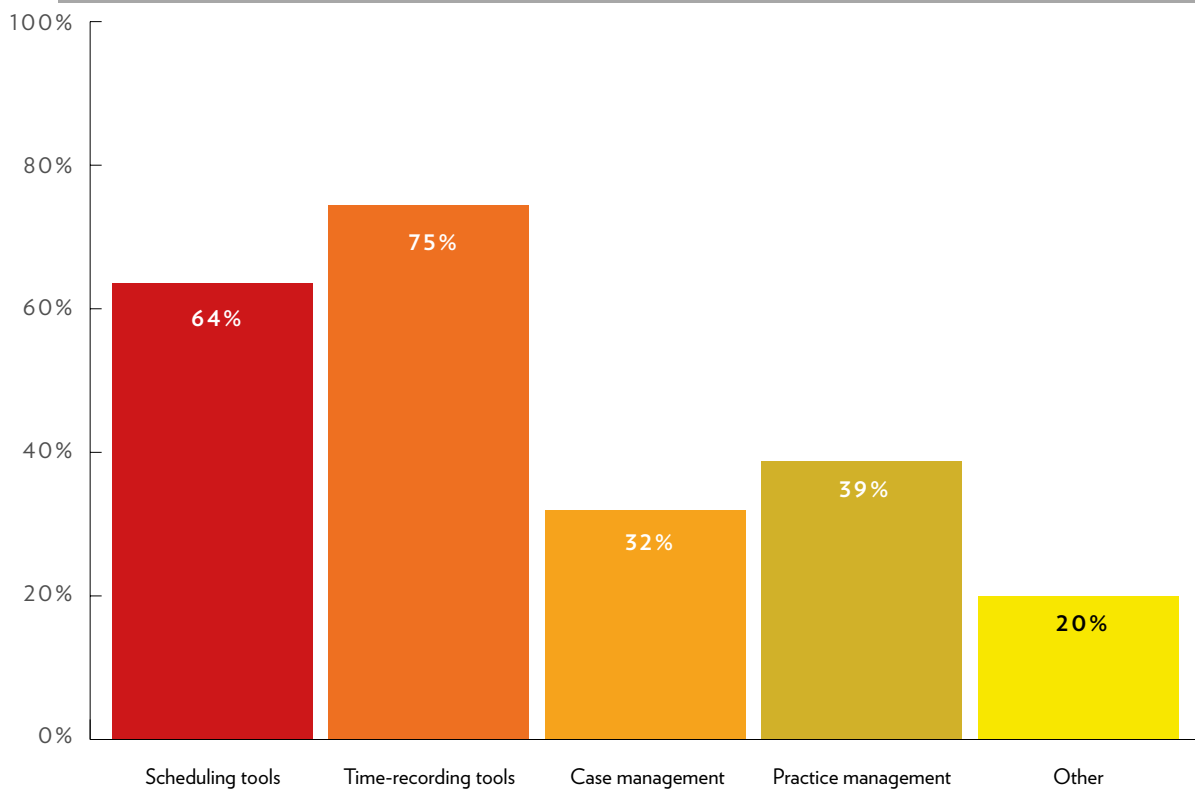
Matt Haynes at Kennedys says: "In a professional services firm, time is money." Even repeatedly having to open events in Outlook to click on multiple meeting links every day could be "better organised and integrated."

Mark Parr at HFW says: "Integration isn't easy – some solutions do need to be cobbled together," echoing a challenge some survey respondents' voiced about unnecessarily introducing complexity. One argued that "screen sharing alone is fit for purpose", while for another, it came back to control – "I want the fee earner to be in control of what they can share." Parr adds: "However, I would potentially be interested in time recording, knowledge management and document management, as well as resourcing tools – ensuring you are involving the right people and support on pieces of work."

WHICH OTHER IT SYSTEMS DOES YOUR CURRENT REMOTE-MEETINGS PROVISION INTEGRATE WITH?



WHICH OTHER IT SYSTEMS WOULD YOU LIKE YOUR REMOTE-MEETINGS PROVISION TO INTEGRATE WITH?



IN A MINUTE

In 2020, remote-meeting solutions integrate with few other internal law firm systems. Most commonly, they integrate with scheduling tools.

A strong vision that emerges of a **law firm of the future** is one where what takes place in audio and video meetings is much more integrated with the management information provided by other systems – such as time recording, case and practice management – to enable teams to work more efficiently, productively, analytically, and profitably, with more granular data at their disposal.



Haynes continues: “One challenge is that we’re wary about layering on too much extra in case it overlaps and conflicts with something somewhere else.” However, the firm has in fact done some substantial work integrating case management and internal comms; displaying information about the team working together on a matter, their availability, and then having the ability to “build that out into holding meetings where it’s appropriate.”

Asked where specifically people would like to see further integration with a remote-meeting platform, the biggest bounce came for time recording (p12). Three-quarters said they would like this to happen. David Aird at DAC Beachcroft says: “Time recording would be useful, although some systems will already check your diary for meetings and capture some of the data involved.”

That said, it’s as much about time saving, as capture, he adds. “The next chapter in IT strategy is about improving the experience for the lawyer, and how systems operate together is the key issue there. If you can start a meeting from wherever you are, rather than going into another system to do it, so much the better.”

Karen Jacks at Bird & Bird adds: “I know some firms do capture the cost of calls using a code, which can be posted through to the technology – but for us, that’s more about reminding lawyers about the option of turning something they’ve

done with a client into a time entry. But I can’t think of another area where I would like more integration.”

Stables at Forsters says: “If time recording is linked to calendar, you don’t need as much of an integration – but I can understand the benefit people would see. You can easily schedule something for an hour, but then it only lasts 40 minutes.” But he sees more value in a closer tie to document management. Particularly now that lawyers are using less paper, effective document collaboration, and “contemporaneous drafting” as one respondent put it, becomes a key driver of increased productivity.

Finally, Axel Koelsch, chief operating officer of Addleshaw Goddard, sees potential value in an area of integration that wasn’t mentioned by anybody in our survey – client relationship management and its connection to more effective content marketing for business development. ▀

“If you can start a meeting from wherever you are, rather than going into another system to do it, so much the better.”

David Aird, IT director, DAC Beachcroft



04

For the record – but in control?

Even without any integration to enact, there is all the information that could potentially be generated from the meeting itself, and usefully circulated or retained. This ranges from the really very straightforward (lists of attendees, mentioned as useful by 82%, and recordings, 76%), through to automatic capture of items of metadata such as minutes taken or actions for individuals (65%), which could pave the way to a beneficial project productivity boost (p15).

The latter would of course involve some automatic transcription, and might perhaps have some form of machine learning also in the mix. Anthony Stables at Forsters could envisage time-saving measures such as scanning diaries for availability then and there as people discuss a time for a follow-up meeting – as well as real-time subtitles to help with strong accents (also mentioned by several others).

David Aird at DAC Beachcroft says: “Speech recognition has come a long way – so there is a question about whether people might be able and willing to stop manually taking minutes or actions because of a form of instant-transcription.” He points out that he already often opts to read transcribed voicemail in a similar vein.

But are there any privacy concerns with such ‘artefacts’ being available after the event? One respondent remarked “I think this areas needs lots of work”, while one third overall suggested information should be available to the meeting host only (p15). Only a fifth said all internal participants should have access to any materials that are successfully produced or recorded, and this falls to just over one in 10 when external parties are involved as well.

Drilling down further, most observe that policies should be established and followed to cover the specific situation; with transparency about those policies, and what happens to recordings for example, being key.

For example, Karen Jacks at Bird & Bird says: “You just need to apply the same level of thought and logic as you would with any business document. If something is recorded, people should know that – although of course, if you share minutes or a recording in any situation, there is some risk of people passing that on more widely.”

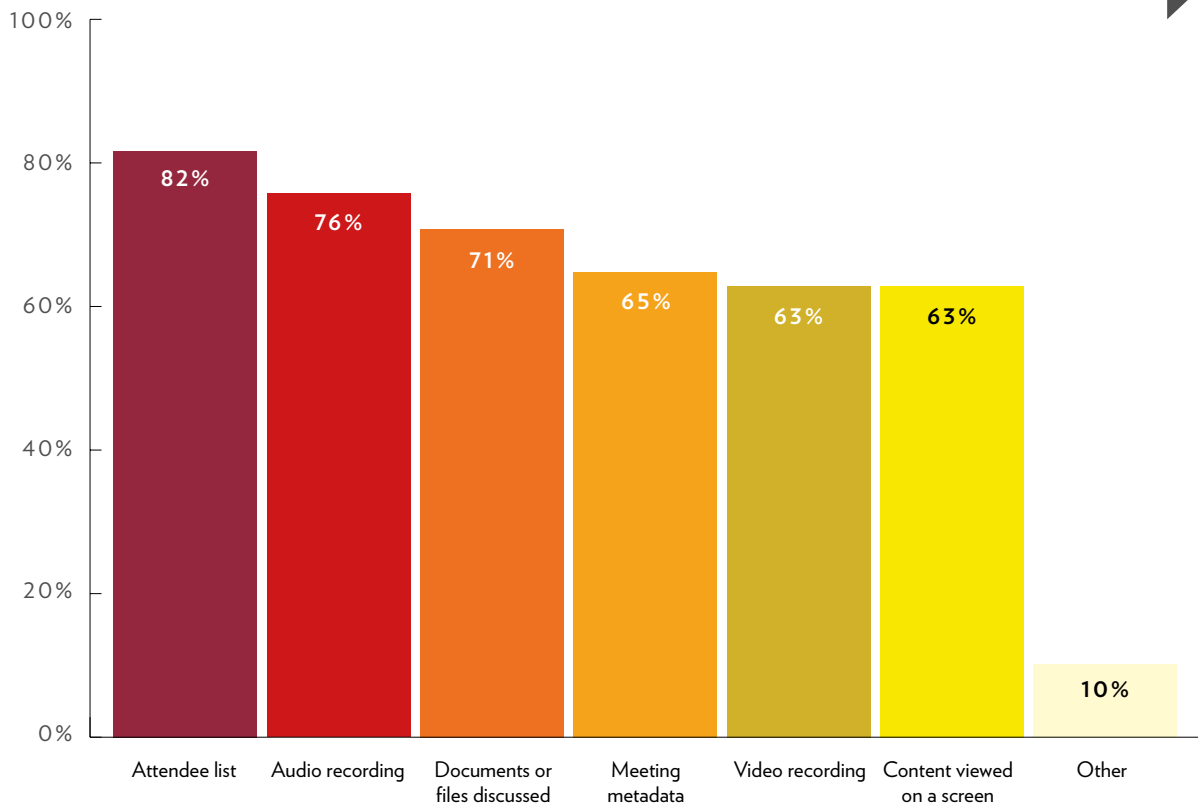
Matt Haynes at Kennedys adds: “I think you do need to apply some distribution control to all of those artefacts. If that was a priority for us – which it hasn’t been so far – it would be in the context of wider rights management.” ▴

IN A MINUTE

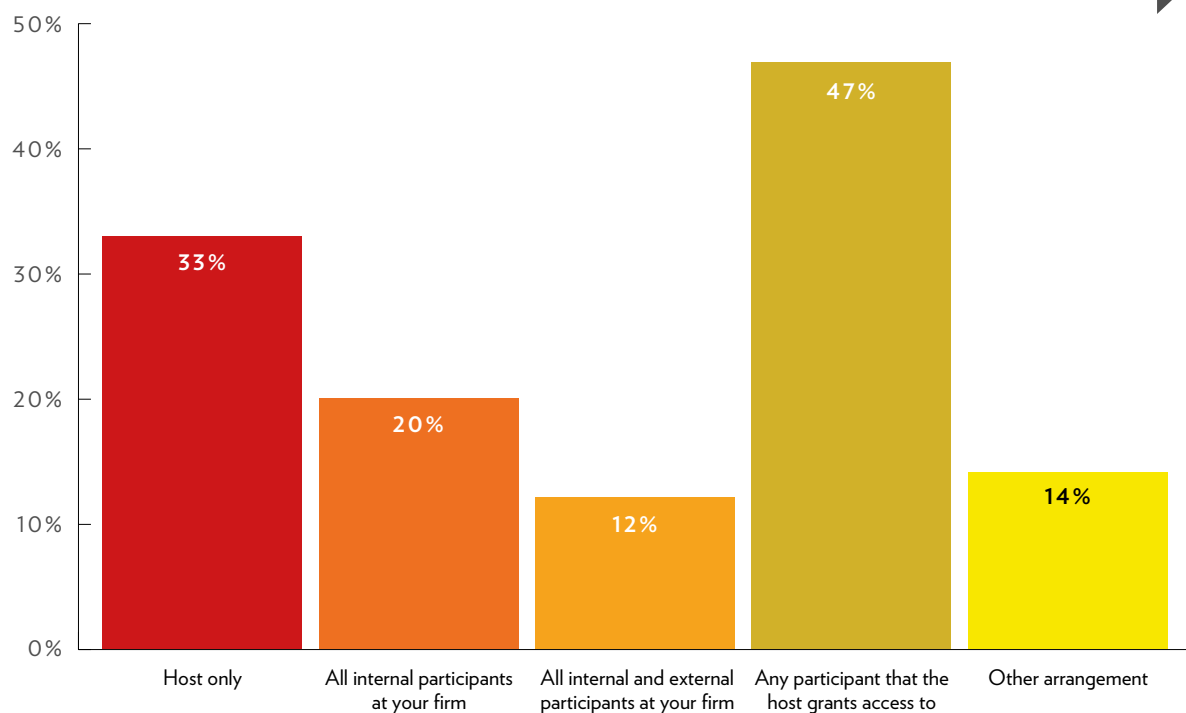
The potential products of a meeting that people value most highly are attendee lists, audio recordings and the documents or files that have been discussed by the parties.

Most are in agreement that it is the meeting host who should decide who can have access to such information after the meeting, but a significant minority do believe all participants should automatically have access.

WHICH INFORMATION ABOUT A MEETING WOULD YOU LIKE TO BE ABLE TO RECORD AND ACCESS AT A LATER DATE?



WHO SHOULD HAVE ACCESS TO ANY STORED MEETING INFORMATION/ARTEFACTS?





05

Meet the future of remote meetings

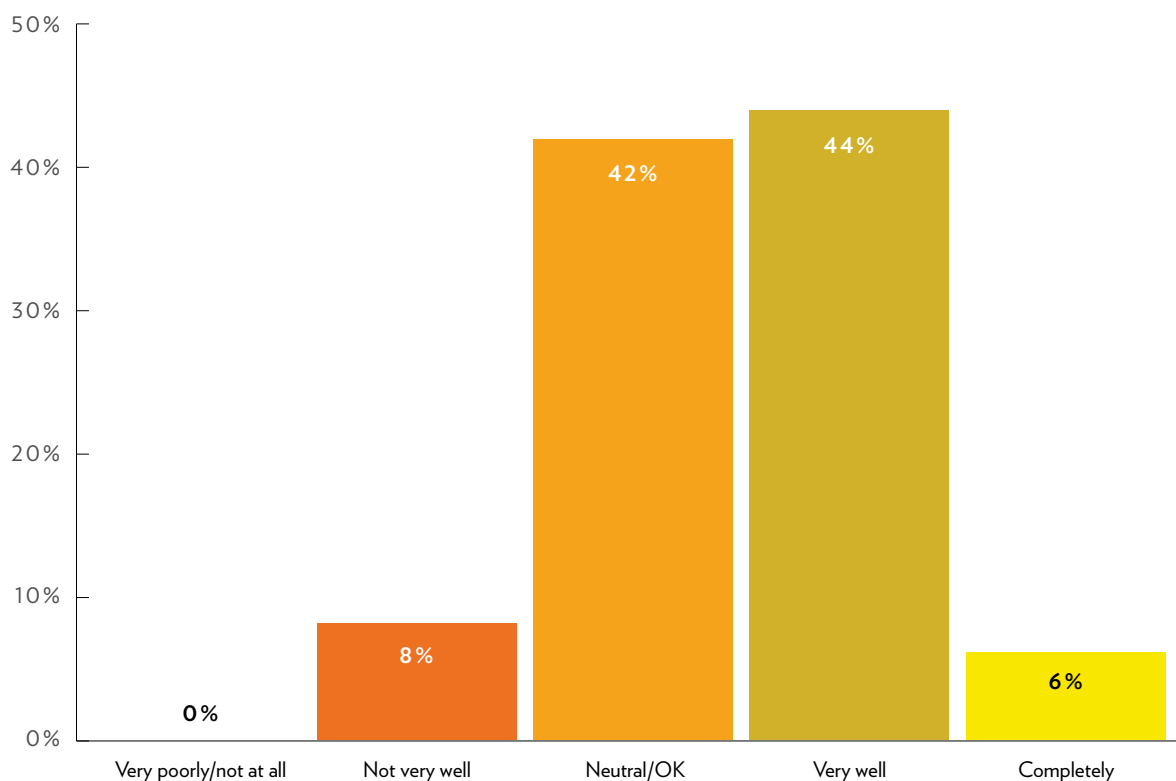
It's also notable in this research that it's the kind of capabilities that effectively capture key detail from meetings – translation, transcription and anything else a virtual assistant might reasonably take down – that are also the features respondents expect to have increased most in importance for those working in this way come the year 2025 (p19).

David Aird, whose firm does a lot of work in the Latin America region, says: "If you could speak, and the system directly translate between languages back and forth for you, that would be excellent – today it may be quite clunky, requiring repetition, but you could imagine that being quite seamless in three or five years' time."

Karen Jacks agrees. "If you're not working in your first language, I've observed that face-to-face meetings are much simpler to manage than conference calls. It's easier to observe body language." As a result she has indeed been doing some research into products that could help with simultaneous translation through another channel.

Then, fourth on our respondents' future-functionality wish list is 'whiteboarding', the ability to collaborate on a plan or drawing. Axel Koelsch at Addleshaw Goddard says: "Whether it's for workshoping or training, different types of collaboration capabilities are very important. In addition, the best systems have content scheduling, recording and and editing built in. It

HOW WELL ARE YOUR CURRENT REMOTE MEETING PROVIDERS MEETING YOUR BUSINESS NEEDS?



means you can set up the entire experience and avoid embarrassing problems when sharing screens impromptu.”

But sitting here in June 2020, these are far from the most business-critical features as firms adjust to new working patterns and processes, with hitherto unseen challenges to their profitability. The aspect considered most ‘vital’ by respondents right now is nothing more futuristic than ‘clear, reliable audio quality’ (85%) – followed by those key collaborative credentials of screen and file sharing, video and messaging/chat (p18). Matt Haynes at Kennedys says: “You can still lose up to 10 minutes trying to get everybody up on a call and ready to start. It’s handling those really basic things well that will lead to greater and better adoption of these solutions.”

Kevin O’Sullivan, associate director, LPM, at Baker McKenzie, agrees: “It’s more about the quality of the call for me than further functionality.” And for Stephen Allen at Hogan Lovells it’s a combination of our top-ranking criteria from the here and now and those of five years’ time:

“Number one is stability, second is audio quality, and third the ability for automatic notes capture. It’s very hard when working remotely to stay engaged in the screen and also capture the notes you need.

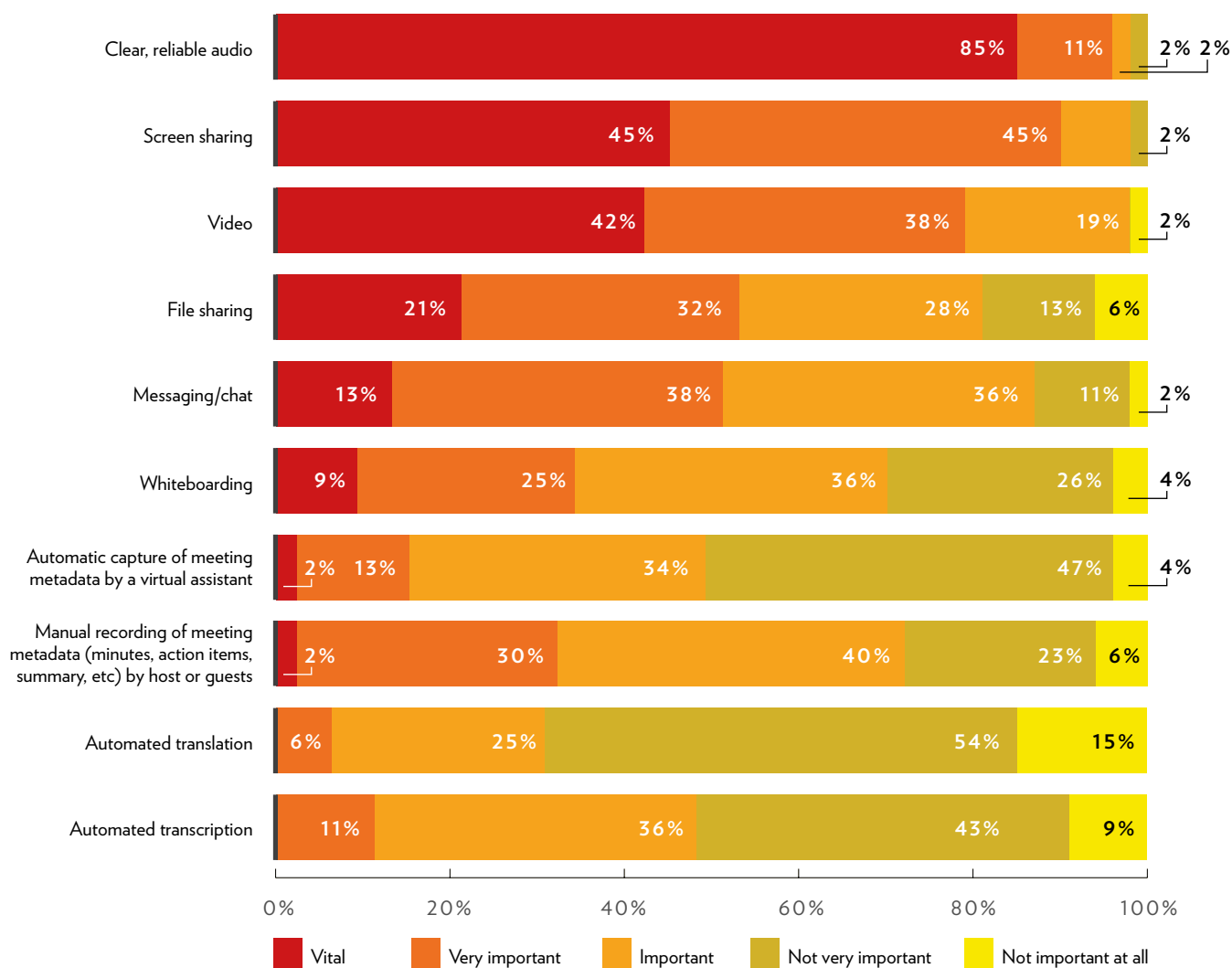
“Further improvements in video quality are also important, when – as 80% of communication can be visual – you can all too often miss the nuance in conversation.”

Anthony Stables at Forsters adds: “Mixing the audio and video can be quite tricky, and video quality can very easily drop with bandwidth, so even lip sync is one thing to try to tick off the list in the next three to five years.”

“Number one is stability, second is audio quality, and third the ability for automatic notes capture.”

Stephen Allen, innovation and digital, Hogan Lovells

WHAT ARE THE IMPORTANT REMOTE MEETING FUNCTIONALITIES/BENEFITS?



Andrew Edginton at Gowling WLG agrees: “Good audio and video quality is absolutely critical, although our experience has been that this is as dependent on home broadband as

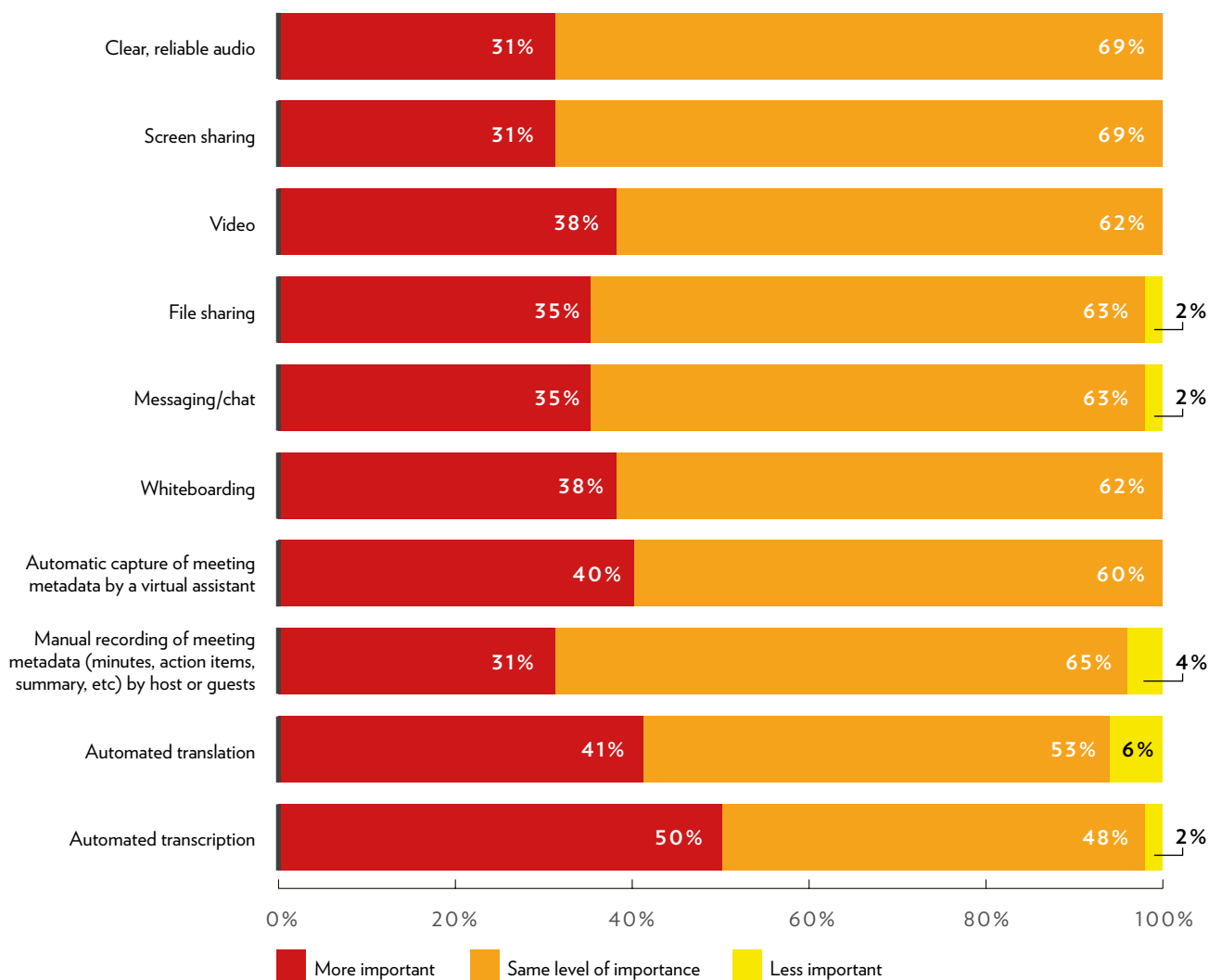
choice of product. And the benefits of video and whiteboarding have been just as important for ensuring the wellbeing of all our employees homeworking as for efficient collaboration. Teams have been able to use it for social engagement after work, and drop in and out of conversations in a way that’s more similar to being in the office.”

If – as many predict – those employees are going to be spending significantly less time sat next to one another in the same building in future, firms will want to ensure they’re not among the 50% whose people feel remote-meeting solution providers are failing to deliver on their increasingly complex combinations of communication needs. ▴

“The benefits of video and whiteboarding have been as important for ensuring the wellbeing of employees homeworking as for efficient collaboration.”

Andrew Edginton, chief operating officer, Gowling WLG

HOW IMPORTANT WILL THESE AREAS OF FUNCTIONALITY BE IN THREE TO FIVE YEARS' TIME?



IN A MINUTE

In 2020, the characteristics of a remote meeting considered most vital to a great experience are clear, reliable audio quality, followed by screen sharing capability and video.

Everyone believes these attributes will still be just as important (if not more so) in the **law firm of the future**.

However, it's felt that more advanced technologies to improve the experience – such as automated transcription, translation and metadata capture – will significantly grow in importance in the years ahead.

A conferencing solution that won't let you down



Today's law firms face a tough challenge. They must deliver exceptional client service while maintaining a high level of productivity in order to remain competitive.

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