

# Briefing

September/  
October 2020

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# Briefing

September/  
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ADMIN ANYWHERE?

YEAR CHANGE  
Charlotte Eberlein at Thomson Snell &  
Passmore on turning 450 in a pandemic

SOCIAL ACTIVITY  
Darryl Cooke at gunnercooke on why  
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*How are firms managing effective client listening in tumultuous times?*



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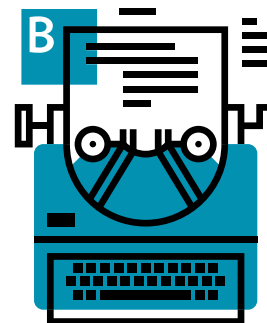


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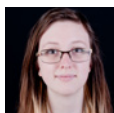
# Editor's letter



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**T**he length of road recently travelled along a topic that has long interested **Briefing** – where and how we work – is quite astonishing. From the urgent matter of ensuring that everyone could manage to work from home, there is now a very serious conversation being held about what office spaces are for. Meanwhile, cities – in the UK at least – are clearly concerned employees might not return to them fast enough, or in sufficient numbers, to sustain other businesses that rely on them.

Several years ago, a steady line of law firms came forward to announce their new agile-working policies – a bit more flexible than formal flexible – in response to drivers such as a need for more committed action to address workforce diversity, and top talent retention plain and simple. The technology was already pretty much there to support working on the go. As long as the clients were happy their needs could also be met, what was wrong with a day or two a week working from home?

## Last month Linklaters became first to announce a new agile-working policy globally

Now, last month Linklaters became first to announce a new agile-working policy globally, intended to stand beyond Covid-19 and social-distancing, and containing some eye-catching details. First, employees could now work remotely up to 50% of the time, without needing to ask for permission, “as long as it is communicated to teams in advance and operational roles are fulfilled,” says the PR. Management is also encouraging conversations about what else people might want incorporated in their working patterns, such as “modified” hours and flexible start and finish times.

And the exploratory conversations that are had about all of this will start with a “yes”, the firm says, supporting “an inclusive culture enabling people to determine when, where and how they get their work done.”

Other firms are no doubt busy crafting other responses to our new normal with great care. Offices can now be open, but the organisational challenges in using them to best effect clearly remain amid the pandemic today, and key decisions made in the coming months will surely have some significant implications for how working works in the decade ahead.

**RICHARD BRENT** EDITOR-IN-CHIEF



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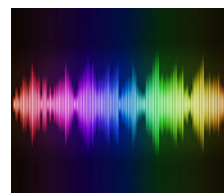
*"The reason we're still here after 450 years is that we have adapted."*

Charlotte Eberlein, head of marketing and business development, Thomson Snell & Passmore



## Briefing

QUARTERLY LEGAL BUSINESS MANAGEMENT



Now hear this

**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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**A JUNGLE OUT THERE**

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In partnership with **Pinnacle**



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Stuart Dodds  
Co-founder and principal  
Positive Pricing

@smarterpricing

**Segment your client base by likely pricing behaviours and proactively identify ways both to help the client and to mitigate any potential impact on the firm. Good pricing always needs to remain fair to both parties**

## SPEAK UP

# Pricing in the next normal

**T**he pricing lessons from the 2008 global financial crisis are still extremely pertinent. However, as any good pricing practitioner will tell you, the approach should not fundamentally change in an economic downturn – the same key principles still apply. So, what should we be doing as we head into the ‘next normal’?

These steps will help you to navigate the potentially tricky pricing conversations you are – or should be – having with your clients now, while ensuring a more sustainable and profitable future in the longer term.

**1. Highlight your value.** You need to be proactive and cleave close to your existing clients. Emphasising the value and outputs delivered is key, so they clearly see what they’re getting and feel they’re receiving a tangible return on their current legal spend. Proactively engaging with them about current ongoing matters and helping to re-evaluate their legal priorities will also stand you in good stead. But this is not a one-time event. We should be doing this all the time. Make sure you clearly articulate how you add value and support your clients.

**2. Take a firm-wide view to managing investments.** It is important to take a firm-wide view of any client investment. This puts a much greater emphasis on good pricing governance and oversight, avoiding ‘random’ discounting by individual partners (even if it’s with the best of intentions). Discounting and broader client-specific investment (for example, provision of ‘free time’) should always be approached with caution, coordinated, and managed.

**3. Review and refine practice group pricing approaches.** Grasp the opportunity while you have your firm’s

collective focus on pricing and profitability to define and agree your practice group-specific pricing strategies for the next six to 12 months. This encourages greater consistency of approach (for example, which fee structures to adopt, and for whom), messaging and management of firm investment. And it’s relevant both for practice areas that will flourish during this time and those that will feel more pressure. Remember, the strategy should evolve over time, rather than be static. Encouraging more frequent discussion of pricing themes as part of practice group meetings can be a simple and great start.

**4. Segment and understand your clients.** Larger clients, those in sectors heavily impacted, or other extremely price-sensitive clients, may be seeking some form of fee relief. Others – perhaps not as economically distressed – may also request some as they seek to take advantage of ongoing uncertainty. Conducting a pricing segmentation exercise will enable you to be prepared and have agreed approaches in place prior to the inevitable client request. Segment your client base by likely pricing behaviours (and by client importance and/or sector) and proactively identify ways both to help the client and to mitigate any potential impact on the firm. Good pricing always needs to remain fair for both parties.

So, a differentiated pricing approach (recognising not all clients and practice offerings are under pressure), focus on the value of your offering, adapting pricing approach to clients’ needs, and pricing governance processes, still remain the ones to watch – albeit with a few subtle tweaks to the old normal. But it’s always better to respond than to react, and that means not losing sight of pricing fundamentals.



## COMMENT

# Safeguarding data and reputation

**R**ecent figures from the Information Commissioner's Office show the legal sector is one of the top five contributors to reported data security incidents, contributing 9% of total data breaches in Q4 of 2019–20.

In another recent study, 27% of IT leaders and employees in the legal sector across the UK, US and Benelux region said they, or a colleague, had accidentally shared or leaked company information. Even more worryingly, 29% said they or a colleague had done so intentionally, and 55% have accidentally leaked data because of a phishing email. The last is perhaps a less surprising statistic given the volume of detected phishing sites rose by 30% last year.

Phishing, and whaling – impersonation attacks – can be as simple as receiving an email from a 'bad actor' posing as a managing partner. This will typically request the transfer of funds to – or the sharing of sensitive data with – an external party. In addition, targeted attacks against your web presence and brand can further affect your relationship with clients and suppliers in equal measure. In turn, this impacts on your organisation's reputation.

A range of factors can lead to a data breach. While technical measures against external factors are often well understood and implemented by businesses, how can the inevitable human factor be addressed?

Ultimately, the solution is to use the right toolset, to maintain the right oversight, and to deliver it with the right approach to encourage all of your employees to think more cautiously about data security. It's something that should also be front of management mind at the moment, given that many employees are now working in a dispersed environment.

Oversight often isn't then as strong as it is when the workforce is under one roof.

To protect against data breaches, we recommend considering the following areas:

- 1. Educate and engage with your workforce** about the security risks, so people will actively defend the business instead of increasing the risks.
- 2. Identify the individuals who pose the biggest risk** through their own mistakes and stop them from making those mistakes.
- 3. Provide training resources even if resources are limited** – apply them where they are most needed.
- 4. Put measures in place to protect your business** and people from phishing and whaling attacks that are attempted through social engineering and malicious links or attachments.
- 5. Prevent attacks** by identifying and neutralising domains that imitate any of your digital assets.
- 6. Stop fraudulent use of your domains** with the ability to identify and block unauthorised use across all email channels.

Even in large law firms there are often disparate solutions attempting to address the challenge. By integrating all security tooling into one solution, or at the very least aggregating data from source systems, firms can benefit from a more holistic view. This is critical not only to reducing IT resource management overheads, but also for measuring the success of the implementation, and continuously monitoring dependent measures and driving improvements.

It also means that your IT team can devote more time to what's really important – innovation and supporting the business. ▀



Andy Bevan  
Cloud sales specialist  
Pulsant

🐦 @PulsantUK

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**There are often disparate solutions attempting to address the challenge. By integrating all security tooling into one solution, or at the very least aggregating data from source systems, firms can benefit from a more holistic view**





Christopher Young  
Principal consultant and business  
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For more information, visit:  
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**How will client and business development need to change? What are the skills that need to be honed? Which tools and techniques need to be developed?**

## TO THE POINT

# BD ready for the future?

**I**t's amazing how our businesses have changed, how quickly and how dramatically – teams really have achieved remarkable things. You may have noticed that we at Pinnacle have been working with the **Briefing** team to look at some of the key issues of the day, by pulling together Tiger Teams to address firm-wide – but also finance, risk and business development-specific – issues. The latest session was on business development.

As things stand, many teams have pretty much 'done their stuff'. IT teams, in the early days of lockdown, had to get the business up and running remotely – buying and configuring laptops, beefing up infrastructure and accelerating implementation plans for collaboration tools such as Microsoft Teams and Zoom.

We then saw the finance and other functions having to digitise processes rapidly – moving to electronic authorisation of payments rather than signing physical cheques; putting in tools to help with expense claims and authorisations, and more. Firms have also become more real-time – some of our Tigers described how this is being driven by client demand, but it's also, amid uncertainty, the need to know where the business is at any given moment, for example in WIP and accounts receivable.

Many firms have pulled together their own small multi-disciplinary teams to get these things done. It's amazing what small groups can achieve if empowered – at Pinnacle, our own Tiger Teams are working to accelerate and enhance forecasting, developing software enhancements and improving the use of technologies we have already.

However, many in the business development space have, I think, been hoping that the world will go back to the way it was – events, meetings and the more social ways of developing business. But that seems unlikely soon, especially

with big clients in the big cities, while physical conferences will continue to be hard to organise.

The focus for most businesses has been on sustaining what they have: keeping the show on the road. Having sorted the IT, and with a handle on cashflow, the firms we're working with are increasingly turning to growing revenues – to the BD. While some are busier than ever, there is always more work that could be won. Others are having to find new ways of driving revenues. But with revenues not picking up, some firms are beginning to cut marketing and business development.

That's all while it's harder than ever to differentiate what you do. Almost all firms have been sending mass emails about how to deal with the pandemic. How do you stand out going forward? How will client and business development need to change? What are the skills that need to be honed? Which tools and techniques need to be developed?

So, Pinnacle has been working with a return-on-investment model, which allows firms to see where they should focus their marketing and BD efforts. Each firm is different and it helps to highlight how and where firms should focus resources: on areas of weakness. MBD teams need to strengthen certain capabilities – and that comes down to more robust processes and thinking.

Take the intelligent segmenting of practice areas within firms. Some practices have to be bought on trust. Others are closer to physical goods, where the buyer knows how much it should cost, and the features and benefits they are expecting. These two types of practice area need different go-to-market strategies, carried out by different skillsets. Lead generation and filling of the pipeline doesn't need to be done by lawyers in one situation. In the other, it does. We need to be clearer than ever in defining clients and what differentiates us. It's time for the BD Tiger Team.





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# Features

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### *Need to hear it*

Lockdown or no, law firms know they need to listen to their clients – but how? Richard Brent hears all about it

## 15

### *Turning the age*

Charlotte Eberlein at **Thomson Snell & Passmore** on a long journey and a sudden change



## THE BIG IDEA

# Need to hear it

How are law firms handling the job of effective client listening in the changed landscape of 2020? Richard Brent asks a few open questions

**B**usiness development is, of course, a constant concern for law firms. But, in the current economic climate, the heat is surely on like something else – somewhere, say, around a blazing mid-August day in the UK circa 2020-mark. And even where offices are gradually starting to welcome some returning employees, traditional ways of connecting, such as in-person meetings and events, remain – at the time of writing – largely shut off. On the other hand, one upside of lockdown **Briefing** has heard is that travel-free virtual appointments are in fact proving easier to schedule. So if firms are indeed somehow managing to spend more time in touch with their clients, not less, they'd certainly better be making the most of every minute.

That doesn't necessarily simply mean the gift of more time to talk about what you do, though – this would be a pretty good time to demonstrate you're a good listener. How firms effectively do this doesn't get that much airtime these days – and granted, 'client listening' has hardly just popped fresh out of the innovation hub this morning.

Nevertheless, is it an area where some firms could explore the value of doing some things differently today?

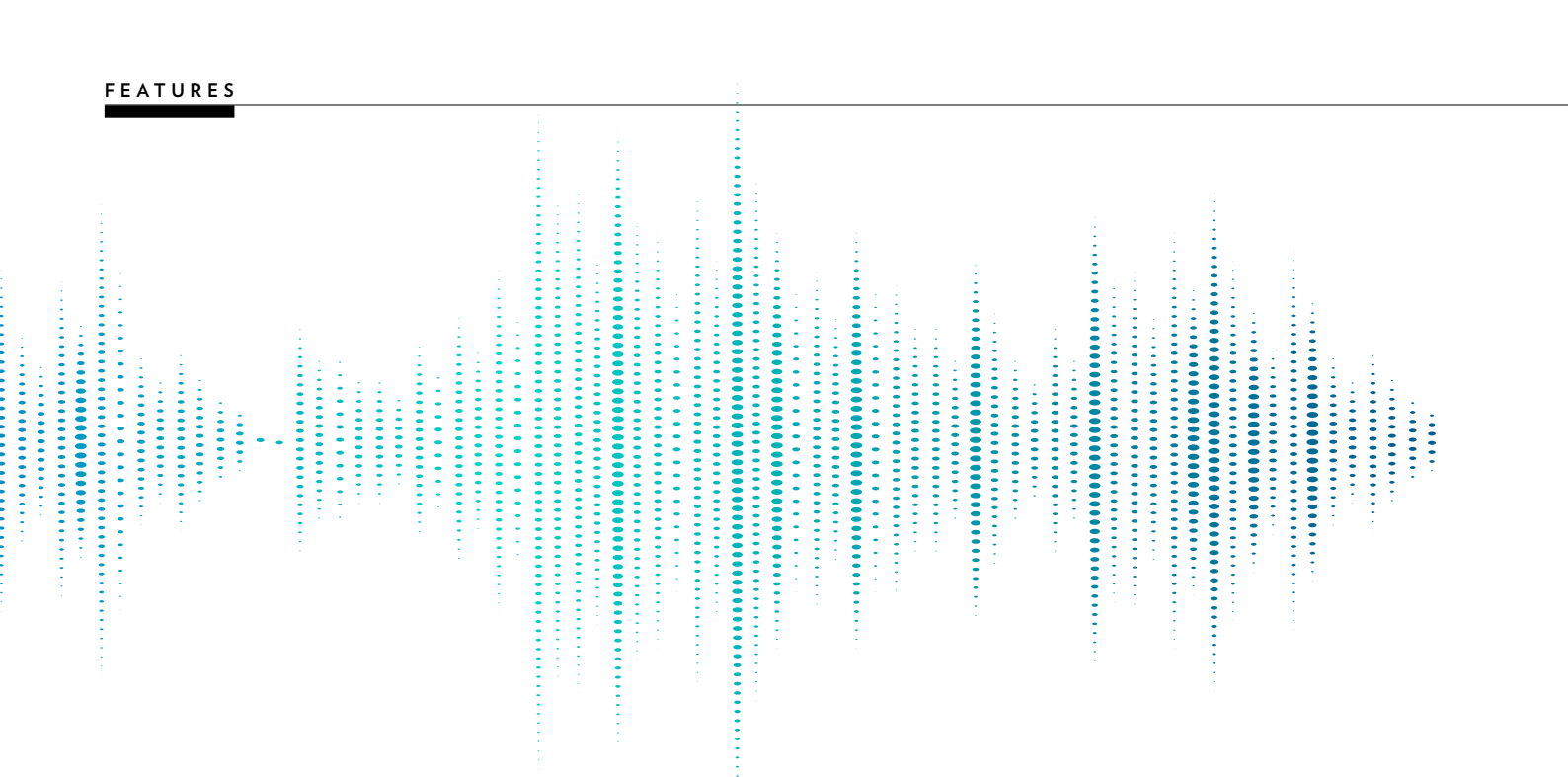
## Feedback groups

Richard Crook, global head of business development and relationships at Charles Russell Speechlys, has introduced several new strands to the firm's approach since he joined in 2019, and says their value – some draw on his background outside of legal – is crystallising in these more challenging times.

For example, he has more than doubled the number of full client service reviews that take place – from its 'top 20' to 'top 50' clients. "It will be increasingly hard to win new clients, so you really do need to look after what you currently have," he says. Clients are also offered a choice of whether these sessions are carried out by a member of the business development team, a relationship partner, or an external consultant, to ensure they're comfortable having the "frank" conversation the firm would ideally like.

Reed Smith chief marketing officer, Sadie Baron,





places particular stress on the importance of independence in the process. Reed Smith revamped its client-listening programme a few years ago, when a very senior member of the management team, who also happened to be a qualified coach, stepped down, she says. He has kept his title of partner, but is clearly not trying to win work in his listening role, and performs it alongside a member of Baron's team. She says: "I will accept the feedback that our fee-earning partners give us about a relationship, but in truth I don't see it as independent feedback. In fact, the main relationship lead really doesn't need to be part of the annual review of the relationship at all."

Negative feedback is particularly important to tease out, she adds. "Some of these relationships can stretch back up to 20 years – and we all know how hard it can be to tell a friend they're doing something wrong. Also, lawyers are trained to reach the right answer for a client as quickly as possible. Open-ended questions can be more uncomfortable to the person trying to get the job done, which is why BD has such a critical role in client feedback. We can ask things like what really irritates them; as well as that one critical question that still often doesn't get asked in this industry – 'how can I help?'"

Crook has also just finished a pilot of pursuing individual matter feedback: "fairly simple, but tailored to practices," he says, and in the lockdown period he accelerated the collection of feedback from clients about pitch performance. "We follow up when we lose but also when we win a piece of work – some don't do the latter – and we're trying to get more in-depth feedback about our perceived level of client understanding, as well as experience and personalities." Listening certainly shouldn't

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**"I will accept the feedback that our fee-earning partners give us about a relationship, but in truth I don't see it as independent feedback."**

*Sadie Baron, chief marketing officer, Reed Smith*

just be about whether clients are happy with fees paid, he stresses, although the pitch itself needs to be appropriately "client-focused, about the articulation of value."

Other good listening routes, he says, include keeping close connections with alumni, many of whom now work for clients, and reviews with firm intermediaries such as banks and accountants. The business is also considering his case for introducing the Net Promoter Score calculation as to whether any given client would ultimately be an advocate or a detractor. "In my previous role for a large real estate business, that proved particularly useful for tracking and comparing client views across different countries," he says.

Baron says that in her own listening



conversations she will also specifically try to uncover how well a client's experience matches elements of brand promise: "We spent a long time working on what we stand for as a firm, and if we say we 'drive progress', for example – as we do – I'm genuinely interested in understanding if that truly stands up with them."

### Listening up?

Weightmans director of business development and marketing, Sarah-Jane Howitt, says that alongside its regular post-matter and rolling client-satisfaction interviews, the firm did place some more emphasis behind the responsible people reaching out to their clients for more conversations in the early days of lockdown. However, this in fact followed a change unconnected to Covid-19.

"We'd recently introduced a new framework setting out the minimum standards that we expect of a client partner, and those include frequency of contact. The timing is coincidental, but there has been a benefit in adding weight to what people have then been asked to do while all at home.

"We made a specific push for those client partners to pick up the phone and have a conversation that wasn't intended to be a sales one. We've seen some good traction with that, and with people often being in the same place all day, I think they've had a bit more headspace for it."

Diane Belford, head of clients and markets at DMH Stallard, adds: "We did wonder at the beginning of lockdown whether the clients themselves would have too much on their plates. But we found they do still want to speak – if you do it right, they find it a useful exercise and they are

prepared to spend the time.

As well as the process, Howitt believes the content of the firm's conversations has become more focused. "The attempt to understand the impact of Covid-19 on a client, and how it might alter their strategy, draws focus to challenges in the short- to medium-term," she says. "Normally", those partners would likely have had a rather "broader set of themes or questions to spark and continue their conversations.

"The pandemic has, of course, impacted different client sectors in different ways, and it's for partners to judge whether what they're hearing potentially morphs into more of a sales conversation. That should only happen at the point it makes sense, given the impact on the sector."

Crook at CRS makes some similar observations, not least concerning the importance of an actual phone (or perhaps video) call in 2020. "It's too easy to hide behind an email, and it also only gets you the shortest response. And you need to ask and hear about other aspects of the business; you're not just a transactional partner." Deeper client insight, of course, can also help firms to cross-sell more effectively when the time is right.

Crook and his colleagues have also recently formalised a "partner education" framework for this part of their role within the learning and development strategy. "Some partners are natural rainmakers, but for others it's some way outside the comfort zone, so we need alignment on what really good client listening looks like."

DMH Stallard also has its listening activity supported by an independent external party, as well as a channel for collecting some feedback online. But Belford agrees that focus is increasingly shifting to "more frequent, non-transactional conversations." That said, she also keeps track of how frequently the firm's clients engage with formal listening, and highlights there are "triggers" that should prompt additional action as well, such as "a key person moving or changing roles."

Baron says part of Reed Smith's approach is to produce a set of "themes", which are regularly updated based on feedback over time. So, at the time of writing, for example, people are particularly interested in talking about their return-to-work policies. These themes could also easily – and usefully – tip into challenges that are more general management than legal, she says:

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**"Some partners are natural rainmakers, but for others it's some way outside the comfort zone, so we need alignment on what really good client listening looks like."**

*Richard Crook, global head of business development and relationships, Charles Russell Speechlys*



“How can I motivate my team virtually? How are you doing that at Reed Smith?”

“Covid is obviously an opportunity to engage with all clients and ask how we can best help them; all 48 on our key account management programme will have an insight meeting of some description this year. But some of ours are businesses like the huge aviation companies, and the last thing they need at the moment is a lawyer’s cross-sell.” The firm also brings people from clients together into deliberately small group forums, either around a sector’s challenges, within a geography, or to hear responses to a topic of much concern. It’s about to run one covering the Black Lives Matter movement, for example, which has also significantly moved the dial of what clients want to speak about in 2020, she says. Every client will also be hearing from one of Reed Smith’s ‘client inclusion leaders’, “the eyes and ears of our conscience, who have to understand the client’s position on all aspects of diversity.”

### Listen and learn

Whatever the forum or agenda, and whoever’s there listening in, in August 2020 face-to-face, of course, meant yet another meeting on Zoom or similar. Howitt says: “We have been encouraging people to have their conversations on video if the clients are happy with that; it does make the interaction a bit more personal.”

Belford adds: “I think face-to-face does make for a better-quality conversation, rather than just by phone, although these conversations do really need to be on the client’s terms, so that both parties feel they’re getting something useful out of it.”

DMH Stallard is running some group-based “refresher training” – covering some listening essentials, but also how to think about it if you’re on video in particular. “Sometimes you need to think twice about any signals you’re picking up,” she says. “For example, if somebody loses eye contact or appears suddenly distracted, do you probe a bit deeper, ask a few more questions to understand the reaction, or could there just be other causes you don’t find in an office setting? Test your assumptions.

“In terms of what to avoid – there can be a risk that people could go in thinking they already know the situation, or that they are thinking about

**“There can be a risk that people could go in thinking they already know the situation, or that they are thinking about selling more than listening.”**

*Diane Belford, head of clients and markets, DMH Stallard*

selling more than listening,” she agrees. “And finally, then you do need to do something with what it is you hear. There needs to be some follow-up to help to build the relationship further.”

Crook says one practical example of this ought to be recording summaries others could usefully pick up to help shape their own conversations and plans – particularly valuable no doubt when those ‘water cooler’ moments of spontaneous sharing are far more rare.

Weightmans launched its new client relationship management system in 2018, and Howitt says that lockdown has also proved a particularly good time for selling the benefits of that change internally. “We had some 60 people voluntarily take refresher training in June alone. There seems to be a lot more interest – again, perhaps, as they have a bit more time. So we’ve been pushing to remember to record yourself, to have a look for what others have done before taking action, and it’s also embedded as an integral part of all our business development meetings.”

In the roadmap for some time, she adds, a more recent project has seen data from this and other systems flow into more user-friendly dashboard displays of business pipelines. “They pull information from the CRM, the practice management system and several other places to quickly show people sales forecasts for the next period of time, the opportunities by sector, segment or client partner, when those are expected to close, and the value.”

It also displays who’s responsible for activities, and the time between the last and next due – all useful reading, to accompany the careful listening required for a fully joined-up and client-focused firm in 2020. ▀



## BRIEFING PEOPLE

# Turning the age

Charlotte Eberlein leads the marketing effort at the law firm that has been running the longest, Thomson Snell & Passmore. She tells Richard Brent its survival is based on responding positively to the forces of change, which is something she recently needed to channel for herself

**T**here'll be plenty who already know how it feels to have a socially distanced birthday party in our age of Covid-19. The Royal Tunbridge Wells-based law firm Thomson Snell & Passmore is one. The business holds a Guinness World Record for being the oldest continually operating law firm, and on 22 July it celebrated turning the ripe old age of 450.

Head of marketing and business development Charlotte Eberlein had planned a client and referrer event at Tonbridge Castle, close to where founding curate Nicholas Hooper's first will was signed; a standout internal summer party for the office it had only recently opened; and advertising to be put up in this famous commuter's town train station saying "home of the world's oldest law firm".

"You can brand a station these days. So in January we were loving life; I'd secured additional budget and buy-in from the board, and everything was ready to go – then in March the whole lot had to be very quickly unpicked, and a new plan formed. The advertising is already up for the year,

but, of course, there probably won't be the number of people travelling and seeing it we had anticipated."

As for so many, the focus of activity now had to be online. "We'd already planned for several months of social media campaigns to get out and ensure that people outside our traditional advertising sphere of the southeast of England got to know the firm better." And, as with the trains, that was with a view to attracting both potential new talent and potential new clients, as part of growth plans.

"Now I had to harness every employee to that cause. On our birthday I wrote to them saying 'for one day only, if you do nothing else, engage with our social media'. I sent people a list of everything we'd produced in recent days, and asked them to pick their favourites, and their favourite platform for sharing it.

"Without everyone's individual networks we would still have been limited in our reach, but people got behind it and we found we'd reached over 4 million people through social and traditional media in 24 hours. I was able to go back the next day with the message of how many new people had engaged, and in five to seven days that web traffic and new enquiries had both gone up.

"Everybody engages with social media in different ways, but there's now so much content out there that if you don't manage to keep a good regular flow, you will fall off the bottom fast. But equally, if you're producing material that people aren't interested in, the same thing happens. Social media is quite a good way for other people to tell you what they do want to hear about."

**"Like everyone, we had a Brexit hub on our website. That was replaced with a Covid-19 hub, but now we're working on an amalgamation of the two."**

*Charlotte Eberlein, head of marketing and business development, Thomson, Snell & Passmore*

## Good conversation

Here, of course, Eberlein had a good news story to tell. At the same time, she thinks many firms – hers





#### FIRM FACTS

##### Thomson Snell & Passmore

Offices: 2

Countries: 1

Revenue (FY19/20): £22.65m

Total headcount: 253

Ratio, fee earners to business services and support: Approx: 7:6

possibly included – were falling into the trap of overdoing the Covid-19 updates, as more implications of lockdown for lives materialised every day.

“We needed to take a step back, and produce fewer general comms, instead concentrating on more bespoke client-centric comms. The needs of somebody leading a 200-strong workforce in a factory are actually very different to those of a 10-person business where everyone can effectively work at home. Sending a link to a generic update on the website probably isn’t going to help. Lawyers need to pick up the phone and talk to their clients, which I’m actively encouraging. Are they doing it enough? I don’t ask for reports, but for the most part they are doing this and they see the business benefit.”

The nature of the conversation also matters. “You need to manage to see the world from the client’s perspective, rather than explain the firm’s. If you try to have conversations about life in general, pieces of work eventually come out.” For example, a partner who specialises in one area of law might well uncover a serious client need in another, she says. “Or perhaps we can’t help at all with that particular problem, but we can put them in touch with another professional that can, such as an accountant or insolvency specialist.

“It’s also very important to remember that

clients aren’t just trying to survive Covid – they want their organisation to thrive, and are building five-year plans for that.”

#### Adept at adaptation

With senior partner Joanna Pratt taking the reins in 2020 – joining CEO Sarah Henwood, who has a BD background herself – Thomson Snell & Passmore recently shifted its own strategy to incorporate a new one-year plan, “with a view still to arriving where we’d like to be in the five years we’d previously planned, but perhaps by a somewhat different route,” says Eberlein.

“The reason we’re still here after 450 years is that we have adapted. We survived the industrial revolution, the technological revolution and countless recessions, and hopefully we’ll come through another one. But we wouldn’t have done so if we hadn’t been able to embrace change.”

This is a theme that comes out of one live event the firm did just manage to squeeze into its early 2020 plans – a filmed roundtable with several former senior partners and other alumni reflecting on its history (available on its website). We hear how it was quick to pick up word processing when it was observed at work for a local council in 1973, and later set up a precedent service with supporting helpline that was sold as a service to other firms (eventually sold to the publisher Sweet



& Maxwell). Challenges have also been plenty, and more recently came the professionalisation of management roles, including, of course, marketing.

The firm is now assessing artificial intelligence solutions, is fully cloud-based, and in the process of “setting up portals for some larger private clients as it has for commercial ones,” says Eberlein. “It’s about information at fingertips now, not even waiting for emails necessarily, but having the ability to check things in real time.” A new document management system in 2019 that significantly reduced reliance on moving paper files could also scarcely have come at a better time.

And does she see the remote working world of 2020 changing business development and client relationship work for law firms in the longer term? “There are clients who want to come back to the office for true face-to-face interactions, and obviously we look forward to welcoming them back for that when we can. But equally, there are clients who are really embracing the new technology – quite happy working from home and talking to lawyers on Microsoft Teams. We’re all probably a bit more accessible now, and scheduling time is a lot easier, but I think it will be client-led.”

That’s just as well as, while the Covid-related support that clients need clearly continues this year, she reminds us that Brexit will soon be right back up there as well. “That was our clients’ biggest concern previously. Like everyone, we had a Brexit hub on our website. That was replaced with a Covid-19 hub, but now we’re working on an amalgamation of the two. They aren’t separate issues any longer. The challenge is ‘Brexit in the time of Covid’.

“You need to keep on keeping on top of what’s happening now, as well as build that awareness of what’s coming over the horizon, even though you don’t have all the answers for it yet.” And the key to that is people and proactive knowledge-sharing rather than technology, she says – lawyers, business development and others pooling what they learn, to start discussions about the possible implications as soon as possible.

Unprecedented is a word that has been used rather a lot this year. This business can at least trace itself through numerous tumultuous transformations of work and life over 450 years, and reflect that, as painful as it inevitably was at times, a path through was possible. ▀

# Briefing

SPECIAL REPORT

## NEW MODEL LEGAL

What are law firm leaders’ visions and plans for thriving in a legal business landscape after lockdown?

### Briefing

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TRANSFORMATION  
AT WORK

What are law firm leaders’  
visions and plans for  
thriving in a legal business  
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# Brain training

20

*Power of purpose*

Darryl Cooke,  
co-founder of  
**gunnercooke**,  
recommends giving  
more thought to how  
you give back





## HANDS ON

# Power of purpose

Darryl Cooke, co-founder of gunnercooke, argues that CSR as we have known it is finished, but having a genuine social purpose is key to ensuring your business survives

**E**ven before the extraordinary impact of Covid-19 began to be felt across society, many businesses were waking up to the fact the world was changing.

From the threat of climate emergency to consideration of the rise of super-brands like Google, Apple and Amazon, traditional attitudes to corporate social responsibility were being eclipsed by new ideas about how and why we need to give something back.

Personally, I've always believed everyone has a

responsibility to help the wider community. In addition, I've always felt that having a meaningful corporate purpose brings huge benefits to the bottom line.

Many people are often surprised to hear such a philosophy being espoused by a lawyer, and the legal profession is rarely credited with having a culture which isn't completely self-serving.

However, when I co-founded gunnercooke in 2010, I decided from the outset that social purpose would be built into our corporate DNA. This would also be inextricably linked to our

differentiation strategy – to be a new kind of law firm, without timesheets and with certainty of pricing alongside guarantee of our quality and a commitment to solving a client's challenges – rather than finding ways to charge them more.

A decade on and we have a growing, award-winning business with over 300 employees. We have offices in London, Manchester and Leeds, and a Net Promoter Score of which I'm incredibly proud.

And although we have even bigger ambitions, we continue to put a sense of purpose at the heart of our business.



## **Wrestling with the issue of how to channel your expertise into activities that will make the biggest difference is not always easy, but it's a vital part of the process**

### **Ensure what you do makes an actual difference**

Our commitment to social purpose has seen us establish the gunnercooke foundation, which enables our employees, our clients and other industry partners to make a difference.

It's popularity and success – both internally and externally – clearly reflects the fact that many people want to contribute to society. But crucially, it also demonstrates that people need a mechanism that can help them to fulfil that desire.

In order to get to this point, we had to seriously consider what we could offer that would benefit society in a meaningful way – something that went beyond painting the local community centre for the umpteenth time, or putting a logo on the shirts of a junior football team.

So, we asked ourselves: What are we really good at? How can we apply that to the needs of our community? And how will it practically help?

### **Finding your purpose and adding real value**

Wrestling with the issue of how to channel your expertise into

activities that will make the biggest difference is not always easy, but it's a vital part of the process. For example, we initially considered offering pro bono support to some of the country's leading charities, but we found that most were already acting as large businesses and were well resourced and supported.

Then we discovered that, in spite of there being over 160,000 registered UK charities, more than 70% of donations go to just 1% of the sector. So we decided to change tack.

### **A structured, business-like approach to supporting others**

As we began looking at the needs of smaller charities, we found we could add some genuine value by offering expertise to grassroots organisations that were typically full of passion but sometimes lacked strategic direction or had gaps in their leadership capacity.

As a result we set up our 'inspire' charity. This is a matchmaking service that brings senior business leaders – drawn from across our workforce, our clients and our industry partners – together with leaders of third-sector organisations.

The core aim is to help to create better leaders within these organisations. By receiving support they can run their charity, social enterprise or community group more effectively – and therefore do more good, more quickly.

It's a structured process, in which hubs of between eight



and 10 non-profit organisations are paired with a volunteer leader. The hub leader – generally drawn from the business world – then acts as a facilitator for the delivery of strategic advice, mentoring and additional support on a pro bono basis.

In addition to offering access to a professional network, regular meetings and free consultancy, inspire also helps to close knowledge gaps by bringing in expert speakers from business areas such as bid writing, recruitment and HR, fundraising, planning, finance, IT and communications.

Furthermore, as I know from personal experience, being a leader can be a lonely place, and the senior third-sector personnel we work with find the programme invaluable. It offers them a sounding board – a direct line to someone who has experienced similar operational challenges to their own, but without a clock running.

Those delivering the support also get a huge amount out of this peer-to-peer approach – professionally and personally – so it's a real win-win.

### **Broadening your offer to maximise impact**

The success of inspire has also then seen us develop several other programmes. One is called 'infuse', a volunteering scheme for those who want to give something back, and use their skills to help local causes. This is more flexible than the inspire model, and it offers participants the opportunity to help in a more ad hoc way, but still a highly pragmatic one.

And for those who are able to make a difference financially, we

have created a microfinancing initiative called 'invest'. This offers individuals or companies the opportunity to support local social enterprises via interest-free loans.

Once repaid, the cash can be reinvested into another social enterprise, then another, and so on. The money is recycled, while the benefits ripple through the whole community.

Then, we also wanted to help to facilitate a debate among other senior business leaders about how we can all help to create a better world. This has led to the firm's 'Inspiring Leadership' talks: a series of now-virtual events, where innovative thinkers and disruptive entrepreneurs share their views on social purpose and the benefits of doing business differently.

But the biggest venture of all, which I am very excited about, will be a new project we're currently developing to help combat loneliness.

### **Make it matter to everyone**

In order to ensure the work of our foundation is understood and valued we have invested in it. It forms a key part of our business strategy, and my employees can find themselves working within the law firm one moment and for the foundation the next.

Our individual programmes also enjoy high visibility both internally and externally, and their achievements are celebrated across the business just as enthusiastically as our financial successes, industry awards, and other corporate key performance indicators.

To me, it's simple. Social and economic goals are not in

**It forms a key part of our business strategy. My employees can find themselves working in the law firm one moment and for the foundation the next**

conflict and they are both integral to a company's growth.

Businesses like ours do not operate in vacuums, and we owe it to the communities we're part of to use our resources – whether knowledge, time, experience or money – to help the whole of society prosper.

Having a clear social purpose also helps us to attract and retain the high-calibre, committed and loyal employees that have made gunnercooke the success it is today. It brings us closer to our clients – especially those who get directly involved in our foundation – and we also find it's a major differentiator when pitching for new business.

Finally, as we have all witnessed during the recent months, many people have an innate desire to come together in order to help others.

This has convinced me even more that any company lacking a social purpose that is clearly aligned to its commercial strategy will cease to exist in the very near future. ▲







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BRIEFING TIGER TEAM

# Paws for people thought

The second Briefing Tiger Team session with Pinnacle took on challenges from remote people development and resource management to sustainable leadership and maintaining appetite for change. Richard Brent summarises what he heard

In the second of our **Briefing** Tiger Teams, our assembled leaders considered the top management challenges they were now seeing in their roles across the entire firm after several months of lockdown, regardless of specific business function.

It should come as little surprise that people were top of the pile this time – fundamentally, supporting and somehow developing them when the future of so much is still so unclear.

Brian Dunlop, director of strategic pricing at White & Case, recommends: “Schedule enough non-work-related communication to help people feel more connected and included in all things. Obviously, we are losing so much of the face-to-

face dynamic of offices – at desks, in the kitchen, on the way to lunch.”

Karen Jacks, chief technology officer of Bird & Bird, echoes this: “We’ve been very careful to ensure we meet much more regularly to try to replace the use and feeling of some of the ad hoc meetings around office spaces.” At the same time, more formal occasions such as performance reviews have needed some extra thought from her as well. “First, being on video simply isn’t the same as being in a room with somebody. But I think there can also be a tendency for the conversations to drift, particularly toward responses to the crisis and the strangeness of the situation.” There was, of course, significant performance put in by people before mid-March 2020.



It's perhaps an illustration that technology can't fix everything – and Sid Welham, chief operating officer of HFW, also begins with a remote people-development challenge. For him, it's the fact that one new tranche of the most junior employees were walking into offices for the first time only weeks before they were closed.

"When you're new to an office environment, you're picking up information all the time just through being there," he says; teams have worked on virtually recreating some of those dynamics and experiences. And then there's the challenge of officially supervising someone remotely when you've only just met.

Welham adds that while it's true a solid remote-working platform, plus adequate trust, can make for increased personal productivity, it's important to keep an eye on any significant creep in the number of hours worked.

"You need sustainable leadership – an example needs setting to help others to be quite disciplined with their own working days and routines," he says. International firms, managing projects across multiple timezones, might be particularly susceptible. "You don't want the expectation to develop that everybody is at the end of a laptop absolutely all of the time to reply to emails from the other side of the world."

"Considerations around the reopening of offices adds quite a weight to business-as-usual work for leaders, and I think as a leader you also need to have your EQ antennae turned up to an even higher level of listening than normal." But he agrees this is significantly harder to manage from home – that only adds to its importance.

Jacks adds: "You wouldn't be continually available in the office, and I try to encourage my own team to structure their days into working hours as works best for them personally. On the other hand, some locations in the network are already back in the office more regularly than others, and that makes for another management challenge."

### Greater future focus

Welham continues: "We've also had to think hard about how we conduct pipeline forecasting – understanding how busy we are, and in which parts of the business, and how much that is likely to change month after month." It's quite fortunate, he explains, that at the point of lockdown the firm had just started to roll out a new resource-

management framework, "part of which is about getting lawyers to forecast forward more than they have in the past." It's one example of how law firms could take a leaf out of books run by businesses such as the Big Four, he adds: "You really need to know exactly where you're going, especially when trading conditions are so challenging, so that you can potentially flex resource."

"The framework has enabled us to flex geographically, cross-sector, and even within offices. I think it also promotes stronger collaboration, and a richer experience for employees, as people are working with colleagues with whom they otherwise might not. That's good for their progression through the organisation."

Jacks agrees that this area is a likely contender for current project books – it taps into effective team management and development as well as forecasting, she says. "There can be a perception in law firms that you need to be visible to get the good work and, of course, at the moment you can't be. The anecdotal partner casting their eye about for the best person to work on a matter isn't an option anymore."

"Another important area is the development of both partners and associates when it comes to their own business development. We have some technology in place so they can input into that and manage their practice group objectives in quite a collaborative way."

Dunlop adds: "We've sharpened up our focus on closing time quicker, as that also helps to accelerate understanding of how busy our teams are. Time recording has generally not been good in legal, but this was a real success – we halved the time it took in around one week." In fact, that produces another challenge, he says, as performance on any given day suddenly looks surprisingly good compared to last year!

He also says White & Case has seen the same higher demand in some areas more than others. "We're moving some people to help in practices like our top-tier restructuring practice, which is much more busy than last year, as well as exploring allowing some more strategic pricing proposals where practices aren't as busy."

### Certainty principles

Tony Pullman, head of business transformation and chief operations officer at Pinnacle, says cash is just as much the king at his business, as it



**“I try to encourage my own team to structure their days into working hours as works best for them personally.”**

*Karen Jacks, chief technology officer, Bird & Bird*



appears to be at law firms needing to project their future activity and revenues more accurately. “We have many of the same challenges – we record time, chase people on their time recording, and need to ensure forecasting is as tight as possible. Our law firm clients are also asking us for greater visibility into project budgets and delivery updates, so we’ve needed to get smarter at getting that information ourselves.”

Transparency with clients has been highlighted as a driver of change for some time, so what of demand for the information our Tiger firms can potentially open up to clients in a crisis?

Welham says: “Clients are looking for greater certainty in what are clearly going to be challenging times around spend, and you need to manage a balanced view of where you can take out cost. For that you need good historical data about the spend, and the firm is indeed working more closely with clients to deliver greater granularity of that information and use it to propose measures that can provide more certainty.”

Dunlop agrees that this trend had been coming down the track long before Covid-19, however, and the firm is just now rolling out some new technology to enable partners to keep clients updated on actual work done against estimates or caps. He adds: “Where partners have to be really careful is in ensuring an estimate doesn’t become a cap in the mind of the client – that’s where communication is so key.”

While reliable information is always vital for good decision-making, Pullman at Pinnacle says a lesson from lockdown at his business has been to “move a bit faster” than perhaps feels naturally comfortable at times, rather than “planning absolutely everything out to the nth degree.”

“We had to adapt our approach very quickly in terms of things such as support and training on projects, and develop a new toolkit for the times – and I think law firms will also need to be

thinking about training or developing their people toward a similar mindset to keep the momentum behind change this situation has brought.”

Jacks says: “You certainly can’t afford just to stand still for however many months when there’s no international travel – we’ve really had to rethink some aspects of remote project delivery.”

Innovation work also continues, she says: “People have had to change fast to face something they haven’t faced before, and it has made them more willing to give things a go. We’ve just started two proof-of-concepts quicker than we would have in the past, and I think this is the time to start introducing other new things.”

Welham agrees: “You can still have an active innovation process of failing fast in the current climate – not being afraid to fail, being creative – as long as governance around projects is tight enough that costs can’t run away.”

And Dunlop believes there’ll be a significant amount of remote working to manage the various impacts for the foreseeable future: “The devil is in the detail. We’ve done a lot of thinking about the new office space, and the number of desks that can be occupied together could effectively split teams up, which may result in less cohesion than currently.” He’s not convinced it would be valuable to have half the team in an office and half at home for no good reason.

Then factor in the calculation that in one New York building it could take an individual up to an hour to get from the ground to their desk in the first place. “I don’t think the situation is binary, but it would certainly be entirely inefficient to have my team spending hours trying to board trains that are crowded and don’t allow social distancing,” he says.

It sounds as though that new, more nimble legal business mindset – adapting, accepting, questioning and evolving – will be needed for some time yet. ▀



Introducing

# Briefing<sup>^</sup> Tiger Team<sup>^</sup>

**Tiger Team** is a problem-solving approach used to investigate, and hopefully solve, highly critical and complex issues. Experts in a range of areas are brought together from different centres as required by a specific work project or programme.

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Aderant

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# Action on admin

**Briefing's** latest survey, run in partnership with Intelligent Office, highlights some of the big decisions UK law firms have made about their secretarial and admin function in the last six months. Kayli Olson reports

**N**o well-run business can be without the massive amount of support provided by those in secretarial and office admin roles. What has been the impact of lockdown and the pandemic on secretarial and office admin support inside top-tier law firms?

The first big question is 'to furlough or not to furlough?' The majority of respondents (66.7%) said their firm only had to put 0-5% of secretarial staff on furlough. A further 18.5% said they furloughed 20-40%. For respondents who said they worked at a large firm with over 200 secretaries (21.4% of responses) this doesn't sound like too much of an issue. Comparatively, for those firms with significantly fewer secretaries (28.6% of those surveyed said they had between 20 and 50), furlough numbers carry more weight in terms of percentage – this could perhaps explain the significantly higher rate of furlough in second place, albeit at a much lower response rate. Overall, these numbers suggest that the secretarial function

wasn't too badly hit by the effects of lockdown.

That being said, the majority of respondents were unsure as to whether there would be a permanent reduction in the number of FTE secretarial and office admin staff in the firm (39.3%). This wouldn't necessarily be too worrying if not for the next largest number of respondents (at 21.4%) saying that it would be 'likely'. Though this is followed by 17.9% of respondents giving a hard 'no' to any permanent reduction of secretarial and office admin staff. Answers to 'yes' and 'unlikely' both saw 10.7%.

Perhaps the secretarial and admin function may indeed have a rocky future ahead if you look at responses to how Covid-19 has impacted plans (graph p29). 'Moving secretarial and office admin staff to more fully flexible working mode' and 'reducing individual support for partners and fee earners' were the two areas where the majority of respondents said they were 'reshaping plans'. Might we see new innovations in the secretarial and admin roles as we work toward a new normal?



## Careful measures

This is also especially interesting when compared with results about how effectively firms said they could track the productivity of secretarial and office admin staff while they were working remotely (see graph below). There was almost a 50/50 split in responses saying this was the ‘same as in the office’, or ‘less’ so. Only 4% said that tracking productivity of admin staff was ‘better than it was in the office’.

Louise Hadland, HR director at Shoosmiths, says: “The critical question here is what are we measuring? Many employers continue to describe their job roles and measure success in terms of inputs and required, historical qualifications. Defining what you want an employee to achieve, being able to describe the purpose of a role and how it adds value is more difficult but if home/remote working is here to stay then it’s time to pivot and put the work in. When there is a clear understanding of what’s needed from an employee then we can build the measures and development to support those outputs. There’s an old saying ‘what gets measured gets done’ – and investing time now to define what you want to measure will reap dividends later in terms of easier supervision and employee satisfaction.”

Clearly, the productivity ‘problem’ isn’t so easily isolated – being able to track productivity doesn’t necessarily equate to actually being productive, which is what makes this all so difficult to pin down. And, certainly, the effects of Covid-19 itself on productivity have been mixed.

Penny Newman, chief people officer at Lewis Silkin, says it’s important to recognise that everyone’s lockdown experience was different. “We’ve operated a model that is based on trust. Because many of our people have childcare and home-schooling responsibilities, they’ve had to find ways to manage work around their other commitments. We asked people to let us know if they were struggling and took steps to support them.

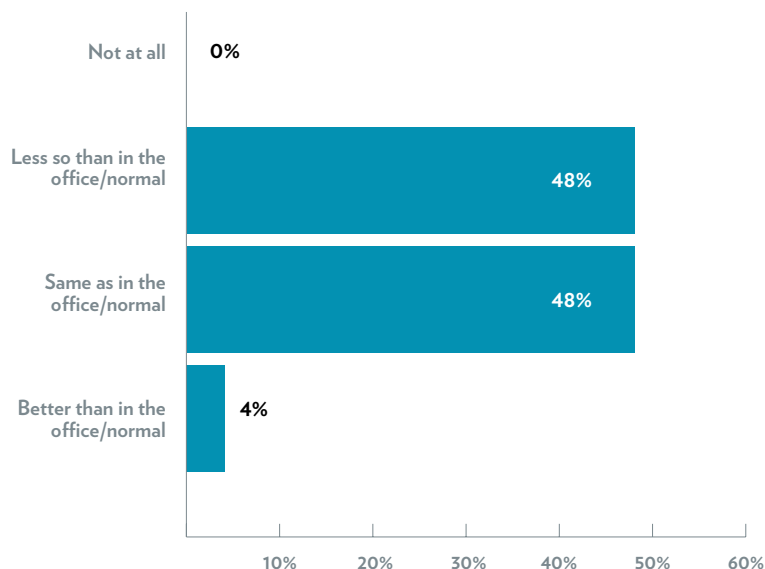
“We increased the frequency of our internal employee engagement survey and asked specific questions around support and productivity. Some felt they were more productive, but they tended to be those staff who did not have childcare or caring responsibilities. When schools open in September we expect this to change. Constant engagement and dialogue with our people are key to overcome any challenges faced.”

When it came to joining up fee earner and

**“We increased the frequency of our internal employee engagement survey and asked specific questions around support and productivity. Some felt they were more productive, but they tended to be those staff who did not have childcare or caring responsibilities.”**

*Penny Newman, chief people officer,  
Lewis Silkin*

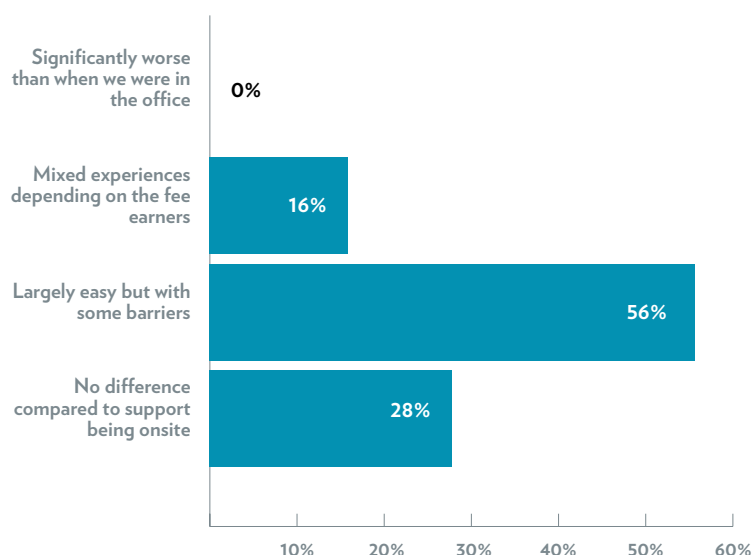
**How effectively can your firm track the productivity of secretarial and office admin staff while they are working remotely?**



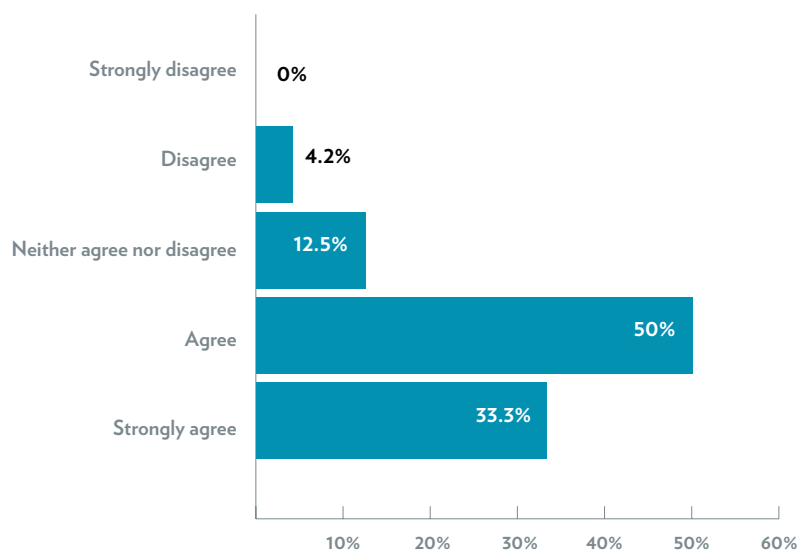


For more information, visit:  
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**Can you rate the level of access fee earners have to secretarial and other admin support when everyone was at home (try to discount difficulties faced by any furloughed staff)?**



**To what extent do you agree with the following statement: 'We have the infrastructure/tools to manage the delivery of secretarial and office admin services when they are largely based at home?'**



secretarial staff collaboration while working remotely, there wasn't too much difference in how firms worked when their people were mainly onsite (top left graph). Responses show that the majority of fee earners have a good level of access to the support staff they need, bar some barriers (56%). A further 28% said there was no difference, at all, to when people worked onsite.

With work levels in some areas remaining below last year and the level to which most firms will have matched their support resource, Hadland at Shoosmiths says it's difficult to establish whether support resources are pitched at an optimum level. "And we've already seen support staff redundancies in some firms. If support numbers do reduce then it's even more important to think about the processes behind connecting fee earners to their support teams. Fee earners will need to be more organised in the way they manage their workloads, not leaving tasks to be completed by others to the end of the day, and adhere to standard practices to enable support staff to be at their most efficient."

Newman at Lewis Silkin says: "We've not had complaints about access to support. Naturally some things now take a little longer, especially where third parties are involved, but people have generally adapted their working styles and practices to account for this – and support across the firm remains as was. As with most things during lockdown, good two-way communication between relevant groups is key."

While firms may be understanding of delays and less support during lockdown, as pressures begin to rise it may not be sustainable in the long term, Sam Nicholls, head of business development at Intelligent Office, points out.

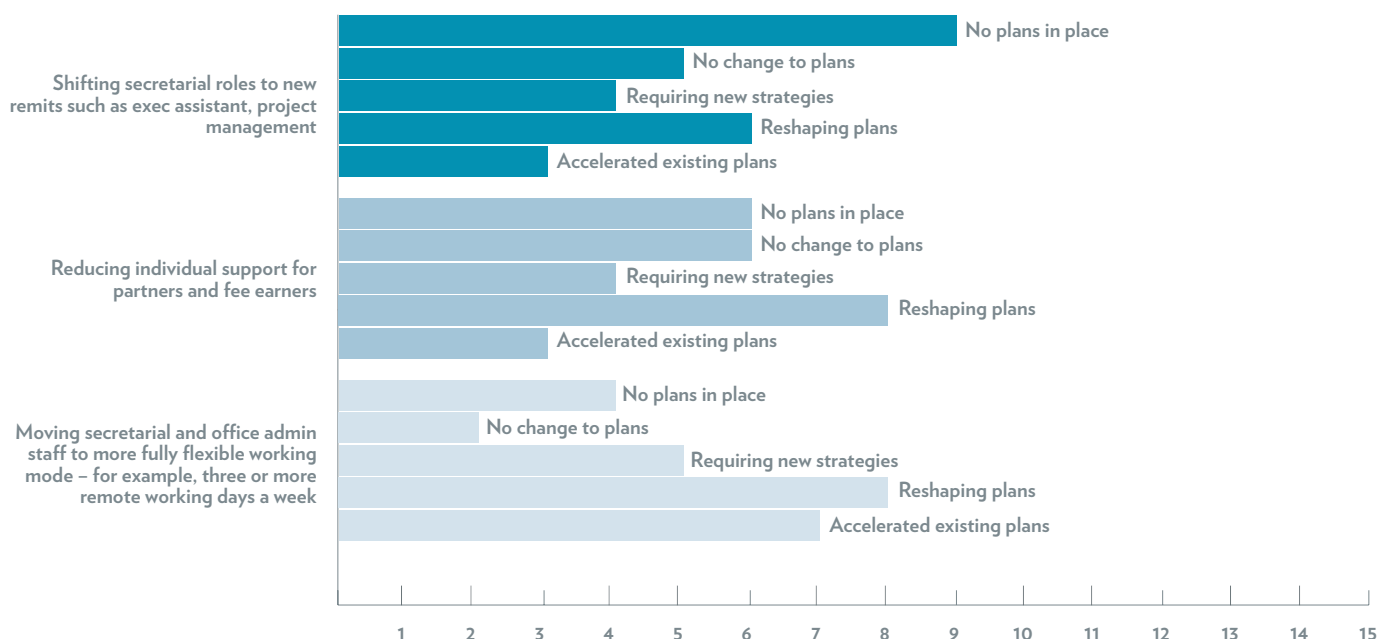
### Tech in or tech out?

Not surprisingly, an overwhelming percentage of respondents agreed or strongly agreed that they have the infrastructure/tools to manage the delivery of secretarial and office admin services when they're largely based from home, at 73.3% (lower left graph). But this doesn't mean there isn't room for improvement and growth. Darren Mitchell, chief operating officer at Hogan Lovells, says: "Most things have worked well without our lawyers and secretaries being located together in the office."

For example, he says, processes like billing have proven more efficient – but at the same time the lack of proximity is highlighting the need for enhanced workflow tools to ensure that the right tasks are allocated to the right individual, "something we were already focused on before the pandemic."



**Pick answers that match how Covid-19 has affected the following change plans  
(total responses)**



Newman adds that good connectivity is the key. “Everyone at Lewis Silkin has the same kit – and we made every effort to ensure office equipment was couriered to our people so that their home setup was as comfortable and practicable as possible. But not everyone has access to reliable high-speed broadband. Some of our people have moved back to the office as soon as they were able because of their issues with connectivity.

“We’ve found that most people have been able to manage. Tech moves fast, however, and as the period of working from home extends, we’ll continue to review our tech setup to make sure it matches the needs of our people and the requirements of our business.”

Hadland at Shoosmiths also stresses the importance of staying on top of tech. “Existing technology has delivered a great result for most in terms of managing through lockdown. And while technology will be developed and enhanced over the next couple of years to better facilitate remote working – VR is bound to take over from Zoom before long – as the survey suggests, the tech is good enough.”

But, she adds, such developments will be wasted unless ‘how’ it is used also changes. “There are three critical points at which remote working is likely to fail: inadequate supervision, inability to performance manage or inability to build an online brand and sell/market from that platform. Failure at any or all of these points is likely to see managers demanding staff come back to the office where they can ‘keep an eye on them’.

**“Design thinking is being extensively employed for client needs but it’s just as important to consider new ways of working effectively intra-firm between fee earners and support staff.”**

*Louise Hadland, HR director, Shoosmiths*

“If we try to overlay old working practices over remote, tech-based working we will fail. Design thinking is being extensively employed for client needs but it’s just as important to consider new ways of working effectively intra-firm between fee earners and support staff.”

And, Hadland says, it doesn’t need to be complicated, just considered and consistent – fee earners need to spend the time properly supervising their support staff. She says time invested here will reap dividends for staff and clients alike.

Nicholls at Intelligent Office says the varied responses to the survey point to the wide range of experiences that law firms had during lockdown. “Many firms have coped well during the crisis management phase of the pandemic. In the longer term, there remain significant operational and people management challenges ahead, particularly as demand increases, alongside a clear opportunity to use the positive lessons learned during the lockdown to introduce transformative operational change.”



## INDUSTRY INTERVIEW

# The collaborative contract

The integration of the artificial intelligence and data visualisation powers of HighQ and document automation of Contract Express can support new process and collaborative change for law firms that neither system could manage alone, say Chris Kitchener and Cassi Waddy at Thomson Reuters

**T**he circumstances of Covid-19 have spectacularly brought the importance of wide strategic investment in technology to enable more efficient working to the fore – and one of the areas where this will be most keenly felt is how teams collaborate on complicated projects. After all, anecdotally managers have widely reported that individual productivity soared during lockdown (albeit with some question as to whether people may in fact be working significantly longer hours than before). But with teams split up for months on end, potentially even longer depending on how different factors play out – granted, frequently connected by a Zoom or Microsoft Teams occasion – how effective are the mechanics of meaningful, outcome-focused collaboration that might make everyone's lives a little easier?

Chris Kitchener, vice president, product management, at HighQ – which was rapidly acquired by Thomson Reuters just over a year ago – says that the goals of both players were highly aligned at the time, and only became clearer in the context of working through the pandemic. “Our mission was, and it remains, to radically transform the way both law firms and corporate legal departments work and engage, internally and with their clients.

“Covid-19 has clearly focused everybody more on ideas about what it means to work digitally, and

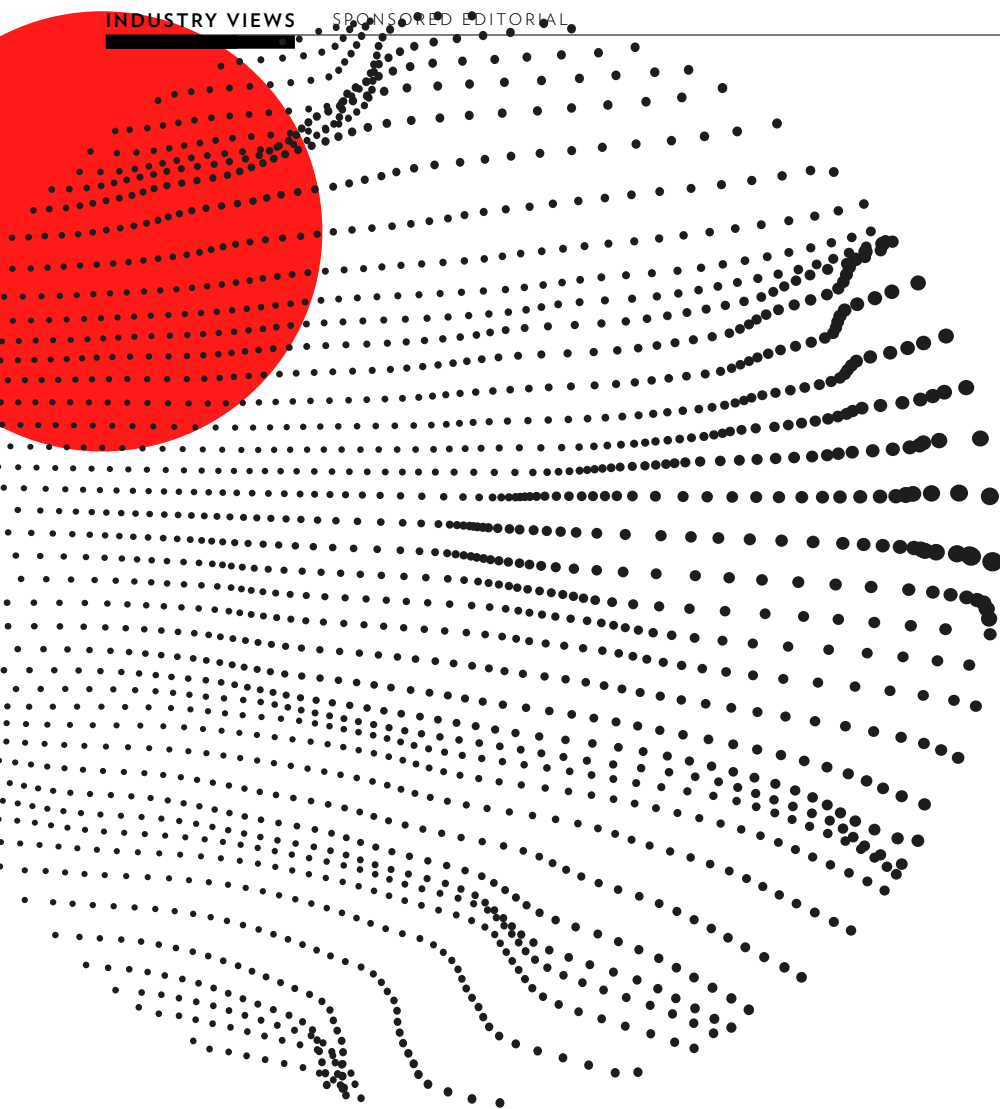
for law firms that includes how they can best plan, execute and manage that work.” HighQ is, of course, a solution designed to help people in law firms to access and share files, data, project progress and insight in a more joined-up and valuable way to grow healthier client relationships, including through demonstration of the greater efficiency such a repository can generate. Cost predictability and control for clients, effective engagement with those clients and new prospects, and effective visualisation to guide actions and improve decisions are all key drivers at play.

## New possibilities

In its latest release HighQ 5.4, Kitchener says, a big step change with respect to all of this is the level of integration it now has with the longstanding document automation solution Contract Express. Firms can expect many opportunities to see and do things differently as they manage workload to deadlines and create new channels for stakeholder collaboration.

He continues: “There are things that you can do now that were not possible with either of the solutions on their own. These centre on things that people in law firms or legal teams often do every day, but which are now easier to get done.” For example, a questionnaire form filled in to create a new document, such as a non-disclosure agreement, will now automatically create both a





series of tasks and sub-tasks that need to be assigned to people (review, for example) and immediately kickstart the creation of the contract itself.

Cassi Waddy, director, product management at Thomson Reuters, explains there was an integration between the two products before the acquisition, but lawyers then still needed to move between them. Here we have HighQ document automation, powered by Contract Express, as a “cohesive capability within one solution,” she says. “We had feedback from the market that it was great that they talked to each other, but it would be better to work with the two together in the same place.” At the most fundamental level, that “single user experience” is an efficiency itself, of course.

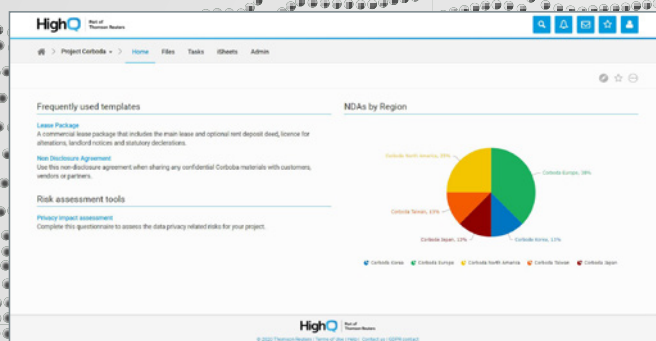
She continues: “All Contract Express documents are now housed within HighQ and, importantly, contract lifecycle and performance data also sit alongside project management data for a fuller picture of pieces of work. It also means that HighQ users can generate suites of ancillary documents for the first time, and allow their clients access to templates in HighQ to generate their own

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**“All Contract Express documents are now housed within HighQ and, importantly, contract lifecycle and performance data also sit alongside project management data for a fuller picture of pieces of work.”**

*Cassi Waddy, director, product management, Thomson Reuters*





The screenshot shows a 'New document from template' window in HighQ. The window title is 'New document from template - Non Disclosure Agreement'. It contains a form for 'General Confidentiality Questions' and a preview of the document. The form has three questions: 'Who will be disclosing information?', 'For how long will information need to be disclosed?', and 'What's the purpose of the disclosure?'. The preview shows a 'CORBODA MUTUAL NON DISCLOSURE AGREEMENT' document with two main sections: '1. Confidential information' and '2. Purpose of Confidential Information'.

**“What matters most for a lawyer is finding the information they need, when they need it, to make great decisions, while avoiding unnecessary work.”**

*Chris Kitchener, vice president, product management, HighQ, Thomson Reuters*

documents.” At the same time, corporate legal departments can explore new document workflow efficiencies of their own, such as surrounding approvals. “A non-standard element in a client contract can automatically be routed on to the business’s legal team for approval, whereas an employee could be enabled to create something more standard for themselves,” she explains. In a scenario like that, compliance now isn’t in the position of being the bottleneck, which can often be the case when a queue of documents builds up for review.

### Insight in time

As well as the synergies of a single system, and leveraging automation for process efficiency, Kitchener is particularly enthused by the way HighQ 5.4 now enables vast amounts of data to be viewed in new ways. “Whenever we create a new Contract Express document in HighQ, data about it is squirreled away into i-Sheets,” he says. This can subsequently be recalled, meaning that somebody could easily compare the periods of different NDAs, for example. “What matters most for a lawyer is finding the information they need, when they need it, to make great decisions, while



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avoiding unnecessary work that takes up thinking time. We hide the complicated bits, and surface the insight at the right time.”

Readily available information is also important for effective collaboration, among teams internally and with clients. HighQ is organised into ‘sites’, which might be one ongoing matter or a wider project. A site will typically include lists of activities that are involved, the people associated with them, files, blog posts and more, explains Kitchener – perhaps also some financial information about progress taken from the 3E practice management system.

“There are many things you can build, which is already very powerful, but customers told us what they really wanted now was the option to create different landing pages for different groups of people.” One page might contain confidential information, for example, where another only displays what the client most cares about – and this is another new feature in the latest release. “The firm can assign specific user groups, who can then add tasks and files, comment and do versions, audit history, and various other things to collaborate.”

Waddy adds: “On its own, Contract Express is a point solution for document automation, but integrated with HighQ you can co-author, you can open in Word online directly, work and save a new version. Even a small change like that – it wasn’t possible before – creates a big collaborative benefit.”

She also highlights the efficiency boost to document work firms can expect thanks to HighQ’s artificial intelligence engine. This means that you can take a template and kickstart hundreds of new contracts in the case of something like a repapering. “They appear there in somebody else’s folder in the same collaborative workspace, ready for review,” she says.

And Kitchener singles out an example of where AI applied to files or i-Sheets powers data visualisation for more proactive decision-making – there’s a new ‘contract deviation’ display, for example, which shows how closely lawyers’ subsequent contracts resemble a standard template. “We need contracts to be completed quickly and efficiently, but critically also

**“It’s when we can give people an instant insight it might otherwise take hours or days to uncover that we most empower law firms and legal teams to manage to change.”**

*Chris Kitchener, vice president, product management, HighQ, Thomson Reuters*

accurately,” he explains. “If something deviates from the standard significantly, the chances are somebody is doing something wrong or negotiating badly – either way, it’s costing money.” So, HighQ 5.4 displays a set of these deviations at a glance, and the user can drill down into the details of any one in particular to investigate further. He says: “It’s when we can give people an instant insight it might otherwise take hours or days to uncover that we most empower law firms and legal teams to manage change.”

He’s quick to add that this is only a relatively quick taster of many, many enriched use cases that are there to help firms on their digital journeys in an unprecedented year of change.

“Law firms are generally somewhere on a maturity curve when it comes to digital transformation. It begins with a client intranet and file-sharing, but as you demonstrate more of the things this solution can do, one of the most valuable aspects is the appreciation of how they’re all connected, and the further connections and insights that enables within the firm.”



## INDUSTRY CASE STUDY

# Financials first

Jeremy Gubbay, chief operating officer and partner at Fox Williams, explains why his firm has become the first in the UK to get heads around 3E Cloud from Thomson Reuters

**I**n June 2020 it was announced that Fox Williams would become the first UK law firm to switch to 3E Cloud from Thomson Reuters, the new software-as-a-service version of the well-known financial management solution that runs on the Microsoft Azure platform.

Chief operating officer of this £28m-revenue, 35-partner firm, Jeremy Gubbay, explains that on one level the driver of this significant investment was quite simple – there was no alternative to finding something new. “Our current system is at the end of its life in 2021, so without a new one we simply wouldn’t be able to run the practice,” he states plainly.

“However, while we don’t have the scale of resources of some of the larger firms, we are keen to innovate and invest in new technology where it’ll add value by making us more efficient or competitive than others. In 2019, we transformed our infrastructure and support for mobile working, and this move also fits into that category. At the same time, we need the result to be a very big step up for the large investment in time and effort to be worthwhile.”

## Profitability motive

The most significant area he’ll be looking for that return, he says, is new visibility of financial information. “I see huge benefits in our partners having a deeper dive into finances – all the different drivers of work profitability, both firm-wide and on individual matters.” The dashboards available through 3E Cloud promise to push metrics into many more displays to aid profitability analysis, where currently the firm still relies on working such things out in spreadsheets. “With a better understanding of where we make or lose money, that can only make us more efficient,” he says.

Needless to say, this could be particularly useful for navigating the economic climate of the next few years. The city-focused firm covers quite a few bases – corporate, financial services and technology, but also partnerships, natural resources, travel and fashion, requiring a disciplined sector-focused strategy. Gubbay continues: “We also spend a lot of money on marketing, but can’t always attribute it as well as we’d like to the return in terms of clients or sectors. We should be able to be more granular there as



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**“I see huge benefits in our partners having a deeper dive into finances – all the different drivers of work profitability, both firm-wide and on individual matters.”**

*Jeremy Gubbay, chief operating officer,  
 Fox Williams*

well, and put more BD and marketing spend into the areas that make most sense.”

The cloud is in fact a secondary factor. Even though the firm has several other systems hosted this way, including client relationship management, he says each is considered on a case-by-case basis rather than this representing a ‘cloud-first’ strategy. “The advantage is the scalability. I don’t need to worry about painful upgrades, and it’s very easy for additional users to be signed up. It made sense for this product, but we would have gone with the 3E on-premise solution as well.” On the other hand, the choice of cloud here was a “short conversation” with

stakeholders, he adds. “Previously putting our email in the cloud was a much longer conversation about security, as you’d expect.”

He says he’d also rather a supplier was managing the system than be dealing with it in-house with the help of the firm’s outsourced IT provider. “Inevitably, anything very challenging needs to go back to a supplier to look at in any case – so it might as well deal with everything.” But in terms of workload efficiency, he says it’s accounts and administration roles that stand to gain the most. “We expect improved workflow will transform both the billing and credit control functions – for example, providing automated reminders about outstanding debt, which is still a manual process at the moment.”

### Time of the essence

The system Fox Williams is replacing is itself a Thomson Reuters one, but that didn’t make the choice of successor a foregone conclusion, says Gubbay. A meaningful list of six solutions was reduced to two, after which followed many workshops and presentations. And in the event, a key deciding factor was the timescale Thomson Reuters would work to in implementation – essentially, less than a year from the point of agreement.

“We’ve a fairly small team, and I didn’t want this to take 18 months,” says Gubbay. “A short, sharp project really appealed.” The intention is to be complete and have some breathing space in time for the firm’s 2021 year-end in April. “Of course, Thomson Reuters also understands our current system well, so the migration may also be more efficient.”

Does he anticipate any impact from the circumstances and uncertainty surrounding Covid-19? “There’s nothing like being in a room together for serious discussion, but our workshops on Microsoft Teams are working well. I did go back to the board to discuss whether the investment was still a comfortable one in light of lockdown, but it turns out the business has still been doing well financially in the recent period. We also have the foundation of an excellent relationship with Thomson Reuters to build on. Its senior management have been really attentive and open to our feedback, and any frustrations are quickly handled. I feel we can call a spade a spade with them, and am confident that can continue throughout the project.”



## INDUSTRY ANALYSIS

# Listen and level up

Leverage practice management system-independent apps to deliver the best in client service, says Derek Schutz, product manager at Aderant

If we are being honest, most people do not really want feedback. They prefer praise and recognition of a job well done, and any criticism puts them on the defensive. We could invoke an inspiring quote here from a great leader about receiving feedback, but instead we feel compelled to pose a question – do you have a fixed mindset or a growth mindset?

A person with a fixed mindset dislikes service level agreements (SLAs) or outside counsel guidelines (OCGs). Whereas a person with a growth mindset not only embraces them, but also welcomes the opportunity to service their clients and communicate about expectations.

Client listening is another way of being open to client feedback, and for years clients have been providing this feedback in the form of SLAs/OCGs. Similar to customer service, client listening is not an end product. It's a mindset and an attitude. Instead of fighting and complaining about SLAs, firms should embrace them. This will make for happier clients, which increases the odds of winning more clients, which translates into increased revenue.

So, how does a firm begin to comply with SLAs? Start with your technology stack and think beyond your main practice management system (PMS). SLAs are prevalent throughout a typical billing cycle, both upstream and downstream. Your PMS

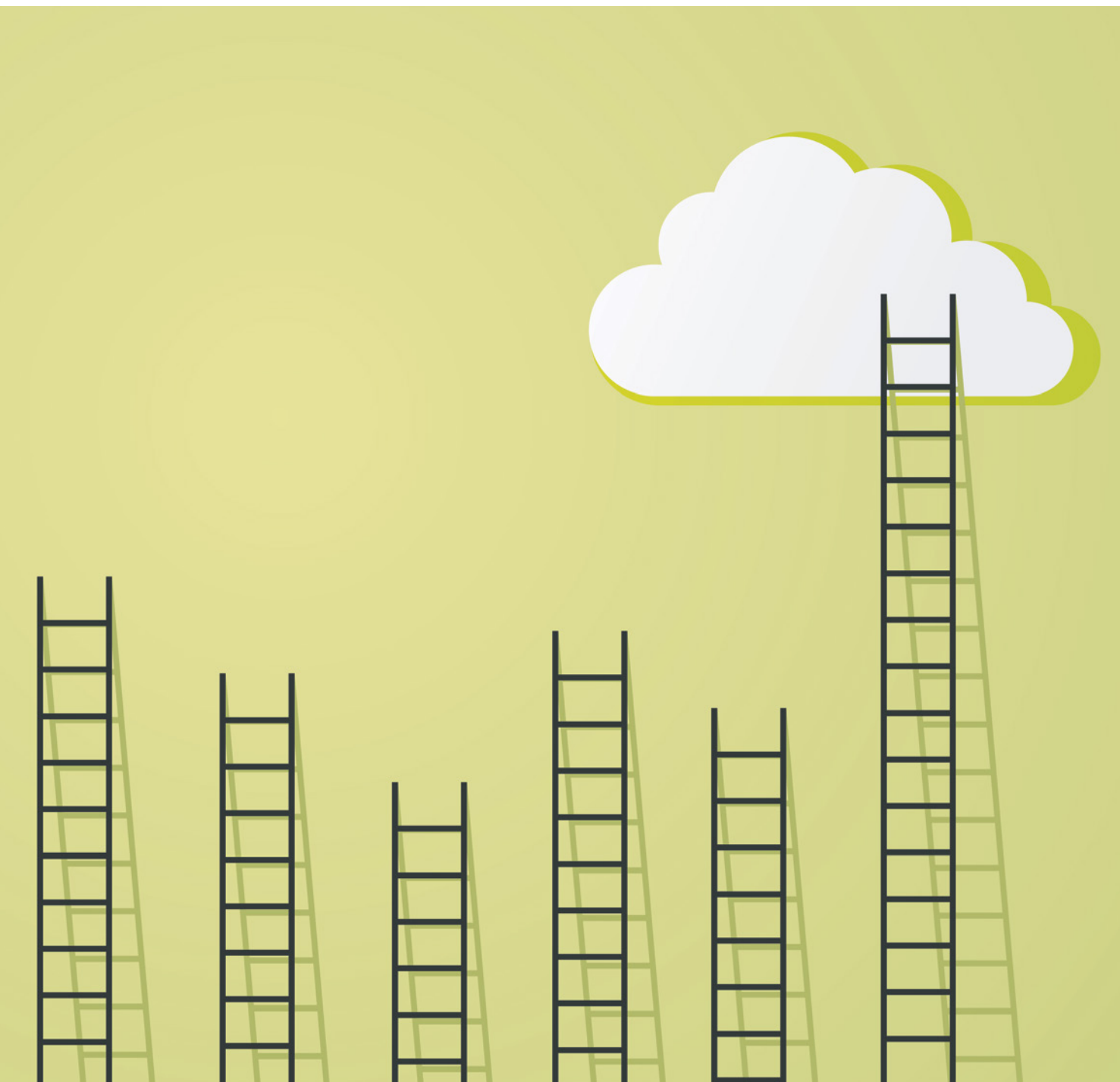
may natively incorporate SLAs, but if it does not, you have to think of your entire technology stack as an interdependent ecosystem to get beyond your current status-quo rut.

Luckily, there are many options for law firms, regardless of the main PMS they're using. We refer to them as 'PMS-independent' or 'PMS-agnostic' products, which means they are compatible, and seamlessly integrate, with every major PMS on the market. Choosing best-in-class options for these different functionalities does not have to negatively affect the relationship with your PMS vendor. In fact, these vendors should encourage you to get the most out of your technology, regardless of who makes it. At the end of the day, these products can have a tremendously positive impact on the day-to-day lives of the lawyers, partners and other employees at your firm. They also help to alleviate the stress of compliance with SLAs, so it is a win-win-win scenario.

## Compliance upstream

So, with that said, where should you start? The easy answer is that compliance with SLAs should start at the beginning – the point of time entry. If time entry is delayed, non-compliant or inaccurate, it's the first in a line of dominoes that will quickly veer off track down the line. Taking steps to improve the process from the outset can eliminate a host of problems before they begin.





Imagine being able to capture your time as it is being worked, with either the push of a button on your smartphone, or even through voice command. All the research from the past 100 years says the same thing: improved timekeeping increases revenue – and that’s why iTimekeep is the most downloaded time-entry app in the legal industry. It can be used securely on either desktop or mobile device to allow for contemporaneous time entry, no matter where you are.

A small investment in iTimekeep can translate into immediate return on investment, with accurate time entry, shorter billing cycles, fewer billing errors and quicker payments.

**Compliance with SLAs should start at the beginning – the point of time entry. If time entry is delayed, non-compliant or inaccurate, it’s the first in a line of dominoes that will quickly veer off track down the line**





**The perception clients are just trying to pay less for the services you provide is a myth. Clients are just asking you to provide accurate accounting of what is being done and what they are being billed for**

Moreover, iTimekeep's companion, OCG Live, takes timekeeping to the next level. OCG Live is equipped to house each client's unique SLAs right inside the software, to alert a lawyer when his or

her time entry is non-compliant. If the lawyer is notified of a non-compliant entry, they can correct it then and there.

This commitment to compliant time entry makes for happier clients. After all, the perception that clients are just trying to pay less for the services you provide is a myth. Clients are just asking you to provide accurate accounting of what is being done and what they are being billed for. So, iTimekeep with OCG Live can be a game-changer in your firm as it relates to the relationships with your clients.

### **Transparency and collaboration midstream**

As work with various clients and matters takes place throughout the month, clients have also been demanding transparency into things such as budgets, and year- or month-to-date spend against retainer. They have asked for more efficient methods to share confidential documents, such as discovery and contracts. They want to know they





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have a way to review and share information easily and securely, and the best way to facilitate these requests is by providing a secure collaboration portal they can access at any time.

This technology has existed for a while, but until now it was only cost-effective for the largest or most sophisticated clients. Aderant Drive, a PMS-agnostic solution changes that. Not only are these client collaboration portals secure, they are scalable and easily replicated so you can provide this service to every client.

A client that wants to know the status of a filing, or to see the latest version of a brief, or to know when paperwork has been signed, should not have to wait until the next meeting to know. Nor should they have to make a phone call or wait for an email to be answered. Aderant Drive lets a client know the status as soon as it is ready.

### Compliance downstream

You will never have clean bills in the end-of-month billing cycle unless improvements are made upstream. So, if you have solved the upstream compliance issues, the billing process will be a breeze, right? Not quite.

For the shrinking number of clients that are still accepting paper bills, yes, the process should be much easier. But as clients move increasingly towards e-billing, you have a new set of compliance issues, with each client spend-management platform having different rules and quirks, not to mention the multiple logins needed to see the status of payment.

BillBlast aggregates all data from the multiple client spend-management platforms, and puts it into one convenient dashboard. This not only shows the status of payments, it also alerts the billing team when an e-bill is non-compliant, along with the reason for that. Often, unless they happen to be in that particular platform, looking at that particular e-bill, a billing team might not even know that an e-bill is non-compliant or late. BillBlast eliminates the guesswork.


Perhaps most important, however, are the

**A client that wants to know the status of a filing, or to see the latest version of a brief, or to know if paperwork has been signed, should not have to wait until the next meeting to know. Nor should they have to make a phone call or wait for an email**

analytics provided by the BillBlast platform, which can show trends and historical data about the clients, spend-management platforms, and indeed the lawyers who have a greater tendency to see late payments, or write-downs/write-offs. BillBlast provides actionable data to address, and correct, situations in future.

### Client relationships

We appreciate that SLAs can be painful, and are becoming increasingly complex, but that is not changing anytime soon. As such, our recommendation is to embrace them as an opportunity to listen to your clients, and so to strengthen your relationships. Client listening is a way of building trust and responding to client needs, and it will cement your place as a valuable partner, rather than simply a vendor.

Providing best-in-class solutions to address pain points within your firm is a small, but important, investment that will pay off in both the near term and the more distant future. It will not only improve the firm internally, but also show your clients you are listening to them. Aderant's PMS-independent solutions are focused on increasing revenue through enabling compliance, transparency and collaboration between law firms and their clients. 





#### INDUSTRY CASE STUDY

# Sense of self-serve

Williams Lea supported Clyde & Co to make a significant strategic transformation to a core business process just before lockdown in the UK, giving chief operating officer Paddy Linighan confidence that further could follow in a more agile firm-wide future

**S**everal law firm leaders have said to **Briefing** words to the effect that the last couple of weeks of March 2020 saw about as much business transformation as they had been expecting to manage over the next couple of years. For Paddy Linighan, chief operating officer of Clyde & Co, it also coincided with a particularly crucial period of just five days.

That's when the firm made the switch over to having all inbound mail digitised and distributed daily to UK fee earners electronically as standard, through a service provided by Williams Lea. Digital post room facilities for this purpose, plus reprographics, were established in the firm's Manchester, Edinburgh and Guildford offices, covering all UK offices. And although moving to

increasingly paper-light ways of working – and this project, of course – was fortunately already on the strategic roadmap coming into 2020, the looming of lockdown certainly injected some urgency to be up and running.

“Clyde & Co had previously been quite traditional, with physical post rooms onsite in each office,” says Linighan. “We were already working towards becoming more agile, but the pandemic has accelerated the plan. Williams Lea, having worked with the firm for a number of years, was able to mobilise very quickly in March, and we're extremely pleased with the results of our collaboration.

“Our people now only deal with inbound post that has first been digitised. Documents are scanned and reproduced electronically, and they



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**“Our people now only deal with inbound post that has first been digitised. Documents are scanned and reproduced electronically, and they know that it will be available, and where to access it online, each day.”**

*Paddy Linighan, chief operating officer,  
 Clyde & Co*

know that it will be available, and where to access it online, each day.” An email notification is sent, with a separate process for any items that aren’t referenced, he explains.

“The enforced working from home that we’ve seen isn’t permanent, but we were pleasantly surprised by how quickly we’ve been able to adapt to it. It has also been quite a welcome realisation for the majority of our practice groups that they can indeed work efficiently with support from our business services functions remotely.”

He adds: “One reason that the transition has been so smooth is the social and cultural capital that has already been built up within teams over time.”

Consideration of longer-term changes to ways of working will need to include safeguarding those human bonds, but the experience with Williams Lea has provided greater confidence that further change is possible, supported by reliable process and technology.

### Another level of agility

For some fee earners accustomed to having their “PA and Post-it note approach”, there’s also something of a mindset shift to manage “from served to self-serve,” admits Linighan. The firm’s learning and development team has also been involved on this front, producing short virtual training courses (plus a little retraining) to help with navigation of the new post system and where to store things, for example. Nevertheless, the firm saw individual productivity increase during

lockdown in the UK, with the period up to the end of April in fact proving one of its very busiest. “We’re monitoring so as to avoid extreme spikes, as some pockets did rise quite quickly,” says Linighan. “It’s important to be mindful of potential isolation, and the wellbeing of our people and our clients comes first in our plans.”

On the point of unifying culture and values, he adds: “To all intents and purposes, Williams Lea people are also our people. They’re fully embedded on our sites, and are treated no differently.” Regular lines of communication between the two ensures that management policies are aligned. The firm’s head of facilities meets with his counterpart weekly, and Linighan catches up every month himself: “We spend a lot of time talking about what’s happening on the ground.”

He now sees strong potential to build on this foundation, tested by a crisis, as the business continues its transition to an even more flexible and agile organisation. There are, of course, several different shades of ‘hybrid’ working models that many firms are exploring. Clyde’s employee survey, carried out as lockdown was starting to ease, found 85% of people reporting they had coped well at home, with 90% expressing a wish to retain at least a proportion of the remote-working pattern and benefits.

“Williams Lea has also successfully demonstrated that you don’t need to directly control every single aspect of service in-house,” says Linighan.

“The way the team has consulted with us this year has proved what it can deliver in one of its core areas.” So the management team is now exploring possible opportunities for introducing greater process efficiency in some other areas, such as linking the digital post room service to the case management system and managing some parts of document production.

This will be alongside re-evaluation of potential for change right across the global network, he explains – for example, following the successful launch of its shared service centre in Kansas City. “We will be seeking to establish regional hubs, which will provide fast, efficient and cost-effective services to our global practice groups. Consistency is very important, and the IT team is also focused on supporting all locations to move to the same technology standards.”



## INDUSTRY ANALYSIS

# Relationships under pressure

Alan Mercer, legal industry director, Introhive, says accurate information about the strength of client relationships will be critical to managing business development through the changing Covid-19 landscape

**I**t's no secret that relationships are a critical component of the legal services industry. In fact, it could be argued that the management, maintenance and growth of relationships is as important as a lawyer's technical abilities in legal matters. It's why law firms of all sizes commit an abundance of resources to relationship-building and client-appreciation activities. But, in today's world, the simple truth is it's often not enough.

Traditionally, the business of relationship management was limited to one's Rolodex and a handful of business cards. Today, though, technology allows us to keep track of these relationships better, to manage outreach more effectively, and to ensure that client connection happens at the right time. With the Covid-19 pandemic cancelling events and changing the way we do business worldwide in 2020, there has never been a more challenging time to understand how to manage and protect a firm's relationships.

In early August, Adam Soames of Hogan Lovells joined Introhive's Alan Mercer and Lindsey Elliott of Savills Investment Management for a **Briefing** 5P webinar to discuss the processes behind strengthening relationships – especially amid disruption. This informative conversation unearthed many nuggets of valuable advice and shed light on the ever-changing playing field for law firms seeking to win and retain business.

The legal services space has, of course, always been a competitive one, and when firms are unable to compete on price, the importance of delivering

added value cannot be overstated – this, at a time when the commoditisation of legal services is increasing, and more and more businesses and individuals seek to cut costs and reduce overheads. While the hiring of law firms was historically based almost entirely on relationships and long-standing histories, this process has shifted in recent years. Think of your own business development. Has there been an increase in the number of requests for proposals (RFPs) or tenders for legal services panels? Perhaps you've even been asked to compete on an RFP for an existing client in order to keep their business.

Increased use of RFPs can be traced back to the 2008 financial crisis, when organisations re-examined their expenditures closely and looked to do things differently when it came to legal spend (among other things). Many of your clients are now likely to have procurement departments to manage the purchase and final selection of everything from office supplies to legal services, accountancy and beyond.

When new clients are won via RFP, there's a good chance you have a limited relationship with the client early on. This makes it even more important to establish strong partnerships from the start. But the importance of establishing, protecting and growing relationships is no less important when it comes to your existing clients – especially in today's global economy. In the Covid-19 pandemic, we've seen many organisations execute large-scale furloughs and cut costs by cancelling contracts or neglecting to





## When new clients are won via RFP, there's a good chance you have a limited relationship with the client early on. This makes it even more important to establish strong partnerships from the start

renew. If history is seen to repeat itself, it's likely that businesses will also seek to reduce expenditures to ride out the financial impact of the pandemic, making it exceptionally important for firms to deliver value through true partnerships at this time. But how?

Speaking with law firms' business development teams, we find a common theme to emerge has been the importance of finding and relying on the right technologies for client outreach and relationship management. With the appropriate tools in place, firms can establish the right processes, ensuring their outreach is targeted and calculated and that it delivers value to their clients.

While many firms may have worried about the adjustment to remote work, Soames explained Hogan Lovells was pleasantly surprised by just how well teams coped with the shift, explaining that engagement has been at an all-time high. He went on to detail how the firm's investment in technologies like Introhive has enabled it to monitor, measure and develop client relationships. More importantly, the way the firm has engaged with clients has changed during these virtual times – and with positive impacts, thanks to proactive outreach and an empathetic approach.

More than ever, law firms are now seeing value in having access to the following information,

which Introhive can quickly deliver:

- An accurate list of every company with which the firm has a current relationship.
- Accurate contact records for your contacts at every one of these companies (and all with an email address).
- Your relationship strength at both individual and company-to-company level (and who has the relationships with whom).
- A breakdown of where these contacts fit into the company from the point of view of seniority and role.
- A record of every email exchange and meeting in the past six to 12 months, as well as moving forward, and who has been involved on both sides.
- These insights sent to your people by email on demand, or when they are about to interact with a company.

Capturing and maintaining accurate data on your clients and interactions will help you to identify the right people with whom to keep in touch, spot at-risk relationships, collaborate effectively both internally and externally, discover warm introductions within existing relationships, and communicate quickly and effectively with your client base during these uncertain times. ▀



## INDUSTRY ANALYSIS

# The case for cloud telephony

Many law firms have adopted Microsoft Teams to improve their collaboration in lockdown. They could now drive greater consistency and lower costs by using it as the platform for making cloud-based phone calls, says Rob Jardine, chief marketing officer at LoopUp

**T**he trend towards digitisation of the workplace is accelerating. Communication and collaboration tools such as virtual meetings and cloud telephony can improve employee productivity and allow more flexible ways of working, as well as reducing costs for businesses. And, for many firms, the recent lockdown has demonstrated the effectiveness of remote working – recent research by S&P suggests that 47% of all businesses expect to reduce their office footprint as a result of Covid-19. All of this strengthens the case for investing in technology to support the more dispersed workforces that businesses expect to be managing in future.

## The rapid rise of Microsoft Teams for internal collaboration

The collaboration tool that has seen the most rapid increase in adoption is Microsoft Teams. According to Microsoft itself, the total number of daily active users increased by over 70% to 75 million over a two-month period following lockdown. Teams is bundled with Office 365 (now renamed Microsoft 365), which is used by many organisations around the world. This makes it relatively straightforward to access much of the Teams functionality at no incremental cost. Users are finding that features like channelised chat, filesharing and internal video calls make it easier to collaborate remotely with their colleagues.

## Using the cloud to transform business telephony

By contrast, one technology that has been less flexible for many law firms during lockdown is business telephony. In most instances, legal

professionals working from home have had little alternative but to redirect their office line to their mobile or home phone. This generates additional call charges for firms, and only provides users with a solution for inbound calls.

Cloud-based business telephony systems overcome this issue. Users can make and receive calls on their office line from any suitable device that connects to the internet – for example, a desktop IP-phone if they happen to be in the office, a PC at home and a mobile phone on the go. Users have access to typical business telephony features such as voicemail, directories, hunt groups and call-transferring, without being tethered to a desk.

The benefits for employers are just as compelling. While IT teams are generally able to provide consistent solutions for all users globally, telephony is often the exception. It's common to find a disparate range of on-premises PBX equipment across different offices, and a different carrier relationship in each country. By moving telephony into the cloud, firms can standardise their approach across all offices and source everything from one service provider. This reduces complexity and cost, while improving control, flexibility and compliance. Specific benefits for businesses include:

- A single telephony platform with a consistent experience for all users globally – improving compliance and reliability, and allowing training and support to be centralised.
- On-premises PBX equipment is eliminated – reducing complexity and cost by moving to cloud-based infrastructure that is provided and managed by a third-party vendor.
- Local carriers can be replaced with a single managed service provider – reducing the number



of vendor relationships and creating economies of scale.

- No charges for internal calls between global offices or for call forwarding – because these calls stay on-net, rather than breaking out to the PSTN network.
- Users can be added, removed and managed centrally – increasing scalability, flexibility, security and transparency.

### **A single interface for internal and external communication**

Today, a common route to cloud-based telephony is with a unified communications provider. They offer comprehensive solutions with features such as web conferencing, messaging and video, as well as core business telephony. Microsoft has offered cloud voice solutions for some time, first with OCS and Lync and more recently with Skype for Business. But by combining cloud telephony with a best-in-class internal collaboration tool, and bundling it with Microsoft 365 licences, they now have a much more compelling proposition. Users can access a wide range of productivity tools through a common interface, while their employers can implement a cloud solution with broad functionality, all bundled into a single licence.

### **Adding cloud telephony to Teams**

In principle, adding cloud telephony to Teams is straightforward. Users require a Microsoft Phone System licence, which is included with some Microsoft 365 plans and offered as an add-on to others. Microsoft's own Calling Plans offer a quick and easy way for smaller firms to connect to the PSTN network, but larger firms typically use a third-party managed service provider. This approach, called 'direct routing', offers greater flexibility, wider geographic coverage, lower rates and increased levels of support. Industry analysts forecast that, by 2022, as many as 90% of large enterprises using Teams will use a managed service provider for PSTN connectivity.

## **Many have already adopted Microsoft Teams as an internal tool to support remote working. Now a significant number are also evaluating Teams as the platform they use to move their telephony into the cloud**

Rolling out cloud telephony across a large organisation can be a complex process. Telephony is obviously business-critical for law firms, and they need to migrate from a disparate mix of legacy solutions. Using a managed service provider, with deep expertise in Microsoft voice solutions and the global reach to support a multinational organisation, typically means that the transition can happen faster, with less risk, and with a lower resource requirement on the IT team.

Recent conversations with LoopUp's more than 500 customers from the legal sector – including 20 of the top 100 global law firms – confirm that many have already adopted Microsoft Teams as an internal tool to support their remote working. Now a significant number are also evaluating Teams as the platform they use to move their telephony into the cloud.

*LoopUp is partnering with Briefing to conduct research into attitudes to communication and collaboration technology at large law firms, as well as their plans to use cloud-based solutions to support more flexible working and reduce complexity and cost. This will be published with the November edition. ►*

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[www.loopup.com/briefing](http://www.loopup.com/briefing)



## INDUSTRY ANALYSIS

# A new way of working inspired

Guy Phillips, VP, EMEA and APAC, NetDocuments, says choice is now driving change to the standard legal business operational and working model

The events of the past six months have undoubtedly been a catalyst for change, from budgeting to technology, process to workplace premises – and the biggest outcome of lockdown is the significantly greater choice given to people about where they work. According to the Office for National Statistics, in 2019 only 30% of UK employees ever worked from home. This has meant firms – and their clients – that are unused to this way of working have had to adapt quickly. In the legal sector, this is particularly true – for an industry traditionally office-based, lockdown has been a tipping point for modernisation.

Firms are now emphasising that, given the right toolkit – a mix of technology and culture – they can fully offer choice and flexibility to the workforce to work in a way that inspires them. For example, homeworking can provide a better work/life balance – something some lawyers have struggled to maintain over the years. In fact, research from Hitachi Capital has found over 60% of legal employees saying they want to continue working from home after the three months of lockdown. It's also clear that having the technology in place for staff to work from home effectively is important for attracting and retaining the next generation of talent.

By contrast, firms that are unable to lay the foundations for supporting choice risk falling behind the competition. And a failure to move to more flexible ways of working could risk damaging employee productivity and retention.

## Busting the on-premises myth

So, how can the legal sector ensure it can facilitate this new way of working, both now and long into

the future? With employees demanding anytime access to information, adopting the latest cloud and software as a service (SaaS) solutions should be a pre-requisite for law firms that want to be more agile and secure.

However, many are still tied to hybrid-cloud or on-premises systems. Security and compliance concerns have led the industry to believe they're more secure because data could only be accessed in one location. Although it may feel safer to store data on-premises, it is a false sense of security in the age of cybercrime. Recent research from Gartner predicts that public cloud infrastructure as a service (IaaS) workloads will encounter at least 60% fewer security incidents than those housed in traditional data centres.

Not only are true cloud platforms more secure and flexible, they also require a lot less management, meaning IT and the business can focus more on client service when it is more important than ever.

## Mitigating the security risks of shadow IT

Since the Panama Papers leak of 11.5 million documents detailing confidential information, the legal sector has become more aware of the financial and reputational damage data breaches can cause. So, firms have generally been prepared when it comes to ensuring compliance with new data protection legislation, such as the GDPR.

However, external – and internal – threats won't disappear. And working from home has brought added vulnerabilities. For instance, data could be unprotected as employees may be using personal or family members' devices to work on. Therefore, data protection and encryption should be at the core of remote working in the legal sector, with





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specialist service line applications. For full support, firms must ensure employees are equipped with the right tools for the job. Otherwise, no matter the security measures in place, 'shadow IT' can remain a threat – where existing systems prevent employees from easily storing and sharing documents, forcing them to use personal email and cloud storage services.

Employees need document and email management tools that enhance rather than hinder the way they work – and that means more than just an aesthetically pleasing interface. To ensure adoption, tools must truly integrate with the day-to-day life of employees and work natively within applications they're familiar using. In addition, whether using a web interface or mobile application, employees should be able to work on documents from home as they would in the office.

### Attracting a wider pool of talent

Equipping staff with the right technology for the job is also key to retaining and attracting the next generation. Research from Capita shows over three-quarters of workers say technology is a factor in their career choices. They want the flexibility to work remotely, and without the right tools, or with a poor user experience, unproductive people will be at risk of leaving the business. Having the technology in place to support homeworking can also open up a wider pool of talent, as location becomes less of a consideration when hiring. As three months in lockdown has irrevocably changed working practices, firms can now concentrate on finding people with the most relevant skills rather than attracting talent into the City.

### Whether using a web interface or mobile application, employees should be able to work on documents from home as they would in the office

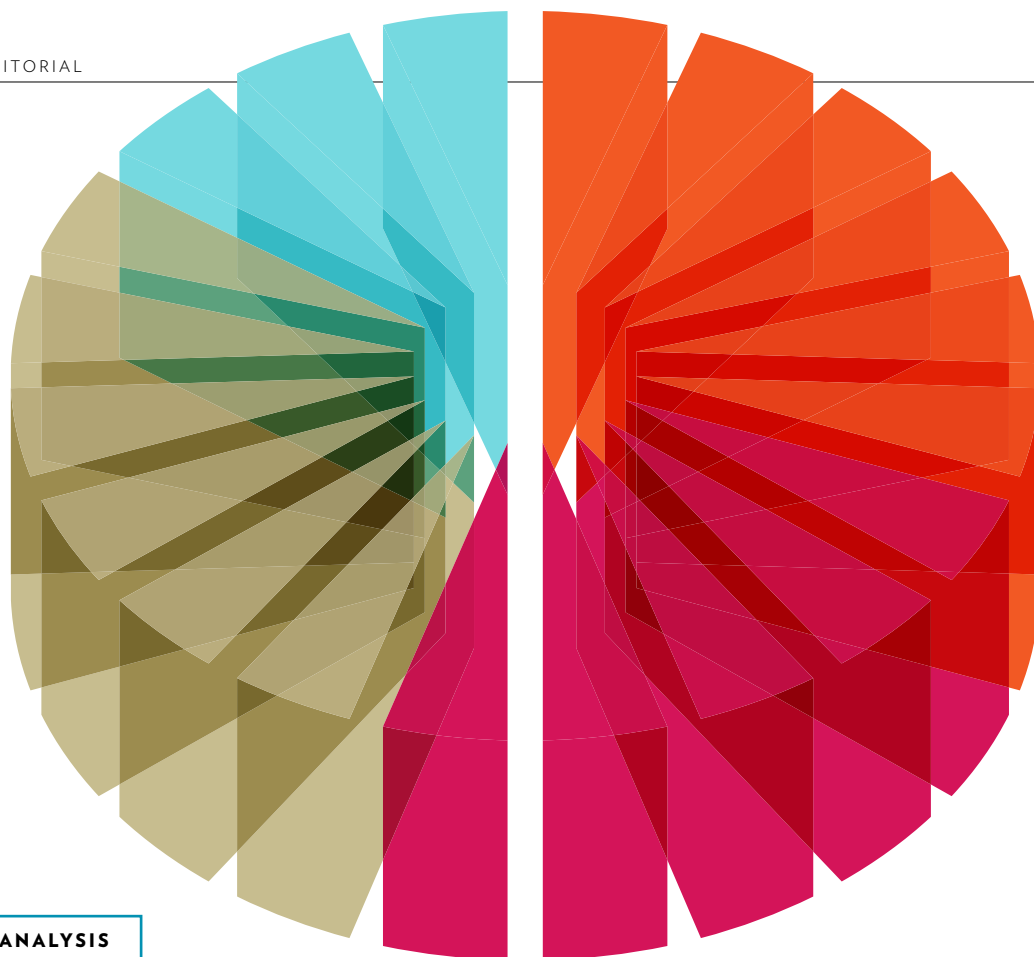
firms having complete control over data privacy and regulatory compliance, but with no impact on productivity or performance.

However, for regulated industries such as legal, many collaboration tools aren't fit for purpose, as they don't provide the necessary levels of security for sensitive documents and don't integrate with

### A shift in mindset

Technology clearly has a role to play in ensuring employees can successfully work from home and keep up with the changing risk landscape. However, this also requires a change in mindset. Once law firms have the technology and infrastructure in place to support remote working, they must ensure they have the culture to fully embrace it. The legal industry is built upon years of tradition, so adapting to this change may take some time. However, as lockdown has proved, businesses need to be quick to adapt, so it's now up to the legal sector to enable a more inspiring model of working and gain the trust to make it work in practice. ▀





## INDUSTRY ANALYSIS

# Segmentation for client success

Michael Warren, VP, client development and intake practice at Wilson Allen, says measuring client engagement means balancing the science and the art

I remember watching the CMO of a global law firm present the strategy and results of their client engagement programme at an industry conference.

What struck me was the absolute certainty with which she quoted figures like “it takes on average 2.2 face-to-face client meetings to close a \$50k deal with an existing client.” She explained that the firm had consolidated its data from a range of sources and was able to use the information on opportunities, matters, meetings and activities to ascertain this statistic.

Most important in what the CMO shared is what those statistics represented. It’s not whether it was 2.2 or 3.2 face-to-face meetings. The point she was making is that her internal users believed in the veracity of the data model and they had to contribute data to the model for it to work.

We are operating in a world of increasing and

increasingly diverse competition. We are also contending with tighter budgets and higher expectations from our internal stakeholders. As a result, it’s more important than ever to be able to measure the effectiveness of your business development and marketing activity. And I don’t just mean measuring click rates and RSVPs. As marketing and business development professionals, we need to be able to measure what works and, more importantly, what doesn’t.

## The importance of segmentation

The foundation of being able to measure client engagement is to have a clear segmentation strategy. To do this, you need to understand the variables that influence the segment a client falls into. Typically, this includes criteria from the following variables:

- **Client value** This might be revenue, collections



## When trying to prove that measuring client engagement is possible, you need to be able to develop in an agile manner, testing the relevance of different data points

or profit-related. It may also consist of other metrics around the number and average value of matters.

- **Revenue trajectory** An important variable is the change of the revenue over time. Is it diminishing, growing or stable? Two clients might have the same client value result, but if one has doubled in size and the other halved, then it's telling you something very different about those two clients.

- **Practice penetration** This enables you to identify how embedded your client is with you across the range of services that you offer.

- **Sector-focused** Most firms will segment by sector in some way, which is important as the thresholds of the financial variables may differ depending on the sector.

- **Revenue potential** This is typically drawn from your pipeline. It is always best to use a weighted revenue projection – for example, not all opportunities are likely to come to fruition, and not all people have the same attitude to risk and success. Some people are more optimistic about success than others, and you might want to take this into account.

- **Marketing engagement** This is a combination of several factors relating to how much different people at a client company are engaging with different messages.

- **Business development activity** This is typically looking at the frequency, recency and types of business development activities taking place.

As you will see from this list, most firms typically won't be able to draw the data they need to perform analysis from a single system. That fact presents challenges around taxonomy, integration and governance.

We have found that using something like Power BI is an extremely good way to take a rapid and

iterative approach to mashing data and quickly producing output. There are many advantages to this, not least of which is that users find it difficult to understand the art of the possible or how a client engagement dashboard might look.

We have also found that starting with one or two of the data elements listed above, and then reviewing with your stakeholders and building from there, gets you to a workable model much more quickly than starting from the discussions around data lakes, warehouses and integration strategy. That's not to say that these things aren't very important in their own right. Still, when trying to prove that measuring client engagement is possible, you need to be able to develop in an agile manner, testing the relevance of different data points and then either advancing with them or discarding them.

### How do you define engagement?

The second foundation to success is that you must be clear how you define engagement. You have to work out the different levels of engagement and the factors that indicate when someone has moved from one level of commitment to the next. That's why it's so important to use data from different sources. Analysing a single data source is only ever going to tell you part of the story.

For example, we have found in the segmentation model of our own CRM practice that there is a very high correlation between marketing engagement and awarding work. We will typically see multiple people from the same firm attending multiple webinars and reading multiple articles as a precursor to engaging on a new matter.

This correlation isn't necessarily surprising, of course, but the ability to see the results in the data enables you to start predicting potential outcomes better. More importantly, it allows you to begin to change your engagement strategy and try to drive that behaviour in others. For example, we can look at other demographic and attitudinal segmentation factors of people who become clients to find others with a similar profile who have not yet engaged. ▲

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## SIX OF THE BEST

# Working tips for the times



A report from LOD in July 2020 – At a crossroads? The impact and opportunities of Covid-19 on legal teams around the world – surveyed 383 in-house legal and compliance professionals globally (161 of them leaders, spanning 25 sectors) about the changes and challenges they're experiencing. Leaders were also each asked for their top-three management tips to have surfaced in the pandemic, which were distilled down to the following:

- |   |  |   |   |
|---|--|---|---|
| 1 | Ensure your own wellbeing and that of your reports and wider team.   | 2 | Be brave – meaning willing to be good and not perfect. Ensure advice is short, timely and easy to action. |
| 3 | Establish a clear strategic plan to prioritise the team's work, aligned to organisational priorities and individual key performance indicators. Capture, and share, the right data to demonstrate the value the legal function adds, which will also help to clarify individuals' contributions to the bigger picture. |   |   |
| 4 | Anticipate the needs of stakeholders and manage relationships proactively. Don't wait for people to come to you, and try to nip issues in the bud.   | 5 | <b>Practical tip:</b> Change the default one-hour meeting to 50 minutes.                                  |
| 6 | <b>Practical tip:</b> Change the default half-hour meeting to 20 minutes.  |   |   |

60% of the legal leaders surveyed said the transition to remote working had been smooth, with just 12% saying they'd "faced challenges". What were leaders' top responses to those challenges?



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