Briefing

June 2021

SMARTER LEGAL BUSINESS MANAGEMENT
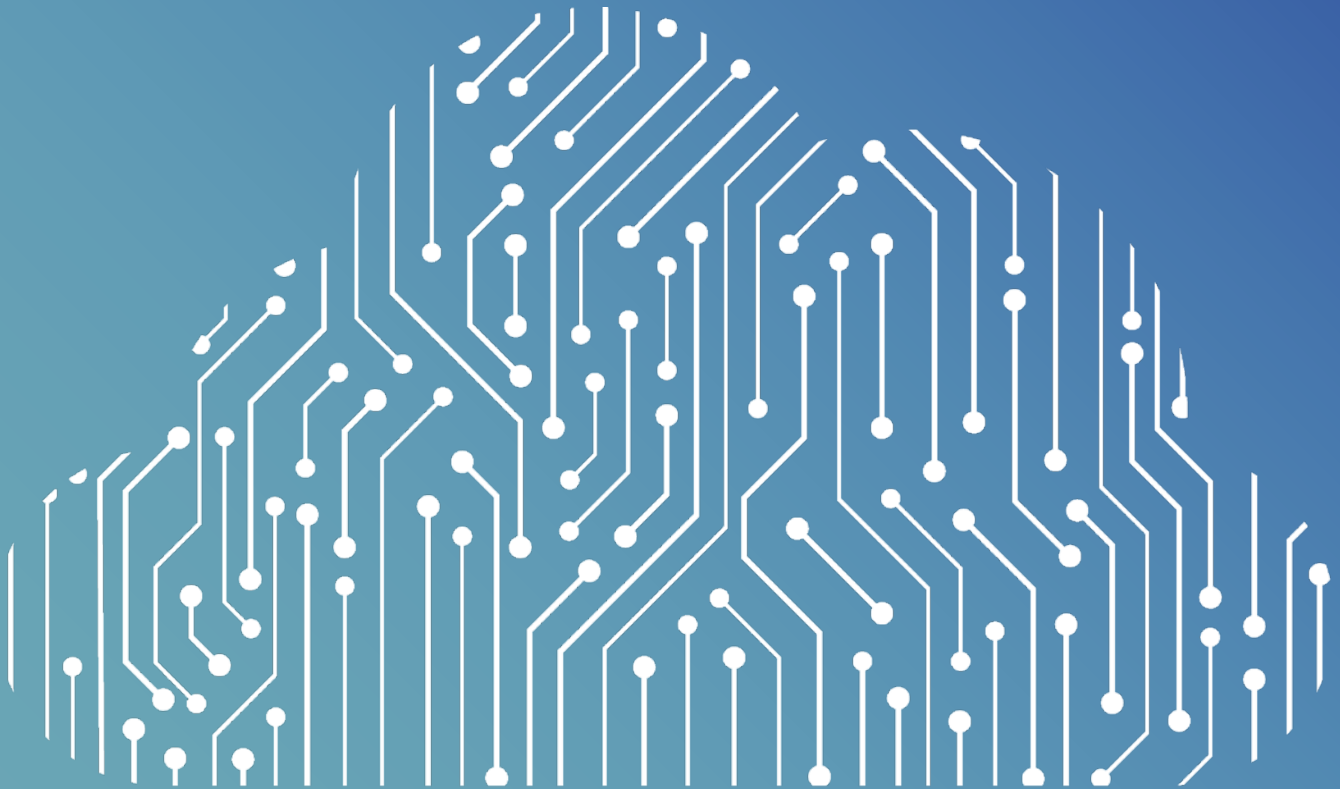
Platforms for progress

Are law firms able to join all the dots on their cloudward journeys, and how does that tie up with their other technology and transformation ambitions?

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Editor's letter

Who we are...

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I n addition to what they're getting up to today, our annual **Briefing** Frontiers Legal IT landscapes research keeps track of how legal business leaders like you say they're feeling about multiple technology types on the horizon, and the drivers for making a change.

We'll sometimes introduce new questions – last year we certainly did – and some might become less relevant. Things change, after all. But one that we've regularly returned to is our barometer of cloud consensus. This asks those law firm tech and ops leaders where they think certain core business systems will mostly be located several years from now – 2024 this year (the same deadline we set in the last round of research). Will they be found fully or mainly on-premises, fully or mainly in the cloud, or somewhere in the middle?

Forgive the exceptional geekiness, but we were all pretty excited when we took this temperature in late 2020. Only one category of technology saw fewer than 70% of votes cast for fully/mainly cloud. Not a soul expected case management to be fully/mainly on-premises come 2024, and just look at the results coming in for matter and practice management systems – in just one year jumping from 52% to 82%, and from 48% to 72%, respectively.

The transformations of working life that surely still lie ahead require more than new systems

We don't just love results like this because 'ooh big, shiny numbers' – it means we also get to dig deeper into what it really means. And that's what Josh Adcock turns his type to in this edition (p12). Did the year of Covid-19 lead to a striking transformation in legal's cloud confidence? Is this a case of necessity being the mother of adoption, or have firms seen movement on certain practical hurdles that may have restrained them in the past? And if the future really is now cloud-first, what's the priority to crack on with ... well, first?

But enough. It's always worth pausing to remember that technology can't solve everything. It's an enabler, as the good saying goes, and the transformations of working life that surely still lie ahead require more than new systems. My own interview this month is with Jay Connolly, the global chief talent officer at Dentons (p16), who offers his take on what the very biggest of big law really also need to get right when it comes to agile 2.0, from a people perspective.

RICHARD BRENT EDITOR-IN-CHIEF
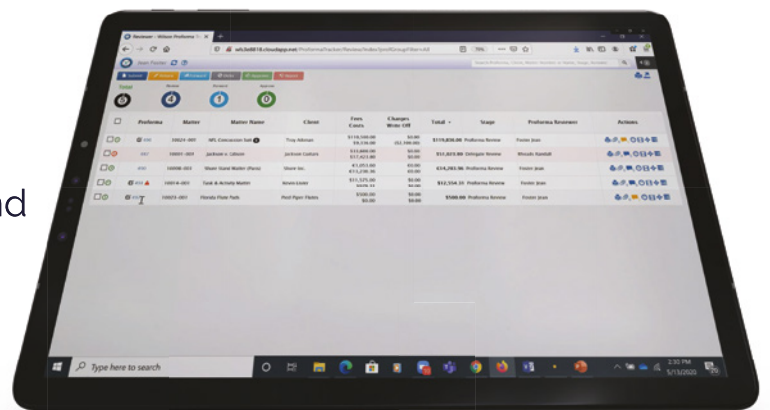
Inside this month

20

Content with cut through?

"Understand the context of a client's current favourability towards your firm."

Leor Franks, director of business development and marketing, Kingsley Napley

Briefing

Platforms for progress

Are law firms able to join all the dots on their cloudward journeys, and how does that tie up with their other technology and transformation ambitions?

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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KM teams can help to examine whether there are implicit barriers to certain groups of employees getting a seat at the table on project working groups or for thought-leadership initiatives

SPEAK UP

KM – secret weapon in the BID battle?

Belonging, inclusion and diversity (BID) initiatives continue to be front-page news as law firms strive to address the challenge of opening access to the profession and retaining more diverse talent. Knowledge management teams might not be the first departments firms turn to for help in this mission, but that should change – if I do say so myself as something of a diversity statistician's intersectional dream (a female, slightly disabled, state school-educated lesbian). Here are just some of the ways knowledge functions – well known as expert collaborators and silo melters – can be valuable allies to their BID colleagues.

• Communities of practice/networks
It would be strange to expect a firm's people to truly thrive without knowledge about how to navigate the organisation they are part of. How do employees navigate the informal knowledge-sharing networks across the firm? And do you have to 'know the right people' to get involved? KM teams can help to examine whether there are implicit barriers to certain groups of employees getting a seat at the table on project working groups or for thought-leadership initiatives. As firms look to avoid 'Zoom fatigue', try not to have everyone join every meeting and start to consider how hybrid/remote in-person training and collaboration will work going forward, it will be important to ensure they don't exclude on the basis of bias.

• Combat alienation by enabling collaboration One example of how a KM initiative has tried to foster a sense of belonging is our own 'randomised coffee trial' SHare-a-ccino scheme. We've tried to simulate random 'watercooler' chats that people missed in lockdown by each month enabling them to connect to a new person at the firm from outside their normal network for a virtual coffee. This has also helped new joiners to develop a sense of belonging and provides an opportunity to diversify networks and gain perspectives from people who have a different experience of the firm.

• Gender-neutral drafting It's now well known that the impact of outdated gender-biased drafting in legal documentation can reinforce stale gender stereotypes and undermine efforts towards equality. It is becoming more commonplace to address correspondence "Dear [name of firm]" rather than "Dear Sirs", and to avoid gender-laden terms like "chairman" or "manageress" in favour of "chair" and "manager". Precedent drafters can help to embed this approach in the firm's base documentation by tweaking templates using guidance from bodies such as the InterLaw Diversity Forum as a starting point.

Ultimately, structuring your firm's data to provide easy access to information (whether through matter maps, enterprise search, intranet knowledge dashboards or process checklists) can also relieve stress and allow employees to feel more in control of their work. And through mentoring juniors and guiding through legal training, the knowledge team is often key to fostering an environment where mistakes can be admitted, and failure embraced, to nurture innovation and team spirit.

In short, good KM really can make you happy.

Dee Tamlin
Head of legal project management
Pinsent Masons Vario

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Personality testing may be one way of recognising and identifying the existing cognitive diversity in a team, while also identifying what is lacking

SPEAK UP

Mind your project diversity

As the legal sector continues to transform, legal projects become ever-more complex and global. Given this rise we're also seeing an increase in legal project management professionals at law firms collaborating with lawyers on how to efficiently and effectively complete these projects using traditional project management methodologies, as well as newer, bespoke methodologies that are being developed purely for the legal sector.

Improving the cognitive diversity of their project teams is also high on the agenda for lawyers. Rather than a focus purely on project objectives – how they are going to be achieved, how progress will be communicated and when the project needs to complete – emphasis is also placed on how lawyers are approaching these projects from a resource perspective. Who might be a good fit and what are the skillsets required?

Employing and valuing people who think differently can lead to increased success and profitability for a business. Research by Deloitte in 2018 found that teams who were both cognitively and demographically diverse were the highest performing.

It's important to identify which differing cognitive characteristics the team is looking for, and how this will help them to deliver successful project outcomes. Personality testing may be one way of recognising and identifying the existing cognitive diversity in a team, while also identifying what is lacking. Using these results, legal project managers can ensure project teams are tailored appropriately to the diverse cognitive skills required.

Legal project managers can also be involved in creating an environment and culture within a specific project team, or across the firm, which encourages different opinions, providing options for better resolution. For example, one good option, and a way of nurturing development, is to encourage more junior lawyers to speak up and give their opinions. They might have a different frame of reference, coming from a different age group, background or culture. A legal project manager can help to facilitate this culture, coming from a more objective position, and could also facilitate brainstorming sessions where different team members get a chance to speak. This also creates a more creative and productive working atmosphere, leading to quicker problem solving and greater cost savings. It's also worth mentioning that diversity and inclusion consultants can work with legal project managers to support cultural differences within project teams too.

Cognitive diversity should certainly be valued as a meaningful way of improving a team's processes and efficiency. A legal project manager can be an objectively helpful individual, who can themselves be part of the cognitively-diverse legal team, but also help to ensure the best outcomes are delivered for managing both legal and business challenges.

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There's no doubt the earlier face-to-face interactions were most effective, including for building new relationships. The group bond built in those meetings can't be underestimated

SPEAK UP

Collaborative capture

As covered in **Briefing** in February, the Protocol for Online Case Management in International Arbitration was the result of months of collaboration between six law firms. Communication was key to success, especially as the collaboration involved disparate and time-challenged parties. Following the protocol's launch the team ran a 'lessons learned' session to assess what had worked and what could be improved as the group continues collaborating.

First, ensure the core team is the right size, structure and mixture of backgrounds. The diversity of experience that six firms brought was a key success factor, changing at different stages of the project. The group of lawyers were the subject matter experts, the project manager ran the project and comms, and process-design experts provided the groundwork and foundations. We also leveraged each firm's PR expertise for the draft consultation and launch.

It's crucial that roles, responsibilities and accountability are clearly defined and agreed at the outset, and continuously monitored and reassessed throughout. This results in all team members being equally involved, participating and communicating. That clarity was perhaps occasionally overlooked; causing a little confusion about who was ultimately accountable for a particular action, for example. Fortunately, we were quickly able to reorganise and revise our approach or reallocate work.

Second, it's easy to jump straight into 'solution mode'. We quickly realised that beginning immediately with decisions such as buy/build/partner on the tech solution was getting ahead of ourselves. It was so important to take a step back and get under the skin of the actual challenges that brought the group together in the first place. This is where the process improvement experts were invaluable.

During the diagnosis workshops we did a deep dive into the areas of particular concern and realised the market wasn't aligned on those areas. The initial focus of a group should be on creating this alignment and standardisation around the root causes of the challenges.

Redefined problem and goal statements allowed for the right focus from an early stage of the collaboration. This played a huge part in ensuring the group stayed concentrated on the objective, which was continually reassessed as we progressed. Was this still the problem we should be focusing on?

Finally, it's no surprise that effective communication is a foundation of success. Establishing a collaboration site, available to the whole team, with an updated project plan, timeline and communications, meant those working in isolation had access to updates and shared documentation between sessions. A 'central point' really made a difference.

In the consultation period, in particular, there was copious engagement with external parties – arbitral institutions, technology firms and other stakeholders. We needed a robust plan, with clear follow-up structures and defined responsibilities once again. Frequent team meetings were the backbone of our communication, with agendas, minutes and follow-up. These became remote meetings in 2020, but there's no doubt the earlier face-to-face interactions were most effective, including for building new relationships. The group bond built in those meetings can't be underestimated, and it later allowed for rapid 'assemblies' to discuss key milestones or unexpected events.

The protocol has now been delivered, but there is clear enthusiasm to continue cross-firm collaboration, and with greater awareness of the core ingredients. ◣

Heading to the cloud? Five key considerations

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Long gone are those extended periods of user-acceptance testing that drew on key business teams for resources, for many weeks or months

J ust a few years ago, if you had walked into most CIOs' offices and uttered the words 'cloud migration', you would have been met with a furrowed brow and perhaps a disapproving glance.

Fast forward to today, and this naturally risk-averse sector is opening its thoughts to the capabilities and possibilities a cloud-first approach can deliver.

As you consider journeying into the cloud, here are five key considerations to think through to prepare for the ascent.

1. Budgeting and costing models As more solution providers introduce cloud offerings, one of the first things to adjust to is the change to budgeting and costing. Cloud computing enables a shift from large server and operating system Capex costs to a monthly subscription licensing model. Monthly fees may be higher, but they are more predictable than large, intermittent capital investments, levelling cashflow. In addition, you typically only get charged for what you use.

2. Adoption and change management
Cloud comes with an ethos of continuous improvement and updates; new features and functions are rolled out continually and incrementally. Users can adjust to small changes frequently, rather than big changes all at once, as part of significant upgrades or new releases. Training doesn't disappear, but the 'small and frequent' approach puts a major tick in the box for easier adoption and change management.

3. IT and infrastructure Turning to IT, the new model of continuous improvement entails a bigger change for support teams than for end users. Maintaining cloud systems requires a different set of skills. Application interoperability and packaging is hugely more important now. The processes of architecting, designing, testing and deploying major systems, which IT teams usually take months to do, will have to be rescaled so that it can be done continually, at much quicker pace.

4. Testing As firms shift to continuous updates, many are considering their deployment strategies and moving towards some level of test automation. Long gone are those extended periods of user-acceptance testing that drew on key business teams for resources, for many weeks or months.

5. Customisation and configuration
With the cloud, ability to customise heavily is somewhat removed. Innovation comes from the technology supplier through incremental improvements, rather than the firm having to turn software developer to re-engineer for bespoke needs.

Getting your firm ready for take-off
Timing is often a critical component of making any change. The reality is that cloud adoption is gathering steam across the sector. Where does your firm want to be positioned on the curve of technological advantage? With careful planning and a steady approach, you too can introduce the cloud into aspects of your firm's technology stack and gain the many benefits the journey brings. ◤

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On seeing the data the teams themselves are either correcting it before presenting reports, or taking actions – such as requesting permission to recruit, to redouble business-development efforts to identify opportunities, or to close business that has been hanging around

▶ **TO THE POINT**

Automation report

A lmost every firm that Pinnacle is working with is looking to put in place automation, whether it is marketing automation, automation to speed up billing processes, integrating with external data feeds in the new business-intake process, or using new technologies built into products, such as Intapp's AI-assisted conflicts clearance. Whatever the process being automated, there are the obvious reduced time and effort benefits that firms expect and build their business cases around.

As I was preparing to write this To The Point column, I had just reviewed my colleague Michael Turner's recent article about how to make business intelligence projects more successful. It struck me that there is an additional benefit to automation that many firms don't consider. Indeed, we have been automating processes and hadn't really called out these benefits in our justifications.

We have been on a drive to improve our reporting: specifically, to automate the production of our business reporting. Pinnacle has grown from half a dozen people seven years ago to almost 125 people, and from being largely based in the UK to spanning UK, North America and Europe. As a management team it was essential to know what was going on across this greatly expanded business. We also run each of our teams as its own P&L, and like most businesses expect monthly reporting.

Monthly reports have the financial results – budgets vs actuals as well as forecasts of utilisation by individual and more business development-driven pipeline and opportunity data. To report in this way requires pulling data from our finance system and our scheduling application, as well as from our CRM system. It required a small cottage industry to pull together a team's report.

We have, over the last six months or so, focused on automating our monthly reporting. It has driven a series of behaviours and thinking, which are alluded to in Michael's article. We have to use our core systems – you can't have a separate spreadsheet on the side for your team. This is particularly true of our CRM system, Intapp's OnePlace for Marketing, where we track opportunities. The report's pipeline is drawn from here, and if it isn't in the CRM, it isn't in the report. The estimated work values and the closure dates are also automatically drawn into the reports.

Our scheduling data is automatically fed in to give us visibility of revenues for the next two to six months. While as a leader of the business this visibility can be more accurate in the case of some teams than others, on seeing the data the teams themselves are either correcting it before presenting reports, or taking actions – such as requesting permission to recruit, to redouble business-development efforts to identify opportunities, or to close business that has been hanging around.

The point is that projects automating business insight at their core may very well be the best automation projects going. They may, by their very nature, be the best because they will do more than give you greater insight; they will drive adoption, improve data quality and make your business faster and more nimble. They will of course spawn sub-projects – such as reconfiguring the PMS to hold budgets, tweaking the CRM system to hold the needed opportunity data.

One thing that shouldn't be needed, however, is to spawn a large data-cleansing project – only the data being used day-to-day will be shown and teams will not begrudge ensuring it is up-to-date if that is how they are measured. ▶

Features

THE BIG IDEA

Chance of cloud

The pandemic may have put a spotlight on the advantages of law firms finally moving to the cloud – but what has that meant in practice and how much further is there to go before cloud is the default? Josh Adcock investigates

he last 18 months have been disruptive and transformative, making certain technologies more significant than ever. With their agile-enabling advantages, cloud-based systems have taken a leap forward at many an organisation. This was borne out in **Briefing**'s own Frontiers Legal IT landscapes 2021 (LITL) report, in which we saw a huge swing towards cloud appreciation, and for many different systems. But this was an unusual year – the question of how strategically valuable law firms view the newly supercharged opportunities remains.

Agile in practice

With respondents to LITL 2021 saying they expect 66% of their people to work from home two days a week or more in future, you'd think there'd be little sign of demand for cloud systems and infrastructure diminishing. That logic holds true at HFW, where global director of information technology Mark Parr says cloud-based systems are feeding into a project called 'Work anywhere, protect everywhere'. "It's intended to offer the same level of access to tools and information, regardless of whether people are in the office, at home, in a coffee shop, railway station or an airport lobby. Technology shouldn't become a blocker to the individual determining how they're best placed to work," he says.

However, while the pandemic has accelerated rollout of technologies, he says many of them were already on the firm's roadmap. Finding ways to enable collaboration in a remote setting is now more of a key priority, with digital whiteboarding being one area of current investigation. "Those solutions will be key to making people feel they're important and part of a meeting – even if you're not physically in the room, there should be an equal level of access and opportunity."

> "How do we use technology as a differentiator? That's where my job gets really interesting. I want us to use cloud-based technologies to support the delivery of legal services – we can let someone else worry about the infrastructure, let me just consume the service they're providing."
>
> *Mark Parr, global director of information technology, HFW*

At Womble Bond Dickinson, US chief knowledge officer Bill Koch says collaboration has always been a challenge and cloud hosting has been part of the solution for the firm. That's included the rollout of OneDrive for certain practice teams that straddle the Atlantic, as the US and UK halves of the firm often use different networks and systems. "We have several lawyers who are using the Office 365 model, which allows them to collaborate on documents in real time – that's something you're only really going to be able to do within the cloud" says Koch.

Adding value

Yet, enabling lawyers to work and collaborate wherever they want has evolved into a baseline expectation, adds Parr – and cloud or agile-enabling tech should now offer something more as well. At the start of the pandemic, as part of a drive to reduce the "technology noise" facing fee earners and remove solutions that weren't being fully used, he explains the firm dropped many software licenses. That move fed into a new, sharper focus around value and tech requirements: "We want much more strategic partnerships across all our technology, and we're trying to have a more holistic view of how our systems interlink," he says.

Adoption of cloud-based software is part of this drive, but a focus specifically on transformational and value-add tools that help the firm to create new solutions for clients is a key priority – and this very much means moving to a consumption-based model for tech. "How do we use technology as a differentiator? That's where my job gets really

interesting. I want us to use cloud-based technologies to support the delivery of legal services – we can let someone else worry about the infrastructure, let me just consume the service they're providing," he says.

That strain of thought, focused on cloud-based systems for solution creation, also runs through a recent partnership between the US-based half of Womble Bond Dickinson and legal tech platform Reynen Court. Koch and chief information officer Bradley Bragg explain the firm has signed up to a new, fully cloud-hosted version of the containerised app platform, in order to accelerate the rate at which they can test, establish use cases for, and ultimately acquire, some of the 200 or so apps available through the platform.

Bragg explains that onboarding a cloud-hosted application platform was seen as a potential solution-building accelerant: "Bill has to jump through a lot of hoops just to do a proof-of-concept around a new application – and he can't even be sure if it's the solution he wants at that stage. Trialling apps through Reynen Court's cloud means I don't have to provide personnel or processors and storage."

Koch says this will allow the firm to be nimbler in its ability to roll out legal tech products without having to think about infrastructure. "It also sends a message to our clients and potential clients that we're serious about adopting legal tech," he adds.

And if law firms are able to provide more innovative, digital solutions, help from cloud applications may be particularly welcome in the wake of the pandemic. Christopher Tart-Roberts, head of lawtech and chief knowledge and innovation officer at Macfarlanes, says client appetite for digital solutions has increased this past year, potentially because they have been forced to rely more heavily on technological solutions themselves: "That has had a knock-on effect on their expectations of us and how we deliver services."

Cloudier days ahead?

Despite this rosy picture of the operational and transformational promise of cloud, wholesale migration away from on-premises systems is far from a done deal today. In **Briefing** Frontiers LITL

2021, we found there were plenty of caveats around the adoption of cloud systems, with several interviewees citing investment models, cost and a perceived lack of strategic advantage as hindrances.

In that same report, Matt Haynes, global IT director at Kennedys, said internal hosting was his default position, unless there was an exceptionally compelling reason to host in the cloud. Decisions around cloud suppliers need to be taken in the context of the specific firm in question, he explains, and the commercial logic is against moving to predominantly cloud-based systems for now. "With our infrastructure, in our Citrix virtual desktop environment, it would be enormously expensive to move all of our enterprise resource planning applications into the cloud. In future, that might change – if our capex investment cycle were to change to more of an opex cycle, for instance."

Nonetheless, Kennedys is currently moving to Office 365 E3 – though the strategic and commercial value of adopting an entire suite of cloud-based solutions from a single supplier needs to be closely analysed, as the firm could become 'locked in', he adds. "We're currently reviewing our investments to see if it makes sense to adopt more of the technologies in the Office 365 stack, which could mean we no longer need our existing two-factor authentication supplier or our mobile device management software, for instance. But the jury's still out."

Bragg says Womble Bond Dickinson has adopted a strategy of going cloud when it can see there's a clear business case to do so – and that may hinge on service capability, rather than cost. For instance, he says the firm shifted 110 client extranets from its own servers to the HighQ platform prior to the pandemic to reduce maintenance needs around those servers – though the crisis did also highlight the advantages of that decision when it came to remote working. The firm has also transitioned to a cloud-based e-discovery platform, so that lawyers could have round-the-clock support.

"We are increasingly moving toward cloud, but I don't know that we'll ever get to a point where we're 100% there. There's always going to be a business case for some of our most critical applications to remain on-premises," he adds.

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>
> *Bradley Bragg, chief information officer, Womble Bond Dickinson*

Integration ecosystems

The matter of how far to go with cloud is also attached to the question of integration. How well are the existing cloud offerings able to work together, particularly when it comes to firms' core systems? The operational leaders who responded to LITL 2021 showed a huge shift in belief that their firm's practice management system (PMS), for example, could be hosted fully or mainly in the cloud by 2024 (up from 48% saying so in late 2019 to 72%). Integration, however, may still need to be worked out.

At HFW, Parr says there's a clear push from suppliers to move to cloud, but he's uncertain whether the integration between them is up to the task of giving people at HFW unfettered access to PMS and finance systems, which he believes are the most important to integrate properly across and within the cloud. "Those conversations are happening, but I don't know if they're detailed enough. If they're not, I'm the one who has to try to fix it. So that's a big concern."

Tart-Roberts agrees that integration between applications should be a high priority for cloud-based tech. "There are still a lot of point solutions around document creation and contract drafting. Once a contract's drafted, you may then move to another technology to help with collaborative negotiation, then another for signing and another for tracking obligations." The better the integration that can be achieved between these technologies, he says, the more potential firms will be able to unlock.

And, when it comes to integrating systems with

collaboration tools like MS Teams – see our supplement later in June for more on that – Bragg adds that the decision whether to go cloud or not has been influenced by the now near-ubiquitous application.

"If we bring a system on-premises, does that break a future capability in Teams? Are we only going to get the integration we want from the cloud instance of a tool? Those are decisions we have to make."

So, while the idea of more cloud may have had a big boost in the last year, and we see more confident claims for 'cloud first', it seems there's still plenty of choices to make and detail up in the air. ◢

AUTOMATIC DRIVE

After solutions to enable agility and remote teams specifically, another tech very near the top of the priority list in LITL 2021 was process automation. More than half (56%) of respondents said they would be prioritising this area. And, in some sense, the last year has been a positive accelerant for automation. Mark Parr says HFW hasn't implemented any new initiatives here per se, but it has "taken a step back" to prepare the groundwork through mapping business processes. "We've taken the last year as an opportunity to start thinking about automation and machine learning as ways that can support the delivery of legal services, particularly in high-volume, low-value work, such as contracts or ship completion services," he says.

But wrangling the firm's data to yield the greatest efficiencies has been rather time-consuming. "Of all the data we hold, what's useful? What are our 'crown jewels'? We're now on a journey to draw insight from our data and become more predictive. Automation will be part of the solution."

One idea to come out of LITL was that automation might have a greater role to play as lawyers needed to become more self-sufficient. Matt Haynes at Kennedys backs this up, saying remote working has prompted an investigation of workflow solutions. "There's a recognition that support staff may be working different hours – so, at the moment, we're looking at a standard legal workflow tool and also an IT service management tool, which we hope will mean fee earners can get support whenever they work."

He adds the firm is also looking to use Microsoft's Power Apps and Power Automate tools for approvals processes: "Those platforms are ideal for a number of old processes that are ripe for digitisation, and we have a member of the IT team training on them now."

Far from at risk of being overshadowed by cloud, automation initiatives at Macfarlanes have only accelerated, according to Tart-Roberts. Legal issues like the discontinuation of LIBOR and subsequent analysis and remediation work have been behind this drive. "It's thrown a spotlight on the power of AI technology and how we can use it to drive things forwards," he says.

Meanwhile, 'operational' automation tools have also been given a big boost by events of the last 12 months, and he expects implementation of automation, workflow and robotic process automation (RPA) tools to continue in the future. In terms of the legal matter-related tasks specifically, he says Macfarlanes is focused on technologies that help its lawyers to focus on higher-value activities.

"We want to leave the more 'routine' tasks, like first drafts of contracts, forms and other legal documents, to automation technologies – or, at the very least, to make them as efficient for our lawyers as possible."

Talent for change

Jay Connolly, global chief talent officer at Dentons, tells Richard Brent what the global law firm with the most lawyers is taking forward from the experience of working under lockdown, and refocusing for a more agile and inclusive future

As more law firms – and many others – set out their visions of the future of office and home-based work combined, we can see some differences start to open up. Will the benchmark for 'normal' be two days a week at home and three spent with colleagues in the office, or perhaps vice versa? And for which specific activities will presence in person on any day be strongly encouraged, if not compulsory? That's before you even get started with the various practicalities of managing dispersed-team demands in all the different pockets of the business, and potentially corners of the country.

Building on an innovative 'collaboration jam' that ran globally across Dentons in 2020, one of the leading ideas was an enhanced approach to agile working, which was implemented prior to the pandemic. Global chief talent officer Jay Connolly says that in 2021 the firm has taken this further, and one example is the UK, Ireland and Middle East partnership of Dentons, which is now committing to personal choice over where to work – people will be free to choose the location blend that works best for them. The announcement of the new agile-working policy in March 2021 comes at the same time as investment in the firm's office spaces to make them as attractive as possible for people as destinations to assemble for team-based collaboration, innovation or learning and development sessions. However, this is also one of few UK firms that saw a clear case for closing a couple of offices in 2020. Increases in digital self-service and technology confidence have been such – with plenty less paper in circulation, but no drop in productivity, we hear – that people based in Watford or Aberdeen have the option of going fully virtual in future or making use of another office in the region if preferred.

"**Virtual working works. However, we have learned several things about the approach and the support that will now be needed to manage with even greater success going forward.**"

Jay Connolly, global chief talent officer, Dentons

"There is competence trust and there is interpersonal trust. The first you can establish pretty quickly, but achieving interpersonal trust involves understanding and empathy."

The new faces of collaboration

Connolly has the job of ensuring decisions like these work for everyone – that those individuals feel empowered rather than restricted by changes, and that culture and values are maintained whatever the mix. He says the firm has turned to behavioural science – an area of investment even before the pandemic – to consider the future of work from several important angles.

"Virtual working works – after more than a year, I think nobody is really questioning that. However, we have learned several things about the approach and the support that will now be needed to manage with even greater success going forward."

First, he says, meaningful connection and collaboration at work can't be taken for granted. "In March 2020, there was still plenty of existing 'glue' to keep people engaged in working together. Connections formed already helped to smooth the big transition, but now firms need to ensure they've systematised all the right touchpoints." There will be recruitment and onboarding of course – new people to get to know, train, manage and motivate. However, less physical proximity as a rule in future may also change dynamics and emotions. Connolly continues: "Our firm has over 200 offices globally. People working in them were connecting virtually before Covid-19 of course – but as well as working on projects day-to-day, they now need to be able to begin, grow and sustain relationships and trust virtually."

The trust point is crucial, he says. "There is competence trust and there is interpersonal trust. The first you can establish pretty quickly, but achieving interpersonal trust involves understanding and empathy."

The second important shift he sees concerns moving on from a narrative of stores of resilience, and instead bringing ongoing adaptability firmly into the skillset. It's clearly no longer about "getting through the next six months", as things were often framed when lockdown was still a new concept. "Individuals, teams and organisations can all be resilient. However, things were changing before the pandemic and we now need to help talent at all levels to find ways of becoming more and more adaptable."

These are matters of mindset, and Dentons added the backing of some behavioural science to its change management mix several years ago. Now, after a period of unprecedented transformation in business, that investment will be tested. The firm has since been taking on some learning from the NeuroLeadership Institute, Connolly says. It also recently started using an EQ assessment tool to help leaders themselves to adapt more easily.

He continues: "You can read a lot about empathy, but you really need to bring it home. Where should people be focusing their efforts most today to make a bigger impact on how they're going to work? Teams will now be more challenging things to manage – some people at home, some working very different schedules in different places, we hear a lot about the risk of burnout, and some roles may need to evolve. Pulling all of that together will need trust and authenticity – higher EQ."

The assessment is a matter of development, but Dentons has been able to gain some insight from aggregate data flowing out of the exercise as well. "Those with higher EQ levels don't just see better team performance, but stronger client relationships," he says.

Meeting mindsets

A number of other new initiatives at Dentons owe something to the scientists. For example, there's the well-publicised 'no internal meetings day' each week – as well as aiming to avoid the half-hour stops now common on other days, instead sharing screens for 20 or 50 minutes at a time. "No-agenda" comms are also particularly important to push into diaries, says Connolly – some time to connect on a simpler level, which has perhaps been missing without the office space to encourage it more naturally.

In 2020 the firm leveraged some of what it's learned by introducing a new 45-minute meetup format, which is deliberately split into distinct 15-minute sections (as in truth, says Connolly, strong concentration can't be kept going for much more than 20-30 minutes). "It's designed both to get the best out of people and get them to take some things away," he explains. "It starts with some music to help to change the tempo of how people are working." Again, that's about creating a different mindset and energy without having a different space to help. The first 15 minutes consist of conversation in randomly assigned breakout groups. Then there's 15 minutes of listening to

something more designed, which is followed by some free Q&A. And one such session could involve over 500 Dentons people at a time, logging in from anywhere in the world.

"We believe that opportunities for all to continue to learn in person will be back, but we absolutely have to keep rethinking how we should train and develop people remotely," says Connolly. "Remote-learning experiences can be really impactful, but one-hit sessions won't work. It needs to embed over a period of time – but not three hours at once – it needs the dynamic of smaller groups, and it needs very proactive one-to-one follow-up, which can sometimes happen more informally when meeting in person."

Inclusion on the agenda

Alongside adaptability, empathy and authenticity, leaders will also now need to prioritise their understanding and addressing of obstacles surrounding inclusion. Leading law firms have long said they recognise the link between achieving diversity at all levels in the business and successful business outcomes. However, the murder of George Floyd and the Black Lives Matter movement have been viewed as a watershed moment for demanding greater change.

The Dentons UK, Ireland and Middle East partnership produced an Accelerating race strategy action plan at the end of 2020, with commitments including new training on racism at work, and business leaders specifically becoming more visible on the subject by each committing to three distinct inclusion and diversity actions. This is alongside several interventions in terms of talent recruitment and career progression – new 'retention interviews', a review of lateral hiring, mapping opportunities for mentors and role models, and doing more with data analytics – and also getting race on the agenda more during all those aforementioned meetings.

There's an appropriate diversity of approach to inclusion work in the different places Dentons is operating in around the world, says Connolly – but global leadership has also acted decisively to help to move the dial.

"Before jumping to act, we ran a series of listening sessions with people from all parts of the firm – and that produced five enhanced new inclusion and diversity commitments with a series of actions underneath that we're working through.

"2020 was the year of the ally for Dentons. We ran a series of ally-ship training programmes, and we're now strongly encouraging leaders to raise the

> **"We ran a series of listening sessions with people from all parts of the firm – and that produced five enhanced new inclusion and diversity commitments with a series of actions underneath."**

discussion as a priority proactively during meetings. It doesn't mean it's on the agenda of every single meeting that takes place, but it should certainly be a discussion topic at all our various boards, town hall meetings and similar forums." Indeed, he says, the global board recently gave a clear directive to regional boards to continue the conversation that came out of assessing current performance against commitments and consultation with the firm's Inclusion Advisory Council.

"As we have for EQ, we've also started to use an inclusive leadership assessment tool – and we run an annual inclusion survey to get feedback from our people about their experiences. You have to measure consistently to know where you are and so improve.

"Our clients want to hear about what we're doing firm-wide, and they too want to see measurable impact – whether as part of RFPs or through regular updates. They are using this to make decisions.

"It isn't about coming up with all of the answers, but it is about commitment, setting the tone and listening."

Everything we've been discussing today is also about ensuring the world's largest law firm by headcount stays in tune with all that its talent will increasingly expect as new opportunities seem set to open up in a world of working differently.

"In truth, you'd now simply expect a firm has thought through how it will drive collaboration, support wellbeing and embody values," says Connolly. A law firm stumbling on any of these fronts as social freedoms return will lose ground. But now there's something else to watch out for. "For us, there is an opportunity here to have a talent approach that can clearly accommodate multiple preferences and tailor an experience more to each individual. I think we'll see a new spectrum of how firms operate in this respect, and I do believe it will make a difference to their ability to attract and keep the best talent." ◢

Brain training

20
Halos, heroes and headlines
Leor Franks, director of business development and marketing at **Kingsley Napley**, has some suggestions for cutting through to clients

Halos, heroes and headlines

Leor Franks, director of business development and marketing at Kingsley Napley, has some tips for boosting visibility and assessing your favourability with clients in the pandemic era

I f Rudyard Kipling had been a BD director during the pandemic, he might have written: "If you can cut through when all about you are using Zoom and blaming it on lockdown, yours is the Earth and every client in it, and what's more, you'll be a marketer, my friend!"

Many of us will have considered the consequences of the pandemic and, in particular, the effect on BD and marketing in professional services. Given the narrowing of channels resulting from lockdown, nearly every firm has sought to maintain client contact using digital tools such as MS Teams. This convergence has led to saturation of the market, with a vast array of webinars and virtual meetings. In such a situation, the challenge for BD leaders is how to cut through the 'noise' to engage targets.

Standing out from the crowd

The quickest route to gaining traction in today's noisy online environment, where many are suffering Zoom fatigue, is to identify tactics that attract attention. Some of the most effective are captured by the three Hs: halos, heroes, and headlines.

• **Halos.** Imagine receiving an invitation to an event where one of the speakers or panellists has 'star' power. This could be a leading figure in the legal industry, or someone from a different walk of life, such as a famous politician, sportsperson, academic, or celebrity. Their personal brand, or 'halo', jumps straight out and creates intrigue, driving the recipient to want to find out

more and make space in their calendar to attend an event. The key with this tactic is to pick 'halos' that will resonate with your targets personally, based on their interests and needs.

• **Heroes.** Content as a route to market is core to most professional-services firm BD programmes. Many marketers will be familiar with Google's model, which segregates such material into hygiene (basic), hub (day to day), and hero (critical insights). Hero content stands out. It requires something unique, and ideally provides evidence-based insightful answers to high-value questions. These should be contextualised by macro trends (today the instability created by the pandemic, Brexit, or international tensions). Again, the key to cutting through with 'hero' content is to address your target's personal agenda, to make sense of the issues that are keeping them awake at night.

• **Headlines.** Whatever the sector and market position of your targets, there will usually be an element of interest in what their competitors are doing. Intelligence-led content on topics making news in their industry has the potential to garner a response. To succeed, this should offer an inside track (without, of course, breaching any confidences) on what the headlines mean for them personally. The key is to do more than simply relay (we can all set up news alerts). Instead, it's important to identify the threat or opportunity for your client specifically, and to bring this to their attention before anyone else does.

These tactics are hardly novel and are often relatively

> Hero content stands out. It requires something unique, and ideally provides evidence-based insightful answers to high-value questions. These should be contextualised by macro trends

straightforward to execute. The challenge is to pick the right ones and derive the right value from them. And to do this, it's important to understand the context of a client's current favourability towards your firm.

A quest for favourability

Before selecting any of the tactics mentioned above, thought should be given to how the client presently perceives your firm and the strategies required to improve this. The 'favourability journey' approach can help. This covers the stages of a target's engagement with your brand, or the four Rs of: recognition, reputation, relationships, and revenue. Imagine the following scenario, which may bring the approach to life:

• **Recognition**. You visit a bar to meet a client for a drink. Contemplating what to order, you see 60 bottles on the menu, and none are familiar. How can you pick without recognition of the brands? Looking at the detail, six are from an area you're aware of. You've arrived at the first stage of the favourability journey: recognition. However, without further data, six is too many to pick from.

• **Reputation**. There is no waiter in sight, so you go behind the bar and peek at the six. In the absence of information on the quality of these, how do you choose? Four of the bottles show an award on their label. This provides assurance that they are of good calibre. You've arrived at the second stage of the favourability journey: reputation. But four is still too many to choose from.

• **Relationships**. A waiter greets you. They enquire about your preferences. With an understanding of your tastes, they advise that two of the four bottles would suit. You've arrived at the third stage of the favourability journey: relationships. Two is a sensible range to choose from, but what about cost?

• **Revenue**. The waiter tells you one bottle is £85 and the other £25. You think about what will look good to your client – the more expensive, potentially flashy bottle, or the lower-cost modest choice? You've arrived at the final stage of the favourability journey: revenue. Conscious of the risk of the perception of bribery, you opt for the cheaper option!

In a short timeframe, you've journeyed from unaware and

unengaged, lacking recognition of the brands, to having a sense of reputations, and with guidance from a relationship you can take an educated decision to give revenue to one of the brands. This scenario is potentially familiar for personal product purchases. It should also resonate as the type of journey targets go on with legal and professional services.

Knowing your clients

In advance of planning investments that can potentially cut through, data on your target's favourability towards your firm is essential. Numerous tools exist to assess this, and choices will vary based on timescale, budget and resource. Here are some examples of a potential 'audit':

• **Recognition** How well is our firm known by our targets? A popular method is a client survey, which would ideally be undertaken by a third party on an unprompted and unattributed basis. A digital review, including search engine rankings, can also quickly add to this.

• **Reputation**. What do our target clients know about us? As well as the tools mentioned for the recognition audit, it's useful to look at third-party sources, for example directories and awards. A media coverage and sentiment assessment, either via digital apps or a PR firm, can also be used.

• **Relationships**. What do our current clients think of us? In addition to input from the above processes, CRM data should be interrogated. Customer feedback results may also be added, as can input from partners and staff in regular contact with clients.
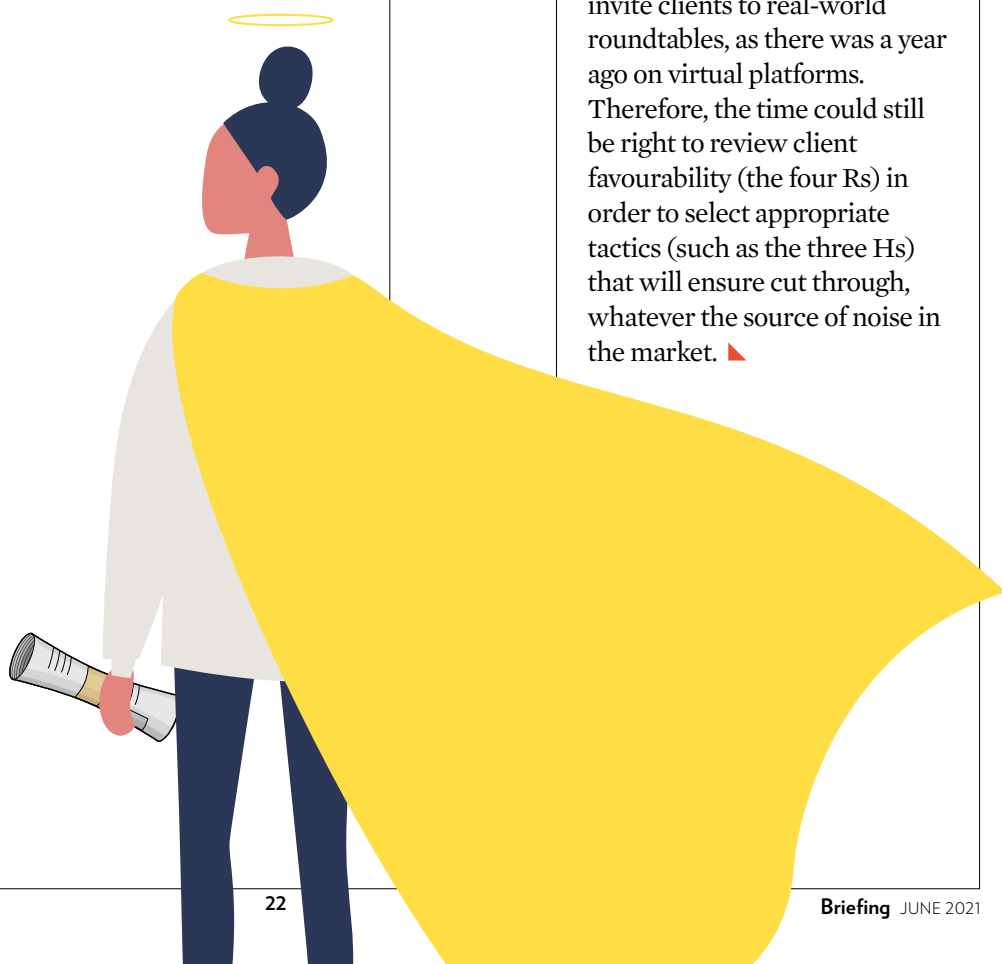
• **Revenue**. How successful are we on concrete opportunities? Analysis of pitch win/loss rates can be conducted. Client feedback should again be sought where possible. Finally, an independent review of bid/tender processes and pricing, for example by consultants, can be instructive.

Outputs from this audit should be used to categorise targets according to their current comfort with your firm. This will guide the tactics that are useful in progressing clients along on the 'favourability journey' and is critical to identifying options to stand out from the crowd.

In advance of planning investments that can potentially cut through, data on your target's favourability towards your firm is essential. Numerous tools exist to assess this

Four Rs and three Hs

Cutting through in a congested digital environment has undoubtedly been the preoccupation of BD directors during the past year. Given current hopes that in-person events will start to return over the summer, many may be expecting a reduction in noise as channels-to-market broaden. But herd mentality means that there will likely be a rush to invite clients to real-world roundtables, as there was a year ago on virtual platforms. Therefore, the time could still be right to review client favourability (the four Rs) in order to select appropriate tactics (such as the three Hs) that will ensure cut through, whatever the source of noise in the market. ◢

Industry views

▶ INDUSTRY INTERVIEW

Change of space

Lauren Colbeck, recently appointed head of product at Access Legal, sets out her top priorities as the business focuses on making future law firm life more productive than ever with a new technology proposition in the cloud

I n **Briefing** April, we heard how 2020 saw the formation of Access Legal as the newest division within Access Group. Case and practice management systems Eclipse and DPS Software were rapidly acquired to join the legal risk and compliance solution Riliance and e-learning offering Socrates, clearly creating a wider pool of law firm management touchpoints. The long-term goal is to continue adding value to firms by bringing more and more of their pressing technology needs together in one place, offering ease of access (of course) and the long-sought advantage of truly joined-up, data-based business intelligence.

Just as that April issue went to press, it was announced Lauren Colbeck would be Access Legal's new head of product. Colbeck spent more than a decade in product management at well-known data specialist Experian, before joining Peppermint Technology. She's now leading on Access Legal's product roadmap as the business progresses toward a single sign-on solution for all its relevant systems for law firms, delivered in the cloud – Access Workspace for Legal.

But she also stresses how critical it is to understand the full breadth of legal businesses that may choose to adopt such an approach; the finer detail of the day-to-day no less than their longer-term strategic visions.

"There are lots of opportunities for Access Legal to continue to improve and add value in this ecosystem, but that begins with understanding the customers themselves," says Colbeck. What are they are trying to achieve every day, each month and in a year? You really have to spend a lot of time talking to users to design products that work for them.

The business has just kicked off a series of new webinars to share product roadmaps with customers, "giving as much information as we can about everything firms can do today, but also everything that we'll be wanting to talk to them about next." It's an agile development process, she explains – features aren't necessarily locked in six months before release. "But we do know what we want to focus on during a particular period, and

> "Automation is one obvious answer to offer as firms seek more efficiency – removing manual tasks that are simple and repeatable. But those can vary with the complexity of the case or matter. You need to ask about how the firm works."
>
> *Lauren Colbeck, head of product, Access Legal*

that can launch an open dialogue that invites questions and experiences to inform the results. It's important and we are encouraging our customers to continually tell us what they think about what we're offering."

Real insight from connected systems
Sometimes new opportunities may hinge on the nature of the legal work. "Automation is one obvious answer to offer as firms seek more efficiency – removing manual tasks that are simple and repeatable," explains Colbeck. "But those can vary with the complexity of the case or matter. You need to ask about how the firm works, all the processes, to build a picture of the best way to solve the problems."

She is already tackling some common areas for improvement. "First and foremost, there is managing to work more intuitively, without friction, when moving to the next step in a process – and with supporting information surfaced in the most relevant place for the task in hand, so people don't need to waste time clicking about to find it." In short, easy access to both sequences of tasks and information helps people to stay productive during a complex day of juggling priorities.

"The vision for Access Workspace for Legal is to provide a common interface between different point solutions, connecting the dots for deeper insight into challenges and opportunities." As an example, she says, HR information – annual leave or absences – could more usefully be factored into understanding performance against fee-earning targets. Client relationship management (CRM) highlights connections between people for more

effective business development of course, but it can also contribute to efficient work allocation. "Those links are harder to make when the data is confined in different systems," she explains.

Task-switching is also set to be more straightforward – quickly moving from progressing a case to completing a piece of important training on time, for example, or an HR enquiry. Other possibilities include portal capabilities for both internal and client collaboration and introducing payment facilities.

Configurable but consistent
Behind the scenes, meanwhile, it's critical to highlight that firms will no longer need to wrestle with product-to-product integrations to get the most from their data. Access Workspace provides a powerful analytics capability, where firms can blend information from multiple products into one analytics system. After consulting with the users, Colbeck says the plan is to define some preconfigured data insights and dashboards, as well as enabling firms to create their own analytics and information reporting.

Access Workspace for Legal is of course cloud-based – another reason that plenty of good conversations are needed in advance of finalising change. "You allow for some flexibility and configuration, but with cloud you do also need to establish the core similarities and priorities for users to keep the software up-to-date," she says.

"Cloud-first is even more compelling today, alongside the tools firms need to manage all work virtually, but securely, without interruption. Many industries previously had questions about visibility, control and security, but now the advantages are coming to the fore much more clearly. Firms appreciate the additional flexibility in terms of time-to-value, reducing IT overhead, and taking advantage of new capability as it comes through that much faster." ◣

> For further information, visit:
> www.theaccessgroup.com/legal

◤ **INDUSTRY CASE STUDY**

States of change

John Hunter, chief information officer at the Council of Europe, explains why experts in 47 countries, as well as its internal employees, needed new ways to access documents and effectively collaborate, and NetDocuments was chosen as the platform to enable it

J ohn Hunter, the chief information officer of the Council of Europe (CoE), is responsible for choosing technology that will have over 2,500 internal users and some 10,000 external users working right across the continent. Focused on human rights and the rule of law, the organisation comprises 47 member states, 28 within the European Union. It comprises the Committee of Ministers – ambassadors from all those states' governmental bodies – the Parliamentary Assembly, two major Directorates, the Congress and the European Court of Human Rights (ECHR). And teams of lawyers, other professional experts, consultants and project managers are tasked with investigating and reporting back on everything from compliance with the European Convention on Human Rights within prisons to the handling of personal information by social media companies.

The CoE can need to assemble a new committee rapidly to follow up on, for example, a recent ECHR judgement in any country – and one effect of this variety of agile working is a regular huge surge of documents at different stages of readiness, and in the past potentially stored in multiple locations. Arriving from a position as head of IT at the ECHR, Hunter was quick to decide that the CoE needed a new IT strategy with controlled document management at its core.

He explains: "We had 10 different places that people could officially store documents, and they were using USB sticks, S-drives and Microsoft Exchange public folders. There wasn't much of a concept of versioning, and lots of people needed to be able to connect and find information for work to

"I wanted our teams to be able to work together more collaboratively, but critically also securely."

John Hunter, chief information officer, The Council of Europe

"Instead of hundreds of thousands of versions stored on multiple repositories, there's just one. There's greater security and compliance, and common working methods because everyone is using the same system."

progress. I wanted our teams to be able to work together more collaboratively, but critically also securely."

Going to his IT governance board, he says, the case for greater centralisation with a new document management system was clear – and after eight months of investigation he selected NetDocuments.

"We had created a shortlist. We'd already adopted a policy of being cloud-first where it was possible. However, I also wanted a range of providers to present their roadmaps, and samples of our users to ask questions and really test the systems. It was great that they were all involved, and fortunately – as I had my own thoughts as well – everybody preferred NetDocuments.

"They particularly like the user interface and integration with Microsoft Office 365, and it's one version of software that is deployed worldwide."

Mastering change
The first phase of implementing NetDocuments had gone live by the time of the March 2020 lockdown in the UK. Working with Tikit, a part of Advanced, several phases would eventually see more than 35 million documents migrated into the new DMS. "One big challenge," Hunter continues, "was moving all the data into a new structure in NetDocuments. We then had a process of interviewing the users, as well as exploring their repositories, to improve our understanding of how people worked.

"We really communicated hard. Directors all sold the benefits to their respective departments, and I told my team that they should be able to answer any question raised, above everything else." Clearly all this activity was also happening fully remotely – from people's homes. "We had virtual 'floor walkers' to offer individual support, and it was a tough journey, but ultimately we were probably able to push the change through faster for it."

But another reason the change effort has been so successful, he adds, lies with the product itself. "It's really quite intuitive. People can easily access documents on their smartphones, create versions, and send convenient links to colleagues instead of as attachments. In future they'll be able to work on a file on a flight, for example, and the moment Wi-Fi is available again it will upload to the DMS.

"But instead of hundreds of thousands of versions stored on multiple repositories, there's just one. There's greater security and compliance, and common working methods because everyone is using the same system."

A foundation for process improvement
By the third quarter of 2021, Hunter anticipates all 23 of the CoE's remote offices across Europe will be live on the system. But even then, the work isn't over – next comes the integration of NetDocuments with Microsoft Teams and adding even more collaborative potential for people on top.

"We can't be complacent – we must have a controlled environment with Teams. We're also introducing electronic signing and integrating with financials to give the files involved in those processes more governance and reduce duplication.

"NetDocuments is the foundation we can now build on – from new knowledge management sites, to sending HR contracts out for a return e-signature and quickly checking documents for any mistakes on the phone."

And with a pre-pandemic workforce where some 40% would typically be on the move between European countries on a regular basis, whenever important in-person meetings approach those volumes again security and agility will certainly continue to be key. ◣

**For further information,
visit: www.netdocuments.com**

Parts of the data job

Paul Honeyman, head of product development at leading Microsoft partner sa.global, explains how the business's new empower platform allows firms to have it in their own hands to make data-driven process improvement happen

I n early 2021 sa.global launched the empower platform – the front-end, user-experience counterpart to its next-generation evergreen technology platform, which was designed to help law firms optimise all their core internal processes and delivery of client services. The evergreen platform is developed on top of Microsoft Dynamics 365, and empower is based on the Microsoft power platform, providing – alongside sa.global's own IP – opportunities to continuously transform how lawyers work.

In this age of remote and hybrid working, empower's mission is to enable those lawyers to perform as much work as possible without switching between so many systems, says Paul Honeyman, sa.global's head of product development.

"It's a question of having the integration to leverage across the entire Microsoft stack. Lawyers will regularly need information about a client, or their latest key performance indicators, and they want to be able to access, then act on, that information without using third-party systems wherever possible."

Delivering the data journey

In order to do that, however, the underlying data also needs to be in a state ready to be surfaced. A recent **Briefing** roundtable joint-hosted with sa.global heard that law firm data often remains highly fragmented across multiple systems, and sometimes is simply not clean enough. In many cases, firms need a roadmap for understanding both where data sits today, and how it can then be delivered to people more productively, for greater insight, tomorrow.

"Lawyers regularly need information about a client, or their latest key performance indicators, and they want to be able to access, then act on, that information without using third-party systems wherever possible."

Paul Honeyman, head of product development, sa.global

"We will collaboratively demonstrate how the technology of empower can solve a particular small problem – a thin slice of functionality, end to end – in just one day."

"It's a complicated and time-consuming job," explains Honeyman. "They may have to unpick system architecture or move it into a data lake for instance. And at the same time a change on that scale can't simply be an IT project. If data is the new oil, it's the wider business that wants to be powered by it."

For that reason, in a three-phase process, sa.global offers to begin by helping firms to analyse their current data frameworks and consider exactly what they may need to consolidate or standardise, to reach a transformation strategy – digging out the oil if you like. Only then, once organised, can the conversation progress to what firms now want to do with their data.

Honeyman continues: "We can suggest many solutions, such as introducing productivity apps or removing manual steps through automation, but the real key to empower is that law firms themselves are the experts in what they could achieve for greater competitive advantage.

"Business challenges can be highly specific to each law firm – and with the empower platform, and the right ideation mentality, they can often identify, articulate and build it for themselves."

One example of this specificity is introducing process changes for particular clients – a new bespoke billing process, for example. "As customer demands increase, it's the firm's ability to meet these requests without breaking their own back-office systems that brings a competitive advantage." It's the malleability of the empower platform, and so the ease of connecting in such ways, which enables this, says Honeyman.

A law firm can effectively set up a long list of new system or automation requirements that would have a significant business impact – and from there, sa.global demonstrates how quickly a useful change can really take place. "With a joint team we will collaboratively demonstrate how the technology of empower can solve a particular small problem – a thin slice of functionality, end to end – in just one day," says Honeyman.

Improving the views

Another potentially useful change for a firm, meanwhile, may be transformation of the business dashboard. A second clear message to come out of our **Briefing** roundtable was that the traditional variety – a design choice of amassing as much data as possible into one dashboard to avoid multiple – was no longer fit for purpose with the proliferation of information and urgency of response today.

"Leaders and lawyers alike already know which pieces of data are particularly important at different periods of time. They just want to see these tailored views at the appropriate time," says Honeyman. "A CFO needs to see information at certain points in the week, month and year, while some KPIs are more important to lawyers at the end of the month. Therefore, the system should recognise and serve these diverse data needs automatically.

"That all needs to be proactive, timely, and crucially, simple – easily digestible and ready for an action in response. Perhaps directly from Microsoft Outlook or Teams, where the individual is already busy during a typical working day."

As such, the time and concentration lost to regular 'context switching' – continuously moving between different systems as data indicates new tasks now really need completing – may well be another piece of empowering process improvement for firms to take on with sa.global's flexible empower technology."

For more information,
visit: www.saglobal.com

◤ INDUSTRY CASE STUDY

Data with a difference

Catharine Mathews, head of marketing technology at international law firm Morrison & Foerster, explains how introducing the Salesforce platform has transformed the business development and marketing function by increasing opportunities to win new work by providing more actionable data and improving the efficiency of processes

L aw firms have long recognised the advantages of introducing technology to make different aspects of work more efficient, but sometimes it's possible to have just too many solutions – causing a problem in itself.

Catharine Mathews, head of marketing technology at Morrison & Foerster (MoFo), says that was one of her main drivers for investing in something entirely new. "The firm previously had over 30 technologies involving some marketing component – there were three email marketing automation systems alone," she says. "MoFo wanted an integrated technology stack, so we chose the Salesforce platform. We started with Pardot – the marketing automation solution within Salesforce. It was just the first step, and we've since adopted

other aspects of the wider Salesforce platform to better manage the workload of professionals in a law firm and improve our marketing and business development efforts."

The efficiency business case didn't rest solely on streamlining the firm's technology – Mathews also wanted to do much more with less. "There's a lot of freedom for non-developers like me to make changes for themselves in Salesforce – for example, customising our own reports and dashboards," she explains. "That in turn makes us less reliant on the IT department, so they can focus more on the tools lawyers need to work productively and deliver client service."

And in a further efficiency gain from removing overlaps, Salesforce has brought more consistency to all the firm's marketing activity, she says –

"As there are so many Salesforce customers, it's really easy to reach out to talk to others – professional and financial services firms, for example – about how they're tackling their own business change projects and challenges."

Catharine Matthews, head of marketing technology, Morrison & Foerster

enabling faster, more coordinated decisions across all teams. "Rather than producing separate target and pitch spreadsheets for each practice area, for example, that data is all in one location, which enables us to join more dots and identify opportunities to serve clients better." And anybody accessing it can do so with greater confidence, both that the central record is accurate and that they know what is happening with clients elsewhere in the firm.

"One of our new dashboards now dynamically aggregates information about pitches and our win-loss ratios from right across the firm." Sent straight to the relevant people's inboxes, this information helps practices to stay aware and joined-up in their BD efforts, rather than overstepping one another, she explains.

At the same time, the ease of dashboard-generation opens opportunities for all to be more responsive to the signals that marketing continually receives from different client touchpoints. "Another problem with reporting by spreadsheets of thousands of rows is that they aren't very actionable for people," says Mathews. But using Salesforce, her team can push regular data snapshots involving web traffic, social media stats, email engagement, and more, to individual practices – which can lead to much more targeted conversations with the most engaged clients around their needs.

Next projects

There's also some centralisation of marketing project management – tracking the process for award and lawyer ranking submissions, for example, complete with milestones and the associated communications. "We can set up task reminders with their due dates in Salesforce, which helps to keep work on track to key deadlines," says

Mathews. And dashboard views once again make measuring the success of such submissions far more efficient than using multiple documents in different formats.

The firm's talent team has even recently started using it to manage tasks for the integration of lateral hires into practices.

Next on the list now, she says, is to take these self-serve CRM and reporting opportunities out to the wider firm more fully – making Salesforce a place that partners or lawyers themselves may visit several times a day, if not every day. "If they're going to do some BD today, they're going to start with Salesforce," is the goal. "It should be a clear part of that process."

It will surely help that she found any training needed to work with the technology very light – and the ecosystem particularly large and open for businesses across sectors and specialisms to share their lessons for leveraging it. "There's a lot of educational material, accelerators on key topics, guides available to all, and you can become Salesforce certified.

"And as there are so many Salesforce customers, it's really easy to reach out to talk to others – professional and financial services firms, for example – about how they're tackling their own business change projects and challenges."

As they reconsider their technology choices in light of new working patterns among the many other strategic drivers, more law firms can also realise the rewards of the Salesforce platform in changing the way data is managed and delivered across the business. ◢

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> www.salesforce.com/uk/solutions/
> industries/business-services/legal

▶ INDUSTRY INTERVIEW

Return to the outsourced office

Clare Hart, CEO at Williams Lea, says law firms face many operational challenges when it comes to adopting a hybrid working model, not least deciding who comes to the office, when and why. Embracing new ways of thinking and outsourcing support roles, she says, may help law firms to solve these issues and get back to practising law

With such momentous change having been foisted on organisations in the last year, it's unsurprising that many businesses are preparing now for the next big change management challenges headed their way – and, unlike in 2020, it's possible to predict what those will be.

"Successfully managing remote workers in a hybrid environment – where some people are in the office and others elsewhere, on a changing basis – is the challenge firms are facing next," says Clare Hart, CEO at Williams Lea. Remote working will have to be operationalised in a sustainable way, she adds, meaning firms will need to be able to keep a close eye on utilisation and the ratio of lawyers to business support staff.

That may be more of a challenge to businesses than the blanket order to remain at home was, she adds. "Even the seemingly trivial matter of

scheduling who is in the office when – and who manages that – is a question that needs an answer." Although most law firms have indeed fleshed out post-pandemic flexible-working arrangements, Hart says there's still much complexity and practical nuance that's yet to be proved in practice for the long term. "Legal leaders need to decide how they'll arrange flexible working for different roles – perhaps some should be permanently remote, and others need more time on-premises. Whatever the policy, that's going to require some sort of rigour around calendarising office presence."

Best of both?

There will be benefits, of course, to a hybrid model. Compared with legal, Hart says, other professional services firms, including the Big Four, have long had more agile operations and training. That has left them better prepared to rely less on paper, in-

For more information,
visit www.williamslea.com

person training and expensive offices. "Law firms' offices are in some of the most expensive cities in the world – London, New York, San Francisco. The commercial benefit of more distributed working is the ability to cut those costs, especially if you're outsourcing roles to other geographies nationally or internationally."

Hart adds that many firms have voiced concern around how to maintain the apprentice-style education legal trainees receive in a more remote environment: "Trainees work closely with partners and become better lawyers as a result – that's still got to happen, and it won't happen incidentally, walking down the corridor and crossing paths. It has to be intentionally facilitated, whether that's a breakfast meeting and a speaker, or a cocktail reception with networking – there has to be a purpose."

Hart says Williams Lea has adopted 'community managers' to enable these kinds of activities, both internally and for its client businesses. "That's what Williams Lea does. Outsourcing those administrative tasks to a business like ours means firms can set aside the management of remote workers: it's no longer their problem, it is our problem."

That's another reason Hart feels firms have been increasingly looking at outsourcing their business support functions: "Our client firms are saying their lawyers want to practice law, not manage the administration of the business."

"Our client firms are saying their lawyers want to practice law, not to manage the administration of the business."

Clare Hart, CEO, Williams Lea

To facilitate that need, she adds that Williams Lea has built centres of excellence around document processing, administrative resourcing, financial support services, and marketing and sales, additionally ensuring quality and the ability to scale. "One UK legal chief operating officer recently said to me 'quality of service is more important to us than saving a few pounds here and there'. It's not about the money – it's about the overheads around technology and training people on it. That lets us provide a better service than is possible internally."

Reporting back

As part of its service offering, and predating the pandemic, Williams Lea developed ENGAGE, a combined workflow tool, data warehouse, reporting dashboard and technology platform to answer firms' needs. Within it, fee earners can email a document to be proofread, for instance, to a Williams Lea support professional and then rate the quality of the output. But ENGAGE also meets a critical reporting need: Hart explains: "A lot can be left to interpretation when you generate reports manually through Excel. A dashboard articulates what's really happening in terms of utilisation much more clearly – and it gives you more detail, such as who's submitting the most jobs, in which offices, and at what times."

Having such detail at leaders' fingertips can also benefit HR and talent management, she adds. "That data can indicate poor workload management, or even potential firm departures – which is really important in the world of managing diversity, equality and inclusion."

And she points to the increasingly intense war for talent – and how business leaders within firms can also benefit from an outsourcing model. "HR leaders can focus more on winning the client-facing talent they need if the administrative aspects for support roles – background checks, onboarding, training – have been outsourced to teams dedicated to that purpose." When it comes to the next big challenge, law firms can hopefully now see the road ahead, and it seems support is also close at hand. ◢

A transformative relationship

From moves off-premises and open-plan, to unlocking the latest opportunities for widely dispersed teams, Wedlake Bell has long had Stridon at its side on the strategic roadmap, says head of IT David Hymers

N ow that law firms largely have employees with laptops everywhere, it's easy to forget quite how far the concept of agile working has come in just a few years.

When David Hymers, head of IT at Wedlake Bell, was managing through an office move in 2016, the scale of change was immense – certainly for a traditional law firm. "There were boxes of paper everywhere – and we were agile only in the sense that you could move your desk from one floor to another," he says." Everyone had a cellular office, and the IT was all on-premises. We once had a flood, where the only option was to switch everything off."

All of that was about to change, and help would be required to make a bold vision of much smarter working an efficient reality. Fortunately one of the firm's then partners recollected the value Stridon had provided during an earlier merger scenario – another highly demanding period of change for any law firm. "I started having conversations with Stridon myself, and was soon struck by the strategic mindset and how well they communicated," Hymers explains. And that was that. Stridon advised Wedlake Bell on everything from replacing the back-end infrastructure and a new external data centre, to selecting wide-screen work monitors and optimising Wi-Fi signal throughout the new building.

There was some future-proofing in terms of space needs – it was then already in Hymers' mind to move lawyers over to Microsoft Surface Pros as standard in a further phase of agility-focused work, and this needed testing. And today Stridon

> **"Recent projects such as Teams, electronic signatures, document assembly – these are all great examples of changes where the lawyers' own input is really essential to success. You need to engage early, or the risk is they just don't bed in.**

> *David Hymers, head of IT, Wedlake Bell*

continues to provide ongoing day-to-day support, which also frees internal expertise to focus more energy on client service and product innovation. "If extra internal resources are needed, they can quickly step in to supplement us," Hymers adds.

A relationship as close as this would require those communication skills of course, and the two sides recently established a regular monthly catchup call to update one another and share, however far particular projects have progressed.

Time for Teams

A relatively new one on the agenda is the path ahead for Microsoft Teams – something Wedlake Bell didn't have in place before the first lockdown, but which has certainly become a top priority since, given changing communication and collaboration needs during the pandemic.

Hymers continues: "Stridon is really good at advising us where there are a range of options. They will often speak to our managing partner, or present at the board, filling in the lay of the land and strengthening the argument for a change."

There is, of course, a lot more to the stakeholder management of a law firm transformation project than that. "Around 10 years ago, your IT team would have chosen a new system, set it all up, and push it out to people with perhaps an hour's training," he says. However, Wedlake Bell has since appointed itself a dedicated business engagement specialist; somebody who will demonstrate new technology's features and the productivity gains in person (clearly when proximity is less of a problem than today). This is what happened with the Surface Pros and accessories, for example.

"Recent projects such as Teams, electronic signatures, document assembly – these are all also great examples of changes where the lawyers' own input is really essential to success. You need to engage early, or the risk is they just don't bed in – it can become a real struggle to get people to use them." Another example he gives is a new piece of work – and long-held aspiration – to automate the client engagement letter using a template management system. "And you need the lawyers to help you to shape a product like that," he says.

"In the second half of 2021 we'll now move on to work with Stridon on optimising other parts of the Microsoft stack – and there's a lot – surrounding Teams." This will involve running workshops with different business units to understand their specific manual processes and "pain points", he says, hoping to map new capabilities to improvement opportunities more effectively.

Threat value

A final strand of Stridon support has also been evidenced in Wedlake Bell's Teams rollout – its comprehensive expertise in different aspects of information security. "Going right back, they helped us to implement two-factor authentication and single sign-on, and now it's setting up all the governance surrounding Microsoft 365 to avoid being hacked, and prevent data from being exfiltrated," explains Hymers.

Advised by Stridon, there are new technologies in place for vulnerability-scanning, for homeworking specifically, and for user monitoring and threat detection – as well as a fresh 'user security awareness system'. "Alongside regular online cybersecurity training, we now have a process of sending phishing emails to test people every few weeks," says Hymers. It's an example of a people-focused push likely to go down very well with all law firms' increasingly security-conscious clients, but also key to the next generation of a firm's agile working – in and out of offices – as those patterns and users now emerge. ◢

> **For further information visit:**
> **www.stridon.co.uk**

▶ **INDUSTRY ANALYSIS**

Agility-enabling technology

In the post-pandemic global economy, technology is critical to delivering firms' required agility, says Paul Suffield of OneStream Software. That calls for careful consideration of data, processes and people as one. The three cannot be treated independently

A gility is a firm's ability to respond to clients and external forces with informed decision-making at a speed that delivers competitive advantage in the fast-moving global markets. Clearly, the transformation of the legal services market is moving at an even faster pace than expected due to the pandemic's profound impact on everyone's lives and the markets we work in. It has highlighted the fact that the only constant across all industries is change. Agility is a firm's ability to respond to – and take advantage of – that change.

So why does OneStream consider the three elements of data, processes and people together? We must understand exactly what our financial and operational position is today to adjust or enhance our service delivery to take advantage of future

The firm needs visibility by practice area and location, but also by the status of matters and the capacity in utilisation. And it needs this information supplemented with other key performance indicators and financial metrics

Paul Suffield, account director, OneStream Software

Delivering the right information to partners at the right time keeps the firm agile enough to make intelligent decisions about acquisition, regulatory, fiscal and other economic opportunities

opportunities that arise. The firm needs visibility by practice area and location, but also by the status of matters and the capacity in utilisation. And it needs this information supplemented with other key performance indicators and financial metrics, including working capital, current cash position and profitability.

Achieving true agility

The role of technology is not only to bring all of this together as digestible, transparent information; it must also enable the firm to model potential decisions against actuals, budgets or plans, and to understand the impact of these decisions on all the above. Once the firm can do that, and effectively communicate the intelligence throughout the partnership, it will have joined up data, processes and people seamlessly. The business partnership with the finance function will have delivered a truly agile firm.

In OneStream's extensive experience with large, complex organisations in both professional services and wider global markets, once a firm has taken steps to harmonise these elements, and automated the collection and visibility of data, it will have reached the level of agility required to adopt a proactive approach to change. This in turn enhances the relationship between the firm and its clients, while also delivering the rewards identified during this ongoing process to partners.

At OneStream, for example, 100% customer satisfaction is not just a marketing slogan. It's core to our DNA and every decision we make, and we can only deliver this through a business and technology partnership. As firms do, we also partner with our clients to help solve their most complex problems. It can only be achieved through partnership between ourselves, our clients and our

delivery partners. We work together to transfer knowledge that empowers law firm users to extend their use of the platform to continue to solve strategic problems.

A single source of truth you can trust

Integration is seamless, meanwhile, as OneStream can layer over your current practice management system or systems (PMS). It extracts your financial data through a fully auditable consolidation process and delivers best-in-class reporting, including the ability to attach and report on commentary against the data. Most importantly, OneStream offers complete data transparency back to a PMS for auditability and trust in the numbers you're reporting. We have built in world-class data quality through a series of governance controls that check and validate the data. The same application can consume your operational data and blend the different datasets through shared structures and hierarchies. This allows the firm to track and display financial and non-financial KPIs at a firm, region, practice, or even an individual level. It all occurs within the defined governance structure, modelling the financial and operational impact of decisions in order to take advantage of opportunities created by the new speed of change. Delivering the right information to partners at the right time keeps the firm agile enough to make intelligent decisions about acquisition, regulatory, fiscal and other economic opportunities.

Continuous client satisfaction

Finally, how does having an agile law firm immediately support enhancing the client relationship? With full internal visibility of the data within your firm, clearly protected by security, the partnership benefits from a controlled mechanism to deliver that transparency and information back to clients through a client licence. The agile firm can also respond quickly, intelligently, and with transparency, to the impact of change on its clients, all while lowering the cost of client acquisition. ◣

For more information, visit: onestreamsoftware.com

◣ INDUSTRY CASE STUDY

Data plans

Chris Lewis, head of data and insight at DAC Beachcroft, sets out how investing in business intelligence – supported by Catalyst BI – has delivered significant gains in both business efficiency and competitiveness

T he law firm DAC Beachcroft has been on a journey of exploring how investment in data management and analytics can improve aspects of performance for more than a decade, says its head of data and insight Chris Lewis.

"It was in 2011 that we first considered building our own in-house management information system to capture data more consistently and also continuously monitor its integrity," he explains. At that time there was still little internal reporting by visualisation, with a further challenge that the work of client reporting was highly bespoke –

information often pulled together for just one client, and in a process that couldn't easily be replicated.

A few years later, after assessing the market, the firm saw potential in the business-intelligence solution QlikView (soon to be migrated to Qlik Sense) to help with the delivery of several data-related goals.

A small initial investment nevertheless started with some big fundamentals. "First, we created processes for assessing our data-entry against certain rules and generating alerts for individuals if those rules were broken," says Lewis. "We also set

> "First, we created processes for assessing our data-entry against certain rules, and generating alerts for individuals if those rules were broken. We also set out to make data more immediately accessible to people."
>
> *Chris Lewis, head of data and insight, DAC Beachcroft*

> ## "Over time we've become good developers using the Qlik products, but in the last two years we've focused on Qlik Sense to upskill our various analysts across the firm to work differently."

out to make data more immediately accessible to people, saving them the time it takes to request it.

"We saw the introduction of executive-level dashboards for a more balanced view of performance across the business, and then worked on data in workload monitoring to support teams' project management." A morning 'scrum' meeting for a team, for example, was enabled to call up an app that effectively highlighted hours, tasks to complete, various deadlines and expected durations, and then to filter the data by different time horizons – today, tomorrow or next week.

In the same period, there was the launch of a substantial data literacy programme "to win hearts and minds" as to the new possibilities – something that is still front and centre of his team's efforts to this day.

Data specialist Informance – since acquired by Catalyst BI – was brought in to supervise the development needed to deliver these outcomes. "Their consultancy was incredibly helpful," Lewis recalls. "Even though we've been through rewrites since, we still follow the methodology they first put forward to this day – the technical layout, documentation and change management approach. They also had a great community and suggestions for addressing the data literacy development."

Help yourselves
This was all part of a five-year plan to drive business improvement, which also included a certain "stretch goal" – transforming data into opportunities to increase real revenue.

In 2019, the team started down the Qlik 'Analytics Modernisation' programme, which extends licensing out to the expanded capabilities of displaying and disseminating business data insights using Qlik Sense.

Lewis continues: "Over time we've become good developers using the Qlik products, but in the last two years we've focused on Qlik Sense to upskill our various analysts across the firm to work differently. I myself chair a network of analysts, all of whom we've been training, and we'll now increasingly involve the wider firm population as well."

Some opportunity is very specific to an area of law. For example, the firm has developed an internal app for assessing the risk of subsidence in an area – mapping data points available online such as the coordinates of urban trees with census data about town populations and the results of historic subsidence claims.

But there are also opportunities to add value for a whole range of clients, he says – offering extra business intelligence about trends in their respective sectors and how the firm sees opposing solicitors behaving in certain situations. It has just started down a road of enabling clients to interact with the dashboards for themselves even, inviting them to perhaps share perspectives back in an iterative collaboration.

A further Qlik-based app – called Compass – enables case handlers to pull reports of how similar types of cases have progressed for others in the past; information such as the average moment that claimants settle in different sets of circumstances, estimates of ranges, and so on. "The data is automatically available to help handlers to strategise," says Lewis. There is the advantage of streamlining process internally – potentially fewer touchpoints and less supervision required – as well as improving key outcomes for clients.

He concludes: "The investment is already starting to pay for itself through securing new work and retaining or winning clients that can see the value – and one day it may become a revenue stream as well." ◣

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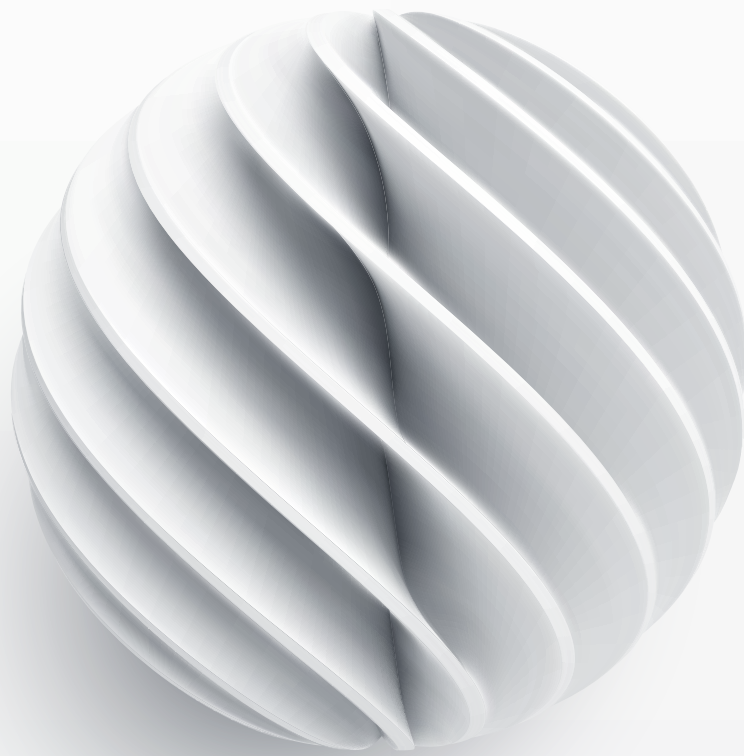
◤ **INDUSTRY CASE STUDY**

Bundling up efficiencies

Remote working has forced firms to revisit key processes and upgrade them for a digital-first age. Riana Nel, IT projects and implementation specialist at Wedlake Bell, explains how Bundledocs has helped the firm to capitalise on the need to bring court-bundle creation into a new era and created long-term efficiency wins at the same time

A t the start of the UK lockdown in March 2020, Riana Nel, IT projects and implementation specialist at Wedlake Bell, explains her firm faced an inescapable change-management conundrum. As the country went remote, all law firms were required to submit court bundles electronically – a challenge to which the firm's existing bundle software was not equal. "It wasn't a cloud-based solution. It would take our lawyers and secretaries hours, or even days, photocopying, scanning and collating thousands of pages of content to produce pdf court bundles. Then we'd try sending the bundle via email, often to find the court's system would reject it due to size restrictions, or we'd need to upload the bundle into a separate system to allow it to be shared," Nel explains.

"The feedback from fee earners was that the existing bundling software was also too slow and clunky – it would have been unworkable during the pandemic, when we needed to prepare for remote

"The feedback from fee earners was that the existing bundling software was too slow and clunky – it would have been unworkable during the pandemic, when we needed to prepare for remote hearings, and court bundles had to be submitted within tight deadlines."

Riana Nel, IT projects and implementation specialist, Wedlake Bell

"Junior lawyers can put together the initial bundle, allowing senior lawyers to review it more easily. It's much more collaborative."

hearings, and court bundles had to be submitted within tight deadlines," she adds.

Future proofs

This prompted the search for a new, cloud-based tool, which resulted in the selection of Bundledocs, initially rolled out to the firm's family department. Nel explains the software has addressed the need to submit court bundles in a digital-friendly way, as its cloud-based setup means bundles can easily be shared via a secure link, rather than as a large attachment, while also accelerating the pace of work. "It's helped our legal professionals save time and created significant efficiencies within the firm."

Many of the solution's features contribute to efficiency gains, Nel explains, including automated inclusion of bookmarks and hyperlinks, easy annotation, redaction, the ability to handle changes and late inserts, customisable indices, templates for specific court requirements, and secure, collaborative sharing functionality.

This has been crucial, given the time pressures the firm's lawyers and support staff have been under, which she says was particularly difficult at the start of the pandemic. Having worked through the night alongside the litigation team on more than one occasion producing court bundles, she says: "If we didn't have this solution, we wouldn't have met the deadlines for submitting electronic bundles to the court. Lawyers are wasting less time using cumbersome technology. It no longer takes hours to prepare documents for any type of bundles – it's more like minutes."

As the utility of the software became more obvious, Bundledocs was quickly rolled out to other practice areas. It's now used by half the firm, and also for creating case bibles. "Our teams were all struggling to use the existing software for creating bundles and case bibles, so we looked at how we could expand use of Bundledocs to more teams," she explains.

Nel is now gathering feedback from the firm's

users to identify any additional use case scenarios for further expansion – but the biggest win has been with the existing users. "They can't live without it now," she says.

Collaborative powers

Being cloud-based, Bundledocs has been a boon to document creation and collaboration in remote-working circumstances. In addition to integrating with the firm's document management system, iManage, the ability to access and edit bundles from anywhere has changed the dynamics of document-creation processes for the better. "You can have a secretary upload all the content and then share that bundle or bible with a lawyer at home. Junior lawyers can put together the initial bundle, allowing senior lawyers to review it more easily. It's much more collaborative."

Increasingly, Nel adds, clients are expecting rapid access to documents and their legal bundles – and moving to a cloud-based solution has made meeting that need not only possible, but extremely easy. "Clients can have immediate access to their content through an intuitive interface, which saves time and makes the whole process hugely more efficient." This has made a particular impact with corporate and private clients alike, she says, as the software allows for the rapid creation of professional-looking pdfs when those clients need to see documents or request an update.

As the software creates bundles in an optical character recognition-compatible (OCR) format, she adds that they're fully searchable, and so contributing is easy. That's made sharing large and complex documents with counsel, courts and the other side of a case much quicker. "It's all about speed, simplicity and ease of use."

That even extends as far as the software's training sessions, which she says were excellent at the point of onboarding, while ongoing support is provided via two-minute videos made accessible in training channels on MS Teams. "Lawyers don't have time to attend long training sessions for a solution. To support the rollout of Bundledocs, we added guides and training videos into our Microsoft Teams chatbot, so it's even easy for users to find tips and support," she concludes. ◣

For further information, visit:
www.bundledocs.com