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Can tech and strategy meet to transform productivity?

When last year's **Briefing** Frontiers was published during the winter lockdown in the UK, a much wider debate had recently raged about the importance of a place called the office. More than three-quarters of firms' strategic leaders then surveyed expected their next HQ agreement to be for a smaller space – with over a fifth foreseeing a 'significant' downsize.

This year's poll of 54 heading up functions at **Briefing** firms (annual revenues of at least £18m) sees them anticipating people will spend an average two days a week in such a space in future – not necessarily mandated, but with an eye to balancing individual preference/flexibility and the power of a group coming together, in the interests of performance, personal development or perhaps risk.

But there is an even bigger question: whatever their chosen model, will firms have the people they need to make it work – for culture, clients and consistent future-proofing? Competition for talent continues to tighten, productivity is under pressure, and leaders need to decide exactly what they can offer to attract it (it may not even be 'more money').

Our new-look flagship market research now centres on the intersection between available technology and the biggest strategic questions of the day. Where is the greatest potential for supporting firms to thrive – in terms of efficiency, competitiveness, or indeed human engagement?

RICHARD BRENT, HEAD OF CONTENT, BRIEFING



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Frontiers biz futures in brief



PUSH HERE
FOR CHANGE

66%

Of leaders say 'maximising productivity' gets most attention from the firm's senior stakeholders when it comes to IT strategy/investment – easily the highest-ranking factor!

THREE TECH AREAS TO FOCUS ON FOR
HIGHER 'HYBRID' PRODUCTIVITY:

1

KM/intranet
systems

2

Client
relationship
management

3

E-signing

TWIN PEAK
CHALLENGES
FOR THE FIRM
OF 2022

Investment in
client-facing tech
(dealing in data or docs)

Retention of
potential top
talent

OFFICE WORK IN PROGRESS ...

75%

Of law firm leaders say firms are in the process of 'repurposing' shared workspaces



HOW'S THAT HYBRID
WORKING OUT? PRIORITIES
TO TACKLE NEXT

1

2

3

- Greater/better AV for an equal experience in different spaces
- Guidelines for managing more efficient meetings
- More training + iterative development + change management push on existing tools

WHO'S COUNTING?



2

Average number of days per week leaders expect people will be in an office the firm pays for

TRANSFORMATION
OF SPENDING POWER?



Little change in tech investment as % of annual revenue (that's cash for solutions AND skills)

TOP RESPONSES ON HOW
TO ADDRESS EMPLOYEE
WELLBEING IN 2022:

'Stop worrying about who is working where'

'Tech time-outs'

'Change the incentives for success'

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WHAT A LAW FIRM NEEDED – ASKING LOTS OF
QUESTIONS, WITH A GENUINE EXCITEMENT OF
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**SIMON BUSHELL, PARTNER
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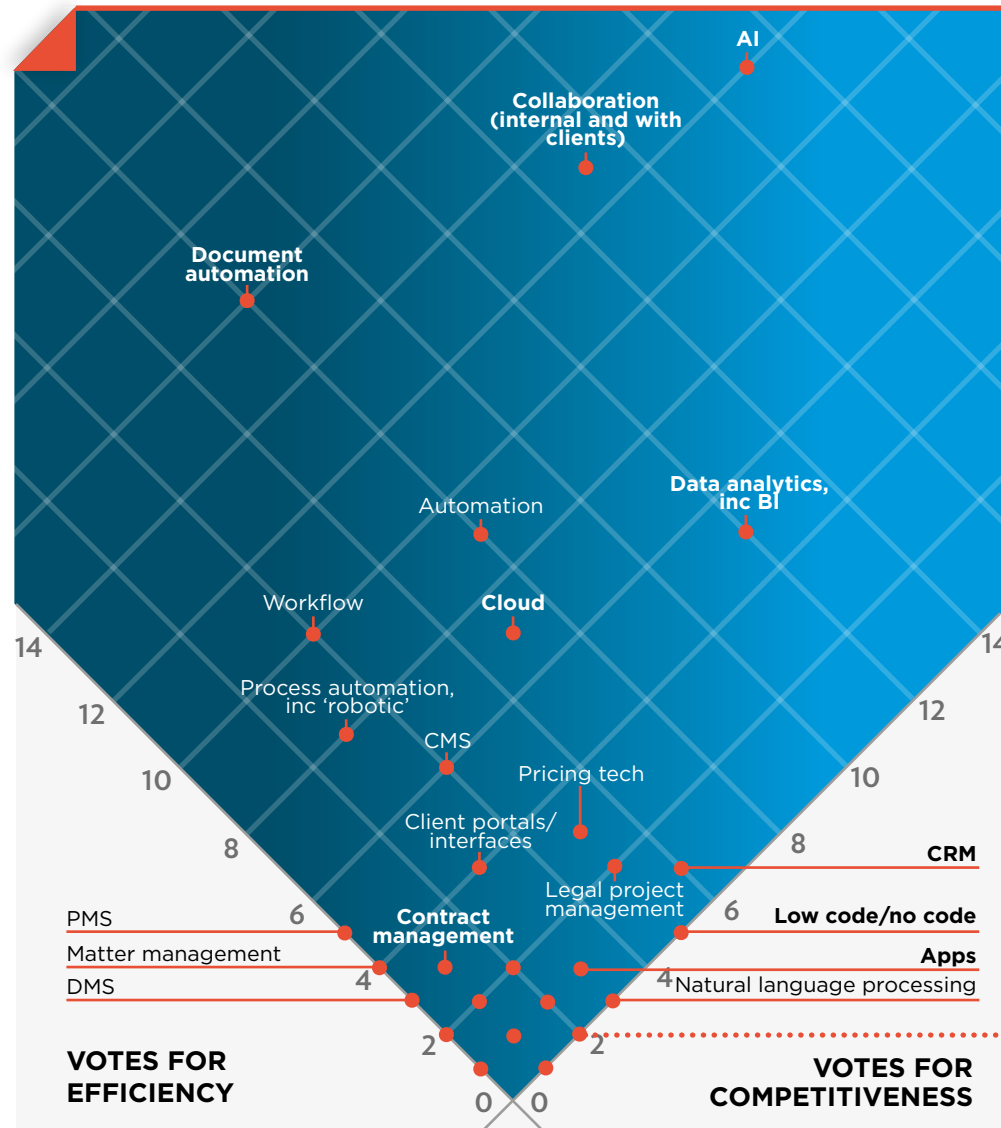
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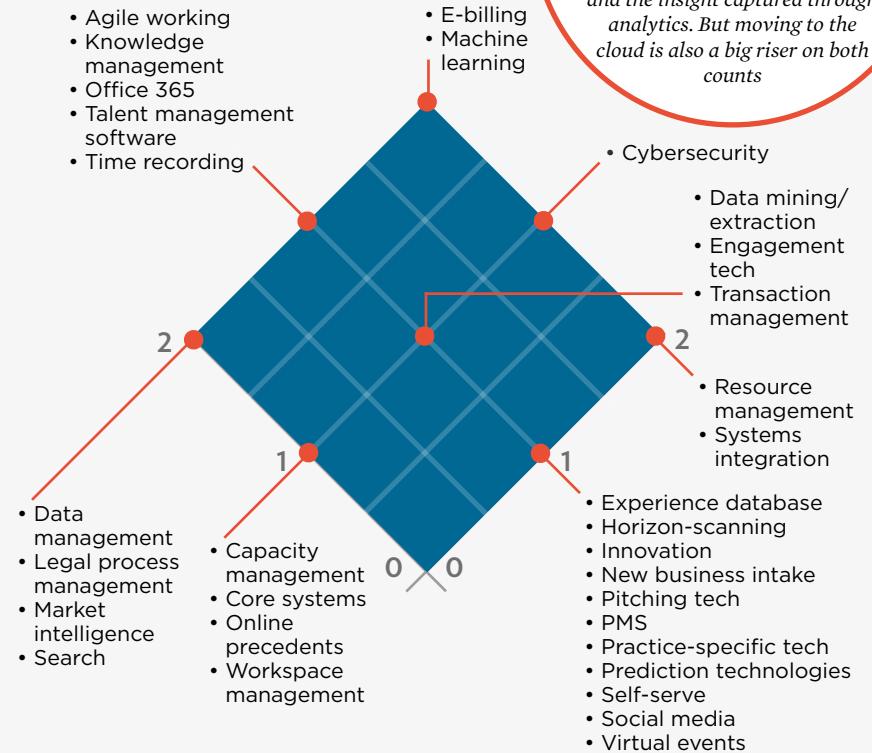
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The Briefing axis of IT investment expectations – Which technologies do strategic leaders feel will have the greatest impacts on their firm efficiency and competitiveness in 2022?



YOU'RE THE TECH TOPS (FOR 2022)

Asked to name top-of-mind investments to transform firm efficiency and competitiveness, big players continue to dominate – collaboration, AI, automation and the insight captured through analytics. But moving to the cloud is also a big riser on both counts



TOMORROW AND TOMORROW AND TOMORROW

The bottom of Briefing's axis regularly throws up mentions of technologies that move on up in subsequent years – for example the shift to more low-code/no-code development. In 2022's results, many have admittedly been on radars for some time (time recording, e-billing, pitching, knowledge, data). But big themes in this year's wider research also feature – resource/capacity management, talent and engagement and the challenging quest for systems integration

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Firms up for growth – but it's power to the people

UK-headquartered law firms have their sights set on growth after two years of extreme uncertainty. However, the focus for 2022 is as much on competing for talent as effectively as possible as it is on transformational efficiency. What's the role for technology?

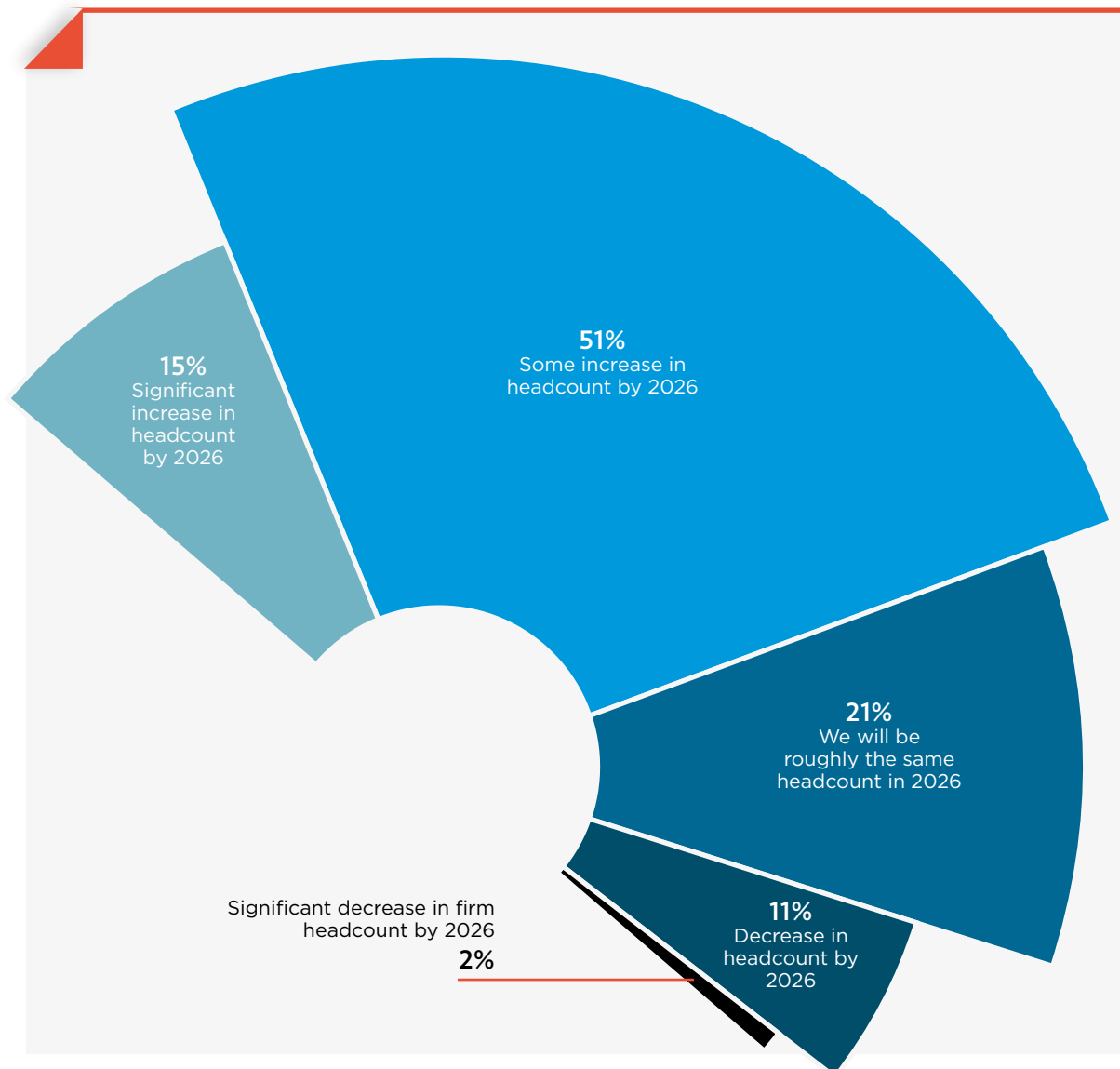
Strategic and operational/business management leaders at top law firms in the UK were considering our **Briefing** Frontiers 2022 question set as the Omicron wave of Covid-19 arrived in late 2021. The backdrop of the pandemic, and government response, has of course moved fast. But while we'll see there's certainly no shortage of high-level organisational challenges to grapple with in 2022, after coming through two years that have tested and shaken so much operationally, our first finding does now suggest a group of businesses at least cautiously optimistic about those immediately ahead.

Many firms have clearly prospered under first homeworking arrangements, and more recently people's new working patterns (much more on which later). And two-thirds of respondents to this research now anticipate growth in headcount along the strategic road to 2026 – 15% foreseeing a “significant” increase (p9). One fifth expect there'll be approximately the same number on the payroll by that time, and only 13% foresee a future of fewer colleagues in four years.

This chimes with some findings from the **Briefing**/HSBC Law firm strategy and investment survey published in October 2021 (polling carried out over the summer). Only 8% of all respondents then said they were in ‘static/freeze’ mode rather than growth; either “no change” or a review of options likely over the next two years. This rose to 12% among those already with an international presence. As Patrick Linighan, chief operating officer at Clyde & Co, put it in that report: “There was an uncertain period where all firms could be forgiven for being risk-averse. With our geographic and practice area hedge, now is the time to grasp potential bolt-on opportunities or acquisitions internationally with like-minded people.”

Sarah Ball, director of operations at Irwin Mitchell, says: “I'd absolutely hope that firms would be ambitious coming out of this period. There's the ability to look again at an international market – after Brexit as well as through the pandemic – but also in terms of the opportunities that new ways of working present. I'd be disappointed if they weren't exploring opportunities to expand.”

How do you think the transformations of recent years (such as automation, augmented working and role switches) will affect how many people are directly employed by your firm in five years' time?



“That could include new related services, alongside pure legal services. Anything that places the client at the heart of what’s happening, with wrappers of support around the experiences they’re going through – I think that’s a really positive development for the profession.”

In addition to complementary services for clients – the likes of Mishcon de Reya’s MDR Brand Management, for example – there is the ongoing investment in innovation, tech development-focused or otherwise, and other aspects of legal operations to streamline delivery and improve transparency. Mishcon for example, which has just paused plans to IPO, ▶

“Anything that places the client at the heart of what’s happening, with wrappers of support around the experiences they’re going through – that’s a really positive development for the profession.”

SARAH BALL, DIRECTOR OF OPERATIONS
IRWIN MITCHELL

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- ✓ Complex Rate Structures
- ✓ Conflicts
- ✓ Ethical Walls
- ✓ Expenses
- ✓ Financial Reporting
- ✓ General Ledger
- ✓ Global Financial Management
- ✓ Records



User Experience

Enriching and enhancing the user experience

empower your firm

- ✓ Analytics and Insights
- ✓ Reporting
- ✓ Workflow and Automation

empower your people

- ✓ AI Powered Virtual Assistants
- ✓ Collaborative tools
- ✓ Productivity Business Apps

empower your sales

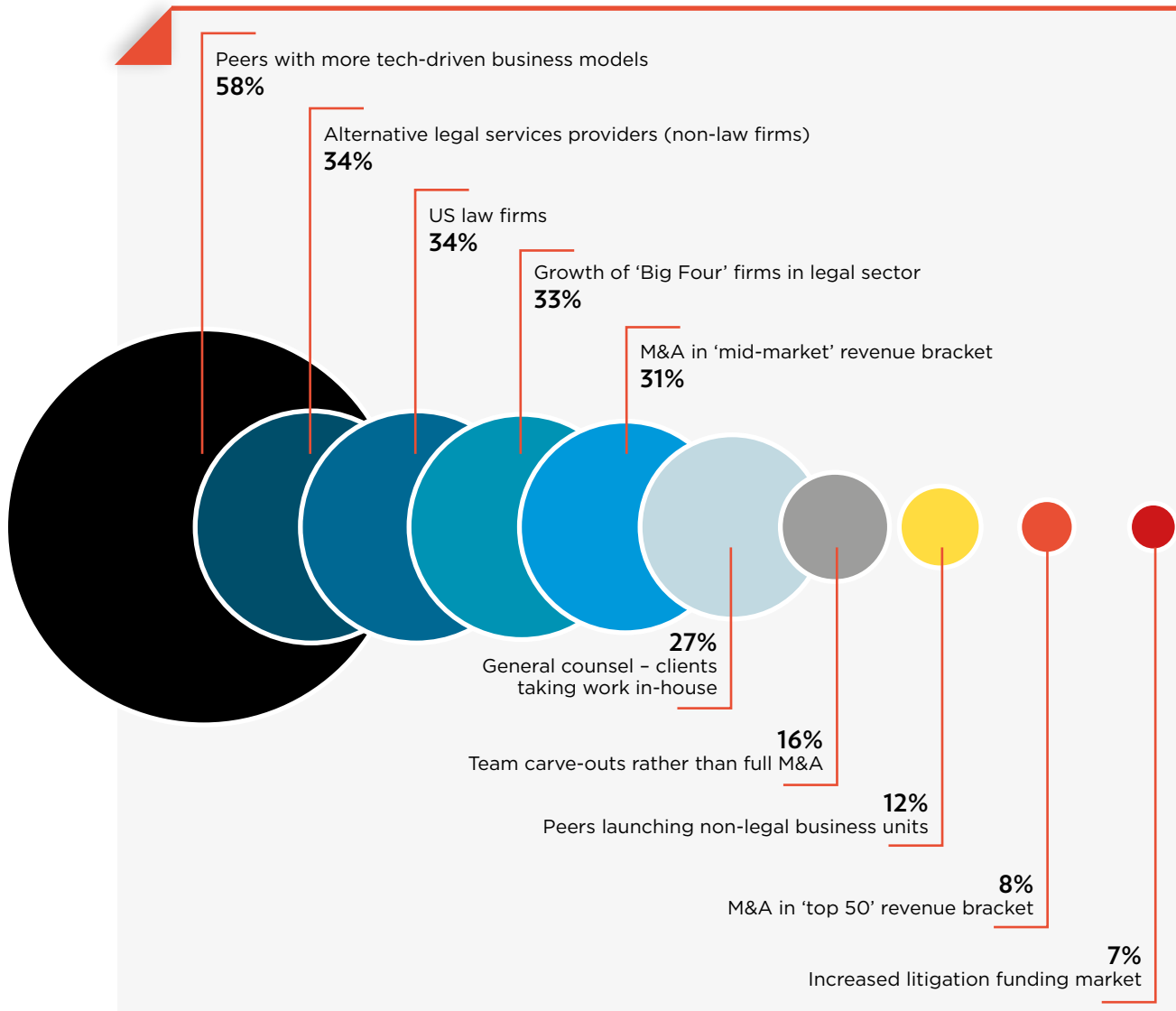
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Which sectoral trends present the greatest strategic change considerations for the large law market? (Choose up to three)



Briefing/HSBC Law firm strategy and investment survey, October 2021



MIND THE COMPETITIVE GAP

The market forces that appear to be weighing most heavily on leadership minds have a focus on strategic strength in technology – led by fellow law firms that are likely to have unlocked greater investment

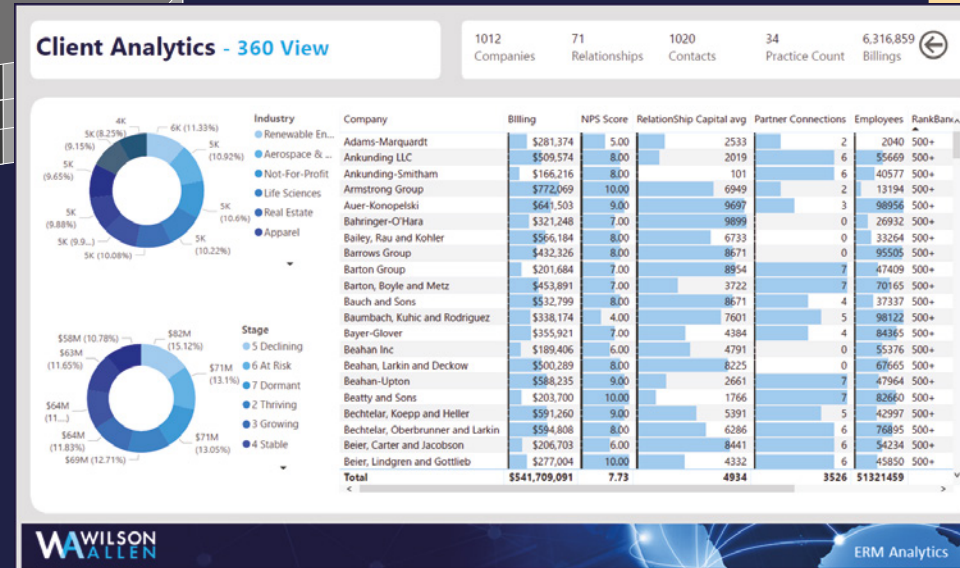
has also struck a partnership between its data science department and the York Law School of the University of York, to explore how application of machine learning could improve availability of evidence relating to judicial review decisions.

At the same time, legal will have eyes on other businesses branching out to compete for its clients. PwC and EY are two that have been busy investing in their legal divisions – new people as well as solutions. The latter, for example, recruited its first global law knowledge leader in January – the former chief knowledge officer at Baker McKenzie. Global law leader Dr Cornelius Grossmann said in a press release: “The organisation will continue to build on the service that is setting us apart from the competition.”

Asked which trends loomed largest as

MIND THE GAPS

closing the gaps between data silos
yields new insights for better
business decisions



Winning in the hyper-competitive legal industry requires intelligence that is fueled by essential data. In addition to financial information, firms can tap CRM, ERM, NPS, risk and intake data, plus DMS documents, images, and web content, to inform strategy. **We can help!**



PARTNER COMMENT

Investing in next-generation tech to support growth initiatives

The **Briefing** Frontiers 2022 survey results reveal a convergence of strategic business planning and technology infrastructure to bolster industry-wide growth initiatives. Once upon a time, the risk-averse legal industry eschewed technology. Today, leading firms are investigating must-have innovations to attract and retain talent, support a hybrid workforce and enable rapid expansion.

LAYING THE FOUNDATION

As the legal industry moves into the new year, firms are bullish about growth, with two-thirds of survey respondents reporting planned headcount increases. And as firms expand into new geographies and acquire novel talent and specialisations, they're relying on cloud-based solutions to support a broadly distributed workforce — because without the cloud, firms can't connect their people, standardise their processes, or unify their data.

Survey data reveals firms are keen on advancing the case for automation for productivity improvements related to both progressing the legal work itself and optimising operations. Investing in

operational excellence pays off in a multitude of ways: higher revenue, improved realisation rates, frictionless payment cycles, and favourable client-retention rates — all of which boost profitability.

ADOPTING NEXT-GENERATION TECHNOLOGIES

In addition to cloud solutions and productivity automation, firms are adopting next-generation technologies like AI to build competitive advantage through business agility. Some firms are using AI for conflicts resolution to reduce time-to-resolution significantly and improve the efficacy of the review process by simplifying search and analysis.

AI's benefits extend well beyond conflicts resolution. Some firms are using AI to improve time capture, starting with reducing the revenue leakage that results when users forget to log billable time. Further, AI enables intelligent visibility into time categorisation, compliance and budget tracking, protecting your firm from costly write-offs and invoice rejection due to non-compliance with outside

counsel guidelines.

SEIZING THE MOMENT

We're witnessing an inflection point in the legal industry where lightning-fast change has narrowed the window of opportunity for firms to innovate and invest in growth and expansion. In short, this change requires moving firm systems to the cloud. Although firms that already use AI to continuously enhance datasets find themselves ahead of the competitive curve, those that wait — even in the short term — risk falling irreparably behind. Data-set improvements resulting from AI happen quickly, continuously and decisively. Now is the time to act, with investments made today reaping exponential rewards in the future.

Guy Adams
Vice president, industry group –
legal, Intapp
www.intapp.com



strategic change considerations in the **Briefing** market (firms with annual revenues over £18m), one third of leaders indicated the ambitions of the Big Four to make a bigger mark on the legal sector (p11). That's significantly more than were wary of peer firms launching those 'non-legal' business units of their own (12%) and only just behind potentially salary-boosting US law firms in London (34%) or the advances made by 'alternative' legal services providers (ALSPs). A 2021 study from The Thomson Reuters Institute, the Center on Ethics and the Legal Profession at Georgetown Law, and Oxford University's Saïd Business School, found that 71% of clients, and 79% of firms themselves, now use ALSPs and their technology to drive efficiencies — calling into question, in fact, whether they are alternative any longer. Mergers are a further factor, with some consolidation now expected as any 'new normal' in legal settles. In January, Weightmans and RadcliffesLeBrasseur were first to announce formal contract negotiations in 2022 — with a view to a March merger, when the new Weightmans will have a total headcount of over 1400.

However, the market factor attracting most responses is 'peers with more tech-driven business models' — other law firms that have positioned themselves to be more efficient, competitive or both. Indeed, Weightmans is

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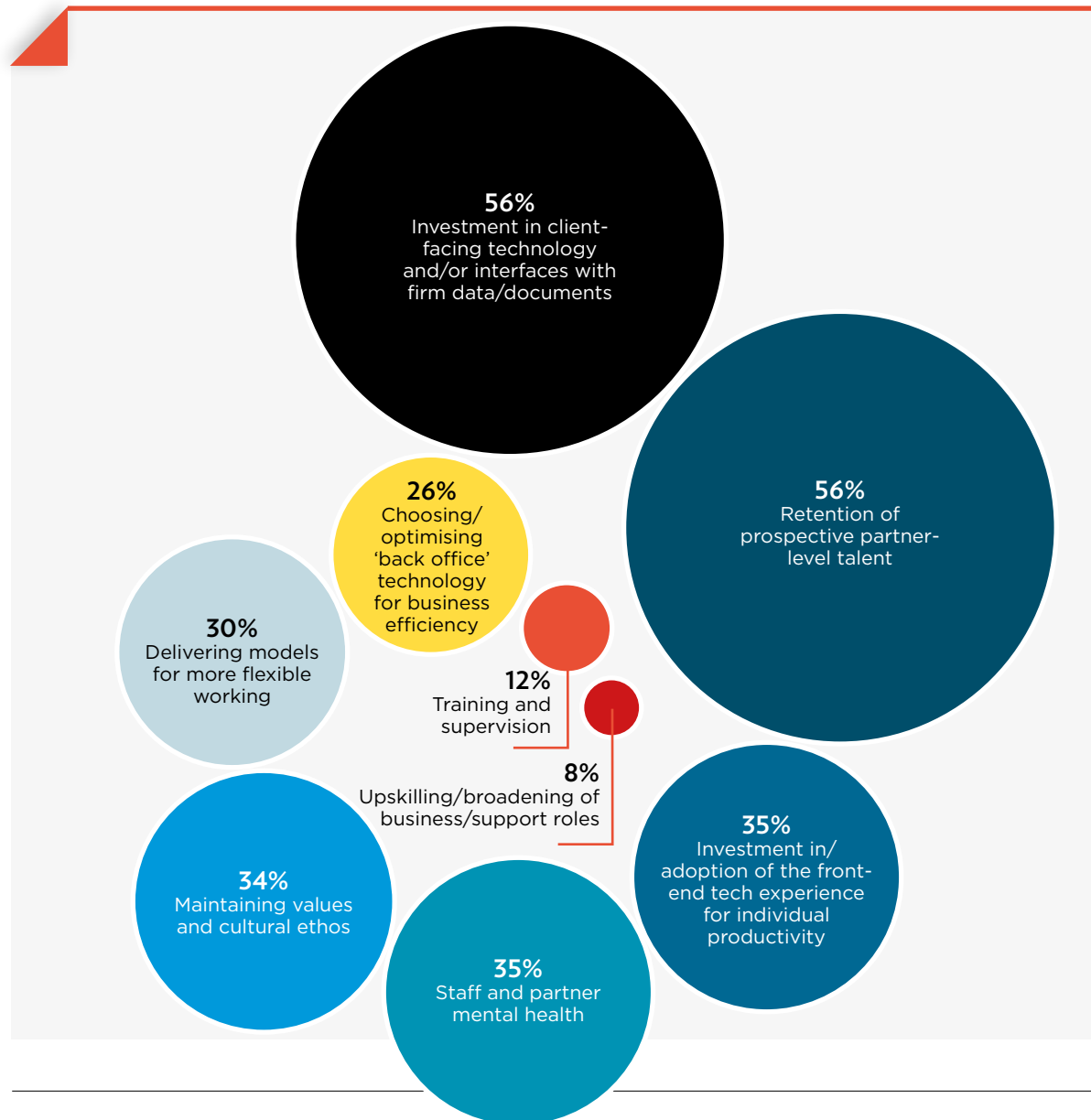
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Which organisational challenges are your top concerns? (Choose up to three)



Briefing/HSBC Law firm strategy and investment survey, October 2021

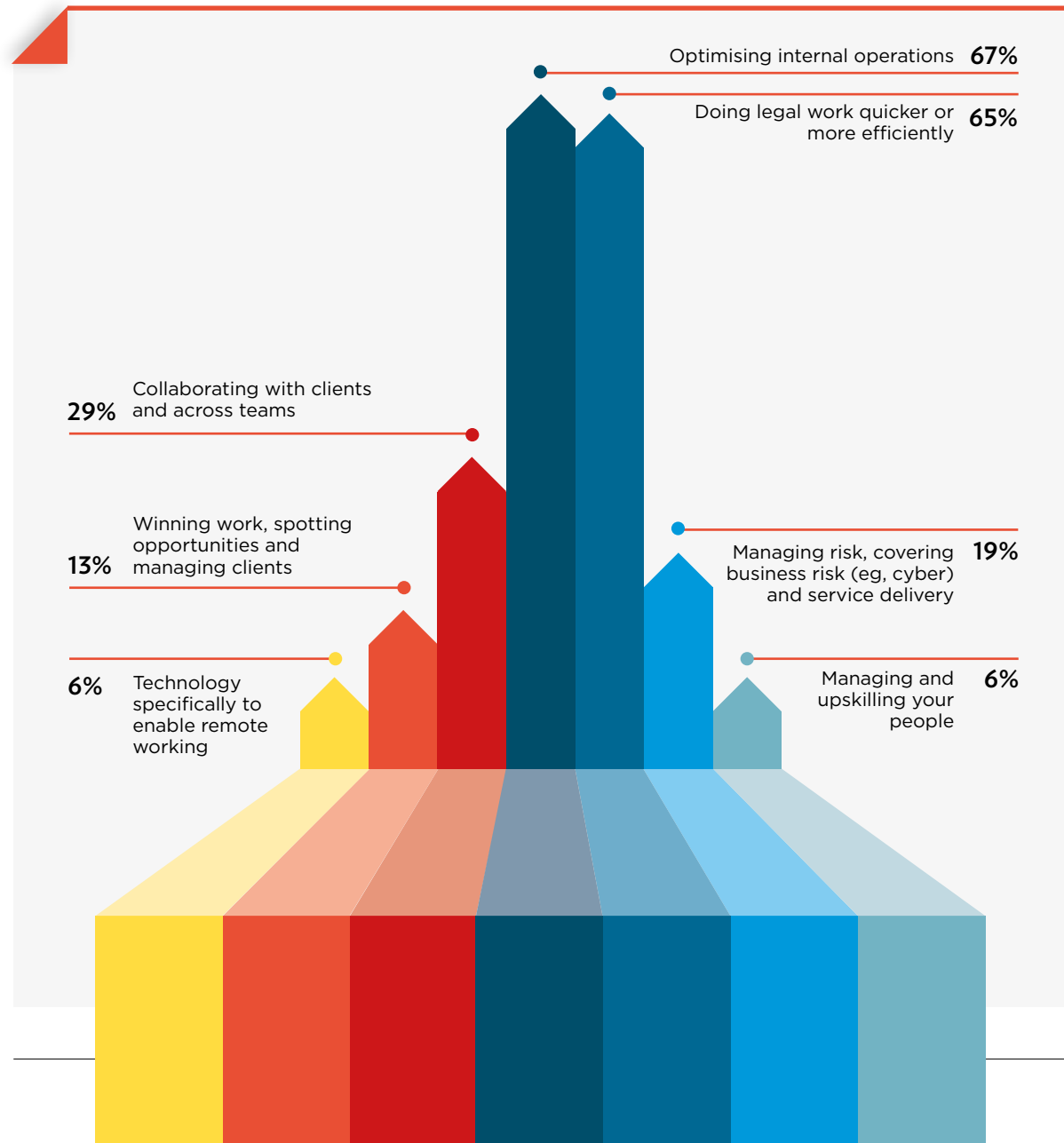
**TIME FOR TALENT TRANSFORMATION?**

More than half of leaders identify shoring up retention as one of two top business priorities – and further challenges present potential routes to improvement. A third also see a need for investment in transforming the toolset of productivity

one that has long developed tools for itself. In December 2021 its data scientists unveiled one for large loss insurance claims, mitigating a lack of information by modelling potential outcomes to help people arrive at an appropriate figure. Partner Will Quinn said: “We recognised the untapped potential of data in delivering fresh insight, shaping strategies and informing settlement offers. Though the expertise and experience of claims handlers can never be replaced, through augmented intelligence we can complement their insight.”

But while firms might be looking to growth and competing harder by various means, David Cunningham, chief innovation officer at Reed Smith, cautions: “Firms can’t just add headcount without correctly aligning roles, incentives, and skillsets – otherwise costs go up and value to the clients and partners doesn’t increase.” He also ►

Where do you see most potential for greater automation to drive efficiency within your own firm's 'new normal'? (Choose up to two)



highlights the need to invest time in the process to “smooth out work allocation”, and that “identifying expertise, relationships, learning opportunities and diversity to properly fit and allocate work” is a key area that attracts the attention of the firm’s senior stakeholders when assessing the case for investment in a change initiative.

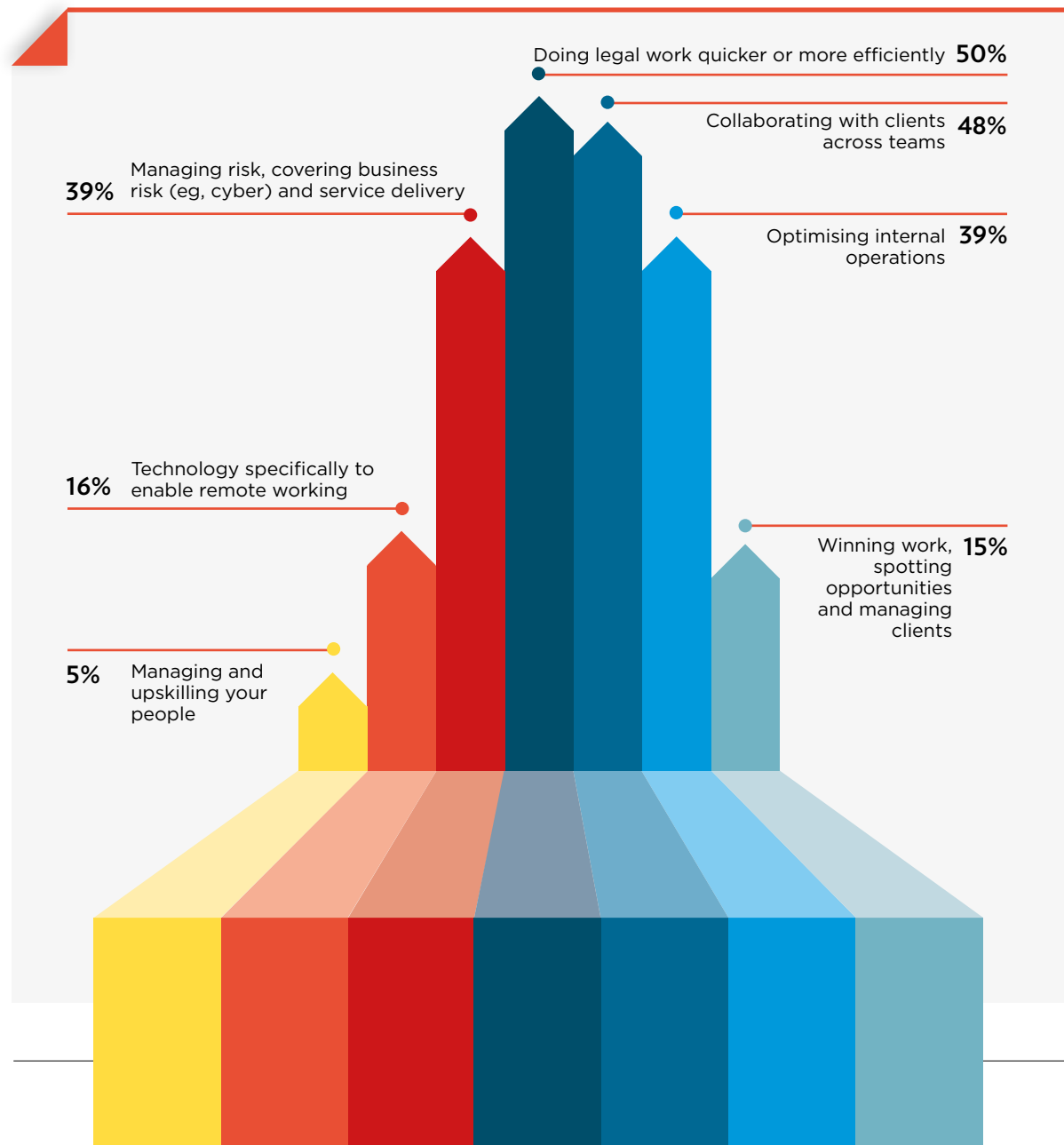
TALENT UNDER PRESSURE

People will always be a business concern of course – the mantra is ‘people, process, technology’ for a reason – but the pressure doesn’t come much more acute than in full flow of a so-called ‘Great Resignation’. Asked which organisational challenges were then of most concern in our strategy and investment survey 2021, most responses pointed to an area of people management (p15).

Out in front was the resilience of connections with two specific groups – clients and employees. Perhaps against the backdrop of adaptation to virtual working, over half (56%) saw a challenge in selecting the right “client-facing technology/interfaces”. But the same number have retention of the prospective partner-level talent pool on their minds (which needn’t of course mean lawyers alone).

Sarah Ball at Irwin Mitchell says: “Getting investment in technology correct is a challenge. It isn’t just about buying the next big piece ▶

In which of these areas is your firms prioritising its investment in technology – spend on systems and people?



of software or hardware, but also maximising the productivity around it. That's a challenge for business generally.

“At the same time, the market is seeing these big salary increases for lawyers. It's not clear how sustainable that is, and there's a knock-on impact on other parts of the organisation. The skillsets in business services functions are increasingly attractive to other industries.

“Firms need to manage to maintain morale coming out of the pandemic and think hard about how to support both clients and colleagues as they evolve – but that's as much a massive opportunity as a challenge. People ▶

Briefing/HSBC Law firm strategy and investment survey, October 2021



PARTNER COMMENT

Time for tech to help the business put people first

The 'Great Resignation' is upon us. According to some recent research from Microsoft, more than 40% of workers around the world are considering quitting jobs or changing their professions. This could be positive for the legal sector, an opportunity for fresh blood to enter the industry. However, it could also be detrimental to talent retention if law firms don't play their cards right.

The global pandemic has given law firm employees a taste of hybrid working and a better work/life balance. Now the genie is out of the bottle. Law firms will need to ensure flexible working isn't simply a one-off but rather a permanent part of their employment strategy. This means doubling down on technology investments and putting in the right processes to enhance working practices and employee wellbeing.

It's therefore extremely positive to see that many leaders recognise the

importance of investing in technology such as automation to increase productivity, making the lives of legal professionals easier. As the research results show, the leading reason for more automation is to help make legal work quicker or more efficient. However, it's also clear from the research that more can be done from a technology and user adoption standpoint to make hybrid working a success. For example, client relationship management, intranet/KM systems, e-signing and internal project management/portal-based collaboration were all highlighted as top areas where law firms now need to drive up use across the business. This highlights that the legal sector is still very much at the start of its hybrid-working journey as further efficiency and productivity gains are being left on the table.

Investing in technology to support

hybrid working will now play a vital role in ensuring that talent can work productively from any location. With legal business leaders estimating that people will be in the office just two days a week on average in this new working world, firms must ensure that those employees are also equipped with the right tools to be able to work effectively. Those that don't risk watching their talent walk out of the door.

Andy Baldin
Vice president of international business
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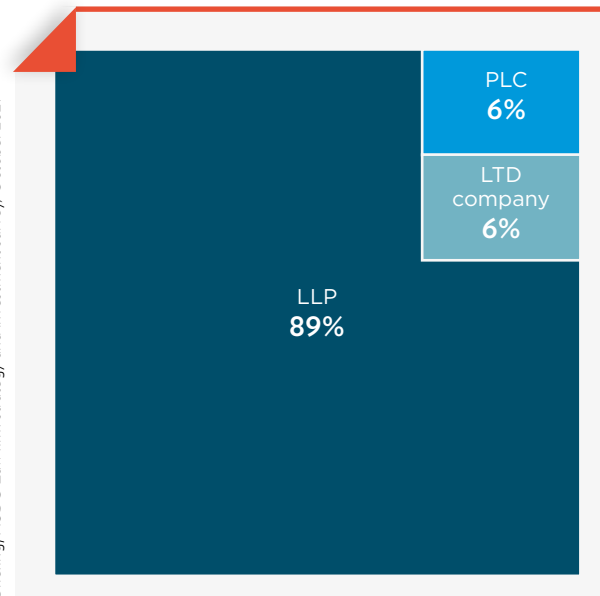
aren't as restricted, they have more flexibility, and firms are no longer restricted by geography in their talent search."

This does rather depend on the detail of hybrid-working availability of course, but engagement with people more generally is a further competitive front. An area of increasing focus before the pandemic, Covid-19 placed business attitudes and approaches to job satisfaction and wellbeing front and centre. The potential replacement of long hours at the office with just as many, if not more, more isolated at home was probed – along with how to balance the different pressures of a remote-working day.

Over a third of law firm leaders say mental health (35%) and maintaining culture and values (34%) are pressing organisational concerns. For **Briefing** Frontiers 2022, we also asked people to tell us the single best steps they could think of for improving employee wellbeing. "Stop worrying about who is working where," pronounced one – and there were many other references to getting flexible working right, recognising different people's priorities and that the days of a 'traditional' working day could be numbered. On the other hand, the complexity of this aspect of management/strategy quickly becomes apparent. "More collaboration face to face", is another answer – "connect people to people to create support communities" a third. Perhaps one respondent also had a tongue in ►

In five years' time, what business structure is your firm most likely to have?

Briefing/HSBC Law firm strategy and investment survey, October 2021



their cheek: “Magically transform the workplace into one which is suitable for hybrid working, making the office somewhere I look forward to being.”

Some other categories of response are also illuminating – for example, surrounding having a ‘right to disconnect’. “Ban work after 10pm and at the weekends” we’re told, and going further, “turn off access to all work-related technology devices after 7pm until 7am the following day”. Another theme coming through is changing or shifting the metrics and incentives for success – away of course from the typical time worked and financials, and towards areas such as client feedback, efficient working and collaboration.

David Cunningham at Reed Smith says that “creating a sustainable balance for employees, so they stay engaged, healthy and growing” is also gaining greater attention as part of the business case for investment in change. “Don’t treat professional staff like back-office workers,” he adds. “Invest in mentoring and career development, and align the incentives for timekeepers with outcomes.”

Alison Devlin, head of knowledge at Eversheds Sutherland, adds: “Most junior lawyers want more balance and don’t want to have to start over finding a new career outside of law – but this is still what happens to too many people in law at the moment. Clients have said

for years that the chargeable-hours model is unsustainable. More firms should be offering an alternative approach: less pay but still stimulating and interesting work and guaranteed better working hours.”

UP THE AUTOMATION

Another offer of a solution to the wellbeing challenge is “automation of ‘mundane’ tasks”. This also surfaced – alongside work-allocation tools, access to data, and improved data-driven business insight – as having potential for improved productivity, a route to “closing the gap between hours worked and hours billed”. One respondent suggests: “Intelligently automate the processing of non-billable tasks that take up time in a lawyer’s day.” Indeed, automated, perhaps “AI-based”, time capture was a task to receive multiple votes for high-priority change – alongside document automation, workflow automation, matter pricing and email profiling.

Our leaders report their firms continue to invest an average 5.2% of annual revenues in new tech or tech expertise (p17) – many, of course, have seen those revenues increase. And they currently see most automation potential in optimising internal operations (67%) and making delivery of legal work itself faster or more efficient (65%). In summer 2021, the



PARTNER COMMENT

A new understanding of the technology partnership

This year's **Briefing** Frontiers research is a clarion call to the trusted formula of people, process, and technology working in equilibrium. With most firms expecting some, but not 'significant', increase in headcount, the need for greater efficiency and profitability from the same resourcing pool means that taking the routine and mundane from the hands of the lawyer to allow them to focus on what is really important is key to most businesses plans for 2022. Increasing productivity and removing cost rank as the highest priorities, with the path to achieving this coming through automation/workflow and driving data-driven insights.

Some interesting verbatim comes out of the productivity push; automation for administrative jobs is understandable, but this extends to the part technology can play in intelligently automating all kinds of process. Improved matter management and increased workflow automation speak to an acceptance that technology can be a critical partner to the lawyer and their success, rather than being something more

suitable for volume law than value. This illustrates the increased understanding of technology in legal but also the increase in the capability of solutions available.

When asked what one solution would help to close the gap between hours worked and billed, automation is the most common phrase used, although it is cited in many different guises – document creation, project management, administration, legal project management, or just dealing with email traffic. It ultimately comes back to a powerful system of record that allows for complex and agile process automation. More effective process, time and budget management as part of the legal project also feature strongly.

Among the general themes, data and insights also feature prominently – and the place that a rich lake of information has in enabling firms to make better, quicker and more profitable decisions is an interesting and important one.

The good news with all these requests is that the solutions to the challenges exist – and they are being

adopted in the legal sector as we speak. As a provider of legal technology solutions, I take considerable comfort from the focus and understanding of the challenges that need to be addressed. Comparing this year's insights to previous years, there is a clarity of thinking, which – if converted to affirmative action – will make this an exciting time for the adoption of technology in the legal sector, to the benefit of lawyers' success and, just as importantly, their wellbeing.

Simon Farthing
Commercial and marketing director
LexisNexis Enterprise Solutions
www.lexisnexis-es.co.uk



second of these areas also emerged as a priority area for further investment. But although team/client collaboration ranks highly as an area for greater investment through 2022 (48%), leaders don't appear to see as much potential for efficiency improvement introduced through automation here (29%).

But for Mark Lawrence, head of projects at Kennedys, there are several areas of active focus, pointed at both the higher-value and higher-volume areas of his firm's work mix. "In high-value, the efficiency and productivity benefit comes from e-discovery engines – receiving hundreds of thousands of pages from all over the world and efficiently extracting what's needed.

"On the other side – the volume work – clients increasingly demand more management information, and there's a lot of mapping you can do to ensure milestones on multiple matters aren't missed. Downstream you're

"Don't treat professional staff like back-office workers. Invest in mentoring and career development, and align the incentives for timekeepers with outcomes."

DAVID CUNNINGHAM, CHIEF INNOVATION OFFICER, REED SMITH

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PARTNER COMMENT

Working smarter with tech as the enabler

It has been a rollercoaster year, as we have seen businesses trying to adapt and redefine new ways of working. The only certainty has been uncertainty and the constant need for change. The 'new world' of working is still not clear, and those law firms able to embrace a state of constant flux while still moving forward will be best placed to thrive.

To accommodate this new world, agility and flexibility are the new watchwords, and using technology as the enabler is the key to success. The firms able to maximise collaboration with clients and colleagues using technology will reap the rewards and see rapid gains through quicker and better communications and improved engagement.

So how do law firms move forward to be more efficient and maximise productivity, while promoting increased collaboration and placing a renewed focus on customer success?

It can seem overwhelming, but as a Microsoft technology partner the answer is very straightforward – unify your business with a single platform, one connected solution that has been designed to work together to cover your

whole value chain.

It's a cloud-based solution that allows connection and collaboration between colleagues wherever they are located, a platform that provides a consistent single source of data to allow the employees to manage the business with true insights. A true cloud-based solution delivers continual free enhancements and upgrades, with the option of scalability and dramatically reduced hardware costs. It also has a positive impact on the environment and the sustainability of your organisation.

Bringing together disparate systems and data silos into one platform gives you the consistency and transparency you need, and hence one version of the truth. Getting the right resources at the right time is critical for business success, particularly for firms where business is built around units of time.

Automation is also key to working in our new world. The removal of low-added-value tasks by leveraging technology designed to streamline processes will free your teams to do what they do best – creating frictionless working to bring disconnected teams together, avoiding spending time on

admin-heavy tasks, and instead improving visibility, collaboration and insights across your firm.

The wellbeing of staff is even more critical in these challenging times of evolving working practices. Firms need platforms that alert employers to potential wellbeing issues. Lack of holiday taken, excessive hours worked, late performance reviews, sick days and so on, are all insights that can be delivered by a platform sharing common data, surfaced to the user via key reporting.

We work with our legal clients to optimise ways of working using automation for routine tasks, creating slick, agile processes while improving efficiency, engagement and collaboration. Working smarter – anytime, anywhere – has to be the future for successful law firms of the future.

Paul Foster
General manager
sa.global
www.saglobal.com



automating document and email generation, and part of the process to complete a particular stage of the matter.

“It doesn't remove the need for a lawyer's involvement, but it does add a level of reassurance the information is there, as well as feeding it through to other systems.”

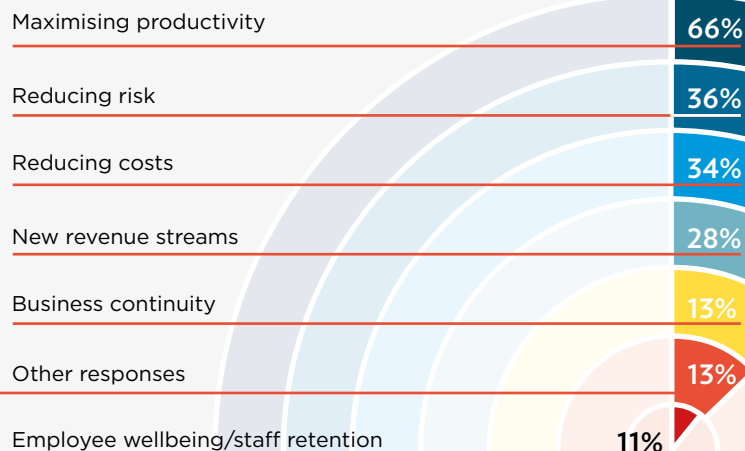
Kennedys is also implementing a new business-intake system to manage volume assessment and population of incoming information, he adds. And on the people side there's investment in more process-driven individuals that legal teams can call on – in a role that includes assessing productivity gains – for “very defined” areas of the business.

Alison Devlin at Eversheds Sutherland says: “After an initially slower uptake, possibly as lawyers struggled to get their heads around ►

“The demand for automation is now huge. Requests are now prioritised in terms of potential revenue generation or service excellence improvements – although I'm still hopeful of getting a couple of internal knowledge team ‘bots’ over the line this year.”

ALISON DEVLIN, HEAD OF KNOWLEDGE
EVERSHEDS SUTHERLAND

Which management/operational factors attract most attention and traction with law firm senior stakeholders or partnership management in relation to IT investments? (You may choose two)



- A cross-section of the other choices. You can't distill it to just two
- Agility and flexibility
- Client demand
- Cybersecurity
- Legaltech generally
- Translation of the benefits to end clients



**IMPRESS TO INVEST:
PUSH PRODUCTIVITY**

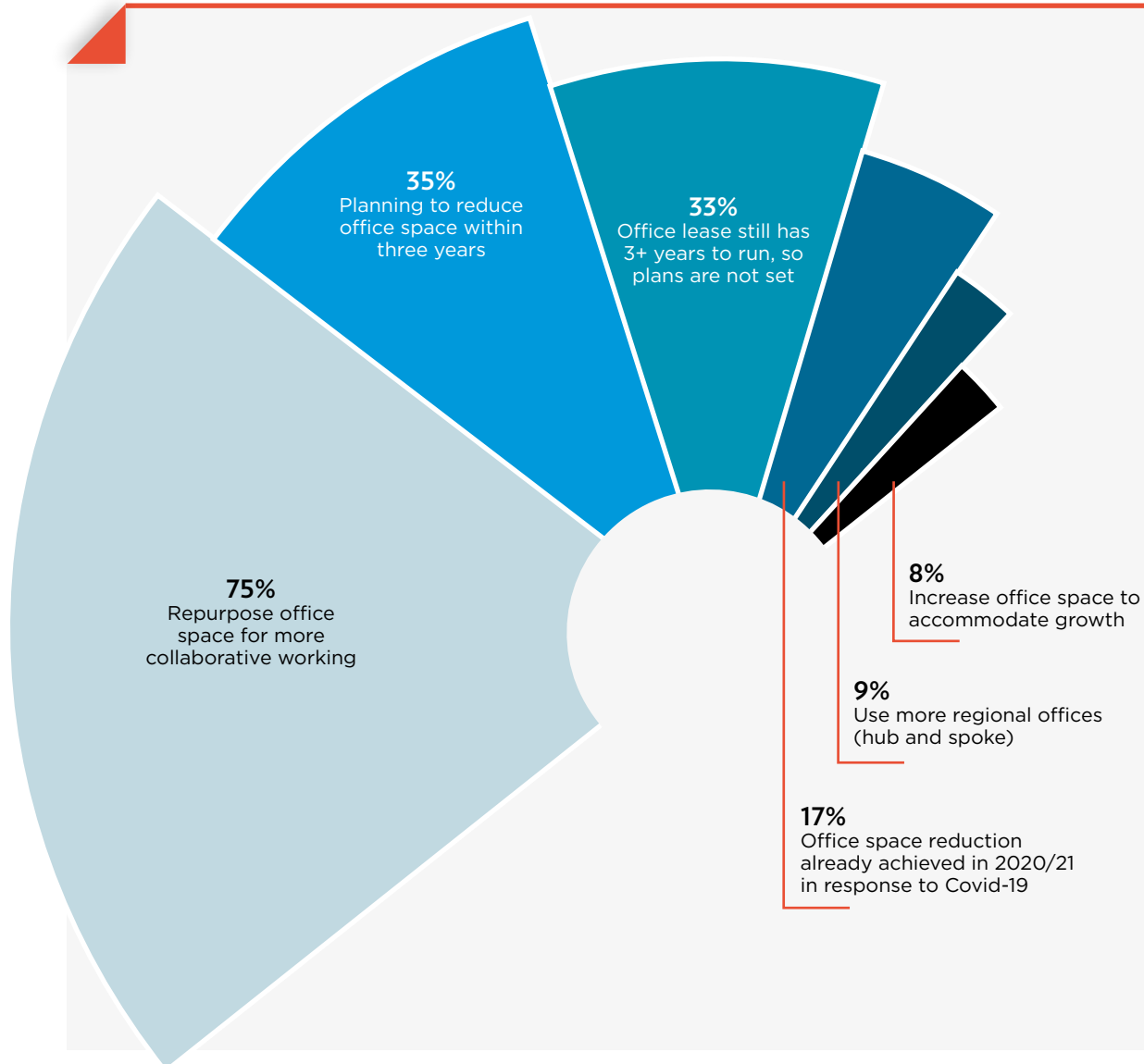
The factor to focus on to win that backing for a new business case seems to be the productivity potential. But can this be proved? Cost reduction, risk and new revenue are secondary – with the leading challenge of retention/ wellbeing in last place

what automation could offer beyond well-established contract automation, the demand for automation is now huge. Requests are now prioritised in terms of potential revenue generation or service excellence improvements – although I'm still hopeful of getting a couple of internal knowledge team 'bots' over the line this year!"

With its clear link to profitability, Tara Waters, a partner at Ashurst and head of Ashurst Advance Digital, isn't surprised that efficiency is out in front as a driver of change – but she too emphasises a more holistic approach to process improvement.

"Our legal transformation programme works with practice groups on the full gamut, from basic process improvement through to automation. That isn't just about time and cost efficiency, but we absolutely need to be

Which of these actions currently reflect your firm's future strategy for the next three years? (You may choose more than one)



Briefing/HSBC Law firm strategy and investment survey, October 2021



SPACE CUT STILL ON THE CARDS?

21%

In 2021, just over a third of leaders reported expecting to reduce the size of their office footprint within the next three years – by an average of just over a fifth. However, the top strategic action was “repurposing” what they have for new ways of working

investing in improving the day-to-day experience of lawyers and automating administrative burden where it makes sense to do so.

“However, there’s sometimes a risk of overlooking efficiency gains on the business side. We’re also investing in the automation of areas such as client onboarding, improved billing process and generating different types of reports for people. It’s important to Ashurst that delivery is holistic, with the right people inputting to any process change from both sides.”

David Cunningham at Reed Smith agrees: ►



PARTNER COMMENT

Why automation is the key to working smarter

With a little critical thinking, today's law firm leaders can leverage technology to transform their business – and elevate the workforce experience.

The accelerated pace of change brought about by the pandemic has created a significant shift in how business gets done – and firms have certainly taken notice. In pursuit of structured innovation, this report reveals that investing in automation technologies – and the productivity gains it brings – is now a core priority for senior law firm stakeholders.

Delivering more with less will be key to securing a sustainable future, and getting legal work done more efficiently (65%) and optimising internal operations (67%) were cited as the top two drivers for integrating new automation technologies that will deliver competitive advantage.

But how do law firm leaders ensure they leverage new automation capabilities in the best possible way? 'Thinking beyond tomorrow' is key to enabling digital transformation. And when it comes to business automation, applying some out of the box thinking can unlock significant opportunities.

The big question, however, is what happens to all the time that's generated by automation efficiencies?

USE TIME MORE CREATIVELY TO TRANSFORM A CULTURE

Giving lawyers more time to work in areas they are passionate about will prove valuable when it comes to boosting employee engagement, wellbeing and productivity. However, taking time out to consider what happens to all those hours saved represents a significant opportunity that goes far beyond simply adding billable hours to the bottom line.

This could prove transformative when it comes to the workplace experience, culture and capabilities of the business. For example, there is using 'time back' to encourage practice groups to brainstorm new revenue streams, or identify new ways of working that will unlock greater efficiencies for clients – actions that will generate lasting loyalty and higher revenue and profits.

MAKE MORE OF WHAT'S THERE

When it comes to working smarter and more effectively, firms need to

maximise the impact of existing technology investments – like current collaboration tools – or leverage data from their CRM systems to generate more value and service revenue.

By applying lateral thinking to the challenge of mining more data, and how that data is put to work, they can gain new insights that will be vital for building the long-term resilience and agility that are key to law in the 21st century.

Today's firms are eager to take advantage of new tools that will enable them to better showcase their proposition, stay ahead of competitors and generate efficiencies that help them manage costs while meeting fast-evolving client expectations. Those that can most effectively embed new technology – with people at the centre of strategy – will be best positioned for future success.

Matthew Stringer
Chief experience officer
Stridon
www.stridon.co.uk

STRIDON
changing perception from within

"Marketing, time and billing automation is still a decade behind in most firms today. Remove as much business work as feasible from partners and associates and move the business analysis closer to real time."

Nicola Paffard, head of legal support services and a partner at Cripps Pemberton Greenish, adds: "Automation will feed into so many aspects of business. Automating more around documents for our employees, for example, can give managers more time. Firms really need skilled and engaged managers, and we're working on new leadership training for anyone managing people to build more consistency."

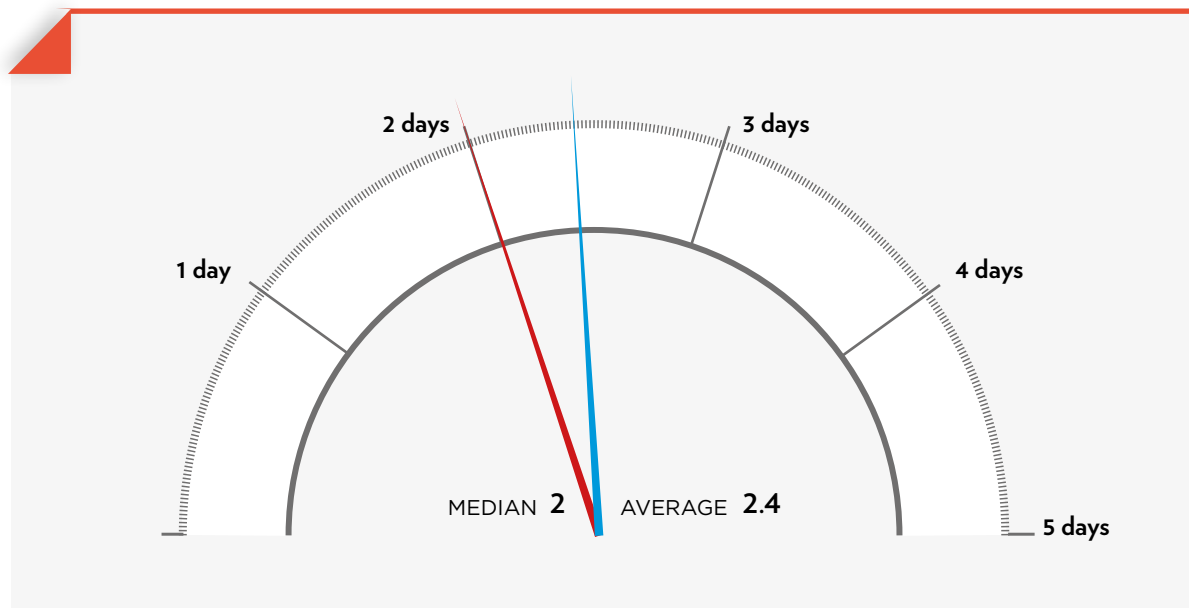
HOW'S THAT HYBRID WORKING?

Returning to the future of the law firm office environment, three-quarters of leaders have said that their firms plan to repurpose office space for more "collaborative working", with only just over a third (35%) expecting to reduce some of their office space within the next three years – and by an average 20% (p24).

The estimate, however, is that most people will be working in that office for just half of their week, so the phrase hybrid-working seems here to stay – but with indicators that a range of challenges remain to make the model optimal.

These are by no means limited to technology interventions, although many

In future, how many days per week do you estimate most of your firm's people will work in an office that the firm pays for?



“Automation will feed into so many aspects of business. Automating more around documents for our employees, for example, can give managers more time. Firms really need skilled and engaged managers.”

NICOLA PAFFARD, PARTNER AND HEAD OF LEGAL SUPPORT SERVICES, CRIPPS PEMBERTON GREENISH

express wanting to address equalising the meeting experience for people wherever they happen to be working – if not, in fact, some form of virtual open-plan office. New approaches to holding those meetings and identifying the best training methods in general also appear high on the agenda.

Sarah Ball says that Irwin Mitchell hasn't mandated a number of hybrid days in the office, instead offering “flexible by choice”. There are many different factors and needs

within the business, she says, and with team-based consultation and considerations the firm can accommodate these. “However, we will need to work hard on ensuring inclusivity – not just in meetings, but with work allocation. In general, I'd encourage people not to have a fixed mindset, but to explore the opportunities, be brave, and try different ways of working.”

Mark Lawrence at Kennedys says that, although office ‘floor-walking’ is hard to replicate, there have been some benefits to smaller-group training on tool changes remotely, for example. “There's a lot of focus on feedback these days, and this has found teams more likely to participate in such settings.” There are experiments ongoing with new virtual conferencing tools. But like many, he highlights the effective onboarding of new people – in particular, those just embarking on their careers – as a priority area for attention.

Jeff Wescott, director of lawyer productivity solutions at Clifford Chance, agrees. “It's the younger generations in the workplace who have the most to lose. They need the right support to get them off to the right start, and we need to close any gap in terms of IT.” For example, he's hopeful of progressing the business networking experience for the firm's junior lawyers in ►



PARTNER COMMENT

‘Good enough’ isn’t good enough for modern information governance

Sticking with outdated, ‘good enough’ software technology for records management not only increases a firm’s risk, it increases costs exponentially. Without a comprehensive view of all your information assets, information governance (IG) is approximate at best. As the saying goes: You can’t govern what you can’t see.

Modern IG includes a ‘full suite’ approach to provide a central, transparent view of your data across physical and electronic repositories – so that you can manage and automate the full information governance lifecycle of the record, which significantly reduces risk and contains costs.

For years, law firms have been aware of the need to mitigate risk with physical and electronic records. The data that exists, where it lives, and how it’s managed against internal policies, outside counsel guidelines and government regulations, increases risk for every firm. It demands a solution that’s purpose-built with features and workflows to meet these needs. This is what FileTrail does – our focus.

For over 20 years, FileTrail has proven we can automate these processes and

deliver a return on investment on IG. As a complete information governance solution, FileTrail enables organisations to meet urgent client demands, pass audits, conduct a client audit response across multiple repositories, address outside counsel guidelines, and address new compliance rules with a modern approach.

With the recent Teravine IG software acquisition, we are able to provide our clients throughout North America, the UK and Europe with the very best IG solution available on the market today. This includes an intuitive dashboard environment, sophisticated, clean and simple automated workflows, and connectors to other records management solutions such as OmniRIM (sunsetting September 2022), Legal Key, iCompli, iManage and Thomson Reuters Elite solutions. This flexibility is a game-changer for the market and the company.

As a use case – one AmLaw 25 firm with over 2,000 fee earners managed over 300 lateral moves and destroyed over 3 million documents globally from its data management solutions and file shares in one year. This activity was

completed in parallel with a very large destruction of physical records. Automating these features in a single solution delivers high-value, significant productivity benefits and savings for the firm.

Physical records management and IG remains a challenge for law firms and other large enterprises, particularly those in highly regulated industries. The concerns expressed by CIOs and other firm leaders are driving many law firms to adopt a more holistic approach to IG and records management. This means selecting the right tools and processes for full lifecycle management of both traditional and emerging data forms. There’s a reason FileTrail has been leading the way for 20+ years, and it all comes down to experience, customer service, and excellence. Stay on track with FileTrail – we’ll help you get there.

Jon Roscow
Commercial director, ROW
FileTrail
www.fieltrail.co.uk

FileTrail

a hybrid world.

Lawrence continues: “You have partners busy with targets, senior associates hybrid working, and you don’t want to leave a trainee at home alone with their laptop just trying to work out how to work.” Managing supervision is vital, but the online-meeting world is also only part of the answer, he suggests. “We’ve also invested heavily in our intranet to get much more information flowing through it, and we replaced our learning management system with something a lot more searchable, interactive and encouraging of action.”

Dawn Ingle, IS director at Shoosmiths, also zones in on the hybrid-learning experience. She emphasises the challenge of catering for more of a blend. “Lockdown working of course took everything to video – but we

“Lockdown working of course took everything to video – but we all learn differently. Perhaps some prefer video, but others might want to be in a classroom or to see some gamification – and the risk is that you lose people.”

DAWN INGLE, IS DIRECTOR
SHOOSMITHS



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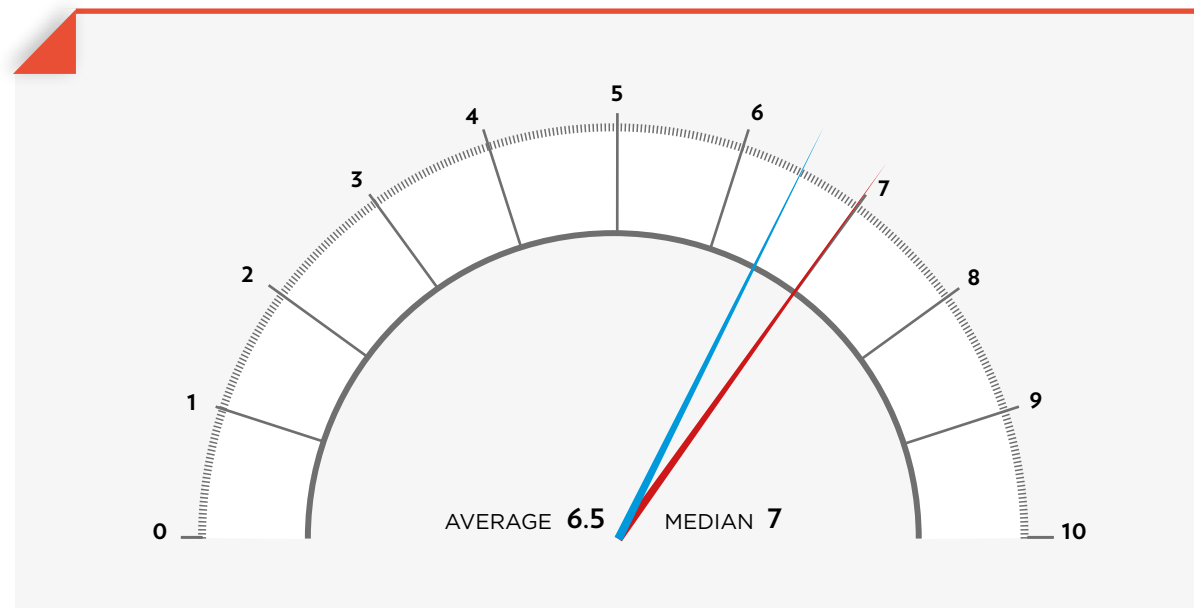
Industry-leading

Enterprise Information Governance Suite

FileTrail® is the leader in information governance for highly regulated markets throughout North America, the UK, and Europe. As your long-term partner, we guide you through every aspect of the IG journey beginning with physical records management through governance management including retention, disposition, and matter mobility. For over 20 years we have led the market in information governance and continue to provide purpose-built solutions with features and workflows to meet the needs of our clients around the globe. Stay on track with FileTrail — we'll help you get there. Visit www.filetrail.co.uk today to schedule a call.

Records Management | Retention | Disposition | Matter Mobility

On a scale of 0-10 (where 10 represents the ideal experience), how well can your current tech provision enable the range of hybrid meetings/training/interaction people need?



“A key element of making the case for investment in IT is demonstrating that you’re making the most of what you’ve already got.”

GREG BOWIE, HEAD OF BUSINESS ANALYSIS,
BRODIES

all learn differently. Perhaps some prefer video, but others might want to be in a classroom or to see some gamification – and the risk is that you lose people.”

She also highlights the potential impact of hours glued to screens on mental health and wellbeing, while another hybrid-working risk arises if “I only ever hear what people want to tell me”.

Ingle is also one of many who see quite a journey still ahead to more productive and

inclusive hybrid meetings. “But any new norm for the majority won’t necessarily fully settle in the next 12 months, so it’s extremely difficult at this point to know exactly the technology that would be needed to support it.”

And Alison Devlin at Eversheds Sutherland adds: “From a global knowledge perspective, we need to look at how we deliver a continuous learning experience and replicate the ‘learning by osmosis’ that lots of people who’ve worked in legal for a long time swear is the best way to learn. The new generation of legal professionals definitely do not want to be in the office all the time and want the flexibility that hybrid-working can bring. I’m working with my team to find innovative ways to help them find answers to those quick and dirty questions that would previously just have involved swinging their chair around. Video calls and instant messaging don’t and can’t replicate the in-the-office immediacy. I’ve seen some really intriguing new platforms, but is the profession yet really ready to fully embrace the fully virtual working world?”

Then, a further area of attention is building a toolset that helps a firm’s people to be as productive as possible within a typical office or home-based day. Two-thirds of leaders say “maximising productivity” is the factor



PARTNER COMMENT

Open to investment in the automation opportunity

Law firms are confronting an unparalleled period of financial stress and operational change, as highlighted in last year's **Briefing/HSBC Law firm strategy and investment survey**. And yet the outperformance of expectations in 2021 was astonishing. Firms have a clear opportunity to invest in technology and practices to mitigate the risks, not only of the ongoing Covid-19 pandemic, but also the requirements of upcoming regulation on environmental, social and governance (ESG) reporting.

The right technology investment unlocks value and drives efficiency. It eliminates time spent collecting and manipulating data to understand the impacts of change, while enhancing business collaboration between departments and practice areas through information that is easy to access and consume.

Much of this value already exists within your firm's technology, but it requires automation of all non-value-added tasks. This is key to enabling individuals and teams to focus on analysis and modelling to maximise productivity and optimise existing

internal resources.

There is further value to be unlocked by moving away from disconnected systems. Integrating data sources (including practice management and operational systems), and bringing these disparate sources into a single application, empowers users with visibility, insight, and the tools needed to analyse the firm and ultimately optimise internal operations. This delivers firms the flexibility to expand both domestically and internationally without the requirement to scale up operational teams. Mergers and acquisitions no longer require costly practice management system replacements onto a single instance to report financial and operational data on the new firm structures. Instead, efficiency is driven through user-friendly, scalable solutions, giving control to the user, all while removing reliance on IT to access the data required to deliver information at every level of the firm as needed.

OneStream Software's mission is to deliver 100% client success. This mission extends not only to our customers, but also to their clients, by delivering transparency and insight to enhance

those relationships. We do this by leveraging modern technology and design principles to manage and drive performance within the firm, from the granular level through to strategic firm-wide decisions – all tailored to the requirements of the individual as well as the firm. OneStream unleashes the power of finance by unifying corporate performance management (CPM) processes such as planning, financial close and consolidation, reporting and analytics, through a single, extensible solution.

At its core, the key challenge OneStream solves is the complexity derived from the ever-accelerating speed of change, not only in the legal market but also the client markets serviced by the legal industry.

Paul Suffield
Account director
OneStream Software
www.onestreamsoftware.com



that gets most attention from senior stakeholders for IT investment (p23).

In addition to collaborative document work, and continuing to take advantage of more Microsoft Office integrations with other systems over time, Tara Waters at Ashurst also highlights the advantageous tracks of transaction management tools. "Again, there's a little less manual labour and admin for fee earners, as well as some more collaboration with clients," she says.

And Greg Bowie, head of business analysis at Brodies, is working on establishing a consistent toolkit for his area of work across the business – a set of pricing and analysis models that may in time, he says, lead to fresh automation.

"There's a lot of data in the business, and we're very focused on shaping it to improve access, subsequent financial decision-making, and of course profitability. We can combine certain information, such as around resourcing models and utilisation, in different ways to give new perspectives and insight. A key element of making the case for investment in IT is demonstrating that you're making the most of what you've already got," he adds.

Lawrence at Kennedys agrees. "We've an increasing number of systems capturing data for the firm and our clients, and with our ►

5 Signs it's Time to Re-Imagine Your Financial Close

01



Time Wasted

02



Lack of Extensibility

03



Low User Acceptance

04



Missing Functionality

05



Quality Concerns



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PARTNER COMMENT

Clarity settles on the cloud imperative

In an environment in which headcount growth is forecast by two-thirds of respondents and automation is top of mind for all, it is interesting to see productivity and efficiency emerge as major themes in this year's survey responses, especially in the wake of last year's focus on transformation and competitiveness. After all, the legal industry has been deploying technology aiming at greater productivity and more efficient operation for more than two decades. How to think about this year's responses, and what they mean for those of us who exist to make law firm business leaders more successful? Where does this research intersect with the big ideas that we hear law firms talking about in other contexts?

It is difficult to attempt any analysis without factoring in the enormous consequences of the pandemic, and the ongoing uncertainty it creates about work models. Perhaps last year's apparently strategic themes reflected optimism about a return to normalcy that was later forestalled with the emergence of the newest virus variant. Now there really is an acceptance

about a new normal, and changes in the work model that we once saw as temporary appear in fact to be permanent. In a world where employees are likely to be physically present in the office just 2-3 days each week, perhaps igniting new energy around productivity and efficiency makes sense.

What isn't surprising is continued interest in all things cloud, and in the rapid movement seen in last year's **Briefing** Frontiers report from cloud-averse to cloud-first. This makes sense as collaboration is a major imperative and everyone is part of a distributed team. Microsoft has provided tailwinds with Office 365, and use of Teams is growing rapidly. As firms grapple with a collection of on-prem and cloud solutions, the need for a strategic approach to cloud deployments will only increase. We have clients who are talking about 'cloud everything', from martech, to new business inception, to PMS systems. Figuring out how to get from here to there will be a unique journey for each firm.

Against a backdrop of new entrants,

substitutes, and continually increasing buyer power, law firms are operating within the most competitive industry dynamics ever. If getting the distributed architecture in place to empower remote workers is job one, close behind will surely be the imperative to modernise business development with data insights from across the firm. We see hints of this in comments about the need for data lakes to inform firm knowledge, about matter budgeting and pricing, and about getting new clients. Exciting innovations in data governance, master data management, and data visualisation will impact law firm marketing and business development going forward.

Matthew DeVoll
Marketing director
Wilson Allen
www.wilsonallen.com



new head of data strategy we're now in the midst of putting together an appropriate one that joins more of it together."

Devlin adds: "Productivity is definitely an important driving factor behind our investments. But there's also recognition that we don't just want to invest in fully bespoke/siloed solutions that deliver a result for individual business units. Software tools that will have use cases across multiple areas of the business, and where learning can be replicated, are also more likely to receive approval."

Cunningham at Reed Smith also picks up on both these themes as strategic priorities: "We need data-driven insights that tune the business in the context of client perception of value – and fewer different tech products, with more focus on process improvement across practices and the business."

"Software tools that will have use cases across multiple areas of the business, and where learning can be replicated, are also more likely to receive approval."

ALISON DEVLIN, HEAD OF KNOWLEDGE
EVERSHEDS SUTHERLAND

In which of these tech areas – those your firm already employs – do you now need to drive up use across the business to increase hybrid-working efficiency/productivity?



THE CASE FOR GREATER USE

The areas where leaders see most potential in pushing for greater adoption are knowledge and CRM – suggesting focus on improved information-sharing and connection-building

81% Intranet/KM systems

77% Client relationship management

72% E-signing

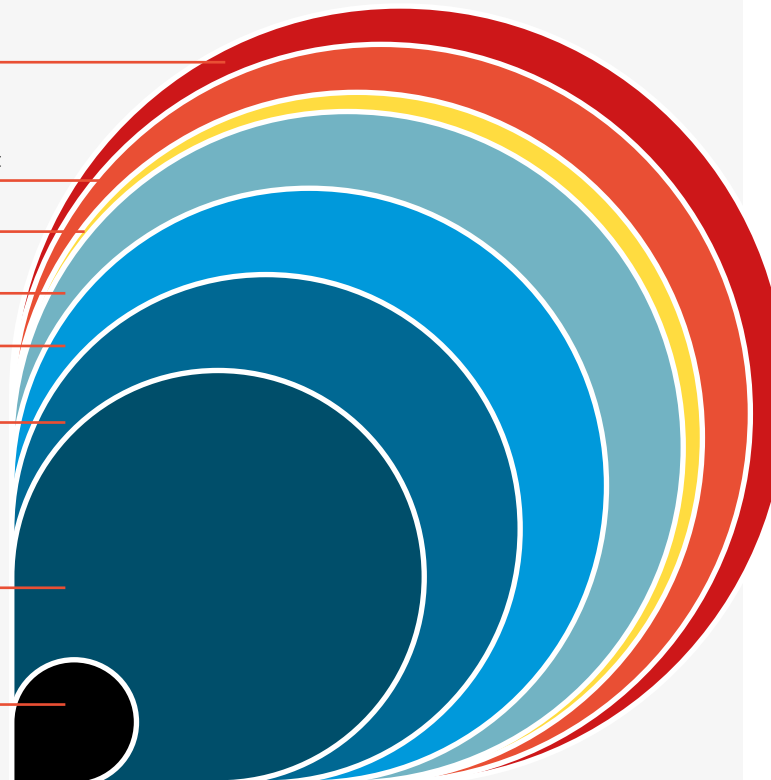
70% Internal project management/
portal-based collaboration

62% Document bundling/building

53% Machine learning for contract
review/due diligence

43% Pricing tech

- 13% **Other responses:**
- Case management
 - Document automation
 - Loads of things, eg decision engines
 - Speech recognition (for transcription to text)
 - Workforce planning, scheduling and forecasting



In the knowledge arena, moreover, Devlin says the Eversheds Sutherland intranet – about to migrate over to a newer version of SharePoint – has significant scope for greater use. “Improving awareness of, and engagement with, our existing knowledge systems will be a core area of focus for 2022,” she explains. “We need to look at better storytelling, building on instances of great practice and team-by-team incremental change to nudge our users in the right direction. Constant and consistent messaging about the knowledge solutions we already have – albeit targeted for the particular audience – can be more effective in generating buy-in and delivering behavioural change than a big-splash announcement of a new system.”

Ingle at Shoosmiths says: “Productivity ▶

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PARTNER COMMENT

Is tech set to transform the talent imperative?

As we enter what may be a third challenging and unpredictable year, we can see that the future of how we work, and how this may affect the retention and wellbeing of employees, are considered themes in this report. However, it also seems that they aren't at the top of most IT leaders' agendas.

When comparing this year's survey to **Briefing** and HSBC's annual law firm survey in 2021 – Choice of change – there is an apparent disconnect surrounding retention of prospective partner-level talent and staff and their wellbeing. These factors score very highly as challenges within the latter research into law firms, but barely register in IT leadership groups. Moving forward, IT leaders must be able to deliver a strategy that supports these objectives to attract and retain talent, ensuring end users' wellbeing – and as a result, their ongoing productivity.

By 2025 millennials will make up approximately 75% of the overall workforce, and they are demanding more from their employers – they

want flexibility, a clear work-life balance and tools that will enable them to work quickly, flexibly and efficiently.

No doubt technology will continue to play a vital part in achieving this flexibility and balance. However, on a scale of one to 10, law firm leaders' faith in their technology provision to support hybrid working only scored 6.5. In order to better understand the pain points of their end users, and to develop a strategy that enables flexibility, agility and productivity, IT leaders must create open lines of communication with all staff to better understand what they need from technology and platforms.

The use of virtual collaboration tools, automation, and of course the cloud, can help to streamline work, eliminate pressures of high workloads, and maintain transparent and effective communication. As the workforce moves to flexibility of hours within a 24/7/365 model – no matter where or when it's working – the use of outsourced technology service desks on follow-the-sun operations can be a great enabler to

support this new world of work without placing unnecessary pressure on in-house IT teams.

Being attuned to the wants and needs of employees will undoubtedly open up a world of good for the legal sector, and so it's vital that firms consider how they can attract and retain the best talent to ensure their longevity and success. The alternative is they risk being at the wrong end of the 'great place to work' scale.

David Fazakerley
In-house legal CIO
CTS
www.cts.co.uk



and user experience are both very top-of-mind. If not for lockdown, firms might have been more controlling of a move onto a new system such as Microsoft Teams – but people managed to adopt it very quickly. Now you see a move for everything to become ever-more intuitive, which could mean less need for laborious user engagement.” Similar effort could be made with data, she explains. “If data is entered once, it should flow on to everywhere it's needed – and if the user has a good, slick experience there, they're more likely to return and enter their next piece of data right first time.”

Nicola Paffard at Cripps Pemberton Greenish also stresses striving for simplicity. “But productivity is still quite hard to prove. It's about working on the gap between what the tech can do and what lawyers really need, proving that you can sustainably make their lives easier.” There are many opportunities – more integration, reconfiguring workflow for a more streamlined experience through different teams, and more collaboration out of the email inbox – and she also emphasises that having reliable data in systems begins with getting the right message to the people entering it.

In terms of building the business case, however, Paffard says there's a real mix to navigate. “Cost is another big issue – the



PARTNER COMMENT

Why systems are the missing piece of the productivity puzzle

Increasing productivity may be the most common performance indicator upon which new technologies, systems and processes are measured. As such, the overwhelming attention senior stakeholders are giving productivity, as reflected in this year's survey (66%), is not all that surprising.

But the landscape of productivity solutions has undeniably transformed. In part, this is because over the course of the past two years, where lawyers work has changed – and I'm not just talking about working from home. In a recent past, basecamp for lawyers was the email inbox – a service now increasingly facing secondment to formal occasions, escalations, and e-sign requests. Meanwhile, Microsoft Teams has by and large taken over – and it's easy to see why.

Microsoft Teams is slick, multifaceted, interactive, and embedded not only in the flow of work, but the flow of each day. We've become accustomed to a world where – by way of colour-coded dot – we know when we're going to get

an answer. Documents, chat, meetings and planners are all in one place. It's a poster child for productivity. But there's an elephant in the room – it's not built for law firms.

The challenge law firms face post-work-from-home-order is that they're in a modern productivity halfway house. They may have Microsoft Teams or another collaboration platform where they work day-in-day-out, but there's an absolute disconnect between this and the weightier, nitty-gritty platforms they use for the likes of client relationship management, case and matter management or time and billing. A lot of time is spent transacting between systems and platforms that still struggle to talk to each other (some things just never change).

It's a challenge that Peppermint has fully committed to overcoming in legal in a truly innovative way. Because in order to truly achieve optimal productivity, there needs to be integration, and software needs to be responsive to the context of how

and where lawyers work. Empowering lawyers with a one-stop-shop and cross-platform hub turns the dial towards productivity to drive outcomes and client service excellence – rather than productivity for the sake of measuring the time taken to achieve a task. As a fee earner, this means delivering great customer service becomes more important than worrying about the number of hours you're charging for it. That's not only productive – it's disruptive.

Mike Walker
Chief technology officer
Peppermint Technology
www.pepperminttechnology.co.uk



tech is now developing so fast, the expense of a 'big bang' can be so prohibitive." Cripps is currently seeing significant internal buy-in for developing more client-facing tools – an example being some document automation for real estate, which its own business analysts took through a design-thinking process.

Finally, for a firm such as Clifford Chance, says Westcott, it isn't only a question of investing in more tools or slimming down the stack – but also finding the right tool for the specific job. He too sees more self-service, direct drafting and e-signing, for example, as new models bed in and concerns shift. "But if there's high demand and less time – not to mention change fatigue – you also need to help people to focus their attention.

"There are so many tools available, and it's no longer the one big rollout, but a continuous pipeline of possibilities. Different groups need different things, and the aim is to remove the decision about where to turn."

So the large law technology team in 2022 must also turn marketer – finding the "what's in it for me?" message and drawing that focus efficiently. But this needs managing "in a deliberate way, rather than just opening up the gates", he adds. "Ultimately, somebody must also take responsibility for all of these fast-moving tools." ▴