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to tackle the biggest firm pressure
points as cross-functional teams



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A room for improvement

A

Almost two years to the day since the first UK work-from-home order came in 2020, in March 2022 team **Briefing** was hugely excited to bring law firm operational leaders from across functions back together for a day of collaborative problem-solving.

What impact have those two years of change and soul-searching had on visions of the much discussed 'office of the future'? Do leaders have the clarity they need about what will ensure long-sought flexibility through hybrid working doesn't come at the expense of structured, or indeed less formal, collaboration on projects and strategy? And how about building broad buy-in for both technology-based and other promising process change to continue improving at the competitive games of boosting business-wide efficiency and turbocharged talent engagement?

With further food for thought on offer from economists, adventurers, and in-house legal leadership, **Briefing** readers co-built potential solutions to their top challenges of today, with a firm eye on tomorrow.

RICHARD BRENT **HEAD OF CONTENT**

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BRIEFING PEOPLE



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LIVE and learn

A brand new Briefing event brought law firm strategic leaders together to tackle common challenges, from workspace redesign to galvanising more intense change

The guiding principle of **Briefing LIVE 2022** – on 22 March – was to build the very best opportunity for senior legal business leaders across firms’ functions (operations, finance, technology/innovation, knowledge, business development, and more) to discuss the strategic challenges that truly matter to – or perhaps even threaten – the organisation the most after two years of often intense transformation.

The day’s collaborators were therefore strongly encouraged to vote in advance for problems that it would be most beneficial to tackle as a group. Would it be, for instance, hitting reset on cultural values or brand identity for the new world of work? How to measure the firm’s social value? Or rethinking the resourcing of workload with an eye on changing career expectations as

much as efficiency and profitability?

In the event, two fronts for possible action rose to the top – mammoth management levers of the moment both, and with potential for pivotal change. What is the mix of ingredients that firms need on the table to keep the workplace of 2022 a stimulating one that maximises their chances of key talent retention? And what does the next generation of office space really need to deliver to the same end? It was a surprise to nobody at **Briefing** that catering for talent was the common thread.

Adapting the World Café method of structured ideas-exchange, our leaders now moved from table to table to dissect the difficulties and surface options with new faces (but the same sets of sticky notes) each time. As new people arrive to take on one of the topics, they’re briefed on what has been



covered by the earlier group, plus any consensus that is building – so ideas for improvement can effectively snowball, and connections, patterns or striking divergences perhaps emerge.

Building better

The question of what a hybrid-working era office should prioritise is somewhat complicated by the fundamental of offering choice, we heard. Of course, some space that can facilitate effective hybrid meetings is required – but it was felt that technology provision is currently only really keeping up with change. It isn't yet able to lead it.

Improved process may trump the introduction of new tech in any case – and remember that IT can also work against what you're trying to achieve if it isn't clearly having the right impact on people's working lives.

More broadly, one idea to arise was the demand for a “destination office” – also thought key to our second priority topic, in fact, of keeping people well engaged with the business. Space should have a “home from home feel,” some found, so that office and home-working environments don't feel

like such separate experiences.

But at the same time, different roles are likely to have some different demands (that may or may not be met). For example, do the firm's various partners and other very senior decision-makers still want an area to call ‘their own’? And will a firm's decision about that influence their appetite for voluntary office face time?

It's not all about the furniture and refit to all the right specs though. Collaboration spaces will require a collaborative culture to function, driving certain behaviours, whether formally expected or otherwise. The ‘watercooler moment’ of old needs more than a convenient place in a corridor.

As one concluded: “The office of the future might not even be an office – it's part of the package, but there's a lot more to consider.”

A strategy for stimulation?

As for the matter of addressing your working environment more generally, our groups found further balances to be struck – between intellectual purpose, for example, and a wider sense of values that also encompass respect for wellbeing.

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Responsibility means more than just responsibility to the business and colleagues in terms of work.

Newer recruits may also question your values, or even perhaps those of your clients – and should this fact be welcomed and channelled in particular ways?

For another group, this one could really be as simple as “taking the time to understand” the workforce as a collection of individual journeys. Career paths through law firms are no longer as cut and dried, and even where partnership is a priority there’s a “tapestry of effort” (in a nice turn of phrase) that requires more commitments from people than racking up their billable hours.

Although optimism was expressed in a direction of travel that’s seeing more opportunities for a greater breadth of business skills and backgrounds within law firms, values such as trust and transparency must now be backed up by evolving clear key performance indicators that recognise more rounded contribution.

Colourful thinking

A second piece of collaborative work then

saw attendees energised to contemplate action by rotating a set of ‘thinking hats’ (see above). This methodology – based on a book by Maltese psychologist, philosopher and consultant Edward de Bono – asks your group to take a challenge and attack it by channelling particular modes of thinking – positive, creative and critical. The idea is to build up, and perhaps strip away, options to arrive at a feasible solution for change.

Groups brainstorm a situation in several strict 10-minute intervals as follows:

- **The white hat** Establishing the facts that lie behind a challenging situation and selecting something useful to change.
- **The yellow hat** Focusing only on the positives and opportunities that should, or could, flow for individuals or the organisation if change were introduced.
- **The green hat** Being creative with solutions, expanding horizons and challenging conventions. What could you try that is truly different, regardless of how successful it’s likely to be?
- **The black hat** The time to critique ideas. Why won’t ideas work – either in part or overall? What are the limiting factors?
- **The blue hat** Summarising and deciding:



After ‘black hatting’, can you review all the different thinking that has flowed and arrive at a practical example of organisational improvement?

For this exercise, groups could select from three areas:

- **Managing to communicate change more effectively**
- **Catering for a range of internal needs, encompassing both digital natives and digital resisters**
- **Maximising value to the business following investment in technology**

Here are some examples of what emerged.

Strengthen strategy for change

The benefits of communicating change more effectively are:

- Communication drives action.
- It should improve both the firm and the quality of working life for employees.
- Communication can educate employees about the change that comes from compulsory regulatory requirements, for example, as well as things you wish to improve internally as a business.

A few potential blockers to these goals include needing a clear answer as to why your changes need to be introduced. It can be extremely difficult to ensure people truly listen to or read communications, and the time for this is often limited. People tend to deprioritise digesting communications on the basis it may have a limited impact on their lives.

This group came up with a number of options, ranging from desktop notifications to intranet posts, WhatsApp messages, ‘lunch and learn’ events, family days and town-hall forums.

The town-hall format was found to be a workable solution, as many had experience of these and had seen how well they land. There was agreement that it was important to run them on the firm’s time to ensure attendance delivers most benefit, and that the message should be delivered by someone who’s both personable and has authority. Top-down communication only works when this combination can be invested, and it should always start with the ‘why change?’ message.



Ensuring that any new tech equals transformation

Another group shifted from thinking about change in a single firm to an industry-wide technology objective. Initially, they zeroed in on factors specific to a firm: understanding end-to-end processes (and where within these processes clients really place value); properly interrogating and so understanding the underlying problem; drawing distinction between different user personas and their pain points; testing any investment against wider business strategy; and the value in firm-wide – or ‘master’ – data maps.

Ultimately, with many of these factors common across law firms – user-base personas and needs, shared pain points, and sometimes a common client base – the solution was to advocate that firms could collectively benefit from challenging providers to develop offerings that solve issues at an industry-wide level, (reference, for example, the OneNDA project – the world’s first open-source Non-Disclosure

Agreement, crowdsourced from contract law experts at several firms and in-house). Any individual firm will then differentiate itself through its ability to drive adoption of the technology in a way that truly responds to a razor-sharp understanding of its own end clients’ specific business needs.

Conquering the law firm digital divide

It was acknowledged that the pace of change had greatly increased in the profession since 2020, with some tools benefiting some users more than others. Individuals have seen varying degrees of value when these are applied to their particular roles, and the challenge is therefore one of winning more consistent adoption, particularly where tech might be regarded as peripheral. The group identified that nudging ‘carrots’ were needed as well as ‘sticks’ here – steering groups alongside better integration between systems were two options, but so was some element of ‘gamification’, recognising individual effort and again linking back to ‘why change?’ ▀

Time to be transformative

Fresh thinking and committed collaboration were also themes that struck with force during the ‘lightning talks’ at **Briefing Live 2022**.

Bea Miyamoto is associate general counsel, with remit for legal innovation, at Panasonic. Having lived in Japan for over a decade, a significant part of her role is identifying potential process improvements within the manufacturing multinational’s global legal and compliance team.

She underlines the importance of having clear desired outcomes to support long-term client relationships:

“We spend a lot of our days working on tasks and moving projects forward – it can be easy to lose sight of the real outcomes we want to achieve.”

For law firms and their clients, this comes down to realising value that may well be about more than price – repeat business or cross-selling for the firm, for example, and strategic business support for the client. But in spite of all the professed interest in alternative fee arrangements (AFAs) across the market, Miyamoto says requests for proposal are invariably returned with a broadly similar “reverse-engineered calculation” based on lawyers, discounts, estimates of hours and assumptions.

GCs, meanwhile, can find fixed rates even less transparent than hourly – so is there

another way?

Pricing might, for example, instead involve a set of “adjusters” based on the circumstances of work within a certain type (complexity, novelty), but also considering quality of client service (proactivity, timeliness) after the event. Perhaps there’d also need to be adjuster on the client side – accounting for any unreasonable demands.

Miyamoto could see such a scheme linking back to firms’

“Be brave, don’t seek comfort in your elevated position, and take a lead.”

assessments/appraisals and even remuneration, she says.

If law firms are to commit themselves, she believes their clients also need to become more outcomes-focused when it comes to considering team diversity – rewarding continuous improvement rather than focusing mostly on box-ticking exercises that ignores progress across the industry more widely:


“Diversity isn’t a marketing tool, and we shouldn’t focus on talent selection to lend a matter an air of diversity. Arguably, we should be much happier working with a firm that’s making strides in improving its metrics around recruitment, retention and

promotion of its talent.”

Duncan Eadie, former law firm IT director and author of *Cold Feat* – an account of crossing the Arctic’s remote Penny Ice Cap – then drew on that expedition’s perils to offer strategic leaders some advice for committing more thoroughly to reducing business impact on climate change.

“All now need to decide whether to be observers or catalysts for change in the effort.”

Eadie fell through the melting sea ice on his trek (it was an earlier spring with the warmer temperatures) and he struggled to climb out. “The window of opportunity was short – and it was closing,” he says. All must play their part in influencing others. However he advises:

- Don’t surrender to panic, but remain intently focused on the mission.
- Stay upbeat and project hope – in spite of the clear evidence of dangers. “If Covid-19 has taught us anything, it’s that we can work together to tackle common crises,” he says.
- It’s easy to think you’re not moving, but start with smaller steps – persistence is key to making gains.
- Pull people with you, don’t push them away.
- Leaders have the power to unleash the potential of the young. “Be brave, don’t seek comfort in your elevated position, and take a lead,” he exhorted. 



Optimise your internal relationships

Alan Mercer, legal industry director at Introhive, outlines the many reasons internal relationship management is just as important as client relationship management to a firm's overall commercial and strategic success

You know that relationships are important. You spend a lot of time and resources making sure that you've got a handle on your relationships with clients, prospects, and others outside your firm.

But how well are you managing your internal relationships?

External vs internal relationship management

When considering the topic of relationships

in a business context, we generally think about external relationships – for example relationships with clients, prospects and intermediaries.

However, this is only half the picture. At the core of any business is a collection of internal and external relationships. Optimising your internal relationships is just as important as nurturing the external ones. Success, in terms of a number of key metrics, can be directly linked to your firm's ability to understand and leverage both of these very

important assets.

In other words, the more connected you are, externally and internally, the more successful your firm will become.

Here we'll explore exactly how important internal relationships really are, and describe four ways that firms can analyse and optimise them more effectively, for the benefit of both the firm and its clients.

Establish your internal network quickly for long-term success

New lateral hires need to establish an effective internal network, and achieving this early is critical to success.

A 2018 study from the Harvard Business Review (HBR) and partners showed that 'pull' techniques, as opposed to 'push' techniques, are more effective for new hires building a network. This means proactively pulling people into your network and being more strategic when thinking about who you make most effort to connect with at your firm.

An article outlining the research quotes David Sylvester from consulting firm Booz Allen, saying: "Very targeted investments make a big, big difference to people becoming productive more quickly and enjoying their time in the firm."

In other words, make strategic connections within the firm to establish the right network for yourself faster.

One example of a scenario where the importance of this becomes extremely clear is the remarkably high failure rate when making mergers and acquisitions. It has been widely reported that a staggering 70-90% of mergers and acquisitions will fail. Why is this? One of the top reasons, as reported by Forbes, is the absence of a people 'inventory'.

According to the article: "Most data about people in the organisation being acquired is a gut call based on meetings and interviews. These gut calls are always useful but never enough when it comes to fully understanding the valuable asset of people."

On top of this, formal organisational

charts often bear little resemblance to the web of people who actually execute work. In every firm, people will build their own informal 'go-to' teams. They rely on that one person who always knows 'how we do things here'. They find somebody in the finance department that can reliably answer any budget question. These spontaneous, critically important connections are the lifeblood of organisations worldwide.

Internal relationship management would no doubt be a game-changer for M&A integration efforts, and it can also offer valuable insights during organisational design, making it easier to establish future structures that position employees where they can deliver the most impact.

Improve both vertical and horizontal communication

Ensuring information and knowledge are effectively shared, both vertically through the ranks and horizontally across a firm's functions and specialisms, is a phenomenal advantage for any team. Maintaining alignment from the top of the organisation down as well as horizontally keeps everybody on the same page and enables their most productive and strategic work.

It's been reported that increasing horizontal communication within an organisation helps people to achieve goals. It also decreases misunderstandings and miscommunications, solves problems faster, increases efficiency, and enhances mutual understanding among colleagues.

An example here is the value of inter-team alignment during growth. As firms grow, it can be hard to maintain alignment between service lines or geographically dispersed teams. Expanding a team from

It's been reported that increasing horizontal communication within an organisation helps people to achieve goals. It also decreases misunderstandings

three to four people grows that team by only 33%, but it sees complexity increase by 400%. As a team grows, interactions can become less frequent and discussions less detailed.

Some best practice can help to ease this misalignment, such as prioritising regular meetings, effective onboarding, and using collaborative tools. When implemented, these practices decrease the likelihood of isolated teams and can create stronger, more cohesive, aligned and collaborative work environments.

In order to maintain, or ideally increase, productivity and growth across the firm, today's business leaders increasingly need to prioritise internal relationship management to guide the development of their high-performance teams.

Collaborate internally, to drive value externally

More effective internal collaboration also increases the value you're able to deliver in terms of additional service lines and improved client experience.

When teams collaborate and have access to the same customer data, they develop a better understanding of client relationships, and can then service those clients more effectively. Teams that work closely together, leveraging one another's expertise and sharing insights, become more capable of exceeding client expectations – and not only become team players but better rainmakers

For example, Heidi Gardner, Distinguished Fellow at Harvard Law School's Center on the Legal Profession, has conducted research that found when professionals collaborate across lines of service, they earn higher margins, as client loyalty increases and they're able to charge higher rates for the work delivered. Her research has found that the more you collaborate and involve specialists across your firm, the more strategic advice you can offer clients – and the more revenue you'll manage to generate as a result.

To illustrate this, an article has described a comparison of the performance of two lawyers who graduated from the same law school, practiced for the same number of years, and billed the same number of hours.

The difference was that one involved six partners in the work they generated, while the second involved 30. The result? The second generated four times more revenue for the firm.

If winning and retaining more profitable work for your firm is of interest, then a closer look at how you can optimise your firm's internal relationships should be a priority.

Fostering a diverse and inclusive workforce

Investing in diversity and inclusion (DEI), and fostering a culture of collaboration where people from diverse backgrounds are connecting with one another, can have profound impacts on a firm's success. Building a diverse internal network of colleagues, teams and individuals benefits all, by introducing diverse perspectives founded in different beliefs, backgrounds, culture and education. This provides a wider vision and broader possibilities to navigate business challenges.

And diversity drives high-performing business development teams. In November 2021, Forrester published a study on how diversity drives sales success. According to the research, companies with stronger DEI practices also produced better sales outcomes. Through an online survey of 500 US respondents in B2B sales leadership roles, Forrester discovered that leading DEI teams saw the following results, compared to those that lagged in DEI:

Teams that work closely together, leveraging one another's experience and sharing insights, become more capable of exceeding client expectations




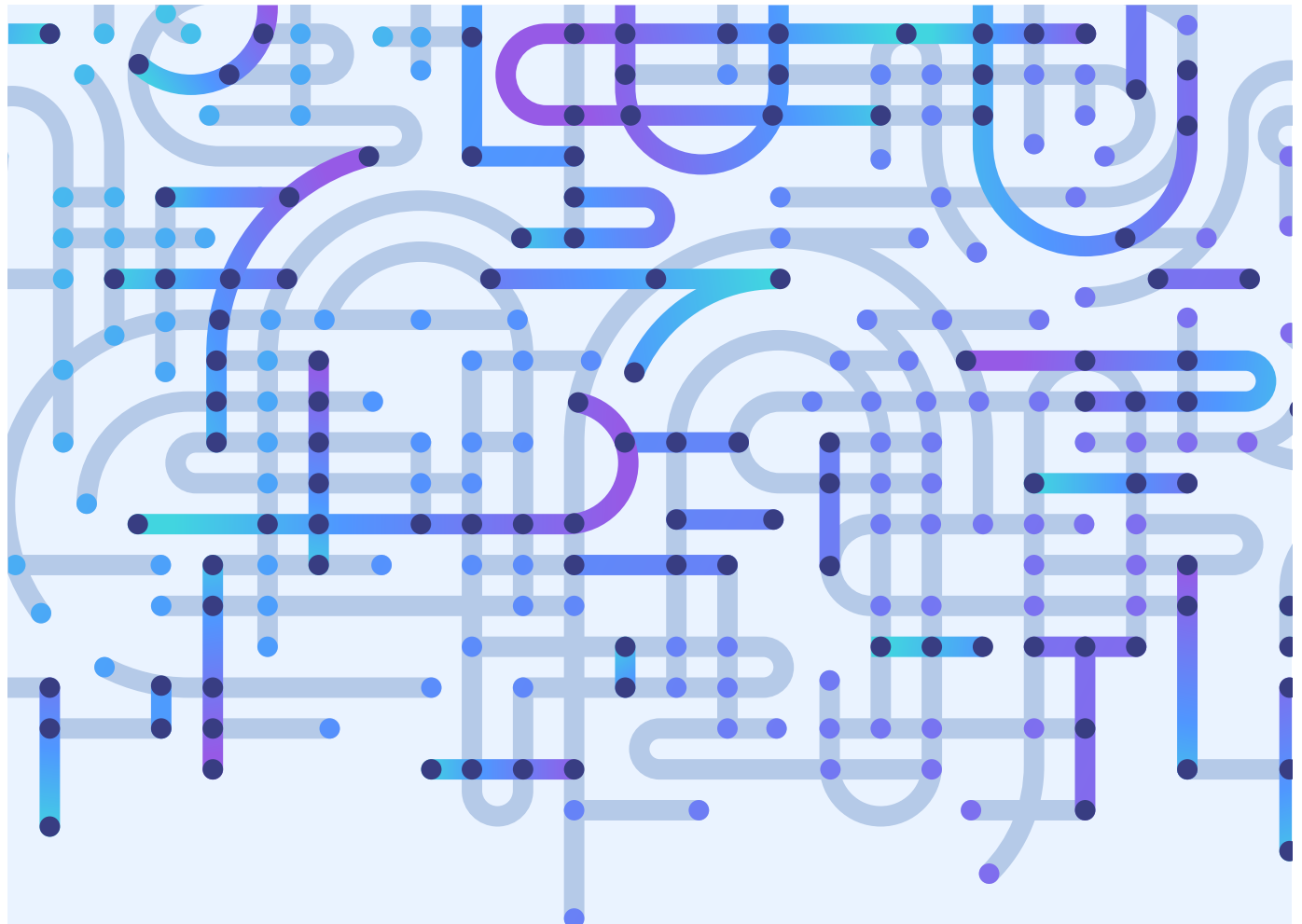
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- 3% higher growth forecasts
- 28% higher conversion rates
- 12% higher revenue attainment
- 6% higher client satisfaction scores.

The power of internal relationship management is unmistakable. When firms invest in fostering a culture of collaboration, the results can be transformative in advancing some of their most important business goals, from partner retention rate, to share of client wallet, diversity and inclusion and client satisfaction.

About Introhive

Introhive is a relationship intelligence platform that transforms your messy data into real insights and opportunities, delivered directly to your professionals when and where they need them. Introhive enables firms to use their greatest asset (relationships) to drive revenue and adapt for the future. Learn more about how Introhive can help your firm to understand and develop external and internal relationships, grow revenue and improve retention by booking a free demo. 



Don't be data-passive – make it actionable

Applying data science to existing sources in order to improve the predictability of outcomes is the future of legal service delivery, says Barry Talbot at Catalyst BI

Most modern data analytics tools take a passive approach to data management and analysis. They rely on pre-configured, historical data, with no ability to make real-time decisions and take action. Users are stuck with making decisions based on what happened in the past.

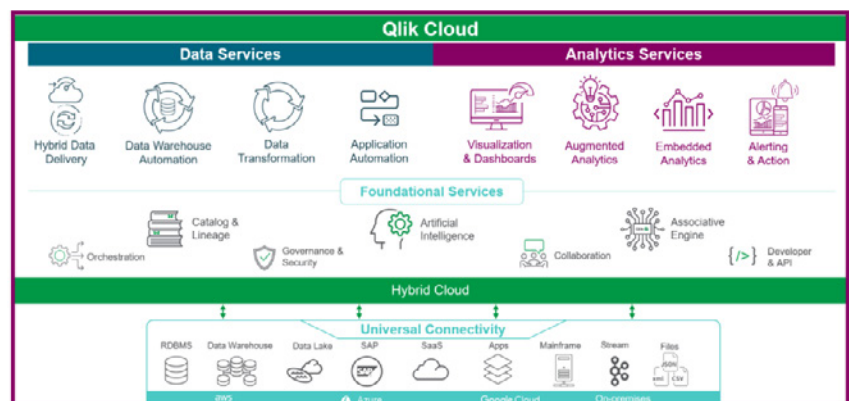
Why? Largely, because of the way the data is managed and made available to the business. It's time-consuming and costly. Users are saddled with data that only provides a limited set of options, without the ability to use any pre-sanitised data. The concept of being able to choose the data from a catalogue isn't generally available to all users. Perhaps a limited number of users are starting to see this capability, but it isn't the norm. Where a user wants more data, most of the time this requires somebody to write a one-use script that will take ages to become part of the data warehouse. But this lost time is something that is becoming easy to avoid – just choose the right tools.

In a recent IDC Data culture web survey (2021), just 44% of organisations reported feeling they had enough data to make decisions. And the NewVantage Partners big data and AI executive survey (2021) suggests only 29% of executives feel they achieve transformational business outcomes with data. Finally, a recent Gartner webinar emphasises that 35% of executives see poor data literacy as a critical roadblock to

business change.

Bringing people and data together means we must do something quite differently. Qlik's approach, using its Active Intelligence Platform, delivers a state of continuous intelligence, with an end-to-end analytics data pipeline delivering real-time, up-to-date information designed to trigger actions when they matter most – in the business moment.

The platform provides the ability to create business-specific data pipelines for any function or business process. These can be updated as quickly as real-time. Retailers use this to ensure that there's always enough inventory to meet demand and to manage slow-moving stock immediately, rather than at the end of the year when the stocktake is done. Wickes, for example, makes this data available to its suppliers, and they can then proactively send stock directly to the store when sales have increased in a particular line. During lockdown, when many people were furloughed, they used that time to decorate their homes. This solution enabled Akzo Nobel, maker of Dulux paints, to see where stock of paint was urgently needed. They were able to manage a 280% increase



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catalyst-bi.co.uk/legal

in demand levels.

This solution is delivered using a Catalyst-developed solution called Coeus BI. It is a low-code web portal that enables the delivery of very specific data to internal and external users, making the analytics experience much easier than it is when using standard analytics tools. This solution will save time and money for law firms wanting to do client reporting and moving away from creating hundreds of bespoke reports for their clients. It also moves away from data silos – letting users find the data they need, enriching it and creating derivative data.

Catalyst shares the Qlik vision that starts with a data-literate world, where everyone can use data and analytics to improve decision-making and solve their most challenging problems. The move to cloud-based computing is well on the way to becoming ubiquitous, and this opens up a whole new world for firms wanting to manage their data in a more governed way. Our strategy is now based around three pillars related to data, supported by cloud hosting using Microsoft Azure.

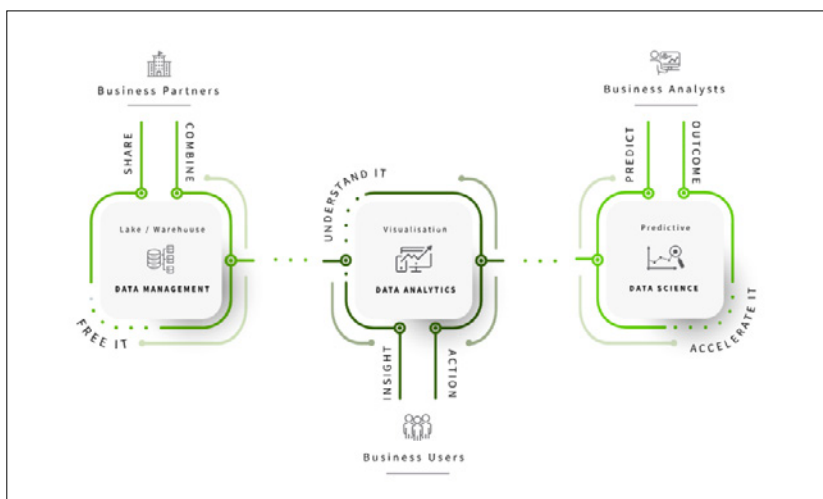
The data pipelines that flow from this approach can be used for far more than

being diagnostic. In most cases the very same data sources used to analyse financial KPIs can be used to predict outcomes that can be game-changing when it comes to increasing efficiencies and being more productive. Being able to predict the outcomes of matters that suits both parties can save millions in wasted time and pay-outs. Data models are being created to do this, and at the same time giving law firms the option of choosing to use a different data model if variables change, all designed to increase profitability. Artificial intelligence should not be seen as a tool to reduce manpower. Rather it should be used to enhance what data experts can deliver within organisations. Stepping into data science requires an investment in people and technology. Catalyst is ready to help with the technology without having to hire an army of data scientists.

In a 2020 IDC InfoBrief, sponsored by Qlik – Transformative data through leadership survey – highlights included that:

- 76% of executives noted an improvement in operational efficiency
- 75% of business decision-makers said that revenue had increased
- 74% of executives reported profit had increased.

The Qlik Active Intelligence Platform delivers real-time information and drives action, accelerating business value. ▲





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How to thrive in a hybrid work environment

Guy Adams, leader of the legal industry group at Intapp, discusses leveraging an industry cloud to build a connected firm that benefits a firm's people and clients in a more dispersed working world

Two years ago, when Covid-19 threw the world into upheaval overnight, nobody could have imagined the sustained impacts. The pandemic fundamentally changed how lawyers and legal professionals perform their jobs — and what they expect from their employers.

Having proved that they can be as productive at home as they were in the office — in some cases, more so — people now expect flexible work accommodations. Subsequently, firms that aren't offering hybrid and full-remote options find themselves at a competitive disadvantage for attracting and retaining talent.

Employers that offer flexible work accommodations benefit from reduced operating costs, an expanded talent pool, and more opportunities to acquire novel specialisations and skillsets, while expanding the firm's geographic footprint to support growth initiatives.

Attracting and retaining talent

With the exceedingly tight talent market at play, the industry is experiencing skyrocketing attrition rates, resulting in a talent war. To win over millennial and 'Generation Z' talent — who often prioritise work-life balance, diversity, and social responsibility — forward-thinking firms are modernising work-location policies and investing in diversity, inclusion and social responsibility programmes to attract and retain this talent pool.

Concurrently, the legal industry is

witnessing the emergence of a significant constituency of legal talent that no longer wants to work in person in a big-city location. Having proved the viability of the remote model, legal talent is flocking to the suburbs and smaller cities, intending to work in their home offices permanently — savvy firms are supporting their life choices.

Building a hybrid work environment that supports growth

Although the pandemic intensified everyone's sense of detachment and frustration resulting from working through videoconferencing screens, strategic technology investments that connect your people, processes and data help to ameliorate these sentiments. Feeling connected to colleagues, and successful in your work, are key drivers of job satisfaction.

With widespread mandates in place to expand firms into new geographies, industries and specialisations, moving mission-critical technology to the cloud is key to successful connectivity. Without cloud-based solutions, firms struggle with the data silos that plague on-premises software and drag down productivity. Conversely, providing firm-wide access to a centralised data repository, using cloud-

Firms that aren't offering hybrid and full-remote options find themselves at a competitive disadvantage for attracting and retaining talent



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based solutions customised for the needs of the legal industry, helps your firm to achieve the benefits associated with collaborating at scale across locations.

Strengthening client relationships with high-touch service

Much as with your staff, your clients have experienced unprecedented disruption – both personally and professionally. This provides your firm with the opportunity to strengthen client relationships by simply listening. How has the pandemic impacted their business, and how can your firm help to solve their challenges?

Forward-thinking firms are actively probing clients about what keeps them up at night, exploring ways that they can help to relieve persistent frustrations. Some are hiring expert communicators to manage client relationships, launching market research-style programmes to improve client service, and leading discussions on topics important to the client base, such as around diversity.

Other firms are implementing new-client onboarding programmes, which typically includes a videoconference call staffed by the marketing and business development team to build a meaningful connection that persists beyond the intake process. All in all, firms are doing whatever it takes to meet clients where they are and to strengthen relationships through enhanced partnership, communication and service.

Transforming data into competitive advantage

At Intapp, we say it all the time: firm-wide access to a single truth drawn from multi-sourced data serves as the hallmark of the connected firm. When your firm is truly

connected, you're in a great position to improve every aspect of performance. It all starts with pulling data out of discrete on-premises data repositories.


The first problem with data silos is the people silos they inevitably create. If your firm can't connect its data and provide firm-wide access to a centralised source, your departments and practice groups effectively operate as fiefdoms.

Disconnected data also impedes growth initiatives, especially as it relates to the advantages of collaborating at scale. As your firm develops new specialisations and expands into new geographies, it's significantly harder to support a successful rollout without connected cloud-based technologies that support a broadly distributed workforce.

Data silos can prevent your people from accessing the same data in real time, meaning it's more difficult to get stakeholders onto the same page for decision-making. The resulting inertia ultimately leads to lost opportunities and competitive disadvantage.

Moving forward

Accommodating pandemic-driven lifestyle shifts – and supporting employees with strategic technology investments – improves employee retention and keeps firms on track with the staffing levels they need to succeed with growth initiatives.

Firms already building the data infrastructure required to successfully compete in a post-pandemic business environment – and embracing next-generation technologies in so doing – are setting themselves up to grow at a steep trajectory and achieve a sustainable competitive advantage. 



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Is the great resignation affecting your firm?

Paul Foster, head of product management at sa.global, says firms must invest in systems that really help them to understand their people as an absolute priority



One of the things that the early days of the pandemic gave us was time to think – in some cases too much time. Most people had the same monotonous routine. After your session with Joe Wicks and the banana loaf baking was safely done, what next? The hour's exercise around parts of your neighbourhood you never knew existed still left plenty of time for thinking.

This forced hiatus in our lives was an extraordinary time of self-reflection, and we were not alone. No event in the history of mankind was shared with the same equality around the world.

Many people took the time to reflect on their lives, relationships, health and current jobs. It was always the current job that was going to be the easiest to change. And so, the wise people of the world predicted a 'Great Resignation'. How accurate they were. Every business has experienced the phenomenon to some degree. Money was obviously one key motivator, but other real issues were just beneath the surface.

There is only so far a business can go to address the remuneration challenge, but there is huge scope to put practices in place to reduce the risk of talent leaving an organisation as a result of feeling unfulfilled, lacking a career path, or simply wanting to change something in their lives.

All organisations may only thrive if their greatest asset is happiness. It is a very simple statement to make. We all know that happy workers are productive workers. Nearly all

senior leadership teams would like to believe that the troops are happy, but nobody wants to dig too deep, to ask the difficult questions, and perhaps truly find out what is going on inside the minds of their colleagues. Yet the pandemic has brought all of these challenges home to roost.

Employee satisfaction surveys certainly have a role to play, but the pandemic meant that we have all had to think long and hard about how we engage with our teams beyond the traditional annual all-expenses-paid Christmas party.

If firms are committed to investing in the people who will drive the organisation forward, they'll need to have an approach to employee participation and development that really works.

Never before has appreciation of mental health been so at the forefront of our lives. Related can be how we feel about our roles. Are we respected? Do our achievements get recognised? Are we given enough challenges? What are the possible career paths? Are there opportunities outside of the current role? If there are, what's the training plan in place?

If firms are committed to investing in the people who will drive the organisation forward, they'll need an approach to employee participation and development that really works



To learn more, visit: www.saglobal.com

Any organisation hoping to keep and grow their very best talent must have clearly defined processes to deal with all of this. It starts with the basics, such as:

- The standard job description
- Employee records with complete skills capabilities
- 360-degree reviews with line managers and peers
- Resource management practices to identify opportunities in the organisation
- A common system to record time, holidays and absences.

If organisations persist in having multiple solutions across their HR and resource management operations, then how can they possibly drive improvement?

Instead, what about an integrated platform that shares common data and allows senior management the opportunity to receive insight into the wellbeing of their employees? It's all well and good getting data into a system, but what are you going to do with it once there?

Imagine a platform that provides early-warning signs around employees' welfare – not enough holiday taken, persistent sickness record, utilisation rates constantly above 100%, failure to attend reviews, and so on. All can be individual signals that there is a problem, but on their own they might be missed.


If presented in a concise, reliable and consistent manner, this information can be used to work with an employee to improve their role and contribution to the business – and their satisfaction. The integrated platform would push alerts to line managers

when certain thresholds are crossed in key areas. This could then prompt meetings with the employees to review the issue.

Not taking enough time off? Feeling pressured to work, with too much overtime required? The experience we have all gone through has shown us there are more important activities in life than work, with more striving to achieve a work-life balance. If employers have failed to grasp this over the last two years then nothing will change.

People have experienced a huge change in circumstances, working from home, working from anywhere, a better balance of work and family life. Admittedly not all of this is right for every employee, but worse is failing to recognise what people want, and missing the key signals that there are problems.

Organisations must move into our 'new normal' with an information-led way of making decisions about the people that should be their most important asset.

At sa.global 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 to connect and empower your teams with insight that also reliably guides and informs the business. 

Information can be used to work with an employee to improve their role and contribution to the business – and their satisfaction



Further firm innovation is crucial


Vincent Perrin, regional vice president of professional services, Salesforce UK and Ireland, says law firms have reached a new crossroads in the potential of data, technology and collaboration that could dramatically transform client service and satisfaction

L leading law firms are transforming how lawyers approach their work. They are innovating at speed, breaking down internal silos, while at the same time legal services are no longer passive but proactive. The global pandemic has accelerated many changes, not least digitalisation, working from home and more data-led services.

Yet many law firm providers still have a traditional operational blueprint. They've

built a lawyer-centric business, populated it with great partners, and expect the clients to come. This 'Field of Dreams' model worked in the past, but it's no longer effective today, and neither is an outdated technology strategy that underpins it.

Many tech deployments at law firms over the last three decades have been inward-facing. Software and hardware has been purchased to 'fix' tech issues, normally best-of-breed – brought in by IT teams but standalone in nature. Fast forward 30 years



For more information, see the Salesforce e-book/video: [The Future of Law Firms](#)

and the result is a complex state of affairs, with many separate point solutions, disjointed data streams, silos and legacy infrastructure.

Right now, there simply isn't enough value being derived from these tools or the vast tranches of data that law firms hold. It means that a lot of money and time is needed, either to innovate or just to meet fast-evolving client needs.

Why change a successful model?

The question is – why should law firms change when they're still highly profitable? The fact is that times have changed, and so have client expectations, rising steeply. A new approach is needed.

It's why data-empowerment and client-centricity are now a key focus for the profession. With digital transformation programmes going on in both clients and law firms themselves, lawyers are now at a new crossroads of technology, data and novel ways of working. The 'art of the possible' is very much within their grasp.

The profession has typically prioritised outcomes over client experience. Law firms have also measured success by their own internal metrics – profit per partner, billable hours and staff targets, or cases won. Forward-looking law firms are now changing this approach. They're becoming more client-focused and outward-looking. They're ensuring their services are optimised for those they serve.

The definition of success is not just one of transaction volumes and fees at the end of a case. It is about the client experience and customer satisfaction. Key metrics and tools in the digitally-driven age, such as net promoter score (NPS), lawyer ratings and reviews, are increasingly vital.

Clients are also moving away from a single-threaded relationship with a law firm. They are happy to use more services

from one provider, but only if this one-stop-shop is cohesive and collaborative, with a truly joined-up approach to services. This expectation is being met in many other professions, although it's yet to be fully developed in law firms.

Time to value has shifted dramatically for many in global business, and firms are not exempt. The faster a solution solves a problem for a client, the better the client experience and the more money the client will either make or not lose. The pace of change in many sectors means that data, expectations and market conditions are evolving fast.

Bespoke client solutions that deliver value to the law firm and its clients must now be formulated in weeks, not months. But are law firms evolving to meet this challenge?

It helps that getting access to data, collaboration, one client view, data visualisation, and therefore value from data, is now much easier to achieve than at any point in history. The pandemic has taught us how agile people and operations can be – and must continue to be.

So, why are archaic processes slowly returning? The fact is that some law firms are still doing the same things they've always done in their desire to innovate. They're turning to the same providers and point-solutions, but expecting different results, in order to enact that art of the possible.

The legal profession across the globe also continues to see itself as unique, but it can learn a lot from innovation in other industries. Client expectations today don't have boundaries. Partnering with organisations such as Salesforce, with a vast experience in many other sectors as well as law, matters. Leading firms may be trailblazing and innovating, but there's still a way to go. We can help. 

5

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Positively productive

Matthew Stringer, chief experience officer at Stridon, considers whether you can strike a happy balance between employee productivity and the importance of wellbeing in the future legal workplace

When **Briefing** recently asked senior IT leaders in mid-sized to large law firms to identify which management or operational drivers resonated most with their senior stakeholders in relation to IT investment, the results made for some interesting reading.

Maximising productivity ranked as the top-scoring priority – 66% of leaders considering it carefully when it comes to deciding where to invest in IT, while employee wellbeing languished in last place at just 11% (see diagram below). However, 35% of firms surveyed for the **Briefing**/HSBC annual Law firm strategy and investment survey 2021 indicated that ‘staff and partner mental health’ was a strategic priority. Clearly, there is a disconnect between IT investment decisions and wellbeing, but time and again industry studies show a direct correlation between employee wellbeing and productivity gains, which ultimately translates to enhanced performance and profitability for firms.

Some forward-thinking firms are now applying insights gleaned from the rapid shift to remote working triggered by the first pandemic lockdown, to rethink how best to improve both individual productivity and wellbeing.

Recently, The Lawyer reported that one candidate for the role of new managing partner at Clifford Chance proposed creating a new position of chief happiness officer. Meanwhile, Shoosmiths’ HR director spoke at a **Briefing** Frontiers event about the firm’s extensive wellbeing programme for staff. But while wellbeing may be moving up the organisational agenda, the survey suggests that this priority is not being linked to

decisions made about technology.

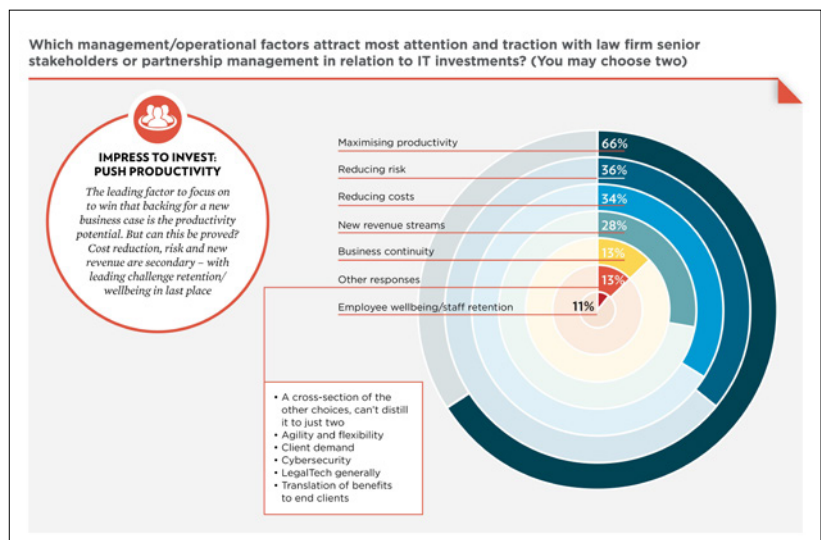
We believe that many firms are missing an important opportunity here. Because done right, implementing the right technology in the right way – and putting people at the core of every digital transformation decision – can significantly enhance the performance, resilience and mental and physical wellbeing of employees.

Technology, productivity and wellbeing

Burnout that results in senior and junior lawyers leaving the profession has been a longstanding issue for many law firms. Indeed, according to a survey carried out by the insurance firm Protectivity, the legal profession is the second most stressed profession in Britain, with 63% of respondents reporting they suffer from stress on a daily basis.

However, in some ways the pandemic gave firms a little breathing space – time to reflect, time to try out (very quickly) collaboration tools, and time to finesse their remote working procedures. Having implemented technology in a strategic way, and by making it people-centric, they were able to maintain continuity of service to clients and ensure the future survival of the firm.

Having experienced some of the transformative gains made possible by



technology in relation to operational efficiencies, more connected client services, and greater agility within – and beyond – practice walls, a growing number of law firms are now evaluating the role technology could play in supporting a wider holistic strategy designed to enhance employee wellbeing.

Boosting positive wellbeing

We believe technology should make people's lives and jobs easier – whether by simplifying processes, automating mundane tasks, enabling team and cross-team collaboration to speed up decision-making, or making it easy to share ideas and knowledge. Increasingly, boosting workforce capabilities and wellbeing includes giving them the tools to better manage how work is balanced with, and integrated within, our increasingly challenging lives. That can include using apps that prompt employees to take a break, get deeper insight into how we collaborate, or when it's time to disconnect for some well-deserved downtime at the end of the day.

So, what does this look like in practice? Here are our top three recommendations:

1 Create a technology strategy that encompasses the entire firm

Input should be sourced from stakeholders across the firm, including executive teams, practice groups and administration and business support, to reap the benefits of a consistent strategy, shared practices, common tooling, and any economies of scale. This enables key objectives to be defined across the business that feed into meeting goals – such as growth, profitability, efficiency and employee wellbeing. With these outcomes in mind, technology investment can be appropriately framed and made people-centric.

2 Replace mundane with meaningful tasks

Greater automation of mundane processes enables legal professionals to do what satisfies them most: focus on complex problems where they can add the most value. Firms that are ahead of the technological curve stand to reap benefits earlier; their people are happier and

more motivated, they gain efficiencies, and clients experience superior service.

These kinds of initiatives, however, require a new way of thinking and alterations to governance structures as new routines are introduced and others are reconfigured or dismantled.

3 Put your existing tools to work

Collaboration tools like Microsoft Teams have made it much easier to bring stakeholders and teams together in one place – ideas can be shared, projects worked on, decisions made faster. They have also made it possible for law firms to adapt workplace practices to fit in with how clients want them to work.

By building on technologies already in place, law firms can finetune the workplace to deliver exactly what people want and need in terms of wellbeing support. For example, Microsoft's new employee experience platform Viva builds on the power of Teams and Microsoft 365 to unify the employee experience across four key areas – engagement, wellbeing, learning and knowledge. As well as helping people to thrive at work, Microsoft Viva delivers the insights managers need to identify when teams are being pushed too hard – they can proactively adjust work norms accordingly.

Rethinking working cultures for lasting change

Technology is not inherently 'good' or 'bad', and as the future of work evolves, law firms that successfully leverage technology to help people achieve both wellbeing and productivity goals are set to reap significant rewards. Alongside preventing burnout, they will have happier and more engaged workforces who are hyper-focused on the task in hand – delighting clients and capturing new opportunities on the horizon. ▲

For further information, visit:
www.stridon.co.uk



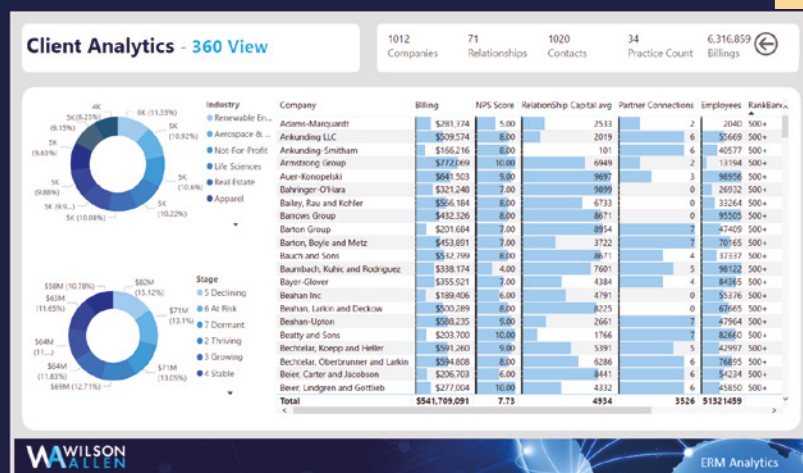
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An elephant in the room

New research from Wilson Allen finds that intense competition for technology talent in 2022 is preventing law firms from getting the right return on their investment in business process improvement efforts

As global law firms invest heavily in new technology, fuelled by the belief that technology is the key to unlocking future growth and profitability, new qualitative research on leading firms by technology consulting firm Wilson Allen has uncovered a rather large elephant in the room.

Wilson Allen's chief revenue officer, Kaye Sycamore, says the research reveals how firms are struggling to find, attract and retain technology and business application talent.

According to the research findings there are several different facets to this problem,

but the outcome is the same. Firms are severely handicapped in their ability to implement and get value from their technology investments.

Never before has there been such a rapid proliferation of new technology. And never before have technology resources been so constrained and so expensive. There's a

Firms are severely handicapped in their ability to implement and get value from their technology investments

To read the full research report, visit:
www.wilsonallen.com

skills gap, and a serious issue around the ability of in-house teams to meet return-on-investment expectations. Expert skills in areas such as data analytics, as well as routine training in practice management system applications, are in short supply. This is resulting in significant salary expectation increases.

The high cost of tech staff is especially difficult for smaller firms unable to compete for talent. And experts in more horizontal technologies (cloud tech, for example, and AI/ML) are more attracted to industries that are utilising and applying these technologies more aggressively. The result is that the supply of talent is waning just as demand is strengthening.

On top of this there is then the 'Great Resignation'. The impacts have been real. Firms that can afford to compete for tech talent have been doing so. However, the talent pool is now actively seeking better opportunities and better pay. There is a feeling that employees have an inflated sense of value. Some firms are considering compensation increases to counter this issue. As a result, there is increased strain on budgets and the affordability of hiring new experienced resources.

The potential for technology to help firms prosper is undoubted. But the challenge is how to realise that potential in this new highly constrained skills environment.

Kaye Sycamore says: "Whatever a law firm is doing, litigation, corporate, M&A, there are hundreds of software applications all adding up to a major enablement problem. It's a rising tide and in-house teams are struggling to stay above it."

What can firms do to address the

enablement problem? Technology consulting companies such as Wilson Allen have a constructive role to play, says Sycamore.

"For our part, we've announced a new range of subscription services designed to fill the gaps facing in-house teams.

"The first service to be launched is iDEA – Digital Enablement and Adoption. This new subscription service is the first of a range of subscription services Wilson Allen is developing in response to market demand for high-end support services based on a trusted relationship that delivers value over time, rather than short term project-based engagements.

"iDEA is designed to help in-house teams with a full service to manage, maintain and deliver training programmes for onboarding, tech skills and adoption, and tech rollouts – including e-learning courseware and tools.

"It's important to stress that iDEA and other subscription services rolling out later this year are not project-based, but are offered via an annual agreement, customised for individual firms, with an annual service fee. No one else is doing a comparable service on an embedded basis.

"Law firms don't need more projects right now. They need an ongoing partnership with a partner who can add value over time, ramping up or down depending on in-house resources." ▴

Expert skills in areas such as data analytics, as well as routine training in practice management system applications, are in short supply



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