

This month:

- **It's not just for Christmas it is for life (all year)**
- **Actions that must be put in place – not just for the new year**

In the last century and before and maybe for many as recent as 2010 (Legal Services Act) many lawyers have been able to assume that they control society and are one step ahead of their client base.

Whether we like it or not the world has changed – there is more competition from new comers but also from firms that are realising only too well that client demands and expectations are greater – so fulfilling their needs as part of running a law firm is a large part of what life has to be about and law firms have to be proactive and reactive as businesses which includes looking after their greatest asset – their client/user base.

In December I put this posting on to LinkedIn

Law firms - Christmas and New Year keeps bringing you that amazing dilemma – giving lawyers and staff a well-earned holiday, competing with empathy with clients some of who, whether we like it or not, will suffer at least bereavement, child problems, family disputes and violence during, for others, the festive period.

I observe law firms, both large and small announcing their closure dates from 22nd December through to 2nd January 2018. Not generating the right empathy with certainly their private client base - It is not a good impression.

It certainly would do no harm for a rota of lawyers to cover the Christmas period to maintain client relationships. In the modern world they can be fully backed up for key issues, without interrupting the rest of the staff, by using for example the digital dictation transcription app and document production from Document Direct www.documentdirect.co.uk and the telephone answering service from Moneypenny www.moneypenny.com/uk

Both are conveniently MLS Advantage suppliers, along with www.nasstar.com who through hosted IT are ensuring that systems are available 24x7x365 for resilience and of course mobility and agility for lawyers with similar support with telephony from Matrix 247 www.matrix247.com also offer <http://mailchi.mp/905ee492fcd4/christmas-is-coming-are-you-prepared> a simple app to at least advise clients what is going on if they should call.

Most of the responses and comments were fully supportive. There was about 5% that said clients thought it was acceptable. Most managing partners have also LinkedIn with me.

This requirement of positive communication with clients and prospective clients is not just at Christmas and has to be positively managed and marketed through the rest of the year. Availability outside of the lawyers working hours that could coincide with a client's working hours making communication difficult for the client – not on – he/she needs support when they need it. There are no excuses as the methodology as above is available.

That 10,000 Will base that you may have is invaluable for updates and additional services, letting people know and being available is critical.

Most of the Y generation also will make selective decisions on line in their own time – they don't necessarily need someone on the phone at 22.00 but ease of communication,

quotations and follow ups on enquiries is essential. Too many firms are missing out in this area. If I owned a firm I would much rather have a 65-70% conversion rate of inbound enquiries rather than 22%. Many of the firms at that level, by the way, don't know it as they don't capture the data let alone follow up enquiries.

New Year Actions

It's that time of year again and has been commented on by me since 2014 – the consistency is frightening

Historically I have laid these issues at the door of the Managing Partner which of course allows others to abdicate. I think these issues lay in the hands of all Partners, Heads of Departments and aspiring lawyers who want to offer a great service and climb the ladder to management

- Too often people in the firm do not understand the direction that the firm is taking and as a consequence their contribution is not as good as it can be. The annually reviewed three year plan for the business needs to be shared.
- Partners and managers in the firm need to start the open-ness by sharing with their colleagues, likes, dislikes, ambitions (including retirement). This covers management, business development and/or just the love of fee earning.
- Too often we are finding that department heads do not understand or accept their accountabilities. It is fairly easy to list these but more important to ensure they are being proactively managed through KPI, Reports and perpetual forecasting. The following are key measures
 - Billing
 - Chargeable time
 - Gross Profit
 - The only true measure of a legal teams performance
 - Working Capital
 - Lock Up
 - Outstanding cash and collection
 - Validation of WIP (there is no point having it if you are not going to get it paid within sensible time horizons)
 - The recession was 10 years ago – the banks now take a very different view but still 300 plus firms a year are going bust
 - Compliance
 - Security and systems integrity
 - Business Development
 - New business
 - Client retention and development
- It is essential that this **accountability is delegated** to individual fee earners by the department heads and that their responsibilities for billing, time targets and cash collection are quite clear – measured and with Key Performance Indicators in place to drive behaviour

- It is essential that there are training and coaching programmes in place for people development and above all meeting the objectives of the business not just ticking the box for CPD points. The effective use of appraisal systems identifying corrective training and individual people development is key
- We have to change our whole approach to business management for each departmental team. Performance against budget is quickly irrelevant. We need to see trended performance and managers telling us how they will recover blips and/or exploit upward trends. Perpetual forecasting is key which starts to demand and underpin proactive management
- The management of discretionary spend is critical like headcount and marketing expense. For lawyers and support GP is a critical benchmark that has to be faced. What is in the budget isn't the point as it is down to performance and expectation from marketing activity
- Please, please – personal checks are essential to ensure that the business continuity and disaster recovery plans for the IT function – applications, infrastructure and telecoms. No one can afford a system to be down and these days it is avoidable. The loss of billable hours and subsequently clients can be disastrous.
- It is essential that used Microsoft licenses are still supported and that controls are in place to make sure your IT and telephony are safe from cyberattack. This requires not only system security but also rules and regulations amongst the staff about systems use. GDPR is going to be a major issue in 2018
- It is essential that senior management and department heads take much more interest in the capability of Practice and Case Management systems and by engagement with the vendors see if the products with their latest releases can assist in our business priorities and if not make it clear to the vendors what is wanted including where necessary integration with third party products. Efficiency yes bit KPIs and MI is also essential to enable proactive management.
- As already stated remember that the greatest source on future business is from my existing clients and you need to make sure they know about all of our services, repeats (like Wills) and new market trends (like LPA)
- You need to make sure that you monitor marketing initiatives for new business and ensure that success is measured, go for low hanging fruit and not carry on a programme with poor results

Here is to a great 2018

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