

This Month

- **Operational Performance – enhance services, cut costs and add flexibility**
- **Document management enhancement**
- **Key infrastructure enhancements**
- **Revolution maybe**

During May I participated with others in a webinar about MI and its relevance with business strategy. Organised by accountants www.menzies.co.uk . Here is the recording www.youtube.com/watch?v=AnDsw53n1gE There were some key points made –

- Firms need annually to complete a three-year strategy, year one is the budget but this has to last for just a month with perpetual forecasting taking over for recovery plans, exploitation plans, resource needs and working capital management. Key criteria need to be trended and the removal of YTD figures alone.
- There needs to be clear accountability and responsibility for all in the firm and reports or KPIs and MI clear for the key criteria – Revenue, GP, WIP, debts, BD effectiveness, complaints, risk and compliance.
- We need to record billable time even with fixed prices and this along with the right person conducting activities – no £200 per hour lawyer undertaking tasks of a £50 per hour person. Also need to be able to compare individual performances and compare to SLAs.

Some more solutions and ROI

Following on from April where I laid out many of the challenges firms were facing [April2021.pdf \(professionalchoiceconsultancy.com\)](#) in the may piece I reviewed some solutions to consider [May2021.pdf \(professionalchoiceconsultancy.com\)](#) including web site and on boarding, MI, supervision and staff engagement and client communication. This month offers some more to consider.

Operational Performance – enhance services, cut costs and add flexibility

We need to make sure that all staff are communicated with, understand their roles and working methodologies and that full use is being made of the available PMS/CMS solutions and added value applications – this needs measurement and supervision and the right division of labour (reference the webinar above).

The last 18 months has presented many challenges – with enhanced client expectation, high rates of work for some types, lower rates elsewhere and who knows what is to come (hence the need for monthly review) and trying to ensure the right level of resource – now and going forward – we do not want too many or too few hence also my drive for monthly reviews and forecasting. Without doubt there is a very increased demand for outsourcing and even senior technical part time resources to enhance the skills.

One natural choice is from www.documentdirect.co.uk (MLS Advantage member) which is outsourced transcription and document production, even without the need for recording devices as there is a mobile phone application. A secure 24x7 service that enables lawyers to work at anytime and anywhere with rapid returns of completed documents. Out of hours and backlog can be the first consideration, then there is the whole thing without the need for staff and office space. So, a general management of peaks and troughs with a ROI. Contact there is martyn.best@documentdirect.co.uk

One particular work-type – Conveyancing - has seen a massive hike in demand and not just because of Stamp Duty relief but also a major demand for enhanced work: life balance, not wanting to live and/or work in cities and remove the 3 hours a day commute. The forecast by many is that this growth will continue for a long time. There are record numbers of transactions being managed by reduced numbers of staff – keeping on top of this is very difficult and the demands of clients and agents is increasing. Even the best users of case management systems have been struggling and often the other side do not help. www.convey-assist.co.uk offer an outsourced support service for law firms which can help greatly with peak demands and also alleviates some risk processes when people are unclear if they are going to need 10 or 20 staff in six months' time. Solutions offered can be bespoke for any demands/needs all the way through the process – new client engagement, onboarding, title checking. Contact here is Julie Williams julie@convey-assist.co.uk

More productivity, efficiency and cost saving is also available from a relatively new legal forms provider www.formevo.co.uk/index.html. This is secure cloud-based access to forms so available at any time, anywhere and on multiple devices. Forms can also be shared with clients and electronically signed and then submitted for example to Companies House, HMRC and of course there is the move towards "Digital by Default". Costs are on a pay as you go basis and imagine the savings available from just avoiding posting forms to having to meet a client for signature and reviews. Form Evo claims that MR01 submissions reduced from 21 days to c 48 hours plus a 75% time saving on IHT400 completions. Integration with many case management and search providers is in place already. Contact Paul Clyde paul@formevo.co.uk

Document management enhancement

Remote and flexible working over the last year plus has encouraged many firms to look at their document management processes and also their mail distribution.

Access to legacy documents has proved very difficult and time consuming and if these were digitised not only would the access be enhanced but also the savings of storage costs.

www.docutechsolutions.co.uk (MLS Advantage member) a bulk legacy and scanning solution where documents are collected, tagged and scanned to BS10008 to ensure legal admissibility. The results can then be delivered in a number of formats – hard drive, uploaded to case management system, or their Document Management system with a financial offer. Takes about 5-7 days for a medium sized firm..

The other relevant solution is that of mail distribution to the right people and quickly. A firm can receive documents into a centralised PO box. It is then digitised with the aid of AI and sent to the right people. It also only needs one live document even if multiple signatures are required. Saves money on resources and enhances efficiency and security. Contact Nathan Doe nathan@docutechsolutions.co.uk

Key infrastructure enhancements

As we know, not handling telephone calls from your clients and prospects in the right way can be very costly – on one side is inbound enquiry conversions which can vary between 20% to 65% with law firms so just imagine the lost revenue and lack of a returning prospect because people remember and likewise with existing clients and their dissatisfaction at speed of response and call back.

We also have to recognise now that communication with clients and prospects is not just on the telephone or via e-mail but also through web chats and AI enabled chat bots, WhatsApp, Facebook and no doubt many more to come.

That client journey is key to satisfaction levels. <https://matrix247.com/> (MLS Advantage member) provides such reporting capability co-ordinating the many sources enabling trend reviews and campaign priorities, that automatically provides reports to head of departments presenting best staff, lost calls, talk time (billable time) and the identification of under used services.

So not just revenue gain but also cost saving – for many years so many firms have automatically just renewed their number of lines when not needed (one multi-site firm saved c£10,000 by reviewing data network usage). A review of a firm's communication network – telephony and data will often give a reward of enhanced communication, security and cost saving. Contact - Stephen Pritchard - ste@matrix247.com <https://matrix247.com/legal-omnichannel/>

As many will be aware Matrix247 has significantly enhanced its service offering to law firm clients with the recent acquisition of an established IT managed service business and this breadth of service is now apparent on their web site and communications along with the understanding of law firm business needs. This is a refreshing approach from IT suppliers.

This has also been underlined by <https://everythingthatis.cloud> who are partners with the LS of England & Wales and included in a recent blog. They make it very clear that IT is there to support the firm's strategy not to form it. The right infrastructure has got to be in place – robust, secure and ready to support the business strategy but in recent years there has been the added value solutions into the portfolio. A training portal – multi topic video tutorials including technology and security pieces but also mental health and wellbeing. Telephony integrations with many PMS/CMS systems. Enhanced chat box support. Digital client on boarding. Technology enhancing customer experience. Contact - Jonathan Ashley - ja@everythingthatis.cloud

Revolution maybe

A few weeks ago I watched a Calico Legal webinar which included the lead director at <https://www.hedgeslaw.co.uk/site/about/> who explained how the firm had revolutionised itself with a significant change in IT. It was a PMS/CMS that I had not heard of Actionstep www.actionstep.com that originated in New Zealand and rather than using the traditional Microsoft cloud based hosting uses Google also supporting Microsoft and Google based tools.

I have naturally followed up and spoken with the founder of www.cloudify.legal who did the implementation and are beginning to establish themselves in the UK rather quickly. I also had a demonstration and was impressed.

Action step is a public cloud product with a very different infrastructure than tradition. It uses AWS public cloud with Google Chrome Enterprise and Zero Trust model.

The main UK conglomerates of PMS and CMS providers are declaring strategies to get to this point over the next few years – but we still need clarity

There are a number of large global businesses that have already adopted Google's Workspace and Chrome Enterprise including PWC, Colgate Palmolive, Airbus, Ocado.

The environment is apparently very resilient with real cost saving on the traditional.

I have asked a number of people to help verify what could be very exciting

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