This month

- **The reality of the need to change**
- **Added value options**
    - **AI**
        - **Added value essentials**
        - **Effective use**
    - **Effective Use**
        - **Getting basics right for business essentials**
    - **Outsourcing**
        - **Skills availability**

Over the last many years and especially the last few months I have had many conversations with the management in law firms of all sizes.

Initially discussions Initially discussions about business change but also about how it is being dealt with.

When touching on Artificial Intelligence that is being spoken about a lot the responses have been quite scary with a mixture between firms of all sizes and the individual management approach – “love it we can afford the IT investment”, “hate it as it is operational involvement through IT trying to monopolies our operation.

Whether we like it or not law firms of all shapes and sizes are getting a big increase in risk and failure to perform and whether individual managers like or dislike - reality has to be faced and it covers so many key topics

Of key importance to all firms

- Achievement of annually reviewed strategy and positioning
- Performance in terms of revenue, profitability and cash flow (bigger challenge) – this is a daily, weekly and monthly challenge – need of real time forecast updates
- Client satisfaction with performance – leads to repeat business and referral – not just in legal performance at effective costing but also communication – they want to know what is going on and what happens next for their files plus a belief in the firm understanding the needs of the market place
- Brand and image of the business – leading to more opportunities – the firm needs to demonstrate that it is proactive in terms of needs in a changing market – such as rules around inheritance tax
- The ability of the firm to gain more new business – yes from marketing but also image and the effective handling of in bound enquiries – handled well success is at least 65% conversion as opposed to 20% - revenue, profit, cash and referrals
- Value of the assets – of the business if a potential M&A or argument with the bank - repeat business, referrals and value of the Will bank

- Achievement of regulation needs – compliance, AML, client account management – the firm doesn't need the fines or the resultant image
- The service being offered needs to be secure and effective from an IT point of view – so much hacking going on – with also people with the positive attitude talking with the clients and prospects
- It is essential across the whole of the firm that there is access to appropriate skill levels and availability. These days, with many, the appropriate level is not available within the business and alternative sourcing is key for some or the whole activity
- The ability to recruit great staff, develop them and retain them is a challenge - not recognised by all. Plus, once the right people are on board their appraisals and personal development challenges need so much more

The source

The result of firms not handling this right leads to some fairly obvious non performance.

People and Data - One major thing that also has to be recognised is that there are many younger people with great attitude and skills looking to leave the firms when they can because millennials are not like much older people who don't necessarily want to see performance data – time capture, WIP potential, next action expectation is not necessarily welcome – the younger community wants to hear on a daily basis how well it is doing, supervisory comments and planned positive steps. AI plus some simple modifications to PMS/CMS and added value add-ons – make this happen

Getting staff on board with the challenges is key. Attitude in reception, through to call handling, cheerful and available – has to be part of appraisals and people development and certainly the personal profile for recruitment.

Amongst the basics referred to at the beginning are workflow efficiency, time capture, production, proof of compliance action, on boarding, financial MI and forecasting

- Essential to this and not necessarily recognised by all is the capability of the existing PMS/CMS system. Is everyone in the firm using at as they should be, what is it capable of and where does it let folks down – what are the added value solutions that already interface with it (such as MI, on boarding, client communication) and where can solutions involving AI be a great assistant to meet all those extra needs.

- Unfortunately there has been variable performance by the established PMS/CMS solutions in terms of account development and there are also a number of new kids on the block. Firms however need to be clear about the solutions they need, the priorities and the timetables to make changes effective. So proper use of what they have now, added value integrated options, AI or replacement needs to be considered against the business priorities.

- Demands need to be very clear for existing suppliers. Failure to beat up account managers is a disappointment. They should be advising all on the product capability and in place third party integrations that will assist the business achievement. It is just not an IT interface with the account managers that is needed but legal teams, business development, finance and management, risk and compliance

- Similar multi-function reviews of new suppliers on the block should also apply

- There are then available some added value options – more that can be discussed

- AI – currently available within the UK market

    - Forsyte - Smart Risk Framework for Law Firms | Forsyte Risk assessment
    - Lexidesk | #1 AI Intake with Lawyer-Level Intelligence effective on boarding and relationships
    - WBT | Bring your Will Bank to life without all the hassle effective management of a key asset
    - Katchr - Katchr MI and BI availability

Skills – availability

- Transcription Services & Document Production - Document Direct – document production and transcription – skills 24 hours a day – removes delays
- Moneypenny UK | The World's Leading Answering Service – phone answering full or part time – web communication
- Cashroom | Legal Cashiering & Accounting Services for Law Firms outsourcing of book keeping and accounting. Growth in demand for all or part of the process where necessary skills are missing
- Home - Legal RSS firms able to demonstrate their knowledge and skills
- Business Advisers & Accountants | Armstrong Watson Menzies LLP | UK business advisory and accountancy firm Accountants in Chester, Liverpool, Manchester, and Widnes Accountants are now beginning to offer much wider services to law firms – from M&A to getting your profitability and cashflow right
- The 'Think Brand - not bland' Guy - Phil Strachan | LinkedIn Getting the image right with the market place is key
- etiCloud | Everything that is Cloud and Transformative Managed IT Services for Business Success getting IT managed well and secure needs experience and track record

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Bill Kirby is a director of www.professionalchoiceconsultancy.com offering advice to firms on business issue from strategy, planning, business development, the effective use of IT applications and IT hosting for compliance, business continuity and DR. He can be contacted at billkirby@professionalchoiceconsultancy.com and www.linkedin.com/in/bill-kirby-ab01632