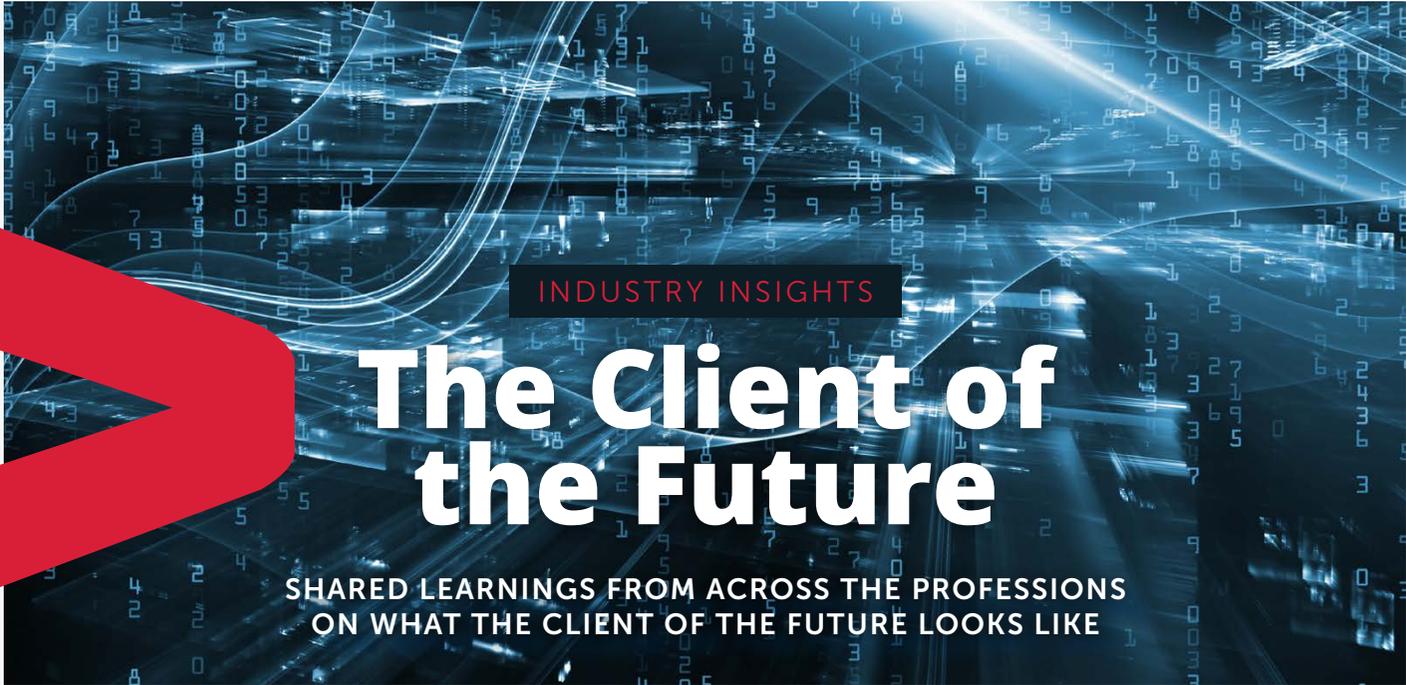


**BRINGING THE PROFESSIONS TOGETHER**



**Client needs are transitioning to a technology-enabled, data-driven, productised, outcomes-based, collaborative model**

SIMON DRANE FOR ALTERNATIVE INSIGHTS

We are moving from a world where professional services firms were focused on their process to one where they are increasingly needing to focus on the client outcomes and reimagine new ways to achieve better outcomes, often through technology. Very few clients care about the processes the firms use, but rather the quality of the outcomes.

We are also seeing changes in consumption patterns leading to greater use of technology to drive productisation of services more than ever before which creates both challenge and opportunity for firms.

Alternative Insights has been exploring this topic area, examining the changing business environment and requirements, alongside the business value, consequences and impact of innovating around the client expectations, experience and outcomes. We asked leaders across the different sectors how professional services firms can provide this depth of “personalised” service more effectively while also using technology and data to a greater degree and remaining differentiated from their competitors. We asked people what the “Client of the Future” looks like in their industry, what their needs are and how firms intend to effectively service them.

At the heart of the changing demands of clients is the change that we have all seen in consumer behaviour. “Clients” are also “consumers” in their personal lives, and over time we have seen a blurring of expectations. They are also “employees” in many cases, but that’s something to bear in mind as we explore that topic in our next edition. Consumer behaviour, largely driven by technology, have moved to a point where there are greater expectations for instant results and arguably less brand loyalty than there used to be.

**CONTRIBUTING COMPANIES**



In his article **Nigel Stott, Head of IT at Hudgell Solicitors** > says “Convenience and speed are ubiquitous as companies everywhere are clamouring to innovate in their industry space. In a world where we can apply for a credit card in less than two minutes or receive our groceries less than an hour after ordering them, the modern consumer has their expectations raised year on year.” In considering how technology such as AI and RPA can be used Nigel also makes the very valid point that “whilst a technology interface can provide the convenience and efficiency to make the quick decisions that both the lawyer and consumer strive for, is it the human element that really dictates the overall client experience?”

> [READ NIGEL STOTT'S ARTICLE](#)

There seems little doubt that there is an increased drive towards focusing on quicker outputs. The same is true in accounting as in law and as the article from Oosha points out, “Without any doubt, future clients will want faster resolutions. So, there needs to be simplicity at every stage of the process to increase delivery speeds.” How this is achieved in terms of reviewing the processes people have historically followed will differ by industry but as pointed out in the article, “In the accountancy sector for example, the cloud has enabled the single ledger concept – allowing client and accountant to access the same set of accounts in real time from different locations.”

> [READ MATTHEW NEWTON'S ARTICLE](#)



ROBERT POPE,  
MICROSOFT UK DYNAMICS  
SELL WITH LEAD (SMB) –  
MICROSOFT BUSINESS AND  
DIGITAL TRANSFORMATION  
SPECIALIST

“Our role is shifting to empower organisations to achieve more through technology.”

A consistent theme coming out across the sectors in the discussion has been not just the need for speed though, but also for transparency from clients on what is happening with the work. As **Robert Camp, Director of Strategic Innovation at Stephens Scown**, points out in his article, > “Our clients want speed, the ability to track what is happening with the work we are doing for them and information prompts from us, rather than having to chase us. They want a comprehensive service. The bottom line is that they want us to make their life easier.” Robert also made the analogy to other sectors and how rapidly they are changing and the need for professional services firms to learn from this, “Last week I opened a bank account with Monzo. All I had to do was upload a photograph of my passport and a selfie. If a bank, with the level of regulation they face, can make the sign-up process so quick and easy, it must be possible for professional services firms to do the same.”

> [READ ROBERT CAMP'S ARTICLE](#)

It is this need to enhance the client experience, through making it quicker and simpler, embracing the greater use of technology, but not losing the personalisation that creates the challenge. The picture that is painted by several contributors is of a drive towards greater productisation, but with quality advisory services sitting alongside. In his article > **Reuben Barry, Director of Data Analytics at Ecovis Wingrave Yeats** sums this up well, “Clients will expect their services to feel more like a product; a dashboard showing progress, tax returns issued with accompanying payment instructions through one portal, automated payment reminders. They may expect no longer to know who’s handling their account and who’s on the team; rather, they will just want to know that the job gets done, and gets done well. In reality, I think the client of the future will want their quality, advisory-led service delivered through the most low-maintenance experience possible.

ALTERNATIVE INSIGHTS  
REPRESENTS THE FOLLOWING  
PROFESSIONS

ACCOUNTANCY

IN-HOUSE LEGAL

LAW FIRMS

MANAGEMENT  
CONSULTANCY

REAL ESTATE & PROPERTY



This means truly proactive advisory, product-like offerings (automate what can be automated), multi-discipline (for how long will accountancy and law be separate?), and when they do need to ask questions, client queries handled like service tickets with guaranteed response times and status trackers.”

> [READ REUBEN BARRY'S ARTICLE](#)

## THE CLIENT OF THE FUTURE



## More effective use of data can facilitate greater productisation

As I have written about before in both articles on productisation > and data. > This sentiment around productisation is mirrored from accountancy to law, in the article from **Dave Eagle, Head of Client Solutions and Innovation at Royds Withy King**, > “The client of the future wants an outstanding, ‘always on’ service with the minimum amount of interaction”. But perhaps with a different take on where the value add can sit, he feels that value can be created in other ways, “Bring clients together in a community. Provide thought leadership and event programmes as well as a forum for your clients to come together and share ideas. Give away knowledge and know-how. Create a reason for them to keep coming back to your platform and create some brand affinity.”

> READ DAVE EAGLE'S ARTICLE



ROBERT CAMP,  
DIRECTOR OF STRATEGIC  
INNOVATION,  
STEPHENS SCOWN

“Clients of professional services firms must wonder why we put up so many barriers at the start of our relationship with them.”



ROBERT STARK,  
SENIOR EXECUTIVE  
DIRECTOR OF STRATEGY &  
OPERATIONS,  
MAPP

“The relationships between client and managing agent will need to become so close that they operate in true partnership, not at arm's length.”



LAUREN PARKER-MITCHELL,  
HEAD OF SALES &  
MARKETING,  
T-TECH

“Virtual workers can adapt across functions, work 24/7, are 100% accurate and do not take tea breaks!”



MATTHEW NEWTON,  
JOINT MANAGING  
DIRECTOR,  
OOSHA

“The client of the future will expect more – more value for money, simplicity, speed and transparency.”

A clear theme in accountancy around the much talked about shift towards advisory, given the commoditisation of traditional lines, comes through in many of the articles. As **Lauren Parker-Mitchell, Head of Sales & Marketing at T-Tech** sets out in her article, >

“The future client expects the books to be done as standard, but they value the advice and guidance on the nuances of accounting that they cannot get from a google search”. Lauren also talks about the shift from time to output, feeling that “old ways of working in accounting take time that the new world client is not willing to pay for” and the fact that “regulation and client experience are driving the need for data management to be seamless”.

> READ LAUREN PARKER-MITCHELL'S ARTICLE

Data and the way in which it is utilised more effectively to help the demands of the client of the future dominated many of the articles in terms of themes. As **Alex Edds, Director of Innovation at JLL**, put it in his article, > “Data is everywhere, and new technologies and data sources are emerging all the time. Soon we'll see more and more decisions being made based on data modelling – from the way buildings are designed, constructed, fit-out, operated, bought and sold. The

obvious consequence of this on the service sector is the need to use and make sense of data, and to provide it to clients in a way that adds value. We are still at the beginning of this journey, with most data still unstructured and unused.”

> READ ALEX EDDS'S ARTICLE

This view of the importance of data comes across in different ways across each sector. An interesting perspective from **Cameron John, UK & Ireland Leader of Silverfin**, in his article > was that “Automating and standardising your compliance workflows liberates the time your experienced accountants need to spend with their clients. But it is the data on each client (and trends across your portfolio) they now have that gives the oxygen to fuel your advisory services.”

> READ CAMERON JOHN'S ARTICLE

The centrality of data feels equally true for law with **Melanie Ryan, Head of Client and Technology Solutions of Herbert Smith Freehills**, seeing this use of data enabling clients need for “more depth to their legal services, with more value being added to their business”. In her article she gives examples of what this means in practice, “I see clients who have vast amounts of data in their businesses contained in contracts.



ALEX EDDS,  
DIRECTOR OF  
INNOVATION,  
JLL UK

“To stay ahead, the service sector really needs to get serious about investing in the skills and tools to understand real estate data.”



WILSON FLETCHER,  
RAE DIGBY-MORGAN,  
CONSULTANCY  
DIRECTOR,  
WILSON FLETCHER

“Focus on ‘what if?’ not ‘what is?’ and you’ll give yourself the best chance of a genuine breakthrough.”



DAVE EAGLE,  
HEAD OF CLIENT  
SOLUTIONS AND  
INNOVATION,  
ROYDS WITHY KING

“The client of the future wants an outstanding, “always on” service with the minimum amount of interaction.”



NIGEL STOTT,  
HEAD OF IT,  
HUDGELL SOLICITORS

“Client experience drives the performance of every modern service business.”



CAMERON JOHN,  
UK & IRELAND LEADER,  
SILVERFIN

“Consistent themes I hear are: get data and use it; automate where you can; develop advisory skills, and spend more time with clients to build deeper relationships.”



MELANIE RYAN,  
HEAD OF CLIENT AND  
TECHNOLOGY SOLUTIONS,  
ALTERNATIVE LEGAL  
SERVICES,  
HERBERT SMITH FREEHILLS

“The client of the future in our sector will require even more for less.”



These documents and how they are created/negotiated hold a great deal of knowledge about their business and the in-house legal function. The issue for our clients is how do you mine that data and extract from it valuable insights that not only enhance the operation of their team but also demonstrate real value to their corporation both legally and commercially.”

Melanie also helps to illustrate how the services model is changing, “In the past our services as a law firm would be to help draft and negotiation the contracts but with our changing value proposition in data analytics and technology solutions, we are starting to think innovatively as to how we can apply these concepts to give back to our clients.” It is interesting perhaps that more people across other industries didn’t also mention this shift towards seeing things as business problems rather than domain specific ones.

➤ READ MELANIE RYAN’S ARTICLE

Interestingly perhaps, very few contributors talked about the changes in client staffing and the impact this has on their service models. Robert Stark, Senior Executive Director of Strategy & Operations at MAPP, pointed out in his article ➤ that “Those clients, like all of us, will have an enormous number of new roles that didn’t exist 12 months ago, let alone 3 years ago. Customer Experience Managers, Data Managers,

Heads of Automation, IoT specialists, amongst others”.

Robert argues that in the property space part of the answer around how they best support the client of the future is to be equally or more agile than the client.

➤ READ ROBERT STARK’S ARTICLE

Knowing where to start with the client of the future around service offerings will be essential, as Rae Digby Morgan and Mark Wilson of Wilson Fletcher set out in their article. ➤ “Understanding the minutiae and loops of a current process, what works (and what doesn’t) tells us what aspects of the service customers currently value, or at least use, the most. Conventional wisdom would suggest that this should be an excellent foundation for designing a new generation. That premise, in many cases, proves to be entirely wrong. The reason, when you think about it logically, is blindingly obvious: these are historic data points based on historic experiences. Essentially, they’re answers to old questions.” In a fascinating article that explores how to achieve step changes with client offerings, they reach an insightful conclusion: “Dwell in the current state and you will fail to ask the more profound questions, you’ll be allergic to leaving out something that works well today, and you’ll never take a meaningful step away from the client experience of today.”

➤ READ RAE DIGBY MORGAN & MARK WILSON’S ARTICLE

## FINALLY, SOME THOUGHTS ON WHAT THIS ALL MEANS FOR THE CLIENT OF THE FUTURE AND THE PRACTICAL STEPS YOU SHOULD CONSIDER TAKING;

### 1 Start in the future not the past

– this was well covered by Wilson Fletcher where they set out how you need to start in the future with the customer behaviours you want to create which will generate new or expanded commercial returns. This shift in reimagining how a client service can be delivered feels very far from where many firms currently stand though (note the recent survey we did where most firms were focusing their innovation efforts on internal efficiency despite stating the goal was external client services, see article). >

### 2 Client experience and collaboration is central

– for me this was best summed up by Robert Camp where he outlined what firms should be doing, (1) Look outside your sector for inspiration (2) Critically examine the whole of your client's journey with you and find ways to make each interaction easier and better (3) Most importantly, actually listen to what your clients really want. However, as a reality check on where many firms are at currently, see the same article I mention in the previous point where 77% of firms said they were afraid of collaborating more with clients for fear of upsetting the status quo!

### 3 Data usage and productisation are key tools

– some great points made by many contributors including Melanie Ryan around how this can be used practically and how this data focus can then move you from being seen as solving a domain problem such as law to solving client business problems. I set out some points in the data article I wrote that you might want to review as next steps.

It is fair to say that technology is shaping and transforming every aspect of our lives, including the working environment. Cultural shifts are evident in the way people now interact through their reliance on technology in their day-to-day lives, and meeting the rapidly changing and increasing demands of technology is challenging for any organisation. Organisations are also increasingly seeing the power of technology to help them make the workplace a more effective and optimised environment. On the skills front technology is driving a transformation in the future employee needs in order to service a rapidly evolving set of client offerings. Generational changes in attitudes are also challenging some of the established incentivisation structures historically used in professional services.

**We are keen to feature view points from across professional services.**

**If you would like to be involved in future topics please contact [racheledwards@alternativeevents.co.uk](mailto:racheledwards@alternativeevents.co.uk)**

JOIN THE CONVERSATION ON SOCIAL MEDIA



**@alternativeinsights.co.uk**  
**@alternativeevts**

## UPCOMING ALTERNATIVE EVENTS

## Alternative Events



# 30

**ALTERNATIVE LEGAL MANAGEMENT SUMMIT**  
→ De Vere Beaumont Estate, Windsor, Berkshire  
[alternativelegalmanagement.com](http://alternativelegalmanagement.com)

**SEPTEMBER -01 OCTOBER**



# 1

**ALTERNATIVE LEGAL IT CONFERENCE**  
→ De Vere Beaumont Estate, Windsor, Berkshire  
[alternativelegalit.com](http://alternativelegalit.com)

**OCTOBER -02 OCTOBER**



# 4

**ALTERNATIVE REAL ESTATE & PROPERTY TECHNOLOGY SUMMIT**  
→ Hanbury Manor, Hertfordshire  
[alternativepropertytechsummit.com](http://alternativepropertytechsummit.com)

**NOVEMBER -05 NOVEMBER**