



# Hybrid

ALTERNATIVE INSIGHTS: LEGAL IT HANGOUT #6  
IN PARTNERSHIP WITH CTS

## Top 3 takeaways:

- 1 As remote working continues, it needs to evolve to meet the changing situation. There is currently a move to invest in making sure that home offices are more comfortable - though this can vary by firm and employee need.**
- 2 There is a drive to unify the various communications platforms that people have been using; and to ensure that communicating with clients is done via the appropriate technology. Even if a mix of solutions are used, firms need to ensure that messaging around their use is consistent.**
- 3 There is still scope for efficiencies and improvements in remote working. For law firms, this might take the form of putting structures around process and document automation or re-examining their document workflow.**

It's hard to believe that we've passed the year midpoint and are facing the final financial quarter. Remote working will form the basis of our professional lives until the end of 2020 at the very least.

It's the ideal time to reflect on the lessons of the past six months and delve into the question of whether your practice is equipped to remain virtual for the foreseeable future. What did we uncover from our discussion with two law firm Heads of IT, and one accountancy leader? That they were not only surviving but thriving - using new and (mostly) existing tech to accelerate their practices and support both their people and their clients through the new 'hybrid' reality. And it's a hybrid reality in which CTS can help firms by providing services from cloud technology to business continuity through to consultancy.

## CONTRIBUTING COMPANIES



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## People

First, the session focused on people. As we enter a “hybrid” work mode (a mix of home and socially-distanced office working), the general feeling amongst the panel was that in terms of basic tech and setup, their people have settled in well. However, there was also the realisation that there doesn’t seem to be an end in sight to remote working (an increasingly probable outcome given that #Lockdown2 was trending at the time of writing). Attention has shifted to supporting people in the long term.

Steve Dalgleish, Head of Technology at Shepherd and Wedderburn solicitors, believes that we will be remote working for quite a while. “Longer term, we’re looking at how we can make people comfortable. We not only do things like transfer equipment out to homes, but also refund purchases that staff make to make themselves comfortable,” he said.

It’s a timely consideration. As Dr Helena Boschi pointed out in her thought-provoking talk on leading people through the current uncertainty, not only are studies showing that the novelty of remote working is wearing thin, but that this could impact people’s cognitive and emotional states.

“They are perched on the edge of their bed in a bedsit with flatmates – it’s starting to be a problem,” said Phil Wood, Head of IT at law firm Bristows, on how some younger staff work. Not to mention a compliance issue. “The challenge over the next six months is ‘how do we handle DSE (Display Screen Equipment) requirements?’” He foresees requests going beyond just extra screens and keyboards: more towards building an office environment in the home. “This home-working situation might be permanent. There’s going to be more stomach for investing in making home offices more comfortable.”

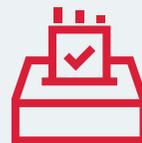
Which begs the question – and it was indeed asked during the session - who will pay for employees to transform their ‘homes’ into ‘home offices’? And how far will firms go?

Bristows has paid for a limited amount of equipment such as extra screens and keyboards, said Phil. He anticipates that that will expand: “People have started coming back into the office; there’s an acceptance that people are going to have more kit at home, and it’s a question of how much more we want to invest in them.”

According to Ali Jones, Partner at Sagars Accounting, how far her firm will go depends on individual team members, and their home environment. “That’s a wider question about how sustainable permanent remote working is in that environment. Often, people don’t want to remote work because a big part of why they come into a job like this is the social interaction. So, we are looking at making sure people are able to work comfortably, but have no plans to invest beyond that,” she said.

At this point in the remote working journey, Ali sees that the tech side is a given - “people have two screens if they need them” – and is more concerned about how training, support, and development play out in the virtual world. “How do we keep the development that comes from conversations that you overhear in the office, and the learning from managers when they’re dealing with clients?” she wondered.

Such training concerns can extend to other aspects of the business. In recognition of the fact that cyberthreats are increasing as agile working takes hold, we polled the audience on what their main challenges were when it came to protecting their firm. An overwhelming 45% selected ‘lack of staff awareness about how to prevent breaches’. It’s safe to say that a dispersed workforce makes such training a challenge: a challenge with which CTS is familiar. Their deep industry knowledge of the legal sector’s cyberthreat concerns, combined with an expertise in managed security, position them well to help law firms with their threat responses.



PROFESSIONALS WHO ATTENDED THE SESSION

### Poll results:

**1** When would you feel comfortable attending in-person events again?



**54%** Personally feel comfortable attending from April - June 2021

**35%** January - March 2021

**12%** July - December 2021

**2** What technologies are you using to support your return to office? (Multi-select):



**38%** Desk/space booking software

**38%** Check-in/ out (QR codes or other)

**31%** Track and trace

**27%** Other

**19%** Health questionnaires & surveys

**15%** Sharepoint

**12%** Mobile app

**12%** Spreadsheets



## Supporting clients

For Sagars, as for most professional services firms, meeting clients face-to-face is a massive part of the business.

“Teams has been a godsend in helping us to carry on doing that,” said Ali. She’s enthusiastic about the many positive things that came out of using Teams – there was that one client who remarked that in ten years of these meetings, this was the first time everybody had been on the same page, looking at the same number, at the same time – but isn’t keen on an ongoing practice of exclusively remote meetings: “Doing remote audits without going out to client premises is difficult and time-consuming. Using the technology as an adjunct and a support to ongoing face-to-face relationships is how we see things moving.”

Now that their people are familiar with various communication platforms, Bristows is looking to introduce a consistent platform. To that end, Phil is leading a unified communications strategy review: “A strategy to say, ‘when you’re dealing with clients in this sort of way, use this type of application’.” It’s a similar story at Shepherd and Wedderburn. “The one thing that let us down in the remote working period was the telephony. So, we are looking at how we should be communicating with clients. What are they using? What do we need to provide as options and functionality? Some solutions are better for some things than others and you might have to have a mix but it’s about consistent messaging so that a majority of people will have a good understanding of when to use which solution,” said Steve.



PROFESSIONALS WHO ATTENDED THE SESSION

## Poll results:

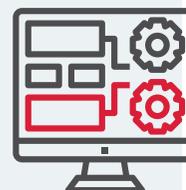
**3** **Cyber threats are on the rise as firms move to an agile model. What are your main challenges when it comes to protecting your firm?**



**45%** Lack of staff awareness about how to prevent breaches

- 30%** Time required to hunt for and respond to threats
- 10%** Insufficient or limited budget
- 10%** Other / no challenges
- 5%** Shortage of specialist security knowledge

**4** **What are your plans on future deployment of legal cloud in terms of core systems such as PMS and CMS**



**45%** 2-3 years

- 20%** Already Cloud
- 15%** Planning to move in the next 12 months
- 10%** In the process of migrating
- 10%** 4 years +

## Tech

**Has Covid-19 been, as many predicted, the game-changer that would revolutionise innovation? Not really, according to Phil - but he thinks it's definitely an accelerator.**

"Someone recently said that in the past six months, we've seen two years of digital transformation. What has happened over this period was going to happen over the next year or two, but it just accelerated," he said. And his determination to seize the moment will resonate with long-suffering Heads of IT everywhere. "What we're doing now is grabbing hold of these new technologies. We've had them in our view for years; it's just been about trying to convince the partnership. Once people start going back into the office, it's going to be 'do we really need to do that?'"

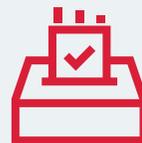
This 'accelerating' impact of Covid-19 has similarly benefitted Shepherd and Wedderburn. "The transformation to a cloud-based organisation is one of the big things for us. But a lot of it is cultural - the tech is available but how do you get the legal teams to buy into the process?" said Steve. Though he agreed that buy-in in general is now easier - perhaps too easy. "How do we cope with the demand? If you spoke to me in February, I'd be like 'here's my plan for the year' and it would be fairly static." He contrasted this with the situation in mid-March of this year: "It's like, what's first? And within a week or two it's deployed and people are using it. But we are bypassing some of that critical thinking, the architectural decisions, that we maybe should have made first."

"The big accelerator of Covid-19 was people saying 'I can do this' rather than thinking it's too difficult," added Ali. Sagars accelerated some projects that were already in their pipeline: "Telephony is a big one, and a move away from on-premise to cloud. A big thing we're looking at is improving our remote desktop environment: making it more seamless. Covid-19 has brought an attitude of people saying 'Let's have these things that talk to each other' and 'why can't I just access that there?' The challenge is finding something that delivers on those expectations."

When we asked the audience 'What would improve processes and performance in your organisation, while staff are working remotely?', a strong 45% wanted platforms that provided better collaboration capabilities. We probed the panel for a few examples of these 'better' collaboration capabilities. "Co-authoring documents is a big thing," said Phil. "There's a big push towards having a document in a collaboration space so that everyone can go in and work on it at the same time." Ali expressed a desire for a solution that would enable collaboration in the sense where people used to get around a table, generate ideas, and stick them up on post-its: "There are online tools to do that. But I'm not aware of one that works really well that integrated as part of Teams or Zoom."

'Looking forward' proved to be a strong theme in this hangout. James Lawrence of CTS noted how there was still room for efficiencies and improvements in remote working. His question to the panel - where do you believe the biggest gains are for your firm, and what are your IT department's priorities for next 6-12 months - elicited comments from both law firms around documents. "The biggest change we've seen is the level of engagement from our legal teams with process automation and document automation - so anything around putting structure around these work types so that it's clear, and the risk is better managed. That will drive the workflows for the next 6-12 months as to how we put that structure in place," said Steve. Phil also stressed the importance of document workflow. "We've not printed a huge amount over the past six months. The electronic distribution of documents and the movement of documents electronically is formalising that - so having systems that can trace pieces of paper," he said. CTS's dedication to remote working being made as efficient and productive as possible is related to their offerings - which include secure and immediate access to data and applications from any device, at any time.

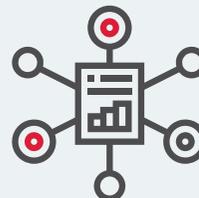
Again, the exciting themes emerging out of this hangout were the acceleration in tech adoption caused by Covid-19, and the future-looking attitude of tech leaders when it came to meeting the needs of their people in this time of hybrid working. As some of the poll results show, a company such as CTS can play an instrumental part in guiding professional services firms due to their years of expertise in offering managed solutions that can cover the multiple needs of businesses with dispersed work forces.



PROFESSIONALS WHO ATTENDED THE SESSION

### Poll results:

**5 Which of the following would improve process and performance in your organisation, while staff are working remotely?**



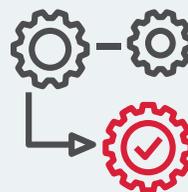
**45%** Platforms that provide better collaboration capabilities

**25%** Access to technology platforms that provide real-time analytics and business intelligence

**15%** Less reliance on spreadsheets

**15%** Increased use of historical data & insights to inform future strategy

**6 What are your biggest tech/operational challenges in providing your team with a hybrid work environment for the rest of this year? (top 3 choices):**



**60%** Ensuring the team doesn't revert back to old ways of working

**35%** Ensuring information security

**20%** Ensuring a good physical environment for team members WFH

**20%** Keeping up with the higher tech expectations our people now have

**10%** Getting the right interface between legal IT and enterprise systems

# CTS



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