Making the most of the disruption

ALTERNATIVE INSIGHTS: LEGAL IT HANGOUT #8
IN PARTNERSHIP WITH CTS

Top 3 takeaways:

1 **Reliable and secure supporting infrastructure is key to successful remote working.**

2 **Collaboration requires a secure infrastructure if clients are to feel confident putting information in the cloud.**

3 **Being paper-lite is crucial to enabling effective remote and agile working.**

Our 8th Legal IT Hangout coincided with the happy news of a possible Covid-19 vaccine. The end of the crisis might just be in sight! Still, this unprecedented digital upheaval has definitely had an upside and that's what this hangout was all about — learning the lessons of the past six months and looking for the opportunities.

We asked a panel of IT experts from mid-market law firms to tell us what they were doing around technology, talent, and change management in order to make the most of the disruption. And realising the opportunities can depend on specialist help such as that offered by our sponsor CTS, a cloud and managed IT services provider. CTS's close relationships with leading legal software developers, combined with their own technical expertise, can be invaluable for mid-tier firms wanting to get a handle on their suddenly accelerated tech roadmaps.

CONTRIBUTING COMPANIES

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HADEF & PARTNERS

muckle

CARSON McDOWELL

FORSTERS

CTS

Technology

We first looked at the technological opportunities that have opened up for mid-market firms as a result of this digital disruption.

One realisation that has come to the fore, according to Anthony Stables, CIO at Forsters, is just how much 'distributed working' relies on supporting infrastructure such as home broadband. Reliable infrastructure has enabled the firm to provide uninterrupted service. "Partners have been grateful that they can work from home as if they were in the office. Some clients didn't even realise that the office was closed. We've been able to - whether by activating a business continuity plan or making it up as we go along - get to a point where the firm has been able to continue," he said. There has also been a more rapid and willing adoption of services: "It's always hard to get money to invest out of lawyers, but when the burning platform is there, you can get it sure enough".

It's a similar story at Muckle. The law firm saw rapid tech adoption upon lockdown, according to Julie Parr, their Director of Business Improvement. They also took the opportunity to assess their existing technology: "We looked at our video conferencing, and at our marketing streams and visibility; developing podcasts to update clients." And staff are also making use of previously overlooked Office 365 features - such as the dictate button.

But perhaps their real lockdown success story is a recent foray into RPA (robotic process automation). "Our debt recovery system didn't automate to CSV files, and so volume pieces of work were a big inputting job - 22 minutes to put one debt on the system. We created a robot to input that data, and it took 1 minute to put it on the system," said Julie.

Mervyn Poli, IT Director at Carson McDowell, has found that being agile, remote working, and collaboration were all better than what they would have been without the disruption. "Things like Teams, data rooms, and 365 platforms are adding a lot of value, and also giving us flexibility with finance," he said. The firm is currently looking at their existing technology: "There are loads of possibilities with regard to AI, and smart contracts, but we're now focused on consolidating what we have and reviewing all the processes."

For the legal sector, the current crisis has definitely prompted a re-evaluation of which tech investments to prioritise. When we polled attendees on the steps that they had taken to ensure that their firms could continue to operate, 47% said that they had invested in technology that has supported collaboration. Of course, when it comes to client collaboration (which most firms are keen on), reliability and security are crucial if clients are to feel comfortable enough to put their information in the cloud. CTS' tailored solutions help encourage client collaboration by ensuring that firms can operate securely and ensure confidentiality, in addition to getting to the point where they are 'always available' to clients.

PROFESSIONALS WHO ATTENDED THE SESSION

Poll results:

1 **The legal sector has faced numerous challenges over the past six months. What steps have you taken to ensure that your firm can continue to operate efficiently throughout this crisis?**

47% We've invested in technology that has supported collaboration

26% We've trained staff on how to work productively in a remote environment

21% We've liaised with clients to discover how we can best support them

5% We've concentrated on business development and sourcing new clients

2 **With an increased use of mobile devices, particularly with SMS, WhatsApp and phone, together with the rebirth of QR codes, which of the following would enhance security of smartphones**

47% MDM is enough

11% I trust my users, so no issue with security

5% SMS is not a threat

0% QR code is not a threat

5% My users do not use WhatsApp for business

11% The extensive security questionnaires I now have to sign off now insist on smartphone security

21% I would like to understand more about the spectrum of risk with mobile devices

Talent and Skills

The firms were definitely enthusiastic about making the most of this digital disruption, but did they think that they had the right talent and the right skills to capitalise upon the opportunity?

Julie said that her firm did identify a bit of a talent technology gap – though she has a fair bit of tech expertise herself. "I'm the data protection person. And I've designed a few data-driven systems such as a portal for debt recovery," she said. But the skills necessary to develop that sort of tech product would require an in-house data scientist, which doesn't make commercial sense for most medium-sized firms. The answer, for Muckles, lay in a Knowledge Transfer Partnership - a government-funded program where a university employs an 'associate' who is seconded to a business for two years. It has proved to be "transformational" for the firm. "We have a data scientist, and a computer science academic. We gained a new skill set and access to updated research," said Julie. "The journey that we've been on in the last two years in tech has put us at the forefront of understanding what's out there, how AI works, how we can get more out of data" she pointed out. It also led to the formation of a Data and Digital team – comprised of Julie, the KTP associate (recently made permanent), and two people from the business trained as data and digital technicians.

Mervyn said that, in addition to trying to keep the talent within the business, his firm is on the journey of commoditising or outsourcing what they can from a resource point of view. "Also, we're trying to get secretaries or paralegals more involved in process," he said.

Lee Robson, Business Development Manager at CTS, talked about the unpredictability of the sudden changes announced by the government. He asked the panel whether their firms were now agile enough to quickly respond to changing circumstances. "We have areas that we're having to quickly improve on, such as electronic signatures and bringing in tech to do that, and things like scanning and printing. But the rest of it, we feel like we're coping with it ok," said Julie. Anthony also picked up on the scanning and printing point, noting that paper was the only thing that held them back in terms of agility – and not out of necessity: "95% of the lawyers have been working at home with no paper, but as soon as they come back to the office it's paper again." One thing about agility is that regulatory requirements are still very much an issue. When helping firms adopt cloud technology, CTS works closely with clients to deliver secure cloud solutions that improve flexibility while mitigating risk. Their expert understanding of regulatory concerns includes picking up things such as 'permissions restrictions' in an initial 'Cloud Readiness Assessment', an exercise which also ensures that the firm's IT infrastructure is configured for, and has the capacity to meet, future requirements.

Poll results:

3 On a rating of low to high how has the recent global pandemic changed your need for cloud hosted software?

59%
No change

31% High
3% Low
7% No opinion

4 What key skill areas are most important for your management team to develop (Top three choices)

59%
Managing remote teams

52% Managing the mental health of the team
48% Use of collaboration technology
28% Developing an effective work/life balance
21% Maintaining informal team contact when working remotely
17% Managing performance
14% Time management
14% Effective use of Teams/Zoom etc. for delivering team training
14% Coaching
3% Having difficult conversations

Change and Change management.

We next turned to the question of how firms are managing to keep up with the rapid pace of technological and organisational change? Have any lessons been learned over the last six months?

Things have been rolled out very quickly at Carson McDowell, according to Mervyn. "We're trying to take stock of what we have and do it better. And basic things like keeping up with being paper-lite. We have a ban on remote printing, and use the Rocketbook app to scan notes," he said, "I do see different things coming in the future such as the RPA stuff, but the focus is on keeping people safe, and our cash flow position."

"We're looking at how we manage our data within the business. We want to create data analytics to become a data guided firm," said Julie. She is also looking at getting more from the firm's legacy systems – using RPA as a 'digital glue' to integrate them. "We're also looking at contract management software and AI and how that would work in the legal market," she said.

For Anthony, the key to change management is effective communication: "We went live with NetDocuments a couple of weeks ago. Everybody has email overload, so we held online sessions to explaining it. We have weekly comms from our managing partner on covid-19 and where we are at." Clearly, successful change management has multiple facets – and this is the approach that CTS takes too with their 'customer success service', which is dedicated to training staff and also ensuring widespread adoption.

A lot of interesting insight into how different mid-market law firms are making the most of the disruption. Some are taking the chance to step back and revisit the technologies that they already have: discovering new features and capabilities. Others are investing in new tech and resources. CTS's range of managed services are particularly relevant no matter which path a firm chooses. And their close relationships with leading practice, case, and document management software providers enable them to understand a firm's existing technologies in depth.

PROFESSIONALS WHO ATTENDED THE SESSION

Poll results:

5 **Which of these client focused skill areas would it be useful for your firm to improve? (Top three choices)**
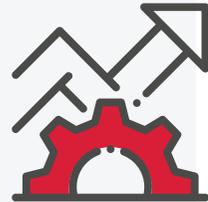
47% Developing business remotely

42% Maintaining informal client contact in a virtual world

42% Effective remote networking

26% Supporting clients facing difficult situations

26% Hosting client events online

21% Keeping clients up to date

16% Delivering engaging remote presentations

16% Maintaining client confidentiality when working from home

16% Cross selling

5% Building and keeping client trust

DIGITAL DISRUPTION

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