



# Tech adoption and change management

ALTERNATIVE INSIGHTS: LEGAL MANAGEMENT #8  
IN PARTNERSHIP WITH PULSANT

## Top 3 takeaways:

- 1 **Mid-market firms have more capability than they often assume, such as the ability to mobilise at speed.**
- 2 **Medium-sized firms are focused on updating existing platforms such as practice management systems, rather than new tech such as AI and machine learning.**
- 3 **Remote working technology will be affected by changes in tech adoption in the upcoming year, making reliable and secure connectivity increasingly important.**

With news of a vaccine on the horizon, could the end of this unprecedented digital disruption be in sight? Possibly, but the mood at our 8th Legal Management Hangout was pragmatic. The discussion focused on the here and now - the lessons learned and the opportunities that have opened up for mid-market firms. Legal management professionals came together to share their thoughts around technology, talent and skills, and change management. When navigating this accelerated environment, it can help to partner with trusted providers who understand how critical technology is to remote working. Our sponsor, Pulsant, provides colocation and cloud infrastructure services, with dedicated IT services for the legal and professional sector, focusing on availability, strong security, and reliable connectivity.

## CONTRIBUTING COMPANIES



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## Technology

**We first looked at what lessons firms have learned from the disruption when it comes to new and existing technology.**

Andrew Gilyead, COO of Anthony Collins solicitors, thought that the big tech lesson was that mid-market law firms do in fact have a capability advantage. "Often, the temptation is to look at larger firms and think, 'if only we have their scale, capabilities, and resource'. The pandemic has been a reminder that we actually have pretty robust IT infrastructure," he said. A medium size also gives firms the ability to mobilise at speed: "We've gained clients simply through our ability to keep going, whereas smaller firms had to shut for a few weeks to sort themselves out".

Brian Evans, Managing Partner at Lanyon Bowdler solicitors, has similarly seen his firm win clients because of their ability to continue operating. "Some of our local competitors have put more staff on furlough, and so on," he said. In terms of technology, the introduction of iManage (document management system) just before lockdown made a big difference. And there wasn't any resistance from staff – quite the opposite: "They want more of this. They're asking 'when will incoming emails be scanned in automatically?'" He sees the disruption as an opportunity for the firm to capitalise on people being more open to new ways of working with technology – though this is more than just investing in new technology. "It's more about leveraging the things we're already doing," he said, referring to projects that didn't take planning and resource over a period of time. "We implemented iManage 18 months ago. It's been pivotal to have robust document management, sitting in the cloud and accessible from anywhere," he said.

Neil Aitken, Finance Director, at Woodfines solicitors agreed that medium-sized firms are more agile in the current environment. He said that lockdown forced them to look to technology – such as using it to go paperless. "Paper-lite is the way forward, certainly within the accounts function. And it's the way I want the practice management side of things to go," he said. He found it ironic that some lawyers don't like the idea of moving to paperless: "There's more risk to being paper based. It's more cumbersome, harder to recover, and the information is more open to lack of audit trail and fraud."

Andy Bevan, Cloud Sales Specialist at Pulsant, asked the panel whether they were looking to use AI or machine learning technology in the coming year, and what the growth areas for these technologies were? "We're not really looking at AI for a fee-earning or interacting with clients process. We have some machine learning stuff around threat detection - looking at unusual network traffic. I can see it coming for business processes and stuff later on but we're not there yet," said Brian. And Andrew had a similar view. "We're not using it for legal processes. It's in that threat detection area, prompting people when they're about to send an email to the wrong person," he said. Of course, technologies such as AI or machine learning rely on data, which in turn raises concerns about data security. Pulsant's managed security solutions - Supported by a team of professionals and relationships with leading security vendors - protect business-critical and client data, applications, and networks from both internal and external threats, assuring data protection and compliance, and protecting firms' reputations.



PROFESSIONALS WHO ATTENDED THE SESSION

## Poll results:

**1** Given the topic today discusses technology adoption and digital disruption, which area do you think will be most affected by changes in tech adoption over the coming year?



**32%**  
Remote working technology

**29%** Security oversight of the dispersed workforce

**21%** Automation of transactional activities

**14%** Client engagement

**4%** Marketing to attract new clients

**2** What key skill areas are most important for your management team to develop? (top 3 choices):



**68%**  
Managing remote teams

**46%** Use of collaboration technology

**21%** Maintaining informal team contact when working remotely

**21%** Managing the mental health of the team

**21%** Managing performance

**18%** Developing an effective work / life balance

**14%** Coaching

**7%** Having difficult conversations

**4%** Effective use of Teams/Zoom etc. for delivering team training

**0%** Time management



### Skills and talent

If firms are able to make the most of the opportunity in the disruption, what skills did the panel think that their people needed?

Brian said that getting the most out of technology required training, in addition to effective communication: “A willingness by managers to use the technology, and sell the message to staff,” he said. If there are any skill gaps, they tend to be around soft skills and the management of remote teams: “It’s a different skill set when you have to keep teams together remotely. We need to do some more work with team leaders and managers and facility with using existing collaboration tools.”

Neil still sees too much reliance on secretarial support, and not a huge take up on tech such as voice recognition. “We get junior staff who are IT savvy and we train it out by saying, ‘rely on your secretarial support,’” he said. He echoed Brian’s view on training being the most important aspect of tech adoption – noting the lack of IT or management training either in the LPC or in training contracts.

For Anthony Collins solicitors, the big issue is not so much a skills gap, but technology disrupting the employee experience that they are able to offer, according to Andrew. “Like many other mid market firms we like to think that one of the reasons staff work for us is the employee experience – the quality of work, the type of clients, or the collegial atmosphere,” he said. It’s a lot trickier to provide that differentiation when everyone’s working remotely: “One millennial said to us that we have a conundrum, saying ‘I don’t get that experience I got in the office; I could work for someone who paid more.’” The firm is currently focused on using technology creatively in order to provide that experience. “We’re doing monthly Zoom office lunches. We’re giving guidance to partners about how they can be doing things in their teams, which ups the degree of connection and collegiality,” he said, noting that in the most recent four-week lockdown, they have offered a collective experience every week to keep people motivated.



PROFESSIONALS WHO ATTENDED THE SESSION

### Poll results:

**3** Given the pressures that hybrid working has placed on your firm this year and the skills gaps that have appeared, how will you adapt your firm’s training content or delivery? (top 3 choices):



**46%** Move training delivery from in-person to online

**38%** Increase your spending on training

**33%** Change training delivery from mainly internal to mainly outsourced

**17%** We won’t make any significant changes to training content over the next year or so

**13%** Change training delivery from mainly outsourced to mainly internal

**13%** Keep training budget unchanged

**8%** We won’t make any significant changes to how training is delivered over the next year or so

**0%** Reduce your spending on training

## Change management

We next turned to the question of how firms are managing to keep up with the increasing pace of technological and organisational change.

"Whatever technology we embrace, good in-house IT training is important," said Neil. "Fee earners argue that they don't have time to read explanatory notes, or learn new things. The crux of it is to re-educate constantly and show the rewards of embracing new tech - getting more work done, more fees, or better work life balance," he said. Vendors can also play a part in helping firms deal with the increased demand for support and training that has come along with remote working. For example, something along the lines of Pulsant's 'Knowledge Hub', which holds a range of resources such as case studies. This is complemented by collaborating closely with customers and their teams right from the initial engagement in order to define outcomes early on, and ongoing assistance to help firms fully realise the benefits of cloud technology.

Andrew noted how change management literature talks a lot about processes. "But early in lockdown, we realised that it was more about changes in mindset than doing things in the right order at the right time," he said. One example was implementing Teams, which the firm had on pause for months because of concerns such as leaving a document in a chat function, or unauthorised access to a chat. Their current change management philosophy is one of momentum, rather than perfection: "We had to just implement it overnight. You just have to keep momentum up and mop up problems as you go; the benefits of just getting on with it far outweigh any benefits from getting the last 20% of the change management right."

For Brian, effective change management was not only about giving people the right tools, but mindset and imagination. He related the story of one department that was keen to move to a paper-lite way of working. "They replicated the paper file structure in the document management system, thereby taking away some of the flexibility of that system. It's not about recreating what you have in a different format, but how to use the technology better to solve the problems that you have," he said. The firm has had problems with change management in the past due to the people driving the project having too many other responsibilities. "There will be a lot of change in the next 12 months and we will employ an innovation manager to manage it," said Brian.

When we polled attendees on which area they thought would be most affected by changes in tech adoption over the coming year, 32% pointed to remote working technology. Of course, the success of such technology depends almost entirely on reliable and secure connectivity. Pulsant's managed networking and hybrid cloud design and delivery services connect businesses internally, while supporting every element of the network to ensure that it is secure, available, and performing.

The focus of this hangout was definitely focused on making the most of existing technology, and the crucial role that training played in tech adoption and change management. It can help to work with a partner that understands how to help firms address the challenges presented by the increasing pace of change. Pulsant has years of experience in helping organisations optimise their cloud and IT infrastructure, taking a thorough and methodical approach to planning a cloud roadmap (including an interactive profiler so that firms can assess their current 'cloud maturity').



PROFESSIONALS  
WHO ATTENDED  
THE SESSION

## Poll results:

**4** Which of these client focused skill areas would it be useful for your firm to improve? (top 3 choices):



**63%**  
Developing  
business  
remotely

**42%** Effective remote networking

**42%** Maintaining informal client contact in a virtual world

**38%** Supporting clients facing difficult situations

**29%** Building and keeping client trust

**21%** Delivering engaging remote presentations

**17%** Hosting client events online

**17%** Maintaining client confidentiality when working from home

**17%** Keeping clients up to date

**8%** Cross selling



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