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2021 – A workspace odyssey

Horizon-scanning is a tough old business today but, as always, **Briefing** Frontiers Legal IT landscapes is here to ask key questions of operational leaders at leading law firms to benchmark both how they plan to transform and the tech required to do so.

Some longstanding trend-tracking questions about transformation we simply couldn't ask this year – around how quickly firms might enable and encourage a very significant swathe of people to homework, for example. That happened because it had to – although the driver was very different. Now the bigger question is surely whether the busy day at the office we can still just about remember will ever return.

At the same time, we've introduced other questions that currently seem super-relevant to the next chapter in the intersection of law firm strategy and technology – what will hybrid working really look like, and which one thing would firms do today to boost their competitiveness if they could do anything at all? Plus, there's plenty we can usefully continue to track – the relative threat of other forms of competition, client expectations, and appetite for cloud deployment, to name just a few.

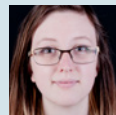
Briefing was busier than ever in 2020, and this year we also incorporate findings from other big research projects carried out in the past year. Has it taken a crisis to change the game when it comes to tech investment in legal? Read on to find out.

RICHARD BRENT, EDITOR-IN-CHIEF, BRIEFING

Who we are...



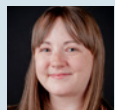
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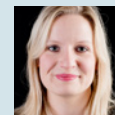
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Threat collection – Where do firms feel the pressure?

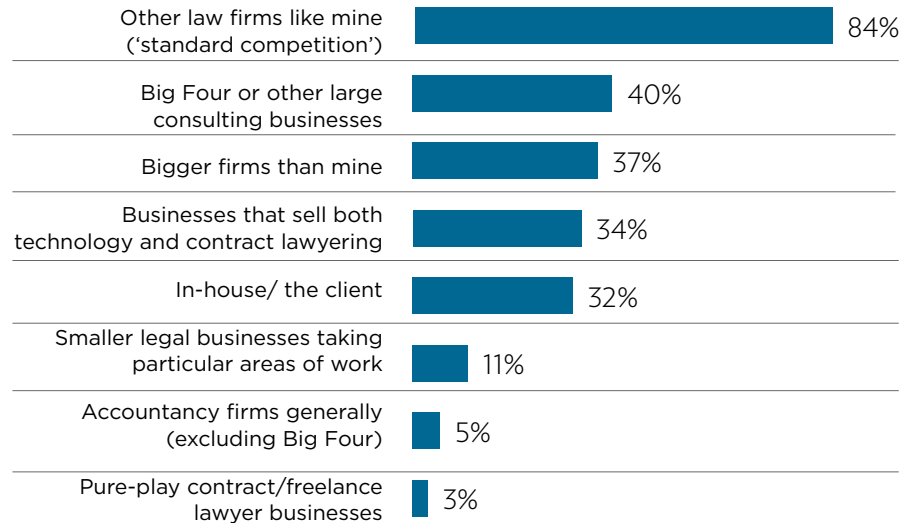
The Big Four are biting, but law firm operational leaders continue to see other firms like themselves as their toughest source of competition, and they expect to see a consolidating market following the pandemic

After a year of such dramatic disruption to business, tracking and interpreting long-term trends around the choice and use of workplace technology is an especially challenging affair.

But strategy doesn't necessarily change as fast as firms needed to get their people working from home in 2020. Law firms will now be trying to horizon-scan an eventual end to the pandemic when considering how models and resources may need to change further (or revert, of course), and perhaps also any impact on the forces of competition. A metric our **Briefing** Legal IT Landscapes research has watched for several years is how business leaders feel about the different categories of competition now seeking a slice of their action. The notion of 'other law firms like mine' – similar revenues, geographies, resources or services, perhaps all of these – has long been seen as the top threat. Almost a year of working through Covid-19 clearly hasn't changed this: at 84%, over twice as many leaders identified their peers as cited the next 'most threatening' source of competition (p6).

There follows a slight reshuffle of the pack. In 2021, the Big Four and comparable large consulting firms (40%) have overtaken 'bigger firms than mine' (37%). Heading into 2020, the margin was just as slim but in favour of those larger firms. And lower down the list, 'businesses that sell a combination of technology and contract lawyering' (something plenty of firms might say they also do, of course) has switched places with clients keeping more work for themselves. Regardless of how well they've all adapted to the homeworking challenges, it's just plausible **Briefing** firms could be a bit less sure of themselves after this most challenging of years. At the same time, we've seen moves such as Deloitte's investment in its legal managed services area and combination with tech-focused law firm Kemp Little (also a developer of some notable legaltech products) in November 2020. The latter took Deloitte Legal's UK lawyer headcount from 85 to over 170. Richard Houston, senior partner and chief executive for north and south Europe, said in a press release at the time: "This demonstrates our confidence and willingness to invest where there is

Which kinds of competitor are most threatening to your firm's future? (Choose all that apply)



clear market demand. The Covid-19 pandemic has clearly shown that investment in technology will be a critical catalyst for the recovery of UK businesses. Business leaders are looking for more digital ways of operating, setting the stage for significant and longer-term cultural change.”

One month earlier, KPMG launched a global legal operations transformation service to roll across its network. Head of global legal services Stuart Fuller said this was designed to “handle large-scale business in a more efficient and technologically enabled way” and was “only the first in a number of capabilities and services that we plan to provide in this space.”

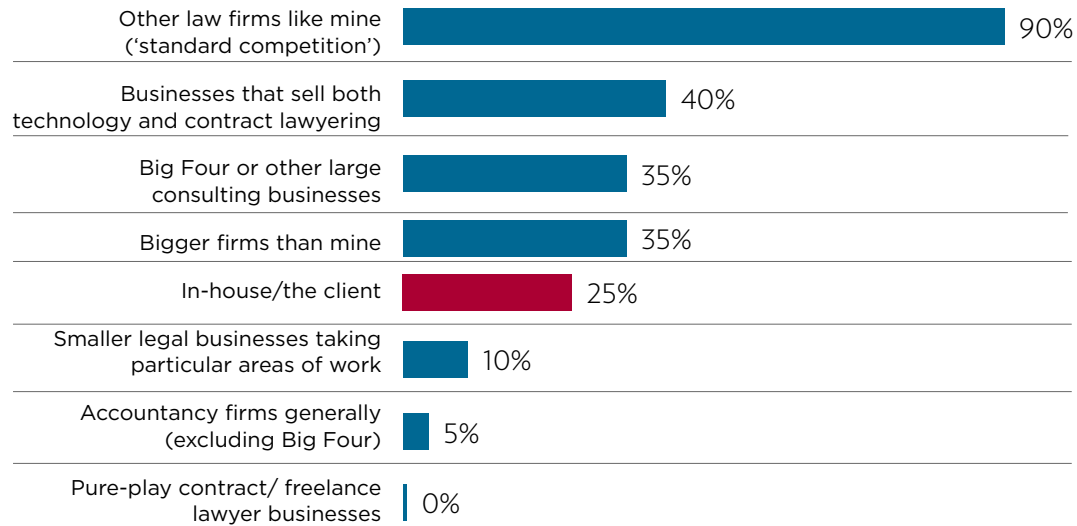
“The Big Four and other legal services providers – like us at Cubed – can be light-years ahead in areas like project management and process, as well as technology. We also have a continuous improvement mindset that aims to make our products more efficient and price-competitive.”

JODY JANSEN, CHIEF TECHNOLOGY OFFICER, BCLP CUBED, BRYAN CAVE LEIGHTON PAISNER

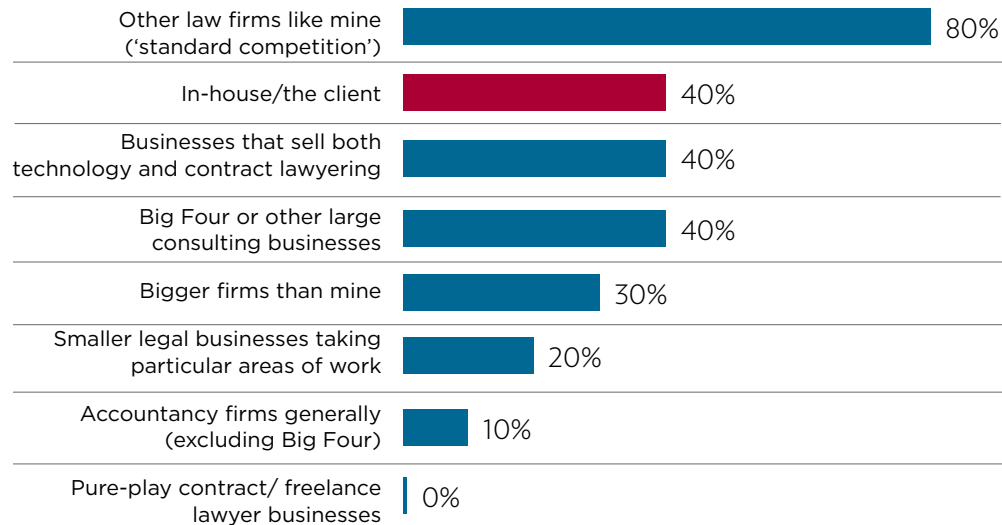
For 2021, we’ve also once again split some of our findings into two groups of firms: those that self-identify as being stronger in terms of either delivering ‘outcomes’, or the quality/skills of their lawyers (they place themselves on a sliding scale between the two). The main difference here is that leaders at ‘outcomes’ firms seem more threatened by the consulting giants or tech experts, whereas at ‘lawyers’ firms the prospect of the client holding onto more work is catapulted into joint second place (p7). This second group may perhaps find it tougher to win the trust of clients to manage their legal spend cost-effectively – for example, by collaborating with others in the market to secure and manage work types where different components are valued differently. Deloitte Legal and Kemp Little emphasised that they had collaborated on several projects prior to November’s move, so the combination was also seen (by Deloitte) as a natural fit.

Anthony Vigneron, legal technology solutions director at Clifford Chance, tells us: “The Big Four have clearly increased their revenue share in the

Who's most threatening to firms that say clients buy their 'outcomes'?



Who's most threatening to firms that say clients buy their 'lawyers'?



40%

Of law firm operational leaders see the Big Four as a competitive threat

32%

Agree the client is an area of competition threatening to the firm's future

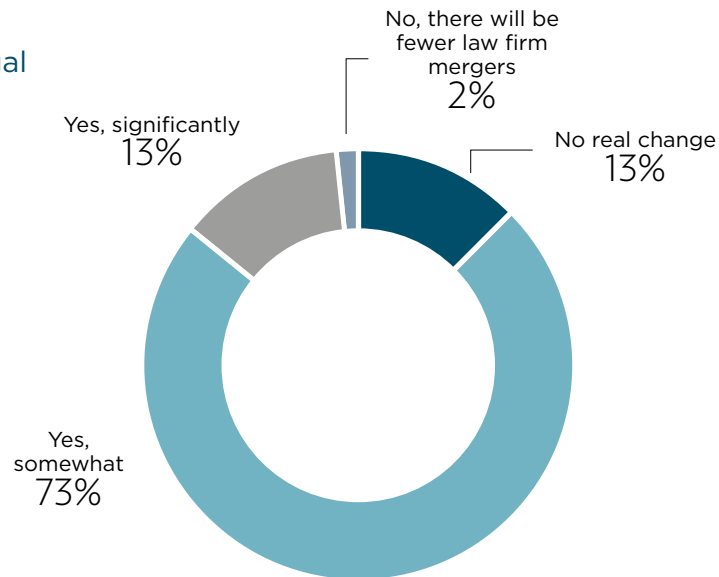
market.” This hasn’t caused concern in terms of its own work, he says. “But our clients certainly ask us whether we can collaborate with them.” More widely, he adds, the market could embrace more of that collaboration. “It doesn’t happen quite as much as is discussed – and we’re happy to embrace collaboration with competitors to deliver solutions based on client feedback and what we know we’re good at.”

Jody Jansen, chief technology officer at BCLP Cubed – which set up as a new delivery model within BCLP itself in June 2019 – says: “The Big Four and other legal services providers – like us at Cubed – can be light-years ahead of firms in areas like project management and process, as well as technology. And we also have a continuous improvement mindset that aims to make our products more efficient and price-competitive.”

MORE SHAPES SHIFTING?

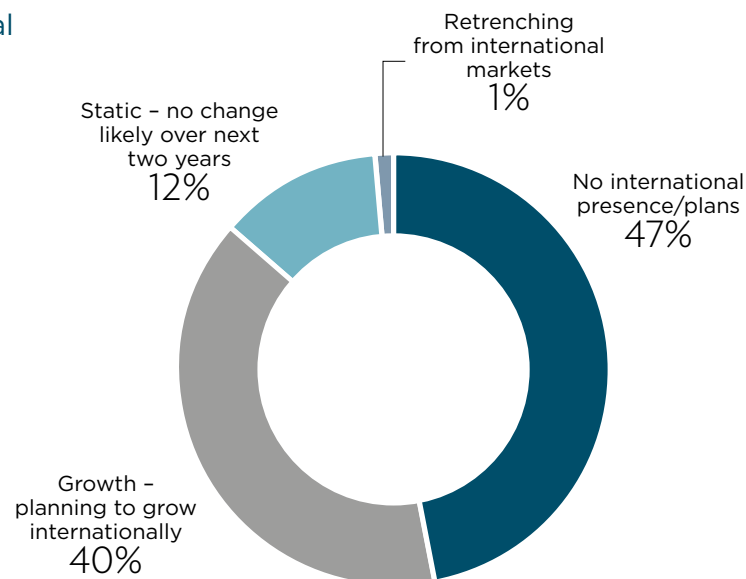
There are more forces at play than these no-longer-new entrants to legal consolidating their positions, of course. There’s also the prospect of the

Will the pandemic accelerate market consolidation in the legal sector in the next three years?



Briefing/HSBC Law firm strategy and investment survey, October 2020

If your firm has an international presence or an ambition to grow abroad, what is your current strategy?



Briefing/HSBC Law firm strategy and investment survey, October 2020

economic outlook driving a consolidating legal market. Law firm mergers were few and far between last year, but the **Briefing**/HSBC law firm strategy and investment research published in October 2020 saw 86% of leaders saying they expected the pandemic would ‘significantly’ or ‘somewhat’ accelerate consolidation over the next three years, compared to just 12.5% who said they expected no significant change (p8).

In that report Patrick Firebrace, director of finance at VWV, told us: “There will be some firms that cannot survive without consolidation. Our own approach, while being agile and nuanced to the circumstances, will be to focus on firms that are thriving, but clearly some firms will want to survive and look to a transaction to do that.”

Irena Molloy, executive director at Howard Kennedy, added: “The future of where and how we work could create exciting consolidation opportunities, in that location may lose some of its importance. However, one of the challenges in any consolidation is the cultural aspect, and we will need to continue to find new ways of engaging people.”

On the other hand, plenty of **Briefing** firms with an international focus intend to stay on that course in 2021, according to their leaders. Four in 10 said the current strategy was still to grow internationally, 12% were planning either no change or a review, and just 1% said they were looking to retrench from global markets.

Furthermore, very few cited financing restraints as



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INVESTING FOR THE FUTURE: PEOPLE, PROCESS AND TECHNOLOGY

With “other firms like mine” seen as the dominant competitive threat this year, firms must differentiate to achieve both revenue growth and improved profitability. Meanwhile, recognition that technology can play a part in achieving both differentiation and revenue growth/improved profitability is clear from the inclusion of “businesses that sell a combination of technology and contract lawyering” and “the Big Four” in the top three threats. It’s to be expected that priority projects for the next 18–24 months include replacements/rollouts of finance, HR, CRM and document automation systems, well established when it comes to achieving law firm efficiencies. These changes will operate alongside business and workplace transformation initiatives, pushed to the fore by the global pandemic. Transformation initiatives will focus on premises and workplace reviews and the evolution of the law firm operating model – a review of people, process and technology, for example, introducing pricing and profitability skills for lawyers, lawyer-utilisation initiatives, client-focused service design and cloud transformation.

The offer of a **Briefing**-gifted £100,000 ‘magic wand’ investment sparked a similar desire to invest in a review of people, process and technology centered around the lawyer and the client. Key to developing the lawyer (and the law firm) of the future will be systems that can educate lawyers

on workflow inefficiencies, provide real-time pricing and profitability analysis, and cater for more modern ways to access legal knowledge. These systems will link training, competencies and performance to clients’ needs (with a focus on client self-serve) to improve legal service delivery and, in turn, utilisation and profitability.

Samantha Steer
Director, market development
– large law
Thomson Reuters

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the factor most affecting international strategy (5%). One third highlighted regional differences in profitability or local competition, a fifth Covid-19 (20%) and 13% Brexit (p11).

Tamara Box, Reed Smith’s managing partner for Europe and the Middle East, said at the time: “There are, of course, regional differences between the rates we recover for our work. The key is to understand the impact of that fact on profitability and to leverage your platform to manage it.”

She was referring to operating models – managing global resources and finances to deliver services as efficiently as possible in different locations – but there are, of course, also choices to be made about the role for technology in managing that process.

WIDER HORIZONS

The year 2021 is also one to try and look a bit wider than what firms already have in their project books. There has been plenty of time spent in the past 12 months driving process improvements to help with homeworking productivity – providing better data to those who need it faster for example, re-evaluating cybersecurity, or enabling ‘smarter’



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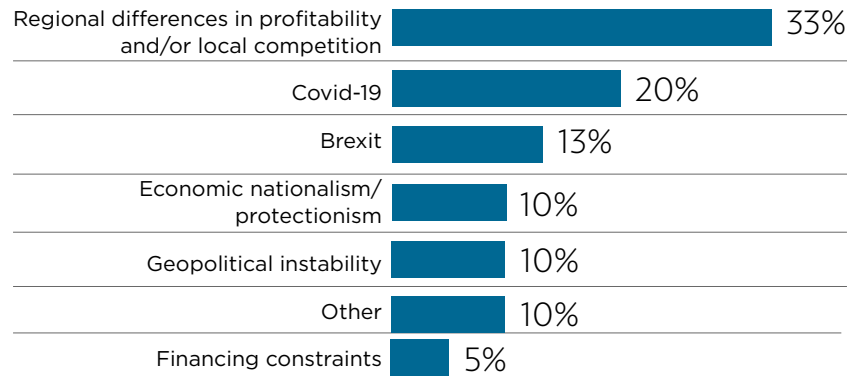
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Which of these factors is most affecting your international strategy position?



Briefing/HSBC Law firm strategy and investment survey, October 2020

workplace collaboration that goes beyond a ‘virtual watercooler’ (though nothing wrong with that). More on all of that later, and no doubt there will be more to come in 2021.

86%

Of leaders expect the Covid-19 pandemic to accelerate consolidation

20%

Say Covid-19 is affecting their firm's international strategy position

But what would business services leaders most like to do if they could do anything? Well, almost anything – we capped their ambition at a “free £100,000”. And the range of responses, alongside what they’d expect to get out of the other side of the investment, was striking. Digital and data were indeed two things that loomed relatively large. “We’d employ a data guru,” said one. But the desired outcome was more about making those already at the firm more appreciative of data’s value. “Legal technologists and data analysts,” said another, apparently in agreement – and they also wanted improved technology adoption in the return. Another would kick off a “digital products

team”, intending increased profitability as well as revenue. And a variation on that theme was “applications creation support – working with lawyers to develop specific IT products.” It was hoped the latter would lead to “more attention to detail” surrounding those products, resulting not only in the eternal goal of client satisfaction but also development of some new lines in fixed fees. Two people would use the cash as innovation budget (“we do this already, but I would love more budget!”). And another made the case for new tech that specifically supported clients’ need to “play” in order to find new solutions – a possible route to more work for the firm in future.

However, a lot of our conjured-up cash would be splashed on people rather than product – either more of them, or more development of existing ones. Two respondents wanted another body in the

security space. For another it was “KM people in all offices” with an end to “real improvements in knowledge culture and foundational systems implementation.” And two focused on reskilling lawyers. In one case it was a question of “new ways to develop the lawyer of the future.” The other was more blunt: “Lawyer education on how inefficiently they are currently working and the ‘art of the possible’ with technology in future.”

Here are a few more that stood out to our team on the systems side:

- Wider access to high-quality online resources – expecting people to engage with clients, with greater impact as a result.
- A real-time pricing and profitability dashboard – even longer-term benefits than the simple ROI through better utilisation, more accurate analysis and efficient scoping.
- Office and meeting room collaboration system improvements, bridging the gap between WFH and office collaboration.
- A learning management system that truly links training, competency and performance – for a double-digit uptick in productivity if it’s managed correctly.
- Robotic process automation.
- AI – “difficult to tell, as the reality may not match the hype.”

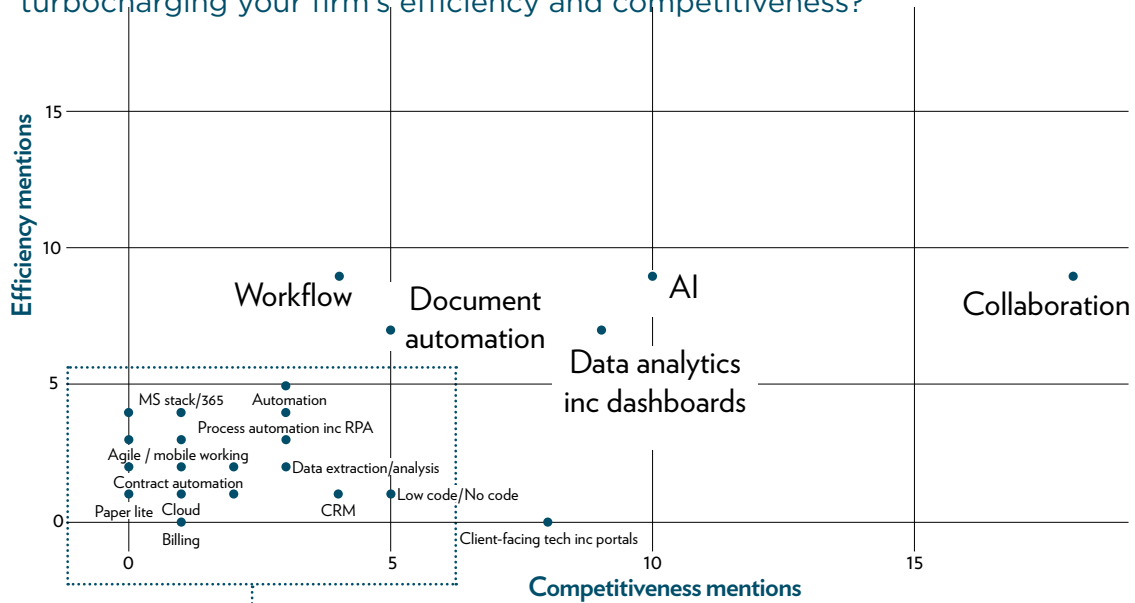


Only a select few
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technology needs
of law firms.

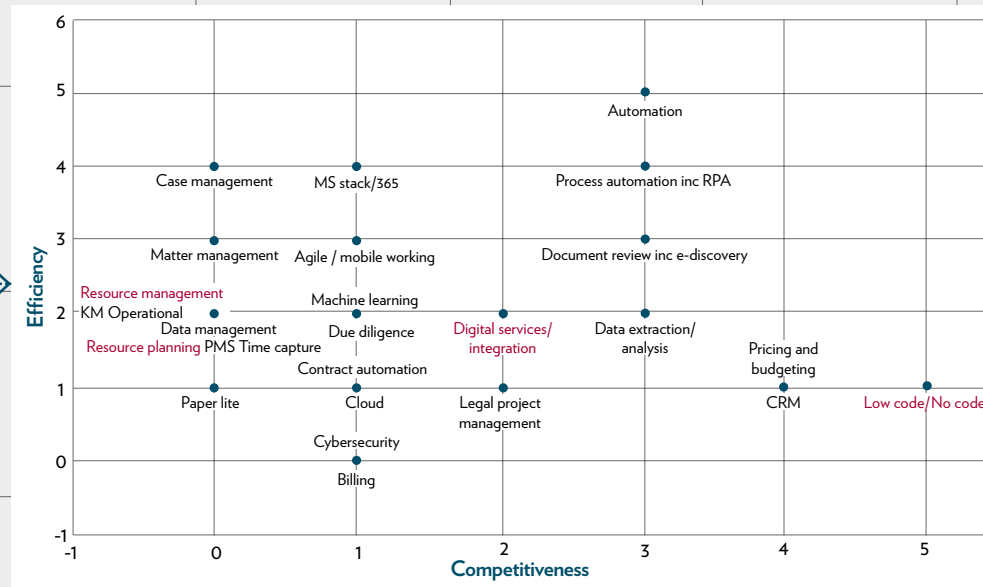
We employ most of them.



Which technologies currently come top of mind when it comes to turbocharging your firm's efficiency and competitiveness?



Gateway to the future: these are techs mentioned by you just a few times – and this year it's very crowded!



WHAT'S EFFICIENT, WHAT'S COMPETITIVE?

Many readers will be familiar with the Briefing efficiency/competitiveness axis we've been producing for several years now. We ask you to name your top-of-mind three technologies for both improving work efficiency and enhancing firm competitiveness (six in total), tot up the mentions and visualise the totals using our axis.

This disruptive year has produced quite an unusually flat plot. Where AI and automation once dominated proceedings, it's now collaboration technology that comes out top (tying with AI and workflow as engines of efficiency). That's perhaps not so surprising when you consider that collaboration has been so critical for firms pressured to perform in various ways while managing massively dispersed teams. (p15)

TECHNOLOGIES TO WATCH IN 2021

This lower-left 'gateway' is an area of the grid where we regularly see 'incoming' new areas. We suggest this year's 'ones to watch' are:

- **Low code/No code** – Using platforms to let people (lawyers) create apps and workflows, and possibly products. This first appeared in the grid in 2020 and momentum appears to be building behind it for competitiveness.
- **Digital services** – Firms clearly need to work and connect with their clients, but also sell to them, in new ways in the emerging next normal.
- **Resource management and planning** – Not a new tech, but a first mention as a top priority.

A new era for IT investment?

More than half of leaders say their firms intend to increase investment in technology in response to pandemic pressures. And a big swing toward the cloud lies in store, as the future of who works where remains up in the air

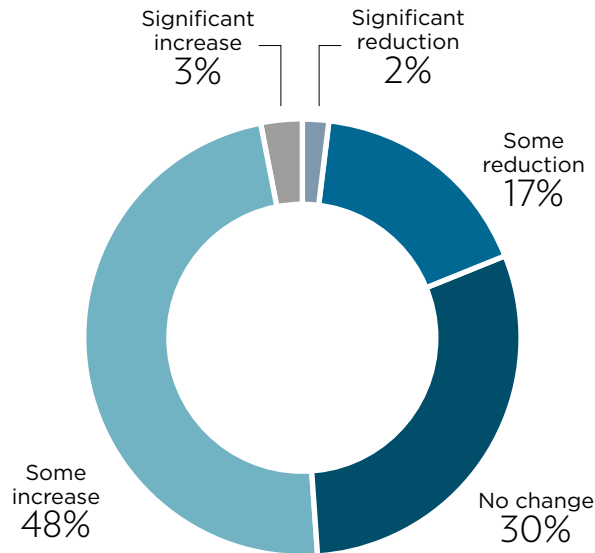
Another data point that **Briefing** Frontiers Legal IT landscapes always wants from leaders is their estimate of the firm's IT spend as a percentage of overall revenue – and this year's average is typically (to us) unsurprising. In 2020 the mean came out at 5.2% – a level that has effectively remained the same for a decade. In 2019 it was 5%, so “a very small change, and realistically only represents standing still at best,” as the former chief financial officer for Freshfields Bruckhaus Deringer Laurence Milsted told us in October last year. “And this at a time when the economic climate is also seeing increased competition for clients from technology-driven alternative legal services providers and the spending and project-management power of other players such as the Big Four.”

But it seems the pandemic may just have pushed firms to increase the amount they're prepared to spend on IT systems and infrastructure (we'll see when we ask for that percentage of revenue again next year). Just over half (51%) of leaders report

their firms are increasing technology spend in response to the pandemic – 3% say significantly – while fewer than a fifth (19%) say the plan is to invest less (p15).

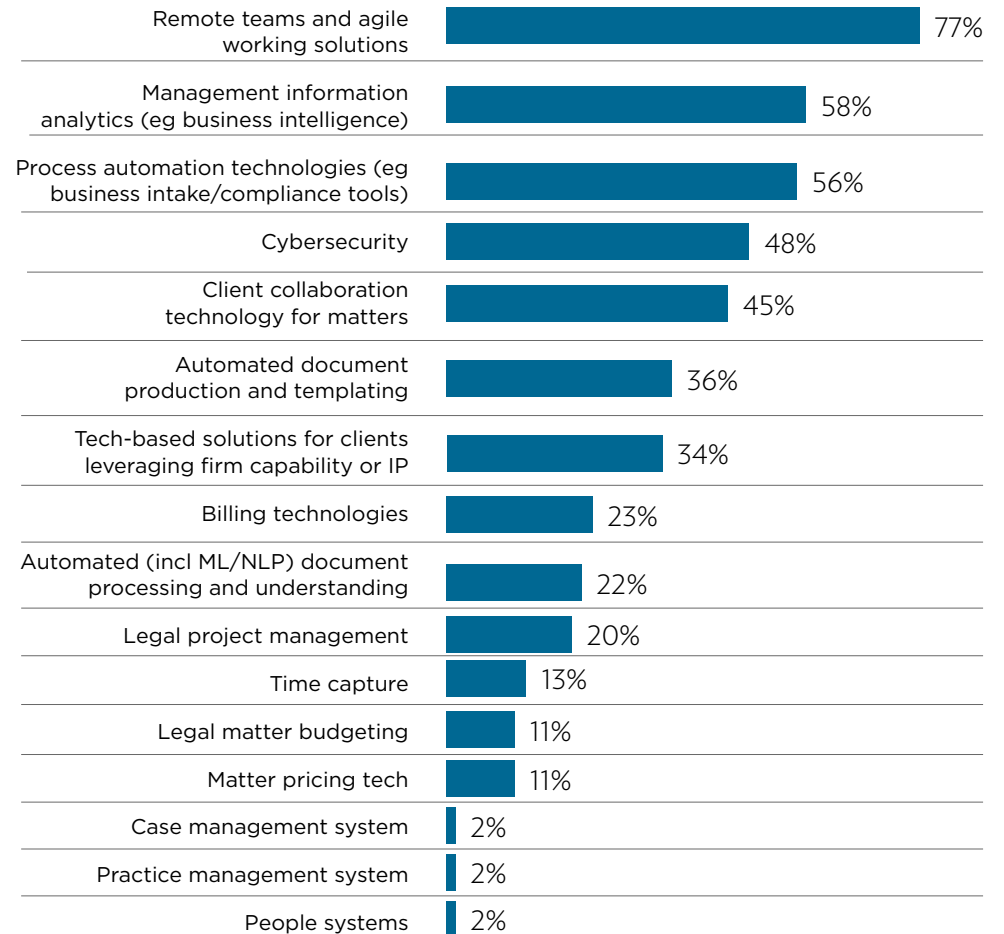
Perhaps the least surprising finding in this year's research is that the highest-priority tech project is now 'remote teams and agile-working solutions' – although that could, of course, cover investment in upgrading infrastructure, new software and devices. Next comes management information, such as business intelligence solutions (58%), and this is followed by process automation technologies, such as new business intake/compliance tools (56%). These are two categories of tech clearly associated with the specific demands of 2020, where fee earners and others have needed to become more self-sufficient at home. Accurate, timely data about financial progress, business development effort and utilisation has been key to making swift decisions to protect both profitability and future business pipeline. And automation projects have intervened to reduce reliance on paperwork when working

How is technology spend in your firm being affected by the pandemic?



Briefing/HSBC Law firm strategy and investment survey, October 2020

In which of these areas is your firm prioritising its investment in technology (both systems and people)?



Briefing/HSBC Law firm strategy and investment survey, October 2020



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CHANGING DRIVERS IN 2021?

This report makes it transparently clear that technology transformation is number one on everyone's agenda for 2021. This isn't a significant deviation from prior years. Rather, the fundamental difference is the compelling set of drivers for transformation.

As firms make those all-important technology decisions, they must ask themselves three questions:

1. Will this change improve client and staff experience?
2. Will this change increase business efficiency and reduce operating cost?
3. Will we increase our profitability sustainably?

The list of priority projects cited is lengthy, but they are all essentially synonyms for automation, optimisation, digitisation, streamlining and budgetary/project planning. One must therefore grasp the sentiment that underlies these priorities. For instance, legal process optimisation equals business efficiency. Systems integration translates to providing the right data at users' point of need.

It's interesting to read the number of references to 'PMS' as a key technology objective at this time, and it would be fascinating to understand the underlying need. Is it to gain financial transparency? Or perhaps to make the firm's lawyers more business-aware? It's also curious that the 'magic wand' section doesn't reflect firms' project priorities. There are no compelling 'enabling' responses that align with what **Briefing** law firms are working on.

WFH has been the biggest challenge and opportunity

for all in 2020. The next question on this topic will concern how we make the tools available as an intuitive part of the legal process and not merely an adjunct.

Covid-19 has spurred serious technology and working practice change for the better. One hopes that it has also created a momentum where the rate of adoption of technology supports the rate of ambition for it. Merely maintaining this new status quo will be unfortunate and a missed opportunity.

Simon Farthing
Commercial and marketing director
LexisNexis Enterprise Solutions

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remotely, while supporting process consistency and onboarding the right clients efficiently. Completing 2021's top-five tech priorities are cybersecurity (48%) and client collaboration technology on matters (45%) – more on which later.

Eddie Twemlow, head of IT and operations at Burges Salmon, says: "I see that demand and investment in technology will become even more prominent as the pace of change increases and expectations of technology continue to rise. With regard to the pandemic, we have a programme of work that will ensure we capture those changes to working practices we want to keep, as well as to our support model, to ensure lawyers receive the same degree of technology performance and support at home as they would if they were in the office.

"Our cloud migration programme remains a significant effort for our team and suppliers over the next 12 months, and alongside that we have a continued investment programme in innovation to support improvements to client service delivery. This includes tools to support collaboration with clients, document automation, analytics and data visualisation, as well as automation of other business processes."

Andrew Telling, UK head of knowledge management at Taylor Wessing, adds: "Most of our files and library were online already, but there are

66%

The percentage of all workers that legal business leaders expect to work from home for two or more days a week under any 'hybrid-working' arrangement

some projects where it would have taken years to move things completely online – billing and invoice management, for example – and change was achieved much more quickly in lockdown.”

HOME INSTINCTS

A big question the business world at large has faced in 2020 is the future of its office spaces – closely connected, of course, to how much employees can be expected (or even encouraged) to work from home in a post-pandemic future. Some firms have already announced new agile-working policies that set out how much people could work from home if they wished (provided certain operational boxes are ticked). Up to half the time has emerged as not unreasonable.

It made no sense to ask some very longstanding **Briefing** Legal IT landscapes questions this year – for example, concerning the number of people firms would like to enable to work from home with laptops, or how quickly they would reduce the number of desks available to people in the office as part of a hotdesking approach. It may be of interest, though, that in late 2019 leaders on average believed 42% of people at the firm worked from

home “regularly”, and they wanted to enable three-quarters to do so. Two-thirds (67%) were then trialling or planning an office space reformat to enable smarter working, but exactly half believed it would take two to five years for them to reach a point where there were significantly (over 10%) more people employed than desks in the office for all those people. A quarter said that particular change could take as long as 10 years.

This year we’ve asked leaders to put a number on how many of the firm’s people could expect to work from home for two or more days a week in a post-Covid-19 future – and the average they’ve produced is 66% (median: 70%) That may or may not be connected to any new strategy surrounding how much office space they think is needed to accommodate people in future. However, three-quarters (77%) say they believe the next property agreement the firm signs in an HQ city will be for a smaller space (or a significantly smaller one). Almost a fifth (19%) said they’d be looking for approximately the same size again, but nobody says they expect to need a larger space (p18).

Anthony Vigneron at Clifford Chance, says: “Firms can’t pivot very quickly – to rent out space,

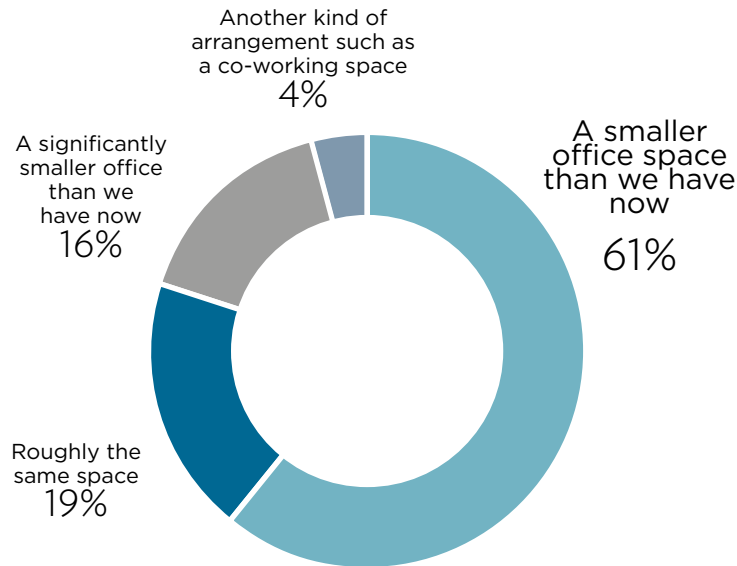
for example – while social-distancing has also changed space considerations. Firms may feel they don’t need as much space as there are fewer people in offices, but at the same time those fewer people need more space at the moment, which makes it a challenging area to plan.

“The new normal won’t be the same, however, and after a whole year of working from home firms might well struggle to justify needing as much space as they have currently.”

Eddie Twemlow at Burges Salmon adds: “The pandemic has shown that firms can operate differently with a smaller office footprint, although we haven’t yet seen the impact of that over the longer term on culture and identity. Some consensus is settling around the hybrid model as the new way of working, but firms will need to decide what the purpose of their office will be in the future, which is likely to be based around which activities need to be conducted where.”

He argues this will be informed by some traditional thinking around workstation capacity, but also how valuable space is considered to be in terms of client interaction and collaboration, internally and externally. “Where firms sit on that

What will the next office lease/agreement your firm signs in London or another HQ city concern?



will be informed by their business and culture – whether they see value in their people being together more frequently, or whether a higher proportion of people working from home works for them.”

Matt Haynes, global IT director at Kennedys, also sees space shifting whether or not it shrinks. “If the office is used more for collaboration, that may necessitate the creation of more collaboration spaces,” he says.

And Abby Ewen, technology and operations director at Browne Jacobson, says planning is also complicated by current levels of emotion about the options. “People don’t want to return to the office at the moment, because they don’t want to be on public transport. They don’t want to stand and wait for a lift.” On the other hand, “it’s also an ‘unreal’ homeworking environment for some, with the

sense that ‘I’d rather be in the office, where I can get on with some work’.”

Andrew Powell, chief information officer at Macfarlanes, adds: “Whether the workplace is smaller or not, it may well need to function differently. It seems unlikely that people will want to commute into the office to plough through emails, but teamwork and supervision inevitably suffer with an entirely remote workforce, while tasks that require concentration need spaces without distraction, which might not always be in an office block.”

But will longer-term remote or hybrid working also require significantly more technology transformation in the months ahead? “Technology focus is likely to be around supporting hybrid teams, with potentially a more even split longer-term of office and remote working,” says Powell.



SPONSOR COMMENT

PRICE RISING AS PRIORITY?

It is interesting that some responses here have shown that pricing and profitability is considered a high priority for firms over the next 18–24 months. This tallies with our own experiences when talking to law firms: a focus on key client programmes and ensuring that the work they deliver is profitable.

Pricing matters accurately, based on meaningful data, such as insights from historic matters, is proving invaluable to this process. We see a huge requirement to identify areas that are more prone to scope-creep and for pre-warning on profit erosion. To this point, ‘staffing and the utilisation of lawyers’ is also highlighted as a key priority for firms, reaffirming that managing which resource delivers the work will have a significant impact on successful client outcomes and profitability of the matter.

It is interesting to note that another of the priorities is improving the pricing skills of lawyers. Lawyers are often conducting pricing conversations without the necessary information and background to ensure those conversations result in the desired outcome. However, this also highlights that firms aren’t investing enough in building their pricing functions to support lawyers (certainly not when compared to US firms), and where those functions are available there is limited capacity. In a recent conversation with one pricing director, we were told that where the pricing team is involved in the deal, not only are they more likely to succeed in winning the deal, it’s also more likely that it will be delivered profitably.

Alan Conway
Practice group leader,
OnePlace operations and finance

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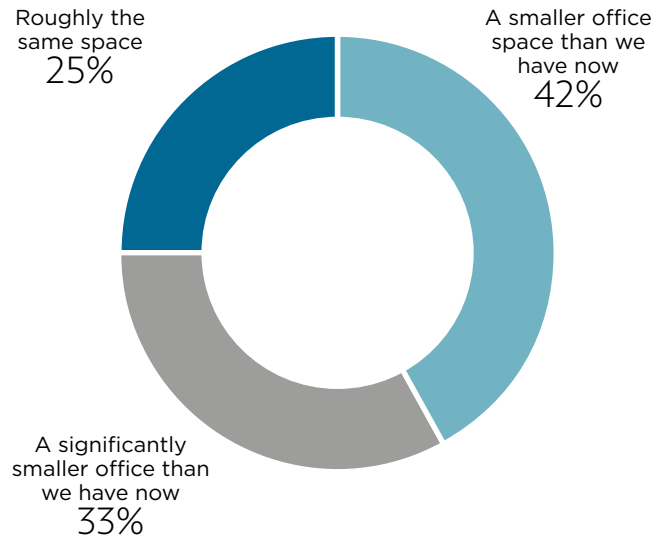
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Next office space: Firms that sell 'outcomes'



19%

Of leaders expect the firm's next main office space to be about the same size

77%

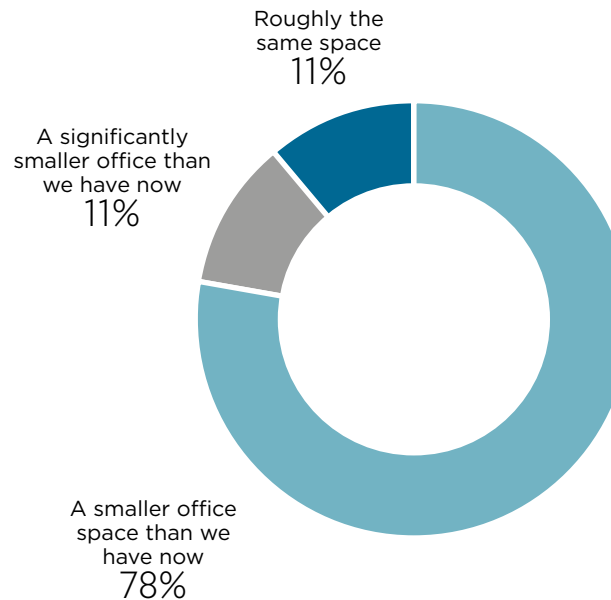
Of leaders expect the next space the firm takes on to be smaller, or significantly so

Jody Jansen at BCLP says: "I think firms will have to rethink technical architecture. We've seen a big shift in data capacity from the local area network to the wide area network. Firms might need to separate traffic to maintain a good user experience.

"They will also need to consider investing in the best ways for employees to connect to the firm, such as dedicated links to the office that aren't shared with the rest of the household."

Anthony Stables, chief information officer at Forsters, adds: "We've had to change deployment for laptop software updates and develop processes for rapid replacement if equipment fails, which we now need to enhance." He's also focused on

Next office space: Firms that sell 'lawyers'



encouraging people toward finding the time to consume a burgeoning supply of self-serve training videos. "The tools are all there, but people are still on the change curve, so adoption can vary considerably."

Eddie Twemlow at Burges Salmon continues: "Just as space needs are different, the technology needed to support each approach will be different. Some of the more universal investments will be integrated AV to support more immersive and collaborative meetings with people in the office and at home, as well as smart-building technology to support flexible working. However, what's clear is that the expectation of service to remote workers has shifted. Lawyers need the same level of

performance from technology at home – or elsewhere – that they receive working in the office."

Vigneron at Clifford Chance agrees. The most significant changes he'd call for concern process to help individual performance and productivity – ensuring people have two screens at home for example, and are happy with the professional quality of video calls they can make. Others also stress this – and Clifford Chance, like many, has made provision for an allowance for people to set up suitable work stations, which now needs oversight. Aside from that, he highlights the investment in digital marketing and virtual business development that many a sector has needed to embrace in order to continue reaching clients. "Legal isn't best known for that, but it has needed to account for the loss of personal contact. "We had also already invested quite a lot in managing our digital assets, and clients want to consume services in new ways as well. We saw an increase in digital product subscriptions during the pandemic, which in fact also proved useful for responding quickly to all the changing regulation."

THE FUTURE OF OFFICE ADMIN

In mid-2020 **Briefing** also carried out a small piece of research with Intelligent Office into 'plans' for administrative functions specifically – in light of indications some firms could see remote-working



SPONSOR COMMENT

THE SPACE TO MAKE CHANGE

The new norm. WFH. Teams. Zoom. Agility. They are terms now firmly embedded into the business lexicon. Will they stay embedded in office culture? Most probably, but the impact of the changing culture of work on future real estate requirements, and the services required therein is not fully scoped out.

It is little surprise that space requirements will shrink, but at Mitie Document Management that has created, and will create, opportunities when changing our operating model.

Previous reluctance to move to a space-free service solution, such as the digital mailroom, and the suite of services that entails (including, but not limited to, hybrid mail, mail scanning, invoice and document processing), partially dissipated in 2020, though resistance remains. But if service departments occupy prime real estate at a time when surveys suggest less requirement, then digitisation and/or the provision of a more cost-effective offsite solution should be inevitable. The nimble way that service providers such as Mitie have changed delivery models easily ensures that no difference is felt by end users. There remains a perception of risk surrounding cloud-based technologies (although this is changing), and in some environments the personal service delivered by known and trusted people remains a coveted thing.

This is the new norm after all, and uncertainty remains. Quick adaptation to strange circumstances doesn't necessarily result in long-term, embedded business processes at the same speed. It feels as though a hybrid model will most likely emerge, which is a blend of onsite

service provision taking up less floorspace and more adoption of technology to drive better business processes. Acknowledgement and adoption of this by those of us who deliver services, and those who engage with us to do so, must have this on the agenda now to be in the best possible shape when uncertainty lifts.

Pat Fox
Director, business services
Mitie

www.mitie.com



as a more frequent mode for this group in particular, or indeed simply reduce this support for fee earners following lockdown experiences.

A significant number of leaders said their firms were “reshaping plans” with respect to reducing one-to-one support for partners and fee earners, and even more were either reshaping or accelerating plans to move people to “more fully flexible-working mode” (such as three days a week or more). Some plans were also afoot to reshape administrative roles with different/new tasks and responsibilities (p24).

Change always needs to be measured as well as managed – so are law firms currently able to track the overall efficiency gains of such steps? Do they have the systems to do so? A clear majority of 83% agreed they had the tools and infrastructure needed to manage the delivery of office administrative services when people were at home (only 4% did not agree), and more than a quarter (28%) experienced no difference in the level of access fee earners had to such roles (16% said mixed). On the other hand, more than half said this access was “largely easy, but with some barriers” and almost half admitted it was harder to keep track of productivity at home (p26).

In this research, Louise Hadland, HR director at the law firm Shoosmiths, said: “The critical question is what are we measuring. Defining what

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you want an employee to achieve, being able to describe the purpose of a role and how it adds value is more difficult, but if home/remote working is here to stay then it's time to pivot and put the work in. When there is a clear understanding of what's needed from an employee then we can build the measures and development to support those outputs. Investing time now to define what you want to measure will reap dividends later in terms of easier supervision and employee satisfaction."

Penny Newman, chief people officer at Lewis Silkin, added: "We've found that most people have been able to manage. Tech moves fast, however, and as the period of working from home extends, we'll continue to review our tech setup to make sure it matches the needs of our people and the requirements of our business."

Hadland also stressed the importance of staying on top of changing tech options. "Existing technology has delivered a great result for most managing through lockdown. And while technology will be developed and enhanced over the next couple of years to better facilitate remote working – VR is bound to take over from Zoom before long – as the survey suggests, the tech is good enough."

But she cautioned that the developments would be wasted unless firms paid just as much attention to how technology gets used. "There are three critical points at which remote working is likely to fail: inadequate supervision, inability to performance manage or inability to build an online brand and sell and market from a platform. Failure at any or all of these points is likely to see managers demanding staff come back to the office where they can 'keep an eye on them'."

"Just as space needs are different, the technology needed to support each approach will be different. What's clear is that the expectation of service to remote workers has shifted. Lawyers need the same level of performance from technology at home that they receive working in the office."

EDDIE TWEMLOW, HEAD OF IT AND OPERATIONS,
BURGES SALMON

CLOUD CONTROLS

We've already seen that leaders identify technology to support agile working as a priority area for future investment. A related regular **Briefing** benchmark is to gauge how soon they think a wide range of systems will be "fully or mainly" in the cloud rather than maintained on-premises (p27). This year we kept the same end date as in last year's research, 2024 (in the past we've set a five-year window for change), and our graph sees a huge swing toward cloud. A year ago, only just over half (52%) of leaders could see matter and project management mainly in the cloud by 2024, for example – this year we're up to 82%. In 2019, it was 59% putting case management in the cloud by 2024, with 17% still saying fully or mainly on-premises. That's now up to 81% for cloud and nobody staying put on-premises. There are also big cloud gains anticipated for document management, digital dictation and particularly practice management (48% of responses for fully or mainly cloud last year, rising to 72% this year). Only document production tools and business intelligence have remained relatively static.

In previous years, leaders have highlighted 'letting it go' as a potential lingering concern –

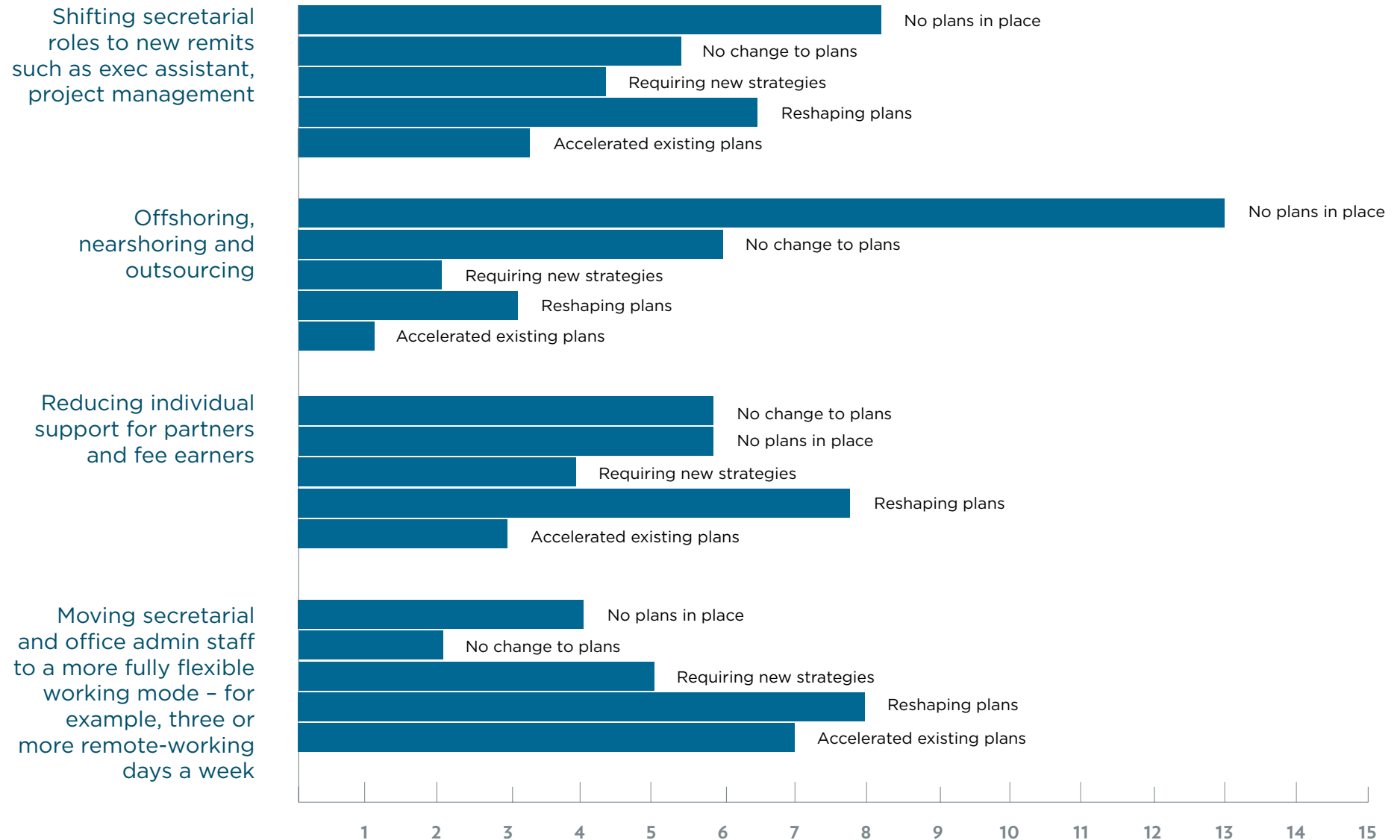
48%

Of leaders say they can track admin productivity at home as well as in the office

83%

Say they already have the infrastructure/tools to manage admin work delivered at home

Select the options that match how Covid-19 has affected the following change plans in your organisation (total responses)





SPONSOR COMMENT

FORGING AHEAD WITH HYBRID WORKING

With hopes rising that we're through the worst of the pandemic and its restrictions, law firms will undoubtedly be keen to retain all of the positive changes and efficiencies they have worked so hard to achieve during this period. As a result of the newfound benefits of regularly working from home, the legal sector will need to develop a standardised hybrid model that finds just the right balance between remote and office working. When firms eventually start returning to their offices, hopefully this year, the likelihood is that this model will involve lawyers regularly working from home – potentially up to three days a week – while simultaneously re-establishing some of the pre-pandemic networks formed between people. To achieve this model, we are likely to see an increased focus on the human side of businesses.

Briefing's Frontiers Legal IT Landscapes 2021 report shows several highly encouraging signs for the future of the UK's legal sector, and with most firms preparing to increase their technology investment, attention falls on the priorities for that spending. In this hybrid realm, there will undoubtedly be some new technology and security challenges. Firms will want to consider solutions such as thin client virtual desktop infrastructure services for specific or complete application and desktop services – moving the application and data back to a hosted/cloud environment to maximise security of data and services as they are consumed in a more dispersed manner. As the assessment for all key business functions increasingly leans towards a move to cloud, this direction of travel seems inevitable.

Andy Bevan
Cloud sales specialist – legal sector
Pulsant



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notwithstanding the argument large cloud providers have resources to invest in security many firms might not – as well as the complexity of migrating core systems that necessarily hook into others. In short, that it isn't as straightforward as it can sometimes be made to sound. So, why the dramatic shift?

Anthony Vigneron at Clifford Chance says: “Some may have been hurt in terms of capacity flexibility as a result of not having some of their systems in the cloud. These systems aren't things

“Some may have been hurt in terms of capacity flexibility as a result of not having some of their systems in the cloud. These systems aren't things you can shift quickly – in the middle of a crisis – but that could trigger a multi-year investment.”

ANTHONY VIGNERON, LEGAL TECHNOLOGY SOLUTIONS DIRECTOR, CLIFFORD CHANCE

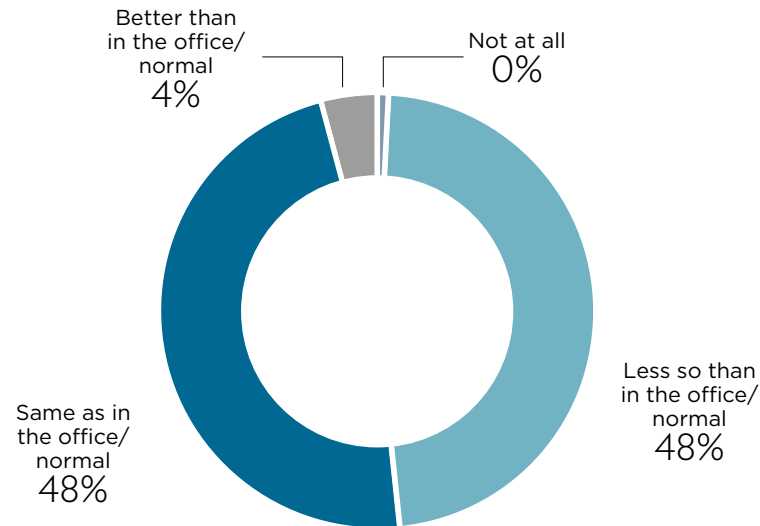
you can shift quickly – in the middle of a crisis – but that could trigger a multi-year investment decision.”

Andrew Powell at Macfarlanes adds: “Data networks have allowed IT services to be located away from their users for many years, and the challenges brought about by lockdown and social distancing have only emphasised the downside of running them from office accommodation that may become inaccessible. It's no surprise that those retaining on-premises infrastructure are looking at changing that.

“Meanwhile, the scale of most law firms makes Microsoft's cloud licensing models attractive. New entrants to the market often follow a cloud-first or cloud-only approach, and it can also be much faster to onboard SaaS services. But only if you're able to get the right data into them, and integrate them with the rest of your estate. At the other end of the relationship, the exit route is not without risk – and procurement without open-ended price increases can sometimes be a challenge.”

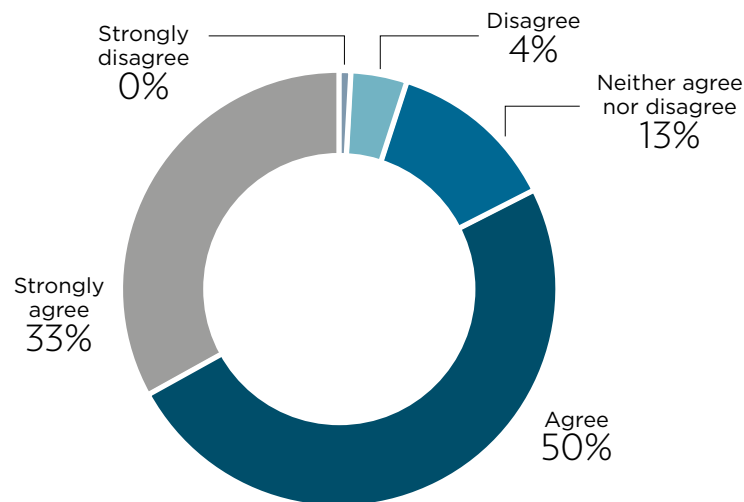
Clifford Chance began moving its document management system to the cloud before the pandemic – the business case for that clearly still stands – and Vigneron says it's also becoming an increasingly important factor in efficient deal

How effectively can your firm track the productivity of secretarial and office admin staff while they are working remotely?



Briefing/Intelligent Office Admin anywhere, September 2020

Agree or disagree? 'We have the infrastructure/tools to manage the delivery of secretarial and office admin services when those delivering them are largely based at home'



Briefing/Intelligent Office Admin anywhere, September 2020

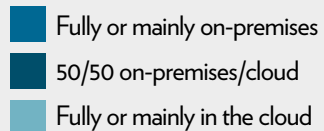
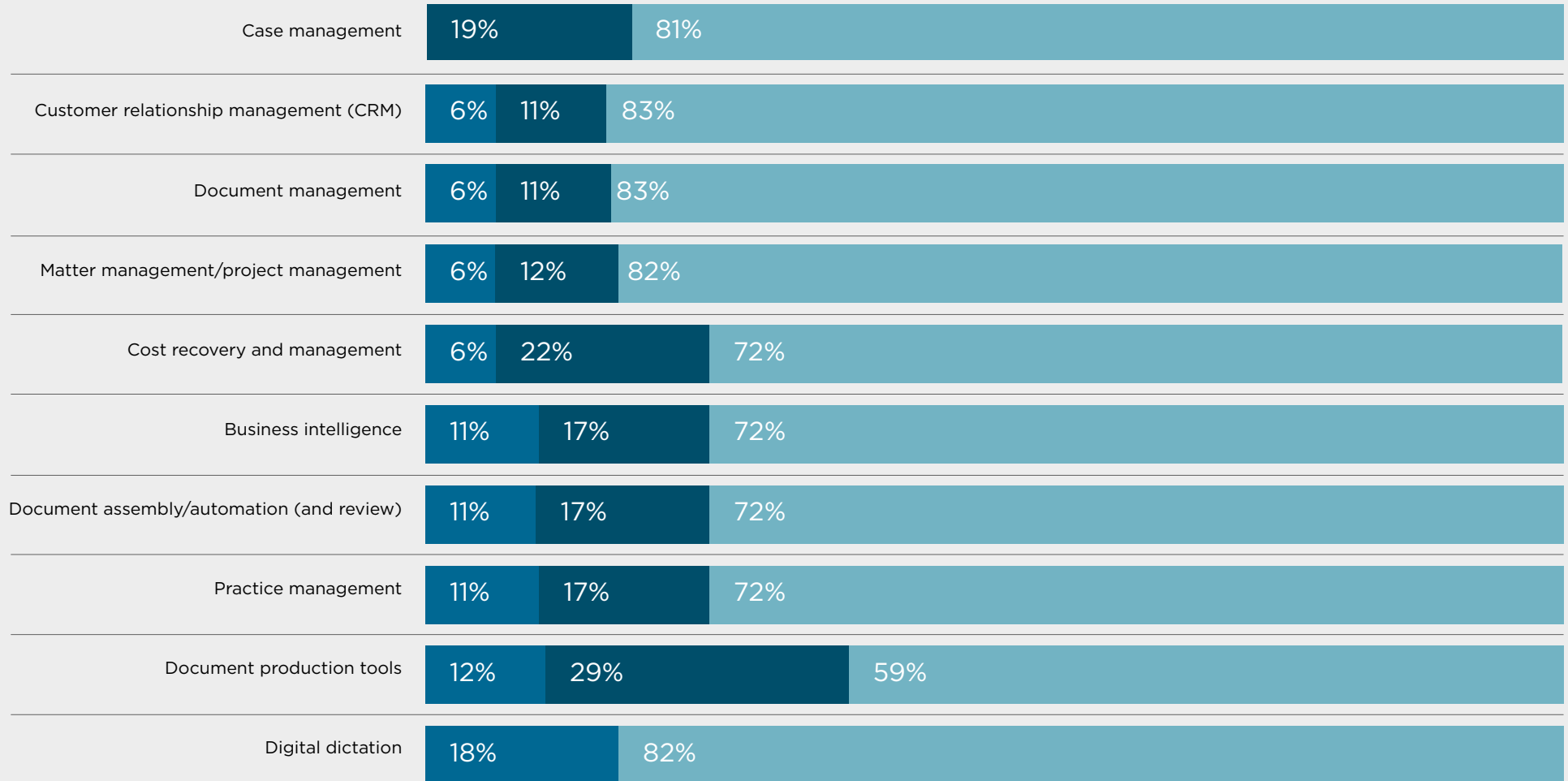
management. "There's growing acceptance that you need digital workflows for that work – to enable people to collaborate in real time."

Forsters also has its document management in the cloud – implemented during lockdown – alongside HR and risk systems, says Stables, and in the case of future projects "it's a matter of prioritisation – there's no nervousness from our partners, we have a clear strategy that is well supported and funded." He'd expect any new practice or client relationship management system to go the same way. "We certainly won't bring any new technology on premises if we can help it."

2020 saw Burges Salmon embark on a cloud programme, with the ultimate goal of decommissioning all physical IT architecture at the firm, as well as its data centres, within two years (email and document management are already there). Eddie Twemlow says: "Whether to adopt cloud is not really a choice that a business has to make, but they can decide when to move. We saw a peak on our asset replacement cycle as the right time to start."

"The market will take us all there, but there are real benefits – our technologists will focus more on solving client-related problems with digital tools and data, with some of the activities of the traditional IT team carried out by cloud service providers. Cloud will help the business to see the connection between technology investments and value to clients more clearly, and it allows flexibility of deployment with shorter investment cycles."

In four years' time (in 2024), to what extent do you think these systems will be available in the cloud at your firm?



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There are challenges with any programme with that level of complexity, but the real strategic challenge – of how to exploit the benefits of the new platform – becomes an issue of business strategy rather than technology itself.”

Not everyone is as enthusiastic, however. Abby Ewen at Browne Jacobsen says: “Cost can still be an issue – we do a cloud cost comparison every time we need to change a system – and strategically there isn’t necessarily that much advantage. I’m certainly not falling over myself to move everything to the cloud for the sake of it.”

Matt Haynes at Kennedys has a similar perspective: “If it’s commercially sensible to move over we’ll do it, but given cloud hosting is often significantly more expensive, our default is to host internally,” he says. “It makes more sense for firms that are significantly larger or smaller.”

Jody Jansen at BCLP Cubed, adds: “Our clients are now more open to cloud-based solutions, and in some cases are actually asking us whether we use the technologies, and if not are less interested in using us.” Internally, he says, people are also aware that ‘cloud’ doesn’t mean a free service. “We’re talking about professional businesses with appropriate staffing, training and certifications – which are in some cases better than firms have themselves.”

72%

Of law firm operational leaders think the firm’s practice management system will be fully or mainly located in the cloud by the year 2024



SPONSOR COMMENT

CLOUD DAYS TO COME ARE CLEAR

This year’s survey shows a definite trend that puts automation, managed services, cloud and process optimisation at the forefront of priorities.

Investment budgets are not infinite. If people had more money, then AI, digital tech, emerging tech, robotic process automation, the lawyer of the future – these would all be at the top of the list owing to their importance in innovation (something else that remains high on the legal sector agenda). Does this mean respondents feel not enough of their current budget is available to invest in new tech and innovation, with too much focused on the ‘here and now’ and keeping the lights on? Have we hunkered down too much through lockdown and lost some of the appetite to invest in new ideas?

The year 2020, though, is the year that cloud’ won. Between 60% and 88% of firms now believe that a wide range of solutions will be in the cloud in four years’ time, with a real focus on document, client relationship and matter management. Covid-19 has pushed cloud migration into overdrive, and clearly the legal sector truly recognises that cloud migration is crucial when it comes to driving firms’ longevity and success. But will all the software vendors be ready?

The CTS model of providing legal vendor software in our own cloud infrastructure, with hybrid links to other SaaS platforms, is a clear direction of travel that most law firms are now taking. As more and more firms start on their cloud journeys, CTS continues to guide and support

the legal sector every step of the way.

There’s also a big question around whether or not working from home is future-perfect. Over two-thirds say homeworking for two or more days will be a new reality, which is very interesting as two days is easy for most to agree to, but three days? Four or five days might be a bit of a stretch.

With over half saying they will have smaller offices and reduced leases, more homeworking may need to be a reality – but have firms acted too quickly and rashly here? There really is an immense logistical difference between working from home part of the time and working from home the majority of the time. Will some firms have trapped themselves into a remote working-first model? Offering remote working is ‘easy’ now, but offering guaranteed office space when you don’t have it is hard!

David Fazakerley
In-house legal CIO
CTS

www.cts.co.uk

CTS

Secure in your agility?

Leaders remain divided over decision-making power. But client calls for evidence of security continue to grow, and there's also the future of collaboration tools to consider

The final area of intersection between tech and how law firms work that we've polled about once again in 2021 is information security. On a scale where one is 'negligible' and 10 'extremely high', leaders rate the level of cyber threat against their organisations as an average seven this year, and this is broadly consistent with how the threat was seen entering 2020.

Alongside the trend toward 'need-to-know' security for new matters and requirement for more security expertise – a legal chief information security officer – in recent years we've also asked whether firms are getting more requests for security audits/reviews from clients (p32). Just over three-fifths (61%) of leaders say so this year, with a third saying not and 6% 'don't know'. That's a drop on the 87% who told us they'd seen an increase when asked in late 2019, but movement is clearly in the same direction, representing a risk and resourcing challenge for firms.

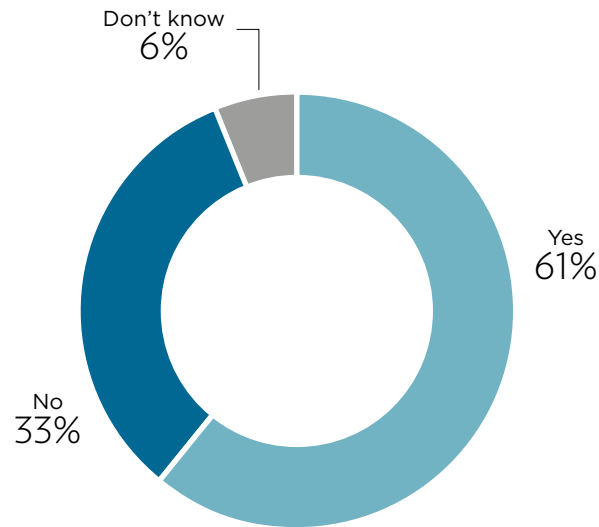
"It's punishing," agrees Ewen at Browne Jacobson. "That's just a by-product of the maturing

of the information security industry in general, but sometimes there's a negotiation process with clients around what's reasonable." She doesn't view homeworking as higher risk than office working, however, and aside from applying machine learning to email-filtering, efforts have focused on ramping up a "rolling programme of security training".

Haynes at Kennedys says of audits: "There's a consistent tightening – first clients start to ask whether something is happening, and a year or so later it has become an expectation. As a result, we're consistently introducing additional security."

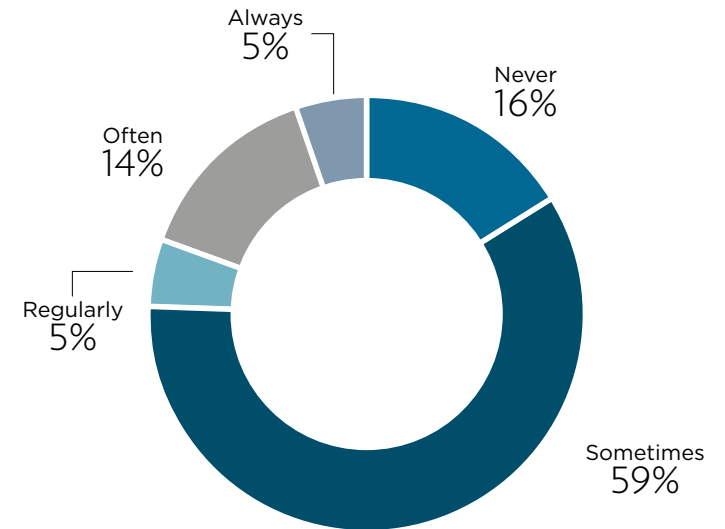
Twemlow at Burges Salmon adds: "Firms know the risk of data loss is a board-level issue, and clients will always want to be assured that their data is in safe hands. They also want to know that firms are renewing their investment in information security and not simply taking a check-box approach. The landscape has changed recently as a number of endpoints and potential opportunities for data loss has now widened to include the homes of all remote workers, but I think most firms realise information security is managed as much through

Are you seeing an increase in the number of clients performing security audits on you?



Briefing Frontiers Legal IT landscapes 2021

Do client security questionnaires or audits that your firm receives cover conference calling/remote meeting security?



Briefing/LoopUp Remote Control, May 2020

the behaviour of those that come into contact with confidential data as the tools we deploy to monitor, intervene and defend it.”

Andrew Powell at Macfarlanes also highlights that security will need to keep pace with a future of remote working more widely. “Enabling a lawyer to operate anywhere – office, home, client site, airport lounge – using the same methods wherever they are, is likely to receive investment from firms if it is not already in place. A more distributed approach to working raises different information security and confidentiality challenges, and business-continuity plans will need to prioritise maintaining

business processes rather than keeping premises operational.”

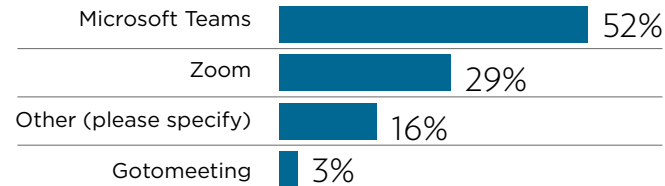
At the same time, he adds, those security audits are no longer such a barrier to cloud adoption – another possible factor in pursuit of that course. “It can be attractive to outsource the running of a service to a SaaS provider – infrastructure, upgrades, patching, security – but don’t forget you’re still looking after your client’s data, wherever you elect to store it for them.”

In late 2020 **Briefing** also carried out research surrounding the solutions firms are inevitably now using to collaborate on work, both internally

and externally. We gathered the data to demonstrate what many would no doubt assume – that Microsoft Teams is the solution firms are turning to most for internal collaboration. More than half of leaders (52%) said so, with Zoom coming second on 29% and a collection of others mopping up the rest of the market (p33). When it came to external collaboration with clients or other parties, however, Zoom was top by a reasonable distance (42%, against 32% for Teams).

Asked for the “best things” they’d done to ensure people were connecting well while working from home during lockdowns, leaders have brought up

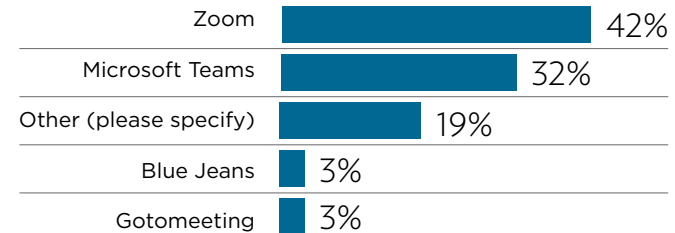
What is the dominant comms and collaboration solution for internal use in your firm?



Other answers: Cisco Jabber/Webex, Skype for Business, Starleaf, Webex

Briefing/LoopUp Cloud calling, November 2020

What is the dominant comms and collaboration solution for external use in your firm?



Other answers: Cisco Webex, Jabber, Webex, Cisco Brick and Meeting Centre, Lifesize, Mitel, Skype for Business, Webex/Jabber

Briefing/LoopUp Cloud calling, November 2020

61%

Of firm leaders say their law firms are seeing an increase in security audit requests

42%

Of leaders say that Zoom has become the dominant solution for external comms and collaboration

the rollouts of both these tools several times (Webex and Workplace by Facebook were the only others named). Many emphasised how the core infrastructure to support distributed working was in place pre-pandemic (even if one leader excitedly declares “laptops for all, Zoom for all”). However, it’s also worth seeing a little detail about just what firms have done with all the chat and channel opportunities these afford. Here are a selection:

- Regular vodcasts
- Town hall meetings
- Identifying the roles that struggle with remote working more than others, and ensuring those are prioritised for any office access
- Randomised coffee trials – or so-called ‘coffee roulette’ – to connect people with others at the firm who aren’t in their immediate team (three people mention this)

- Meetings with no agenda, only “fun stuff”, which can create ‘we need to catch up about’ conversations
- Senior and junior ‘shadowing’ opportunities
- Leadership training (several separately emphasise leadership visibility, availability and communication quality)
- Complete overhaul of the operating environment, including the streamlining of remote access, with security improvements.

This last was the only response to this particular question to include a mention of security – although the move to Teams, Zoom or an alternative for meetings could of course involve some security considerations. But when our research in the first UK lockdown (with LoopUp, Remote control) asked leaders whether those client

security questionnaires and audits included their arrangements and technology for remote meetings, fewer than a quarter (24%) said this was always, often or regularly the case (p32). More than half (59%) said they sometimes do, but more often than not, we heard, a firm will use a platform preferred by a given client. One highlighted he’d seen an increase in federating with clients, and others process points ranging from screensharing restrictions and passwords required for meetings to considering what the webcam might manage to pick up in the background.

Although video-based business comms have clearly skyrocketed, in a further gain for the cloud we know many firms have also already made a break with their traditional telephony. In our November 2020 report with LoopUp Cloud calling, more than a fifth (22%) of leaders said

How did your firm handle phone calls for people working from home/ remotely during the pandemic? (Choose all that apply)



Briefing/LoopUp Cloud calling, November 2020

they're already using Teams for telephony, with slightly fewer using an alternative cloud-based solution (19%) and two-fifths "actively considering" such a move. Almost a third (31%) reported their people had lost the ability to pass calls on to colleagues homeworking in lockdown, although a majority were still forwarding office lines to mobile (in some cases in conjunction with a UCC solution rollout). Being heavily invested in Microsoft, many firms were on course for cloud already, although it was noted that the removal of the PBX phone system would have appeared quite a radical step only 12 months earlier. Anticipated advantages ranged from reduced telecom costs (60%) to

"We noticed from other organisations that telephony was what caused most problems when everyone went home, but in our case people could just pick up their laptops and headphones and leave the building. The challenge will be getting the best comms experience possible for a meeting when half are at home."

ABBY EWEN, TECHNOLOGY AND OPERATIONS DIRECTOR, BROWNE JACOBSON

simpler portal-based user management (60%) and, of course, enabling productive working regardless of a person's location (70%).

Abby Ewen says Browne Jacobson had dispensed with fixed office phones many years ago. "We noticed from other organisations that telephony was what caused most problems when everyone went home, but in our case people could just pick up their laptops and headphones and leave the building. The challenge will be getting the best comms experience possible for a large meeting when half are at home and half in the office."

And now these platforms are successfully established as part of everyday remote-working



SPONSOR COMMENT

MORE POWER TO PRODUCTIVITY IN 2021

The **Briefing** Frontiers 2021 Legal IT Landscapes report's findings suggests that, in spite of disruption caused by Covid-19, productivity has in fact increased. This is coinciding with accelerated migration to the cloud, as law firms have been quick to react and respond to the pandemic, realising the value the cloud can bring to drive greater efficiency.

Law firms are for-profit enterprises. Each must therefore make prudent choices in terms of optimising business processes and technology investments. So, how can law firms continue to unlock productivity gains in 2021?

1. Law firms must truly embrace digital – at a simple level this means not calling digital meetings 'virtual', and embracing what digital has to offer in terms of human interaction. It also means investing in cloud platforms and the right tools to simplify the user experience, thereby helping to increase engagement by integrating with the day-to-day life of employees and helping them to work natively from applications with which they are familiar. This increases efficiencies and ensures lawyers can work on documents from any location.

2. Law firms must enable increased collaboration – lawyers need to be able to manage, collaborate and share content effectively, both internally and externally. By choosing the right cloud platform, lawyers can enhance connectivity and provide a secure location to collaborate and communicate as effectively as they would in the office.

Digital helps business. Inspired solutions help users to be happy and productive. And having an effective cloud solution will ultimately help to drive growth.

Guy Phillips
VP, International business
NetDocuments

www.netdocuments.com

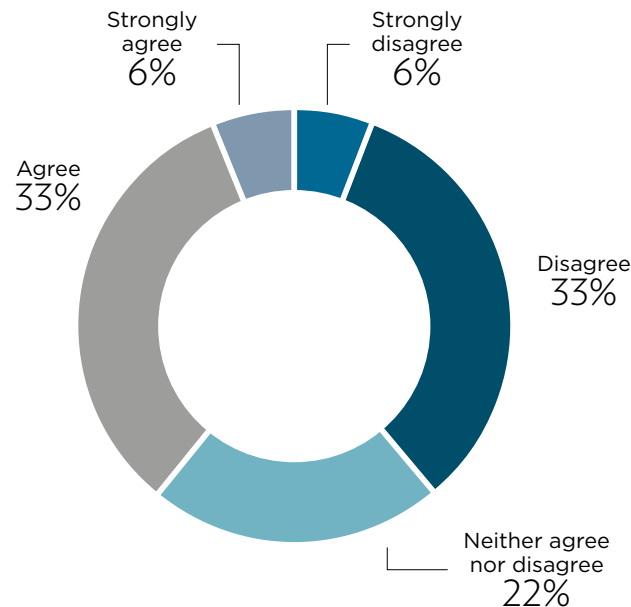


life, attention will turn to any opportunities for increased efficiency and productivity. Which information do firms want available in meetings or alongside chat? What exactly can be done with documents? Which apps will different teams find most useful, and would collaboration benefit from integration with other systems?

Andrew Telling says Taylor Wessing has a significant project underway to change the dial on knowhow – leveraging client relationship management and credentials data for insight into experience on matter types, but he also sees potential in Teams. “You can see how it’s useful for riding the wave of change as it happens in the short term, and I can see that effectively becoming a part of our knowhow system, harvested at the appropriate point for longer-term output.” That said, some of the flurry of Teams activity gravitated back to email over the course of 2020, he says: “One thing for this year is to identify the right balance between the two.”

In Remote control, we also put forward some options for possible integrations. Just under a third (32%) of leaders said they’d like integration between remote-meeting and case management systems, two-fifths (39%) said so for practice management, and three-quarters saw potential in a time-recording integration

Agree or disagree? 'The IT leader's role in top-tier UK/international law firms has the same level of executive/decision-making power as IT leaders in other sectors.'



(almost a quarter had this already). Document management was also mentioned, given increased need for “contemporaneous drafting”.

POWERED UP?

But however much the IT landscape and pressures move on each year, something that never seems to be a divide between leaders on the question of how much power they have to make decisions. In keeping with a long-term trend, respondents this year were split exactly down the middle, with as many agreeing status is comparable with leaders in other sectors (39%) as disagreeing (p33).

Anthony Stables at Forsters says: “Leaders may sit on boards, and have the respect of the partners, but in legal there’s still a difference

between being a partner and not. I don’t believe the partnership model helps, but I do believe influence is increasing across the board.” The last year may just have helped on that front. “Anything that raises the profile of IT in the firm in a good way is positive.”

Matt Haynes at Kennedys adds: “I’m fortunate here that my firm does listen and invest. But it’s our responsibility to form the relationships, build the credibility and make the business case – and that also needs to happen across the entire IT team.

“Lockdowns have really focused us as a firm on the value of involving and engaging people in change. However, if your laptops don’t work or the network is falling over, of course the board

won’t be as keen to hear your ideas for further digital transformation.”

And on top of the obvious part the department played in the success of remote working, Abby Ewen says IT has gained client-facing ground.

“It’s invited to the party a lot more than used to be the case. We’ve helped to make people more self-sufficient and tech-curious, removed some of the fear to try things, and now we’re focused on maximising the advantage of what we already have. There’s a strategic focus on developing bespoke client-facing products from some of our existing tools, including through three-way collaboration with the client’s legal and IT teams.”