

# Briefing

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SMARTER LEGAL BUSINESS MANAGEMENT

**RESPONSE TIMES**  
The legal business community's first actions faced with the coronavirus crisis

**LEADING LEDGE**  
A few words with Suzanne Liversidge, global managing partner, Kennedys

**FITNESS FOCUS**  
Why Eversheds Sutherland chose to channel the world of athletics



## *System thinking*

*Much of the working world has changed in just a few weeks – but what were views like of the expanding legal technology ecosystem at the top of 2020?*



INDUSTRY INTERVIEW

# Process under pressure

Nick Morgan, global head of technology for Williams Lea, says the Covid-19 crisis has clearly put the spotlight on business-continuity preparations, while in all climates firms must invest in rigorous change management, as well as the right technology, to drive sustainable value from their business transformation plans

**T**he number of large or medium-sized law firms that outsource at least one ‘support’ function increased 14% in 2019, to 70%, according to the latest Williams Lea-sponsored Sandpiper Partners’ survey of leaders on the topic. It says the areas of work being considered for such a transformative process are increasingly high-value – and well-managed workflow change will be critical to making them a success.

Williams Lea’s global head of technology, Nick Morgan, says that although firms continue to feel pressure from clients over fees – and therefore on cost of delivery – there’s a growing appreciation that “consistent service quality” can be protected by placing processes in new pairs of hands, supported by IT solutions. Now, as business-

continuity frameworks suddenly find themselves tested against the impact of coronavirus, this argument may well gain even more weight.

He explains: “We’ve seen law firm volumes onsite reduce significantly, as many have already asked both fee-earning and business services roles to work from home. And a significant proportion of that work has found its way to our offsite centres in the US, the UK and India. These can cover multiple locations, and move work around as necessary and appropriate, in compliance with client and information security restrictions.

“There is also anticipation of tougher economic times to come, driving more demand for flexibility – a presence in the different time zones, for example, which allows global job management 24/7. Firms may also want to change their mix of

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language capabilities, which are concentrated in different places. And then there's retaining key knowledge, if not talent, as employees move on. If somebody leaves after a long tenure, is there a risk of expertise and productivity leaving with them?"

### Automatic interventions

One area where Williams Lea takes on this latter challenge is the move to a virtual admin (VA) model. "Alongside general shifts in working practices, people are already more comfortable working with others more remotely, if supported by a reliable workflow platform," says Morgan. Indeed, Williams Lea has developed its own, called ENGAGE (Enabling Global Automation, Governance and Efficiency), which allows 'requestors' to upload work that can be automatically resourced out to the best assistant, with appropriate access controls, audit trail and real-time KPI analytics. And of course, as Covid-19 has forced widespread remote working, the value of a robust workflow tool such as this to direct, monitor and protect work becomes ever-more clear. "Robotic process automation, coupled with natural language processing, picks up structured or unstructured text, and passes a task straight to an operative," he continues. Progress on an assignment is tracked through a portal, potentially making use of collaboration functionality along the way, and it avoids the efficiency "black hole" of emails forwarded but not actioned. And an added benefit is ensuring work's only seen by the right eyes. "It gets you away from email, where it's so easy to begin typing a name, which then auto-populates incorrectly. Data loss by 'sticky finger' is one of the hardest leaks to control," he says.

Automation tech also meets compliance needs in another key service line – document and records lifecycle management (today, of course, in line with the EU General Data Protection Regulation). It's helping some firms to "digitise at source", says Morgan. "Document management strategy then becomes more straightforward. You can auto-classify and auto-set retention policies, with reminders about when to review, so you're not keeping data for longer than necessary." The business is doing something similar for a firm in the matter-inception process – "identifying keywords from a new matter or addendum and classifying it into a workflow, straight to the fee earner." Also likely transferable to the content-

heavy legal world, investment banking clients are automatically scouring publicly available information about companies to create booklets that follow a common format.

Notably, in Williams Lea's survey, 59% of leaders cited process automation as an area for investment now to help see them through any economic downturn. "But rather than technology for technology's sake, you need to find the specific use cases to drive real value at scale," says Morgan.

### Mind your change

But a change for a business on the scale of outsourcing an entire function is as much about the people as technology.

"Fear of change – of business disruption, more than anything – is real, so we've developed a methodology, as well as technology," he says. A discovery phase to deeply understand the specific business is critical, as is continuous training of the teams both implementing and delivering.

"The solution may also be phased. Centralising something somewhere new at a single push might halve your costs, but you don't want it to break your business in the process." Multiple phases may be necessary, and key success factors in implementation are communication, training, and hypercare, he explains. The ENGAGE platform, for example, lets the requestors regularly score their satisfaction with work completed, which can be used to monitor trends and address any weak points in performance, resourcing or process.

### Cloud covered

Finally, after process management (73%) and resistance to change (54%), 46% of leaders cited 'security and confidentiality' as a top challenge when managing support or administrative functions. "Maintaining complex and ageing infrastructure as cyberattacks grow increasingly sophisticated is becoming more and more difficult," says Morgan. "You need a coherent security strategy, and my advice would be do not discount the cloud.

"There can be some reluctance, stigma, and the sense firms have invested a lot in infrastructure already – but many security services, in particular, are cost-effectively available at the flick of a switch." And as with other well-managed changes to business process like outsourcing, the full benefit ought to scale over time. ▴

# VIRTUALISING SUPPORT SERVICES SAVES FIRMS MORE THAN 30% EACH YEAR

WITHOUT SACRIFICING SERVICE TO PARTNERS OR CLIENTS



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### VIRTUAL SUPPORT

