



NOVEMBER 2022

# LPM

LEGAL PRACTICE MANAGEMENT

## Efficiency first

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Now is the time to make sure that all resources are being deployed in the most efficient way possible

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### **CLEARING THE INBOX**

Categorising email management to stay in control

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### **QUIET QUIT NO MORE**

How tech can help people realise their full potential

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### **A VIBRANT BOUQUET**

Building a workforce that is equal, diverse and inclusive

# Welcome

Fine-tuning processes, systems and attitudes can deliver those all-important efficiency gains

Efficiency comes in many shapes and sizes – from something as small as a quick fix to a repetitive process, to something as substantial as the overhaul of a core business system. But it can also mean thinking outside the box – tweaking attitudes and relationships to make sure your firm is moving forward.

The simple task of creating folders and rules in your inbox can change the way you work (p4), while the incredibly challenging feat of cultivating a truly equal, diverse and inclusive workforce can make your firm more relevant for your people and clients alike (p3). An engaged workforce is critical to functioning well and making the best use of all your firm's tech investments (p6).

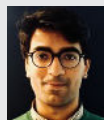
Some big questions to think about – does efficiency or effectiveness necessarily entail lower costs? (p6) And is your firm going to the right place for support? (p4) Read what experts think about these questions, and enjoy the story of how **Glover Priest Solicitors** has streamlined its conveyancing processes with **Legal Bricks**, an **Access** company, over the last decade (p5).

In case you missed it, LPM released *a special* this week – looking back on LPM Conference 2022, a tremendously successful day in early July that marked 10 years of the event. Enjoy, and do get in touch for a chat!

Aftab Bose, editor

@LPMmag | [aftabb@lpmmag.co.uk](mailto:aftabb@lpmmag.co.uk)

## THE LPM TEAM



**Aftab Bose**  
Editor

[aftabb@lpmmag.co.uk](mailto:aftabb@lpmmag.co.uk)



**Emily Nash**  
Head of client services

[emilyn@lpmmag.co.uk](mailto:emilyn@lpmmag.co.uk)



**Richard Brent**  
Head of content

[richardb@lpmmag.co.uk](mailto:richardb@lpmmag.co.uk)

## HOT TOPICS THIS MONTH

### SPONSORED

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##### Clearing the inbox

Kaden Smith of **NetDocuments** on managing high email volumes

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##### Provider problems

Nick Hayne of **Quiss** outlines challenges faced by managed services providers

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##### Real cost of cloud

**Access Legal's** Louise Abbott on whether cloud is a cheaper option for law firms

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##### Quiet-quit no more

**iManage's** Jenny Hotchin on the role of tech in improving the employee experience

Issn 2398-9742

### CASE STUDIES

#### >05

##### Efficient for a decade

10 years of using **Legal Bricks**, an **Access** company, has brought notable conveyancing efficiencies, says Ian Bury, sales and marketing manager, **Glover Priest Solicitors**

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### COMMENT

#### >03

##### A vibrant bouquet

Examining the value of a diverse, equal and inclusive workplace, with Susan Humble, partner and regulatory specialist at **RIAA Barket Gillette**

020 3925 2769  
[LPM@lpmmag.co.uk](mailto:LPM@lpmmag.co.uk)  
Burlington Media Group  
20 Mortlake High Street  
London, SW14 8JN

# A vibrant bouquet



Diverse, equal and inclusive workplaces are linked to greater success – Susan Humble, partner and regulatory specialist at RBG, outlines some principles for progress in this space

“We will all profit from a more diverse, inclusive society, understanding, accommodating, even celebrating our differences, while pulling together for the common good” – the words of Justice Ruth Bader Ginsburg aka ‘the notorious RBG’. The Solicitors Regulation Authority (SRA) expects that firms will play a leading role in making a difference. The SRA itself faces equality, diversity, and inclusion (EDI) challenges – see its 2022 ethnicity pay gap report, where CEO Paul Philip accepts that it has ‘a long way to go’.

In October 2022, sole practitioner Lubna Shuja was the 178th person, first Asian, first Muslim and seventh female to become president of the Law Society of England and Wales. To reiterate, since 1841, out of 178 people, one Asian and Muslim and only seven women have been appointed to be president. The first female president, Carolyn Kirby, was appointed in 2002. Stephanie Boyce, appointed in 2021, was the first black office holder and the first person of colour to achieve this distinction.

The Legal Services Act 2007 introduced the regulatory objective of ‘encouraging an independent, strong, diverse and effective legal profession’. The SRA Principles are the ‘fundamental tenets of ethical behaviour that we expect all those that we regulate to uphold’. Principle 6 requires the



“How do we make our people feel? Do we ask? Do we care? The SRA expects you to ‘run your business or carry out your role in a way that encourages equality of opportunity and respect for diversity’.”

**SUSAN HUMBLE, PARTNER AND REGULATORY SPECIALIST, RIAA BARKER GILLETTE**

regulated community to ‘act in a way that encourages equality, diversity and inclusion.’

The SRA has published detailed guidance on its expectations – a must



read for all practice managers. Key words are defined as follows:

- **Equality.** Making sure there is a level playing field and people are treated fairly
- **Diversity.** Encouraging and valuing people with a broad range of different backgrounds, knowledge, skills, and experiences.
- **Inclusion.** Accepting people for who they are and encouraging everyone to participate and contribute.

The Law Society provides a ‘diversity and inclusion framework’ on its website, including an action plan template. It focuses on: establishing the purpose for advancing EDI, developing actions and ensuring performance. Plans must be lived and breathed. I recall the words of Maya Angelou – “people will forget what you

said, people will forget what you did, but people will never forget how you made them feel.” How do we make our people feel? Do we ask? Do we care?

The SRA expects you to ‘run your business or carry out your role in a way that encourages equality of opportunity and respect for diversity. We expect you to be inclusive in your approach to everything you do’. Are you meeting this expectation? For example, are your firm’s client events inclusive? I recall a partner back in the day consistently inviting only the ‘special ones’ to sporting events with clients. Those excluded felt like failures. No one explained their exclusion or told them how to be included. [LPM](#)

**Continue reading about building a more diverse, equal and inclusive workplace on the LPM website**



# Clearing the inbox



Your inbox could quickly distract you from doing higher-value work, says Kaden Smith of NetDocuments

Here are six email management tips to help you master your inbox:

- 1. Take a time out.** Start by taking a break from working in your practice long enough to work on your practice and email process improvements.
- 2. Break the distraction cycle.** One easy way to stay focused when working is to disable Outlook email notifications, which will help you resist the urge to check email in real time. Windows 10 added a notifications setting, so you might need to turn it off as well.
- 3. Develop a routine for batch processing email.** Use time blocking to schedule 'processing email' as a dedicated task, not something you do continuously. Some people prefer to check email twice a day, while others check email every two hours for 15 minutes. The best way to find what works for you is to experiment, and then stick with it!
- 4. Set up processing folders.** Start by creating a folder for 'processing'. Of course, you will also need folders to file items pertaining to client matters, so you maintain a complete record within your client files. These processing folders will be used as work is being

done. Next, create three subfolders: Flagged for follow-up; read later; waiting for response

These allow you to get things out of your inbox that have already been initially processed.

**4. Reduce email volume.** Subscriptions, newsletters and things that are not directly work-related could automatically go to a 'read later' folder that you check at a specific time.

Most people choose to do this on either a daily or weekly basis. This is a separate time block from your processing time. Next, it's time to take action. **LPM**

**Read more about keeping high email volumes under control on the LPM website**

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# Provider problems



There are barriers to being the ideal partner to law firms, says Nick Hayne, head of professional services at Quiss

Managed cloud services continue to develop quickly and we understand our responsibility to match the evolution of these services to the unique needs of the organisations that rely on us to deliver the data anywhere, anytime - with any device agility their users have come to expect in the current hybrid working world.

As a managed service provider (MSP) we face a number of challenges that we need to overcome to ensure we provide cloud services that deliver the full potential for the clients we serve, especially those in the highly competitive UK mid-market legal sector.

In no particular order, here are some of the challenges we face as we endeavour to shape our cloud managed services to better reflect the needs of organisations just like yours:

## QUICK ADOPTION

The cloud is still the most attractive option for clients and prospects, but thanks to the constantly changing trends in technology we have to adapt quickly to manage any issues our clients suddenly encounter as they introduce new technology to their businesses. We also recognise that we have to be

entirely agnostic when selling cloud services to our clients - it should be based on what works best for them, not just what's easiest for us to implement. This understanding of private, public and hybrid cloud options requires more training for our teams, which could add cost to our solutions, but the outcome for every client is key.

## SIZE MATTERS

High quality MSPs such as Quiss can struggle to stand out, as almost all service providers use the same words to describe their service and appear to have similar offerings on paper. **LPM**

**Read more about challenges faced by managed services providers LPM website**

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# Efficient for a decade

Ian Bury, sales and marketing manager at Glover Priest Solicitors, reflects on a decade of using Legal Bricks - an Access company - to optimise its conveyancing processes

Glover Priest Solicitors are a West Midlands based firm with 7 offices in Birmingham, Staffordshire and Northamptonshire. They offer a range of personal and business legal services, including a thriving conveyancing practice.

Ian Bury, sales and marketing manager at Glover Priest Solicitors, talks about his firm's use of the services of Legal Bricks, part of Access Legal, and what benefits they have seen.

“The quotation tool, client portal and AML/ID checking service from Legal Bricks has really streamlined our conveyancing process. Not only is it quicker, it gives our conveyancers a snapshot of progress in real time.”

**IAN BURY, SALES AND MARKETING MANAGER, GLOVER PRIEST SOLICITORS**

## WHICH OF LEGAL BRICKS'S SERVICES DO YOU USE?

Glover Priest Solicitors have been clients of Legal Bricks for around 10 years. They use Legal Bricks to provide conveyancing searches and additionally use the quotation portal, the client on-boarding and AML/ Biometric ID checking service and Indemnity Insurance products.

## WHAT PARTICULAR CHALLENGES HAS LEGAL BRICKS HELPED YOU TO OVERCOME?

Previously, Glover Priest used around five different portals in order to fulfil all the various stages of onboarding and client information needed as part of a conveyancing transaction, which meant that the process was pretty laborious and time-heavy. Using Legal Bricks means that everything has been streamlined to one portal, making everything instantly so much easier.

The conveyancing process has been streamlined and transactions are much speedier. Previously, the conveyancers



had no visibility of the progress of their transaction and the progress their clients were making in filling out all the required documentation. Now they have easy access and updates about what is going on and can communicate directly with clients using the secure messaging feature.

Glover Priest still has clients who like or prefer to come physically in to the office to fill in forms and they continue to offer this if it's a particular preference of clients.

Where earlier they had around 25% of conveyancing clients visiting offices, with the introduction of the portal from Legal Bricks this has reduced to less than 10%, so again, it has allowed the conveyancing team to be much more streamlined in terms of service delivery while still maintaining all the same level of detail and compliance needed.

“The quotation tool, client portal

and AML/ID checking service from Legal Bricks has really streamlined our conveyancing process. Not only is it quicker, it gives our conveyancers a snapshot of progress in real time.” **LPM**

**Read more about Glover Priest Solicitors' decade using Legal Bricks on the LPM website**

## ACCESS LEGAL

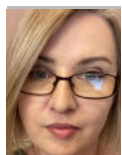
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# Real cost of cloud



Cost-effectiveness doesn't necessarily mean savings when it comes to cloud, says Louise Abbott, product marketing manager at Access

One of the first points of hesitation when considering a move from on-premise infrastructure to the cloud is the cost. This is not a simple factor to address, and more often than not the decision will come down to value rather than cost.

While cloud is sometimes positioned as more 'cost-effective', this doesn't necessarily mean you'll save money. It ultimately depends on what you want to achieve by moving your IT to the cloud. This often includes considerations not only in terms of monetary cost, but in terms of resource, time and user experience.

There are various reasons for considering the cloud, and all of these should be included in a business case for moving to the cloud or staying with an on-premise system.

## WHY SHOULD YOU CONSIDER MOVING TO THE CLOUD?

It could be that your current on-premise servers have reached end of life – they're slowing down to the point of impacting productivity, and the risk of failure is critical. Or you may be using a greater number of SaaS (web-based) software and applications that simply

don't need huge amounts of onsite server storage.

And then, of course, there is enabling a remote workforce. Cloud is certainly the easiest way to implement hybrid working – offering users a choice of working from the office or from home, or other locations such as client premises. But how does it compare in terms of cost?

## ON-PREMISE COSTS

On-premise server hardware requires capital investment – likely to run into tens of thousand pounds depending on workload requirements – which will depreciate, degrade, require

**Read more about the real cost of cloud for law firms on the LPM website**

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# Quiet-quit no more



Jenny Hotchin, legal practice lead at iManage, examines the 'quiet-quitting' trend and the role legal tech could play in keeping employees motivated

## QUIET QUITTING

At least 50% of the U.S. workforce is now made up of 'quiet quitters', finds a report from Gallup. The term, which has been doing the rounds on social media in the last few months, refers to the idea of coasting in your role and not going any further than your job description.

The study, based on a random sample of 15,091 full- and part-time US employees suggested that the overall decline was especially related to clarity of expectations, opportunities to learn and grow, feeling cared about, and a connection to the organisation's mission or purpose. According to the report, engagement figures are particularly low among remote Gen Z and younger millennials (those below the age of 35), as "less than four in 10 young remote or hybrid employees clearly know what is expected of them at work."

Is it possible to function on an operational level as a lawyer while quiet quitting? I'm not so sure – such are the demands on knowledge workers, especially when needing to keep up with clients' needs. Perhaps improving the working conditions, the tools and the processes and training is the noisier, better way to go?

## EDUCATION FOR THE LAWYER OF TOMORROW, TODAY

Talking about making noise, Law School 2.0 attracted over 700 lawyers, legal and legal tech professionals, and students to its Legal Tech Vacation Scheme this year. The course aims to arm attendees with a foundation of knowledge and practical skills, enabling them to excel in their chosen career paths, and help their organisations tackle the knotty challenges of legal service innovation. Missed it? Fear not. Law School 2.0 has partnered with iManage and BARBRI Global to launch an online, on-demand and free version of the course. The legal service innovation (LSI) course will be launched in early 2023. **LPM**

**Read more about how your firm can buck the quiet quitting trend on the LPM website**

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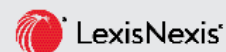
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**Emily Nash**  
Head of client services

[emilyn@lpmmag.co.uk](mailto:emilyn@lpmmag.co.uk)