



JAYNE SMITH
ASSOCIATES

Agile Working Conference

4 November 2016
at Pinsent Masons, London



Introduction: Tara Layman and Jayne Smith

- Law firms increasingly adopting agility, driven by
 - Global marketplace
 - Advancing innovation and technology
 - Need for competitive advantage
 - Capacity to move quickly and resource flexibly
- Needs
 - A mindset and desire at the top
 - Embracing change from people at all levels
 - Change architects resilient to challenges, avoid negative consequences
- Questions
 - Are firms changing quickly enough in line with the world around?
 - Is the culture of the firm enabling or impeding change?
 - Are there structures in place to support agile working?
 - How do you become more forward thinking?
- Jayne has spent the past 10 years
 - Establishing a remote business support service
 - Developing, training and managing remote teams
 - Involved in security and ISO management
- Jayne set up Bluebird Support Services in August 2016
- The Agile Conference brings together unique people from all areas of the legal business to share ideas and information
 - Members of Executive and Management Committees
 - Secretarial and Document Production managers
 - HR
 - IT
 - Facilities and Operations



Tara Layman

National PA Services Manager



"There is no reason that PAs cannot become agile. In fact it's inevitable."



Jayne Smith

Managing Director



JAYNE SMITH
ASSOCIATES

"I'm constantly at the mercy of a law firm's willingness to change!"

People



From Stephen Covey:
“Begin with the end in mind”

Ruth Davison

HR Manager for Business Services



People: The restructuring process

- Focus groups consulted for successful change management
 - Traditional generalist service with ratios of 1:3 or fewer, moving to average of 1:5 across the group
 - Partner demands dominated, so associates and trainees drove change
 - No longer marking up documents but doing it themselves, so a different kind of support was needed
 - Unbalanced utilisation – some very busy and some not at all with lack of engagement and motivation
 - Increasing amount of admin created by fee earners: Real Estate, 60-70%
 - 80% of secretaries "senior" - too highly paid for admin tasks, and based on longevity promotion not skills
 - Very little differentiation in work types between "senior" and junior secretary
- The aim was to create a task delegation structure aligned with the way fee earners actually work

Task category identified	Task delegation structure
Client management: PAs working for partners, requiring knowledge and judgment	Legal PAs: High end, personal client support in a more evolved role, delegating work within each practice area
Paper management: legal admin and basic support for NQs and trainees	Legal admins: Embedded in practice groups, team environment with legal PAs and admins working to support lawyers
Document management: document production for associates creating documents	Document production: Centralised unit dealing with documents

People: Restructuring in action

- Announcement was framed as a modernisation, announced after successful financial results
- Went live on 1 September 2015, with continuing communication via intranet and meetings
- Legal PAs
 - Training included how to manage workflow, prioritising work and delegation of tasks
 - Now more willing to push themselves and take on new challenges
 - The old way was to replace a leaver with a new joiner, but now more a case of absorbing the extra work into the team
- Legal Admins
 - Intensive interview process via social media
 - Online testing for numeracy, verbal reasoning and use of third party software
 - Video interview
 - Intensive induction programme
 - Had never worked in an office before so training in behaviour in a professional environment
 - Fluid resource, dictated by number of fee earners and amount of admin
 - The downside was that there has been a higher than expected turnover because there was an ambition to move up the ladder but a lack of opportunity to do so
- Everyone was now doing what they were supposed to be doing

People: Summary

- A year on, partners are pleasantly surprised at how well the structure works
- BLP is committed to agile working practices with an agile lawyer team already in place
- Change to an open plan environment accompanied the restructure
 - Daunting for a lot of people
 - Has brought greater interaction between fee earners, PAs and admins
 - More natural conversations and fluid teamwork
- Firms need to overcome structural, behavioural, cultural “norms” to achieve successful change management
 - Not necessarily cost-cutting exercise, but modernisation, process engineering and efficiency
 - Undertaking a legal document review and automation process
- Take notice of technology advancements and listen to younger generations driving change
- Working from home is hot topic, but behavioural change and practical considerations needed

People: Panel discussion



Thank you to



Chris Bull, Moderator
(Executive Director, Kingsmead Square)



Tara Layman
(National PA Manager, PinSENT Masons)



Ruth Davison
(HR Manager, Berwin Leighton Paisner)



Claire Jones
(Senior HR Manager, Fladgate)



Rachel Baiden
(Global Technology Training Manager, Squire Patton Boggs)



David Jones
(Business Development Director, BigHand)

People: Panel discussion

Introduction

- **David Jones** is UK sales director of BigHand, responsible for top 30 law UK firm clients, mostly global. He deals with resourcing requirements and technology to assist with strategic plans.
- **Rachel Baiden** ensures 3,000 global users, regardless of role, are as efficient with technology as they can be. She is a founding member of LTC4 which sets global standards for legal technology.
- **Clare Jones** is currently engaged in moving agile working forward at Fladgate. The secretaries are very keen to take this up, but the partnership is more challenging to convince of the merits.
- **Tara Layman** manages 32 team coordinators, a small internal DP team and the firm's offshore outsource provider which, although in its 8th year, is still a work in progress. Tara is a keen supporter of agile and works with HR teams to utilise resource across all offices.
- Technology now permits us to work anywhere and more support staff are working from home. There is a move from a *reactive* secretarial role prioritising typing, filing and phones, to *proactive* role of managing teams of lawyers, coordinating month-end billing, developing client relations and drafting correspondence.

"London-based lawyers do not have to have a London-based PA any more"
- Tara Layman

There is transformational change around how legal support is organised. Is this kind of transformation essential, inevitable and is it overdue?

- **Tara** says yes to all three, with the scarcity and cost of office space being the prime motivator. **Ruth** says that there is a fear of losing lawyer/secretary relationship. But expectations of IT and other business services have changed in how they support lawyers, so can no longer hide behind this fear.

People: Panel discussion

- **Clare** said Flaggate is starting restructuring process. Ratios are currently 3:1. Partners are quite protective of the way they work, so most secretaries are still generalist although Property has admin team. But it is clear that work is not being performed efficiently enough and that there is a hierarchy – the more qualified, the higher the service level.
- **Tara** agreed there was a clear distinction between the type of support given to a partner and a trainee, resulting in a skills gap as secretaries move into managing lawyer teams. Hard skills like Word, that you previously would never have been employed without, are being lost, while soft skills like acting under pressure and multitasking are given priority.
- Summing up, **Chris** noted that the first round of change involves recognising that there is a need to move away from generalist secretaries, and creating a specialist roles either within practice group or centralised.

What about the US firms? How do they feel about such transformational change?

- **Rachel** says there are huge differences in culture - US lawyers are very traditional with having direct and immediate access to their secretaries which makes it harder for HR teams to reduce ratios. But although culture may be different, firms face the same challenges with changes in legal secretary role.
- Squire Patton Boggs has administration support in Manchester and a centralised team expert in DP, and will be adding admin assistants. It is creating a closer relationship between PAs and lawyers and clients.
- **David** said introducing specialists started around 2 years ago, accompanied by a need to drill down into the data around restructuring - how to measure what is needed and its success. Big Hand assists with data collection, measurement and benchmarking process. Larger firms pushing towards global service centres.

"Flaggate has introduced LTC4 – associates cannot work from home without being certified. Partners also go through that"

- Clare Jones

People: Panel discussion

Are secretary-to-fee earner ratios a blunt instrument? Are we moving towards generalist vs specialist models? Are ratios still a useful tool?

- **David** commented that the average is around 5:1 but some are at 7:1, depending on where they are in restructuring process – around half the room on show of hands. People often say it's not cost-cutting but things get approved because there is a saving to be had. Margins, efficiency gains, potential cost efficiencies by moving specific work to a new location – internal or external – bring significant ROI over 3 years.
- **Audience** asked mentioned that a pressure point in her firm was Real Estate which was quite traditional. **Clare** said that they had a ratio of under 3 while Corporate and Litigation are 4.5 to 5. Ruth and Tara said their experience was different, in London at least and at BLP it was 6:1.
- **David** said BigHand were piloting task digitisation with the biggest impact to be seen in Real Estate. They took a Top 100 firm that had a turnaround time for some tasks of up to 23 hours, reducing it to same-day turnaround in 6 weeks. No ratio or other changes – just providing a more efficient process.
- **Nick Jenner** of Ince & Co commented that improving ratios is good on paper but not so good if you have a reduction in fee earner productivity. **Ruth** answered that there were still too many fee earners doing work they shouldn't be. For some it is just the way they work and for others, less work means they do it to keep busy. Or some simply choose not to walk to another floor to find the right resource.
- **David** said capacity management technology analyses how long it takes to do a task and has developed into a continuous improvement exercise in potential fee earning time. Initiating instructions need to be right first time so a piece of work is handled by the right person without follow-up to verify/clarify instructions.

"Making sure everyone is trained properly is crucial to these structural changes being successful"
- Rachel Baiden

People: Panel discussion

- **Chris** summed up by saying it should be called legal support restructuring, not secretarial. Much of it is about technology and how effectively we are supporting the lawyers supporting the client. all about ratios.

How are people getting buy-in on the restructuring process, getting away from “my secretary”?

- **Tara** said there is a need to identify value add for lawyers, to show them that the changes free them up to be more productive. Pinsents saved 18,900 lawyer hours by streamlining a process. Lawyers are sales-based and have targets to meet so can't ignore figures that come with improving technology and working practices. PAs want more career development and ability to use their judgment. **David** says technology is the easy bit; it's the adoption bit that's difficult.
- **Ruth** commented that most PAs are still working with the same people, but with added support. Client work will come back quicker because admin work is prioritised and delegated by the PA who understands the work and chooses the best way for it to be done. It comes down to the PA changing the way she works.

Home-working for legal PAs is contentious. Is this something we will see in the future?

- **Tara** sees no reason why it shouldn't happen, saying that premises space is a prime motivator - putting a bum on a seat at Pinsents costs £25,000 before adding salary, overtime and benefits. With the right technology and support in the office, no reason why a PA shouldn't work from home. It adds flexibility to get more out of the workforce, playing to benefits and strengths rather than mandating presenteeism.
- **Ruth** disagrees somewhat. BLP currently discussing sabbatical and dynamic working policies. Fee earner habits make it difficult – when a PA is working from home, they will seek out a PA in the office. There is also an element of trust and resistance to PAs working from home comes down to the culture of the firm.

“Secretaries can help you with the education of the lawyers. It's a top down and bottom up exercise. You need it from both ways”
- Tara Layman

People: Panel discussion

- **Chris** says there is massive investment in mobile working and, in space planning surveys, there is plenty of evidence to show how seldom lawyers are actually sat at their desk. **Clare** comments that some parts of the role cannot be done from home, like the post. **Chris** replies that this is “paper-based” which is also a hot topic of cost and management conversation in the modern office.
- **Ruth** commented that some roles facilitate others working from home, ie, lawyers who have calls in the evening need office support in the office. Currently agility only applies to lawyers – rightly or wrongly.
- **Rachel** spoke of law firms in Australia and in Leeds that have moved to completely agile model. Everyone works in the office when they want to, irrespective of role. It takes attention to process, communication and workflow, but it also means keeping your talent when people have families and gives work-life balance.
- **David** says lawyers now demand to work anytime, anywhere. Large firms already managing remote centralised global teams. Adoption is key – ensure buy-in before touching the technology.
- **Ruth** adds that agile working is not just “working from home”. 60% of their PAs have agile working in some shape or form - changes in core hours, part-time work.
- **Audience member** says their PAs work from home using Citrix, with a buddy system. Fee earners contact remote secretary who pass on to the buddy the tasks they can't do from home. Because of the cost of space and growing legal teams, the only option is hot-desking and converting PA space to lawyer space.
- **Chris** summed up by saying that moving resources to a different office or outsourcing may mean firms don't retain skills and knowledge of secretaries in London; working from home might maintain those capabilities.

“We have grown up in a culture of presenteeism – you need to be there from 9am to 9pm, even if you aren't working. You need to be seen”

- Ruth Davison

Place



Nick Jenner

Interim CIO
and IT Director



Kate Bottomley

General Manager

INCE & CO



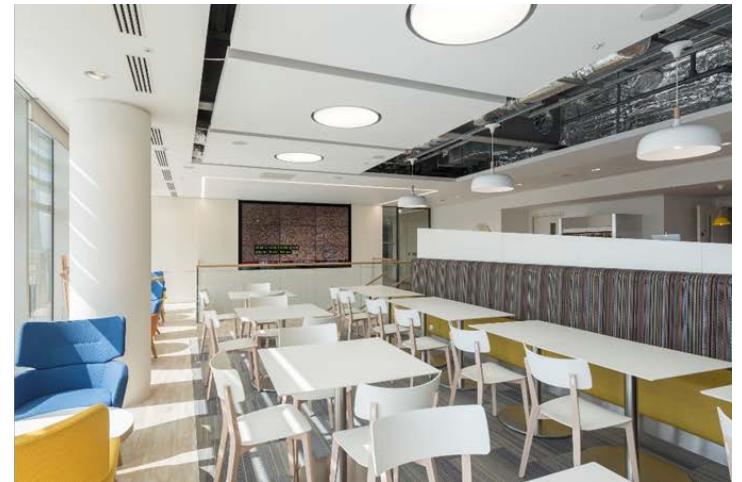
Place: Open plan ... an introduction

- In March 2016, Ince & Co moved to new premises and with that, to a fully agile office design
- Utilised latest developments in office design and technology to create a more collaborative and agile working environment
- Communication was key, involving everyone with demonstrations, sharing layout and technology plans, floor plans, site visits and mood boards

Before	After
1960s building, inefficient floor plate, old infrastructure	New BREEAM* rated excellent building, efficient floor plate
50,000 square feet	35,000 square feet
Single or dual occupancy offices	Open plan for everyone
Various shapes and sizes of office furniture	Standard desks for fee earners, pedestal storage for secretaries
Individual printers, bins, wardrobes and stationery	Centralised filing, printing and stationery, bins, individual lockers
22 linear metres of storage for fee earners	paper-lite project to push down to 6 linear metres
Various task chairs	One core task chair with variation for medical certifications

* Building Research Establishment Environmental Assessment Method

Place: Before and after



People

Place

Process

Place: Changes in environment and technology

- 15,000 square feet reduction brings huge savings in office space costs
- A more difficult message was that not everyone would have a seat without compromising the spacious design
- A major investment in technology, including a major overhaul of desk furniture
- Direct Access technology provides a secure and automatic connection wherever you have wi-fi

Out with old and in with the new
Desktop computers and laptops	Microsoft Surface Pro 4 Tablets
Monitors	Wall mounted monitors
Desk phones	Soft phones with ear piece
Keyboard and mouse	Tablet keyboard
Personal printers	Follow-me printing; tap to print
Citrix	Latest generation wi-fi
Video and audio conferencing arrangements	Skype for Business and Wireless video in meeting rooms

Place: Summary

- Agile policy is based on common sense and trust in our people
- Practicalities of the agile working arrangement
 - Consider whether there is a likelihood of anything urgent
 - Communication with the relevant office staff is key
 - Keeping personal information updated
- Agile arrangements mean you can work in any part of the office, a client's office or from home – just a case of picking up your tablet and moving
- Trainee and staff moves no longer a huge project undertaking for Facilities and others
- Not everyone was keen in the beginning because open plan arrangement is a radical transformational change
- Open plan design and multi-touchdown areas encourage
 - Greater communication and cooperation
 - Open and collaborative environment, both within practice groups and between them
 - Improves work-life balance and team morale
- New agile technology and systems enable people to generate work from any location as well as move to any location to work
- 90% of the business are now able to be flexible in how they work
- The different ways of working appeal across all generations

Place: Panel discussion



INCE & CO

INCE & CO



**hobs
on-site**

Thank you to

Chris Bull, Moderator
(Executive Director, Kingsmead Square)

Kate Bottomley
(General Manager, Ince & Co)

Nick Jenner
(Interim CIO and IT Director, Ince & Co)

Nigel Blackwood
(BIS Director, Gowling WLG)

Ben Nilsson
(Business Development Director, Hobs On-site)

Place: Panel discussion

Introduction

- **Nigel** says that Gowling's experience reflects Ince & Co. From electronic typewriters to PCs and laser printers, with each of the 4 or 5 building changes resulting in technology impacting the building and space. Wragge went open plan in mid-90s, which was led by management. In 2013 invited an acoustician who put in a white noise system that generated hum of background noise that stops office noise spreading.
- In 2014, we engaged with more agile technology so people could work anywhere within and outside the building using Direct Access. Follow-me printing meant people had to move around, which has health benefits. Improvements in AV and VC technology mean people don't have to commute between offices. Changes are often driven by client requirements which shouldn't be underestimated. People still have their own desks although the space-occupancy challenge continues to grow.
- **Ben's** company is an outsourced service provider, providing managed print service, follow-me printing, repro centres and digital mail. Ince & Co had 1.6 printers per person, so part of his function is to assist with adopting soft services to offset the pain of "losing" a printer and understand that paper management process can be changed. Shrinking the size of services and equipment, and blending infrastructure tools to shrink the footprint and gain efficiencies for everyone.
- Firms often have a massive change programme under way, shifting from a large repro service and capital equipment. Ince & Co had won hearts and minds before we came in - 'in the new building, you won't have this equipment' – which made process easier, particularly when there was a lot less space to work with. Changing the culture to encourage people not to have stacks of lever arch files, but to use an e-bible instead

"Hearing a telecoms client say 'we will not deal with law firms who will not deal with us by email'. It was a changing moment.

- Nigel Blackwood

Place: Panel discussion

How far we are from true anytime, anyplace, anywhere, maximum agility capability?

- **Kate** commented that courts and litigators still rely on paper and war rooms, which are set up but seldom used. London leads the way at the moment but international offices may take more time. Want London look and feel for new Hong Kong and Le Havre offices, but the sell is tricky to achieve in different countries.
- **Nick** says the technology is close but the biggest issue is home broadband. People say that kit doesn't work, and on investigation it always comes back to broadband speed. Being so early on this, they were able to get high level support at Microsoft, which ended up helping them debug some of the issues. In new edition of Windows 10, Direct Access is replaced with something more reliable on slower connections.
- **Nigel** agrees that tech works well on good broadband connection but it can be temperamental especially with regard to document management systems with documents going back and forth. It's down to the area and the time you're using it as the evenings are always slower, and particularly on people's train commute.
- **Nick** confirms that technical people are used to being disconnected on a train and know it will eventually reconnect when you get a signal. Direct Access takes 30-60 seconds to connect so if it drops out, unless it stays stable for a period of time, it won't reconnect.
- As for the rest, **Nick** says adoption of softphones was a big change as was open plan model because of concerns about noise. People were invited to the London office to see how quiet it was. We have a lot of small rooms so people can just move with their tablet if they have confidential matters. A partner recently came in from the Chinese office for 3 weeks and left with our tablet, he liked it so much!

"Soft phones are tricky for lawyers to get their head round. The first thing they say is 'where's my phone? What do I do?'"

- Nick Jenner

Place: Panel discussion

How are we managing the piece about agile working and printing?

- **Ben** says that if people need a bundle, they can use Direct Access to order it. They can send a job to the print queue and pick it up in the office. The document can be queued in the office and sent to them but again there is a cost element and you need to ask do you really need the document in printed form?. There is an increase in scanning things into DMS so people aren't leaving the office with paper, and a massive increase in e-bibles, where once there would have been war rooms.
- Asked whether the panel had printing from phones, **Nick** responded that they did not have that in place yet. There is Skype for business so people have access to a lot of things with that. They want to get everyone settled with what they have first, before tackling the printing side of things. There are challenges when you take the crutches away - printers, telephones, computers.
- **Audience member** asks if anyone is facilitating home printing but **Nick** says they are avoiding it because home printers are very variable and that there is a 3 page limit. **Nigel** says they have facilitated it for some people who demand it, but Follow-me printing spools it so it comes out when they get to the office. There hasn't been a huge demand although he has been experimenting with wireless printers because you can connect to a device but definitely trying to discourage printing at home. Plan your work to avoid it, and take what you need with you.
- **Ben** said they have invested a lot of energy into making sure there are alternatives, but firms are concerned with the guest experience, and ensuring that they can access the Wi-Fi and print easily and securely. The reality is that few firms are offering mobile printing. **Nick** agrees that the last thing a firm needs is the need to manage people's home printers, the functionality of which varies widely.

"It's important to have a good service manager in place to work with the client and educate them the difference between a good and bad paper process. What is tertiary and what can you feasibly replace"
- Ben Nilsson

Place: Panel discussion

What about soft phones? Are fee earners answering themselves?

- **Kate McDermott** says Trowers is considering a working trial of agile for everyone except post and print room. The sticking point with PAs working from home is telephones and whether fee earners or PA answer.
- **Kate** said it is down to the fee earners, and everyone is responsible for remembering to forward phones if they are out, but there are also call groups in the office. Some fee earners answer all the time and some pick up from Blackberry. Practice groups and people have different preferences.
- **Nick** says his team work from home a lot because it's project work, and allocation is 2 to a desk. He uses Skype and has had no problems with quality. Telephone conferences are easy as well, but it's down to how you control it – set it to forward after so many rings or to voicemail. Just as you do with a desk phone.
- **Chris** wondered if there was a sense that fee earners are answering more of their own calls because it's easier, more natural or they've forgotten to forward them. **Nick** replies that it is a mix, depending on the culture. In the Cologne office, fee earners do not like to answer their own phones. It gives the client the experience and avoids them being "unprepared" for the call.
- **Audience member** asked what kit has been lost or damaged and **Nick** responds that it hasn't really been a problem, with only two tablets stolen and one dropped. People have a sleeve and must sign a "pay if you break it" agreement with the message that an accident is fine but don't make a habit of it. The keyboards are more rugged than the previous version. They also hadn't had a problem with leaving them at home.
- **Rachel Baiden** asked about monitors to work from home. **Nick** said that the tablets can be plugged into a monitor at home, and the DP team and a few others who need it have a dual screen.

"Devices are heavily locked down, so it's more or less a brick if it is stolen. The only person who gets value is the thief that sells it and runs off."

- Nick Jenner

Place: Panel discussion

How challenging is the agile office model to US firms and generally?

- **Rachel** responded that although they love the kit, open plan will be a challenge because the US is quite traditional. **Annette Brown** said Milbank is moving out of the financial area into a more trendy part of Manhattan. Their COO was looking at what other law firms are doing, which was quite radical, but open plan and hot-desking may be a stretch. But at least they are talking about it which is something.
- **Nigel** commented that in Continental Europe and the Middle East, offices are status, and in Germany there is a closed door policy. The new office in Hong Kong is fully open plan. These are the kind of cultural shifts that are faced in trying to achieve this kind of radical change.
- **Nick** said that success is down to their senior partner's vision and being able to sell it. The senior partner is firm on the message that the design must not be compromised and that people must be willing to make the space work. We invite people to come and experience it, 'come and play' and see that the open space idea really does work.
- **Chris** said it becomes a litmus desk of the person being hired. One new partner in open plan environment at Osborne Clark asked where his office was and walked out when he was told he didn't have one.
- **Nick** said they had learned a lot from the move and got a lot right in user experience and user adoption, although some things could have been done better.

"New fee earners can struggle with the open plan design. They remark on the lovely open space but then want additional desks."
- Kate Bottomley

Place: Panel discussion

What about the business case for agile? Is there a net gain in short or long term?

- **Chris** comments that although square footage, storage, less churn, less cost of moving people bring cost savings, particularly in London. But there is also big cost in kitting the place out and putting them in place.
- **Nick** says there is definitely a net gain. It's not just the money spent on kit but there are big savings if you are downsizing premises at the same time. It's not downsizing for the sake of it. The decision to go agile comes first and the rest comes after - what do we need, find space and kit that works. It's a big investment but it is over a period of time and there are options, like negotiating on rent-free periods in leases.
- **Nigel** commented that savings on printing were significant and reducing piles of printing laying round unwanted. But that cost levels out eventually. More important was the interaction between people. Our floors are mixed fee earner and business services, and you bump into different people from different areas of the business in the kitchen and print areas. It's hard to quantify the value of such interactions.
- **Nick** says that the fact that people have to get up from their chairs may be initially be seen as negative and "wasting time", but there are health benefits and social benefits. People from different practice groups are usually in their office and see few people, but now are seeing and talking to each other. Having space for people to intermingle means that communication has improved dramatically.
- An **audience member** asks what is the average desk per person ratio at Ince & Co. **Kate** responds that business services is about 40% agile and fee earners about 25%. But this is increasing all the time with new fee earners and no additional desks. But as fee earner population grows, there is greater need for secretaries to be agile.

"More important than cost is interaction between people. It's value is unquantifiable, but better social interaction is important to the culture of an organisation."

- Nigel Blackwood

Process



Jo Nelson

Managing Director



Process: Jo Nelson

- Worked in Top 100 software company which moved from 40 offices across the UK to one floor in Paddington, 10 years ago
- Faced the same cultural challenges as we are talking today, including productivity concerns, which rose by 40%
- Most law firms have enormous amount of paper stored offsite - costly in terms of time, space, efficiency and environmental
- The risks associated with losing a file is immense, documents are a major part of business and a hugely valuable asset
- Blutex has done major digitisation exercises for NHS, London City Airport and others
- Some worrying facts
 - A well-used file will typically have 3 copies or part copies of documents - more costs, more paper, more risk
 - Misuse of boxes – opening boxes reveals leftover stationery, even empty beer cans and old videos!
 - 500-person law firm produces 1,900 pages per month per person = 11.5 million documents, 23,000 boxes per year
- A paper-lite office for agile working
 - No more boxes around the office, creating health and safety trip hazards and lifting hazards
 - £52 per square foot per month for storage + £15 to deliver each box = huge cost saving by digitising files
 - Reduces paper creep by up to 80%
- Accessibility is key to agile with barcoded files giving access within an hour, rather than waiting 24 hours for delivery
- Frees up valuable office space and improves efficiency of lawyers and their busy PAs and administration staff
- Technology efficiencies of agile paper-lite office
 - Can link to most internal workflow management systems
 - Secure - all boxes are tracked so everyone knows where they are at all times, and who has requested it, files never lost
 - Manage documents and requests with a mobile app

Process: Panel discussion



Thank you to

Chris Bull, Moderator
(Executive Director, Kingsmead Square)

Chris White
(Global CIO, Clyde & Co)

Andrew Staite
(COO, Charles Russell Speechlys)

Jo Nelson
(Managing Director, Blutex)

Jezz Gobran
(Managing Director, I-Secured)

Process: Panel discussion

Introduction

- **Jezz Gobran** helps law firms understand their risk information - paper-based or cyber threat. Law firms are fairly robust with IT security but their problems tend to lie in lack of awareness and training, and people not recognising a threat and how it can come into the business. This presents a challenge from an agile perspective, as does paper. Paper is as much a threat to a firm's business and reputation as cyber.
- **Andy Staite** has spent 2 years involved in the merger and post-merger of Charles Russell and Speechlys, finalised on 31 October. They are in catch-up mode with agile objectives to achieve by 2020. They have informal agile policies although they didn't call it that -allowing working from home but not "tech'd up" to do it properly. They have much work to do over the next couple of years to be agile, in a mature sense.
- **Chris White** says that like most firms they suffer from too much paper. Clyde & Co's business operates at both ends of the scale – large global deals and high volume claims handling work. The challenge is to adopt the right technology and processes to handle both although volume is where most gains are to be made in terms of making better use of technology and getting lawyers to understand "process".

"As a firm we are clear about people and premises aspect of agile, but more difficult is the process. The devil is in the detail"
- Andy Staite

We cannot be truly agile with so much paper. How far away are we and what's stopping us?

- **Chris Bull** comments that producing paper prevents agile working – from a macro level of where to put things and allowing people to home work, to a micro level of how individuals work. Agile means different things – moving around a building and meeting clients, as well as working outside in different environments. A lot of incredible things are happening... why not on paper?

Process: Panel discussion

- **Andy** says that law firms are making good progress but paper is a generational thing and for most, it is what they are used to and what they understand. They can absorb it, work with it and navigate it, and is particularly prevalent in Private Client work. Need to ensure that e-files have robust processes adopted and they do a lot of auditing on electronic files. One of the barriers to paper-lite is the quality of filing.
- **Chris** sees 3 things pushing it. First, client demand – a client has said the firm needs to go paperless or they can't do business. Secondly, cost – there is huge pressure in negotiations for efficiency and lower fees. Thirdly - lawyers are travelling more and need to be efficient, and expect technology to enable them to do it. If lawyers are paper-intense, they can't work on the road and there is a need to give them access on any device, securely. Keeping a copy of every email is no longer what happens, and all will have to change to ensure the business survives.
- **Chris** adds that, if you were setting up a business today, you would certainly not set it up in way it is currently run, and certainly wouldn't be talking about archiving paper. Law firms are competing with companies offering legal services who are not law firms, and who are digital. This is an admin process and not a legal one, but this is difficult to get through to lawyers who have been working this way for 30 years.
- **Andy** remembers the Bishopsgate bomb and the paper scattered in the street. Digital is clearly a better way to store information but we need to move quickly. Technology has matured. A legitimate objection is a lack of good software and applications in the industry to allow the lawyer to work productively in any file, and it needs a better interface to engage lawyers a bit better. In the last Agile conference, we looked at a product that did that – an electronic filing system that looked and acted like a paper file.

"It's not only 'any time, any place, anywhere' but also 'on any device.'"
- Chris White

Process: Panel discussion

- **Jezz** sees education as being a big part. There is not a great level of understanding about cyber security and where it comes from. In Top 200 firms, it's OK but the mid and lower tier is a very different story because it's about resource and culture. But if things are done in the right way with digitisation and agility, and security and functionality are well-balanced, it can work. But has to be a sense of both. We are probably familiar with lawyers where you have to navigate around stacks of paper from the door to the desk, and I have heard of one who had a meeting in a pub and left the file behind. Fortunately it was found but it's a huge security risk.
- Audience member asked about LTC4 and security streams. **Sue Pasfield** said there were several streams for security – information security, managing documents and email, road warrior, filing emails.
- **Julia Marron** says that filing is electronic at DLA and they are aiming for paper-lite as it is hard to imagine ever being paperless. Different groups have different successes but key to making it work is getting the PAs on board to manage lawyers and their paper retention. If there is an electronic copy it goes in the bin.

UK firms are not good at destruction as it always seems costly and time consuming.

- **Jo** says that it is very expensive to scan everything in archives, so most now operate a “scan-on-demand” approach, where they retrieve a file, scan it and then dispose of it. It can be costly to destroy files and it depends on your contracts and reasonable rates with shredding companies. If you keep a file forever, the cost never finishes although there is a comfort for many in keeping files to be able to look at them and fear they might need them if they destroy them. But if there is a digital copy, there's no need to worry.

“Education is important. In mid- and lower-tier firms, it's a long way off because paper is seen as integral”
- Jezz Gobran

Process: Panel discussion

- **Chris** raises the point that a busy lawyer can't spend hours of expensive time going through files deciding what to keep and dispose of. Opportunity cost plays a role. But as more work is digitised, there is already a long tail of electronic filing in emails – it may not be elegant but most things are in electronic format somewhere. The critical thing is having access to it when you're out of the office, particularly for matters that may no longer be "live".
- **Jayne** asked about digitised mailrooms. Andy said that this is what he meant when he was talking about "mature" and proper agile. If you haven't got stuff coming into the postroom in electronic form, you're missing a big piece. Chris said lots of post these days is *Legal Week*, *The Lawyer* and Amazon packages.

What about data protection and retention of CRM information?

- **Audience member** was curious about data protection, particularly CRM information and retention of that information. Everyone has policies, but are they adhered to and would they stand up to analysis from the Information Commissioner. Particularly things like children's dates of birth and private information.
- **Jezz** says that most law firms he deals with keep files forever "just in case". The Information Commissioner confirms that it is the firm's responsibility to decide what is kept and for how long. With regard to CRM, it depends on how the data is secured and who has access to it. It can be exported and anonymised so it doesn't cause any problems.
- **Chris** thinks a bigger issue is data sovereignty in the cloud. Where is it and who owns it. Providers are getting smarter, and Microsoft can broadly tell you where your information is held, which they couldn't do a year ago. The issues are changing and it exercises different people, like risk and compliance teams. Jo adds that they store all their information on UK servers for this reason.

"It's tricky for a global business when they are trying to share data and make it accessible to everyone, while at the same time ensuring it is secure."
- Chris White

Thanks for your feedback

"I loved the conference, it is such a hot topic for everyone right now so was bang on for us. I went straight back to the office and told everyone about Ince & Co and that we should be aiming for the same! I think in the next one I'd like to discuss in more detail about PAs working from home."

Kate McDermott - Trowers & Hamlins

"Every time we get together to talk about agile working, we seem to unpack more and more about the subject. Each law firm we hear from is tackling it from different perspective, focusing on different workstreams and starting points. It is clear there is still so much to talk about and I can't wait until the next conference to see what comes out of it."

Leanne Bentley – Bluebird

"The challenges around digitisation and paper reduction are the same throughout the sector despite the scale of a business. One would assume that the smaller firms would find it easier to make changes but that's not always the case. The challenge is around people's behaviour and a willingness to change. The key is to engage the right people / partners and move the firm forwards."

Alex Hutchinson – TBA Group

"A most enjoyable, informative day. It really made me think about the bigger picture of agile working and how it can work for all levels of employees."

Lynn Beck – Stephenson Harwood

"Thanks for organising a great event. The panel discussions were excellent and inspirational in terms of how law firms are starting to work and change their culture. There was also ample opportunity to network with peers, law firms and vendors, which enabled all to continue with the discussions. It is always a pleasure to talk and share experiences with contemporaries in the industry and make new connections. The event was definitely on point and a real hot topic for the legal community. I look forward to the next event."

Rachel Baiden – Squire Patton Boggs

And thanks to our partners and supporters



People

Place

Process