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# LPM

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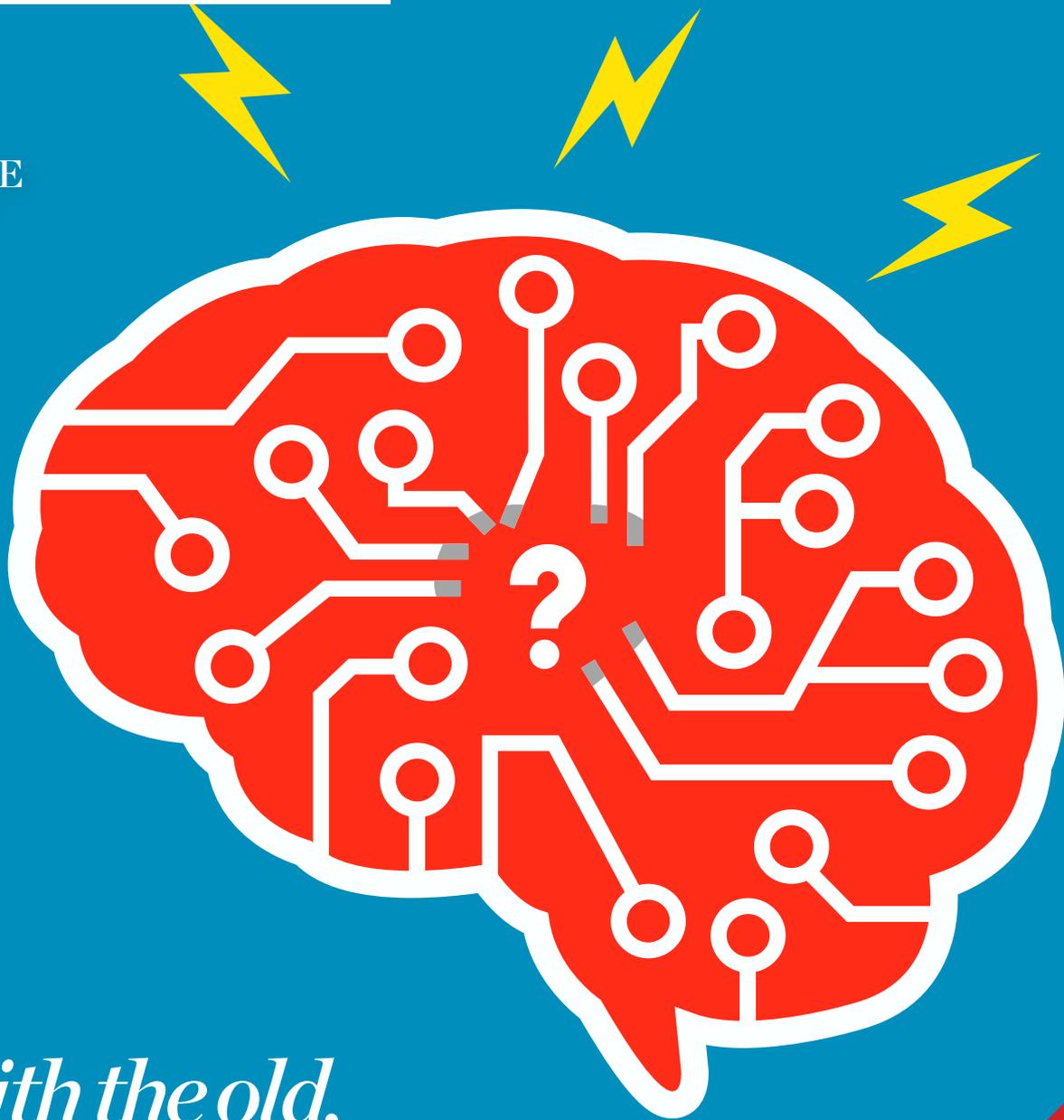
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# ON THE SAME PAGE?



Getting documents and files created quickly and seamlessly can have a huge impact on productivity. Simon Jones at Kerman & Co talks about the firm's information journey with Nikec Solutions

If lawyers are unnaturally attached to printing and reading paper in the age of the ubiquitous smartphone, just why is that?

One big challenge to cultural change is that sifting through pieces of paper can still seem significantly easier than scrolling and selecting for certain important tasks.

This fact was brought home particularly hard to Kerman & Co when people needed to review particularly large numbers of files in a short space of time.

"We'd long before realised we wanted a full digital file for our matters," says IT manager Simon Jones. "In the past we'd been able to get away with a 'bit of both' scenario. We knew we needed to make a concerted effort to move to digital by default.

"We're quite short on storage, and we wanted to get paper off the floor. But even where paper was still used we decided it should be scanned and compiled digitally, and at least stored electronically, so we had a consistent record."

It sounds nice and tidy - but there's a catch. "If fee earners needed to catch up on a new matter quickly, they found a full digital file isn't all that easy to review," says Jones. "It's actually still quicker to flick through, and cross reference between, different documents on paper."

And the limitations become clearer still when the factor of outsiders to a firm is introduced - auditors, for example. "Lexcel assessors aren't trained in our practice management system. We didn't have time to invite them for a day of training, or have someone sit with them for three, essentially doing it for them. We needed a way for anyone to move through matter information and documents intuitively.

"In previous years we would have just printed everything out," he laughs.

## BINDING AGREEMENT

The firm really stumbled across the solution, says Jones. The Nikec Binder is a product that replicates the colour coding and flick-through feel of the familiar ring binder in digital form.

But it was initially pitched to Jones for quite a different purpose. "It's a collaborative tool," he says. "You can combine files, make and share notes with other team members, and potentially pass them to clients too.

"We saw another advantage. We're not a huge firm. There's not a great need for electronic collaboration. But what immediately struck me about the Binder was that anybody ought to be able to pick it up quickly. It's hard to get the senior partner, say, in for intense training, but they

### ABOUT THE SPONSOR

**Nikec Solutions** helps law firms with their less-paper initiatives resulting in improved business efficiency.

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## LPM FACT FILE

**Kerman & Co****Revenue: £10m****50 fee earners, 70 total staff****Offices: London and Dublin****Specialisms: Full service with particular expertise in corporate, commercial, capital markets, sports law and litigation**

would instinctively know how to use this.”

The style of interaction is familiar from other tools such as PDF documents, he says. “And silly as it might sound, there is a comfort factor in the presentation of a file as you know it physically.” With a structure of clear tabs, people see it “as any other bound set of documents”.

### QUICKER COMPLIANCE

Sifting information online may be faster, but another challenge is entering it efficiently.

“Risk and compliance information such as passport details are normally held in the physical file – but when you go digital, client information is stored against them as separate contacts,” says Jones.

“It means that if a client has multiple matters, or someone returns as a director for a different firm, we don’t need the same data again. The advantage of digital is that data’s collected once and reused through the system.”

But fee earner navigation of the data levels can be less efficient – from matter up to client, then contact, and back again. “It can mean reviewing information on lots of screens at once. Several files for each fee earner every few months adds up to quite an arduous process,” explains Jones.

Nikec and Kerman collaborated to integrate Binder with the practice management system to sidestep the need to copy information across.

“At the front end it means fee earners just push a button for a file to be built,” says Jones. “It automatically fetches information from each level and creates a matter summary page at the front.”

Cleverer, he says, is the new procedure for anti-money laundering checking. “The client on file may be a limited company and we need the information on all its directors. But if one of the major shareholders is another company, that’s another investigation. You can have four tiers before you get to the major beneficiaries – so you have a big tree of contacts.

“The partner reviewing this work would be going up and down every branch verifying each document is created and saved correctly. But using Binder script we can summarise all contacts, see each one’s status and when it was last checked, and surface the actual documentation. After the summaries each document is another page in the Binder.”

Something that might take half an hour is now available for flicking through in a few minutes, he says.

### THE PAPERLESS PATH

Earlier this year Kerman carried out its first

‘paperless’ Lexcel audit.

“It was our full assessment year, so a very rigorous test,” says Jones. “It was something like 25 files over three days, which would have been boxes and boxes in the meeting room, and the assessor going in and out with various fee earners.

“We also used a data room to share internal policies ahead of time, so digital certainly ensured the assessor’s time was spent more wisely.”

Nikec Binder was also useful on the day, because assessors needed more granular detail than the firm was routinely compiling for internal purposes.

“Our current Binder template pares down files for administrative purposes. We don’t bring all emails and legal documents through, so it isn’t the full file. Our assessors needed the full files – and Binder was so much more efficient than printing and collating everything in hard copy.” Assessors had just 20 minutes of training on the morning itself, he says.

“Then fee earners were chasing to get their own hands on it.”

So this year lawyers will be allowed to start building their own binders whenever they need them.

“We’re keeping it internal for the moment – but they have the flexibility to use it for collaboration and other purposes as they see fit. We may add more automated templates as well.”

The big question, of course, is: has the firm cut back on printing? It’s hard to quantify, admits Jones – but the answer is a lot. Each audit Binder averaged 700 pages – and as new uses are rolled out the savings should start to pile up as the pages do the reverse.

But the picture is complicated. Pre-Binder, even with a digital file, printing in some parts of the firm actually increased.

“Although storing digitally, people are perhaps still working in a more old-fashioned way offline. They might be printing double-sided, but they still want a physical document,” says Jones.

That’s not just inefficient – it also introduces risk. “Print-outs used to be left on printers unclaimed at the end of the day or were muddled up with other people’s work,” he explains.

The firm has also introduced print management technology to eliminate some of these smaller human mistakes – but it’s the default print mindset that needs the most pressure.

Turning from page to screen needs to be supported by intuitive technology that takes the reader on the same mental and informational journey. **LPM**