

A portrait of a middle-aged woman with long, straight grey hair, smiling warmly at the camera. She is wearing a white, long-sleeved button-down shirt with light blue buttons. Her arms are crossed over her chest. The background is a soft-focus outdoor scene with green foliage and a building structure.

# A guide to building successful business habits

How good business practices can deliver long-term success

## Contents

Does your firm have good habits?

---

Small changes can deliver long-term success

---

The importance of building good habits

---

Continuous review and improvement

---

The benefits of continuous review

---

How to implement good habits

---

How technology facilitates good habits

---

Start small, aim big

---

# Does your firm have good business habits?



We're all familiar with our own, personal bad habits, which we often resolve to break at the turn of each year, but how often do we think about breaking business habits?

Businesses can often be unaware of their internal bad habits. Daily processes become so engrained in the business that they remain unchallenged; it's the way things have always been done and over time, it's hard to recognise the good habits from the bad.

This is particularly damaging to a business in the long term when the world around us evolves, yet our beliefs, systems and processes remain the same. Working in the legal tech sector, I'm acutely aware that when it comes to law firms,

client expectations have changed dramatically over the past few years – they expect seamless communication and prompt response times to queries – yet some firms haven't upgraded their systems or invested in automating their operations to meet this expectation. Failure to consider change within your firm, despite recognising that certain processes are holding you back, is likely to mean that you're locked into some bad habits that are potentially damaging from a commercial perspective.

# Small changes can deliver **long-term** success

I recently read James Clear's Atomic Habits. Clear talks about how, when combined, the most miniscule changes can have a significant impact upon business success and emphasises that the only way to meet your goals is to create an environment that sets you up for success.

Clear's book got me thinking about how these simple steps and atomic improvements could have a profound and positive effect on a law firm's success in the long term. Clear highlighted to me why lawyers should care about implementing good business habits and legal technology to help them succeed. Whilst improving client service and growing profitability are clearly important, without good business habits and digital foundations in place, lawyers are inflicting unnecessary restrictions on themselves.

Technology facilitates the implementation of good habits to achieve a streamlined operation – and when these become the norm, you'll

reduce errors, overhead costs and the cost of being complaint. You'll also increase employee happiness, sales opportunities, enhance client service, and importantly, achieve your goals quicker.

Digital solutions help firms to build good habits in the present that enable them to meet their future goals. As well as reaping initial gains from automating processes, increasing efficiencies, and improving productivity, technology enables firms to easily manage the day to day running of their business, so that resource can be refocused on driving growth, achieving goals, and maximising potential.

## What is a habit?

Habits are actions that have been learned, repeated, and become normal behaviour over time. What you repeatedly decide to do forms your brand's personality, reputation, and how you're perceived. Habits serve basic needs and goals, but also form part of your bigger ambitions and builds out the characteristics of your business that you hope to portray to your employees, clients, and prospects.

# The importance of **good habits** for your law firm

Clear explains, 'business is a never-ending quest to deliver the same results with the least effort'. Building good business habits helps you establish a foundation of seamless and effective processes for maximum output using as little resource as possible. When standardised effective processes are agreed upon and implemented, those actions can be performed seamlessly, therefore freeing up resource to focus on the bigger picture. They provide freedom from the daily tasks to focus on the activities that will impact future success such as marketing strategies, business development or client relationships for the longer term.

Good habits for your law firm could include agreeing on a standardised client care letter that can be easily completed and sent to a client, or ensuring all data and documents are stored centrally so everyone has access to the same information or scheduling timely follow-ups to enquiries, meaning opportunities are never missed. When the fundamentals of efficient operations are standardised, it means resource isn't wasted and time is freed up for value-added tasks that take you one step closer to achieving your business goals.

These good habits, especially when combined, have huge benefits for your team and firm. To build an efficient and productive firm, good habits need to be implemented into order to achieve a streamlined operation.

Building good habits in the present enables you to meet your future goals. Similarly, though, continuing with inefficient, bad habits now will accumulate to bigger challenges in time. As the

world changes and adapts around your firm, if your core processes continue without review it's likely those minor inefficiencies could grow into larger challenges at a time when others have likely taken the steps to move forward in reaching their goals.

**"Business is a never-ending quest to **deliver** the same results with the least efforts."**

James Clear, author of Atomic Habits

# Continuous review and improvement

It's important that habits are continuously reviewed to ensure those behaviours are still benefitting us as things change and evolve. When a behaviour becomes so natural and automatic it's easy for it to go unnoticed - and that's when habits can turn into ineffective patterns of behaviour that stop us from adapting whilst the world around us continues to change and shift.

Lean, a well-known continuous improvement methodology, focuses on removing wasteful processes from a business and is a great mindset to implement into your firm when looking to review the effectiveness of your habits. The methodology provides a structure for identifying wasteful activities, highlighting the effects of those activities on business efficiency, and eliminating or reducing those activities. If your operational habits provide processes to enable a

lean mindset then you're always going to be on track for achieving your firm objectives.

Clear explains, 'habits are the backbone for any pursuit of excellence'. The biggest impacts and powerful outcomes come from small beginnings and incremental improvements. The best results are delayed and require patience. That's why even the atomic habits of your firm will determine the success of the business. In 2003, the Performance Director of the British cycling team, Dave Brailsford, focused on 1% marginal gains and the results were phenomenal. Leaving no stone unturned, Brailsford looked to optimise performance across every area of the team's activities and after years of dedication the team went on to dominate world cycling from 2008, breaking Olympic and world records.



# The benefits of continuous improvement

Implementing a continuous review mindset puts your firm in the best position to achieve its goals, stay competitive, and tackle challenges. It allows the practice to be more agile and adaptable and ensures the foundations and basics of the business are performing at their best.

The compound effect of small improvements has a big impact on overall success but with minimum disruption and firm-wide responsibility. The benefits of continuous improvement include:

## Increased profitability

When time is saved, costs are reduced, and returns on investments are maximised, profitability increases.

## Enhanced client service

Efficiencies are passed through to clients, which improves satisfaction rates. When employees are freed up to dedicate more time to the client experience it can boost retention rates, which increases reviews and recommendations that help win new business.

## Longevity

By improving your reputation through quality client service, increasing profitability by improving efficiencies, and by implementing adaptable, flexible processes and habits you increase the longevity of your business.

# How to **implement** good business habits

It's only by proactively reviewing and analysing processes that you realise what could be improved; it's the key to identifying your opportunity, potential and growth.

The best place to start is with an implementation plan that outlines the goals and objectives of your firm. Be specific with what you want to achieve and how you plan to achieve them. As these should be firm-wide goals and habits, it's important to involve your team in the plan to reduce friction and improve buy-in.

The next stage is to take note of your firm's habits, good and bad. Review your current processes and daily activities to identify what is serving you today and whether they will continue to support your goals in the long-term. The first step to changing bad habits is to notice them. Once you're aware of your firm's ineffective processes you can implement small improvements that'll take you one step closer to achieving your goals.



**Set goals & objectives**



**Communicate to your team**



**Map out existing processes**



**Identify habits to improve**



**Implement regular, small improvements**

# How **technology** facilitates better business habits

Building better business habits is the easiest way for law firms to achieve their goals and utilising technology is the simplest way to implement better habits. No matter your goal or priority, practice and case management software (PCMS) provides the digital tools that'll help you to get there quicker. The combination of time-saving features that centralise data, reduce risk, and streamline operations helps to free up time that can be focused on taking the steps needed to reach the firm-wide objectives.

Legal software helps to build a strong, resilient digital foundation for your firm that creates endless opportunities. First, the software can reduce the bad habits throughout your firm that cause errors, delays, or poor service. Second, digital solutions facilitate the implementation of improved and modernised habits by making use of client-centric tools, automation, and centralisation. Once good habits are introduced, the software is then a platform for optimisation and improvement that can continually be adapted so your firm stays flexible. And finally, software offers freedom from the day-to-day tasks so individuals can focus on the value-added work that will propel you towards achieving your goals.

When law firms take a

digital-first approach they're increasing their adaptability and agility, so it's easier to respond to unforeseen challenges, ensures business continuity, and helps them stay competitive. Sharing, collaborating, changing, and communicating all become easier when there is a single platform to operate from, which houses data, documents, and processes.

A fully integrated, cloud-based PCMS is the cornerstone of any law firm looking for long-term success. It's the foundation on which all habits can be implemented, monitored, and improved to ensure optimum performance.



With the right PCMS in place you're better able to:



## **Stay compliant**

Reduce the cost and time of staying compliant by centralising and standardising compliance tasks to ensure best practices are followed. With better visibility of your firm's performance, you'll be able to act quicker and reduce risk.



## **Enhance client service**

Streamlined, efficient processes enable your team to deliver an effective, quality service, freeing up their time to focus on what matters to the client. Utilise client-focused features and portals that enhance the client experience and help you stand out from the competition.



## **Improve profitability**

Improving efficiencies and reducing wasteful activities, which don't service clients or the firm's goals, help to reduce costs and improve profitability. The streamlining of operations helps to increase productivity too, so the business can do more with less.



## **Reduce errors**

Embracing technology helps to minimise the reliance on manual administration and therefore reduces the risk of human error. Digitalising processes helps to centralise data to remove the creation and duplication of errors and inaccuracies.



## **Motivate the team**

Access to software that enables your team to perform their best helps to reduce the pressure of workloads and provides digital tools that individuals can take advantage of to optimise and improve. PCMS helps manage daily tasks easier, which creates a happier and more enjoyable work environment.

# Start small, **aim big**



Continuous improvements help you achieve a return on your investments, whether that's applied to your people, clients, or software solutions. Always look for ways to better utilise employees' time, skills, and feedback. Be open to discovering new software or technology features, take training, and consider adapting processes to maximise technology. These regular reviews of your processes will help your firm achieve more with the same resource and put you on the path towards excellence.

Start small when building new habits, be consistent and open to change and you'll make big impacts on the success of your firm.

[Discover Osprey Approach](#)[Book a demo](#)



# Transform your firm

The complete Osprey Approach solution combines comprehensive case management, powerful practice management, legal accounting and a secure web portal, so your firm can run a streamlined and profitable operation that exceeds client expectations.

**Save time, reduce costs and stay compliant.**

Get in touch to find out how Osprey Approach can future-proof your firm.

[Book a demo](#)

[Visit website](#)