



# A guide to implementing a continuous improvement mindset into your law firm

How to maximise success and build better business habits

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# Start with the fundamentals

A good trait of any successful business is they focus resource on doing the basics well. When applying the People, Process, Technology (PPT) Framework this suggests investing time to creating solid foundations in your operations, talent, and technology to help support the sustainability and longevity of your business. Without the fundamentals, you can't hope to optimise and compete. Hire the right people, foster the right culture, build effective processes, and implement the right technology to support your goals.

As mentioned in our previous article, how good business habits can deliver long term success, the importance of building such habits is crucial to establishing a foundation of seamless and effective processes for maximum output towards your goals. As the bestselling author, James Clear, explained, 'habits are the backbone for excellence' because they provide a solid core for performance that enables your law firm to effectively run automatically, freeing up resource to focus on value-added tasks, making improvements, and the next goal.

# Why is continuous improvement important?

In the world of business, and law, there are always so many moving, changing, and adapting elements to juggle. Nothing stands still for too long, which is why – to be most effective and optimise for success – the habits and processes you build for your business need to be continually reviewed and improved.

The process of reviewing ensures those habits are still relevant today and continue to serve the business in achieving its goals. It also helps to identify resources and investments that aren't being fully utilised, which can be key for getting the most from your technology solutions and team.

The role of continuous improvement (CI) isn't simply about improving but crucially it's about identifying what is no longer serving the business and is having a negative effect on performance. Often, it's the bad habits that are more

detrimental to performance than following good ones.

The cost of not reviewing and reevaluating existing processes and investments can be incredibly high. Being complacent could result in an increased risk of cyber-attacks; financial performance could suffer; employees may become disengaged; and clients could start leaving poor reviews. And ultimately, all those costs effect your firm's ability to stay competitive, the longevity of the practice, and your ability to navigate challenges.



# What is a continuous improvement mindset?

A continuous improvement mindset is a business culture built on the aim of implementing ongoing improvements to all elements of the business including its processes, tools, services, and products. The focus, primarily, is that those improvements are small, incremental, and frequent steps.

A famous example of the impact of continuous improvements is the incredible effects it had on the British Cycling team. You can discover more in our guide to maximising a return on your investment, but David Brailsford, their Performance Director at the time, looked for marginal gains that would compound and have a big impact. He famously said to forget about perfection but focus on progression, because that's what will make the biggest difference.

In the same guide you can also discover the three well known continuous improvement methodologies that can help you to implement the mindset into your practice. Ultimately, a continuous improvement mindset believes long-term success comes from engaging all employees to discover ideas and share knowledge that will help to innovate how the business operates to deliver a better service to customers.



## Maximise ROI on your software investment

Download our guide to discover more about the impact of continuous improvements and the well known CI methodologies.

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# 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 ensure 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:

**A positive impact to the bottom-line** because when time is saved, costs are reduced, and return on investments are maximised, so profitability increases.

**An enhanced client service** because 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, and reviews and recommendations increase to help win new business.

**An increase to the longevity of the business** because reputation is improved through happy employees and clients, risks and errors are reduced, which aid compliance and reduces costs, and processes and tools are adaptable and flexible to meet unforeseen challenges effectively.

**A competitive firm will collect, analyse, and utilise firm-wide information to make data-driven decisions that drives performance and potential.**

## Why continuous improvement is a **mindset**

A continuous review plan isn't a one-off project, but a mindset that ensures your team and business never settles. Rather than attempt large, complex, resource-heavy improvement projects, a continuous improvement mindset is an ongoing effort to seek out marginal gains.

By looking for small steps that take you closer to your goals it helps with momentum and provides a sense of achievement and progression, which is essential for a sustainable plan and long-term motivation. That's why a continuous mindset is based on goals, but doesn't have an end-goal, because this promotes curiosity and enables the team to always strive for better. A crucial element of the mindset is to ensure it flows throughout the firm else it won't succeed. The openness and willingness for change needs to be a culture adopted by frontline employees and management to see the true impact.



## How **technology** aids continuous improvement

Running a successful law firm requires more than being an expert on the practice of law. In business, data is power, and a competitive firm will collect, analyse, and utilise the right information to make data-driven decisions that drive performance and potential.

Legal technology helps to digitalise and connect the data you hold to extract and analyse through reporting tools and business intelligence dashboards. This means that your firm can gain data-driven insight into the firm's performance, rather than relying on gut feeling or instinct. With a centralised practice and case management solution, which is integrated to your other business tools, you can build an accurate representation of your firm so you can make smarter business decisions based on fact, enabling you to spot trends, better allocate resource, and identify opportunities.

Without a connected digital platform, it's an almost impossible and time-consuming task to collect and report on the data you hold. The management information gained from the software can determine the priorities you focus on in your continuous improvement plans. This insight can help to identify the areas for improvement that will have the biggest impact on your goals, and crucially let you monitor performance, and the impact your continuous review processes has had on the business.

# How the **legal sector already embraces** continuous improvement

Continuous review is already a requirement for compliance officers throughout the legal sector. The requirements, set out by the SRA (Solicitors Regulation Authority), for COLPs and COFAs is to ensure the systems, tools, and processes that are in place to aid compliance are reviewed and managed on an ongoing basis to ensure the risk to the business is minimised.

Continuous training and development are also expected of all lawyers to ensure individuals are up to date with the latest legislative rules and best practices. That expectation of review needs to also apply to business operations to ensure the firm is keeping up with client expectations, employee needs, and technology platforms.





# You five-point continuous improvement plan

We've put together a five-point plan that sets out the steps you should consider when implementing a continuous improvement programme into your firm, from creating guidelines and setting goals, through to mapping out processes and evaluating your digital tools.

# 1. Create guidelines

For an effective continuous improvement mindset and plan, there needs to be basic guidelines and structures in place to help employees understand the role they play in reaching the firm's goals. There are several things you need to consider but start by giving it a name as that will help you to refer to the plan moving forward.

To bring the plan to life, create a handbook that covers the five steps in this toolkit. Document the reasons why it's important, the benefits, and your firm's goals. Detail how it'll work, who is responsible, and how you'll measure success.

This will also help to communicate the mindset to new starters, so everyone is on board with the culture from the start.

Within the handbook, answer the following questions:

- What's the process for reviewing ideas? And who decides which ideas are tested and implemented?
- Who will have the responsibility for implementing?
- How will these improvements be monitored and measured for success?
- How will we share those success?
- How do we ensure it's a mindset across the firm?
- Are you aligning to any methodologies?
- How often are the goals reviewed?

Step one and two in this toolkit will build the fundamentals of the plan and will rarely change. Step three to five however will form the continuous review cycle and the ongoing effort to improve.

## 2. Set goals and communicate the aim

Step two is looking at the firm-wide, top-level aims and goals and ensuring these are communicated to the entire team. This should not only look at your goals for the firm, but also the reasons why you're implementing a continuous review plan.

Ask yourself what do you hope to achieve and why? How will this benefit the firm, team, and clients? What does 'the dream' look like?

The aims and goals need to be defined and communicated across the firm to provide everyone with a common purpose. This helps to measure success but also helps with motivation to improve buy-in and reduce friction.

## 3. Map out current processes and challenges

Before you can look to improve anything, you need to be realistic about your current processes. Especially as a firm grows, management become distanced from the bad habits and challenges faced in the day-to-day tasks.

Go back to basics and map out all the key functions and processes that happen across the business to identify your strengths and weaknesses. This will highlight what could be replicated or shared and what needs to be a priority for improvement.

It's easy to assume and document what team leaders think is happening, or 'supposed' to happen rather than what is actioned. Therefore, everyone within in the business should work together to map out current processes so real change can occur. It's important that employees feel they can be honest, so a supportive and open culture is important to avoid assigning blame.

With each process, tool, or task, look to the team to understand the current barriers, challenges, and pain-points. This will help you to be more realistic in step three when you're breaking down the improvement plan into manageable actionable tasks.

## 4. Define the 'what'

Based on the initial mapping out of current processes, it's time to review what can be improved to bring you one step closer to meeting your goals. This list of ideas is likely to be overwhelming, but because this is a continuous cycle, you'll always circle back to steps three to five.

To get started however, focus on the high priority list that were identified in step three and break them down into manageable objectives and plans.

For example, a goal for your firm could be to simplify the client journey. In step two, when mapping out existing processes across all departments, you identified a key challenge is not being able to keep on top of client communications, which is leading to poor reviews. You also identified that there isn't a standardised process or expectation set for client communication. So, in step four you outline the key areas you believe could be tackled to help improve on the existing process and get you closer to the goal of simplifying the client journey:

- How are teams made aware of new client communications?
- Is this managed centrally?
- Who is responsible for replying and how is the task delegated?
- How do people reply and is there service-level targets for time?
- Are notifications set and reminders added?
- Could standard templates be created or scheduled?



## 5. Evaluate digital tools

Technology and software will be the cornerstone to your firm's success and will provide the foundations on which you can optimise processes and maximise your teams' skills.

As you evaluate existing processes and look for ways to improve them, you'll either need to implement new digital tools or look to better utilise the ones you already have in place. The effectiveness of your practice and case management solution (PCMS) will play a key role in your ability to streamline operations.

If you already have a PCMS in place, ask yourself:

- Does the solution support us?
- Can it help us achieve our long-term goals?
- Do you need training?
- Can it be better integrated with our other systems?
- Is the support and training services useful?

If you don't already have a system in place, or you know it's not suitable for your firm anymore, start by considering what features and functionalities are must haves for your practice as well as what you'd like from the supplier in terms of support, training, and implementation help.



# Future-proof your law firm

By putting in place a continuous improvement plan you're giving your business every chance to succeed through boosted profits, happy staff and clients, good reputation and being adaptable to challenges.

If you choose to commit to a drive for continuous improvements, then it's important to review your processes on a regular basis, to consider whether they're still working for you. Continuous improvement isn't about a big upheaval of massive change; it's about identifying what you want to achieve, looking all areas of the process and considering how each stage can be just 1% better each time and then the overall impact of those improvements.

It's easy to become too focused on the need for perfection, but simply taking steps towards building better habits and having a continuous improvement mindset, is a great place to start.



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