

# The importance of the legal operations professional

How to bridge the gap between legal processes, people, and technology.



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# Connecting people, processes, and technology

It's no longer just about *what you deliver* as a law firm, but *how you deliver it*. There has been a permanent shift in the way legal services are delivered, which is driven by client expectations, employees demand for greater flexibility, and innovations in technology.

This has drawn the attention of many leaders to consider the effectiveness of their legal operations, an area of expertise that law firms have previously overlooked. The success of any business comes down to mastering the fundamental processes and tasks that are crucial to running a smooth operation. This involves creating a solid foundation of processes and habits, supported by tech and software, utilised by skilled and passionate people.

The connection and relationship between a firm's people, processes, and technology determines the workplace culture. To remain competitive, law firms need to foster an inclusive and innovative culture to avoid the sectors notorious reputation of toxicity and outdated practices that often lead to burnout and dissatisfaction. According to a survey from [Culture Shift](#), 55% of legal sector employees said they have previously left a job due to a bad workplace culture and 50% said bad workplace culture had impacted their productivity.

The culture of a firm impacts the effectiveness of its operation, and therefore its ability for long-term success. This guide explores how building the right culture impacts the effectiveness of daily processes, the importance of the legal operation roles and how technology supports the function, as well as creating the right environment for people to succeed.



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# Building the right law firm culture

A firm's culture is how you do what you do in the workplace. It's a combination of systems, mindsets, behaviours, and values that create experiences for employees and clients.

Your culture defines how decisions are made; how employees interact with each other and clients; how people are hired and promoted; and how individuals are recognised or celebrated. A thriving culture promotes teamwork, togetherness, and connectivity because everyone is working towards a common goal.

Company culture is important because it directly impacts upon the success of the firm. Key performance metrics such as employee retention, client satisfaction, profitability and innovation are all affected by the culture present in a company.

With the right values, systems, and behaviours in place, workplace culture can flourish, but the same can be said in reverse. If the behaviours of employees don't reflect the firm's values, the culture can quickly collapse and have negative effects on performance. A key element of success is leaders modelling the way. The culture isn't just about words, it's formed in people's actions and so it's important this is reflected in the actions of senior management and directors too.

## Law firm values

The values of a firm will be unique to each practice. However, typical mindsets and effective values could include being client centric. This may be represented in the firm by implementing a client portal and mobile apps to improve convenience for the client, ensuring case updates are always sent immediately to improve transparency, and offering electronic signatures to speed up case progression.

Or if a law firm's value is to empower employees, they may have a quarterly review meeting scheduled to enable staff to provide feedback and discuss ideas in a one-to-one setting, which is later discussed between management to help influence improvement.

**A thriving culture promotes teamwork, togetherness, and connectivity between employees and clients**

# The effects of **daily habits** and behaviours on firm culture

Your daily habits define your firm's personality, culture, and how you're perceived by clients, prospects, and employees. Your employees' business habits and behaviours need to align with the values and purpose of the firm. If your employees' purpose is simply to increase billable time to earn more money, their actions will reflect that without consideration for client satisfaction or innovation.

Leaders need to decide what is important to them so the goals can be communicated to the team. For a modern law firm to succeed long-term they should adopt these four mindsets: think digital-first, be client-focused, continuous improvement, and empower employees.

Your subsequent habits, processes, and systems then need to reflect those values to ensure you deliver on what you promise. This helps to shape the business decisions you make, the people you hire, and the technology you implement to help build a successful culture and operation within your firm.

# The **operational challenges** faced by SME law firms

Alex Hiscutt, non-practising solicitor and case management developer with Osprey Approach, says that one of the key operational challenges she sees for SME firms is finding the resource to assign a dedicated legal operations or legal tech role. Fee earners are stretched and unable to dedicate their time to the role of heading up legal operations and they don't have the budget to hire someone.

"Taking charge of legal operations covers so many elements within the firm; you need to understand the firm's culture, strategy and what you need the technology to do."

Hiscutt points out that some firms fall into the trap of believing they have outsourced this role to an IT consultant – "but that only covers the firm's servers, network, and equipment – not legal operations and case management. It doesn't get under the skin of what the firm is all about and what it's trying to achieve."

In many SME firms the responsibility of at least some aspects of legal operations tends to fall into the lap of practice managers, but Hiscutt sounds a note of caution: "Unless the practice manager has expertise in operational, financial and technology management, along with a strong understanding of how the legal sector works, then it's likely that the role will become a watered-down version of what's actually required."

Ultimately, if the role of heading up legal operations falls to someone who juggles other responsibilities, such as fee earning, the latter is going to take precedence because billable hours is the priority. This means that opportunities to improve the running of the firm, and remove any barriers to greater productivity and profitability, are missed.

**"Taking charge of legal operations covers so many elements within the firm; you need to understand the firm's culture, strategy and what you need the technology to do."**

# The **role of technology** in facilitating effective habits and operational success

According to [Briefing's 2022 Frontiers Report](#), firms are threatened by peers with more tech-driven operational models, which is putting pressure on practices to advance their digital strategies to stay competitive. Firms of all sizes are, by now, aware of the benefits and opportunities tech can bring to the legal sector. It enables lawyers to do what they're hired to do – lawyering, not endless unbillable admin. It also aids individuals to juggle multiple roles or responsibilities more effectively by utilising legal tech to centralise data, improve performance visibility, automate processes, and digital tasks.

It isn't the decision to embrace tech that causes challenges within firms, but its implementation, adoption, and utilisation. Firms - and their clients - will never reap the rewards of any tech investment if no one is using it. But the adoption of tech is influenced by culture because it'll determine where it's encouraged, prioritised, or seen as a benefit.

The key to adopting any new process or system is to start with the basics. Identify how you currently complete fundamental tasks including opening a case, producing a document, raising an invoice, and providing updates to clients etc. Then, highlight areas for improvement where legal software can help to standardise, streamline, reduce, or automate.

When implementing the improvements to your team's daily habits and processes be sure to consider how they relate back to your wider values and goals. Are they helping you to be client-focused, empower employees, and innovate?



Discover the fundamental business habits all modern law firms needed to adopt for long-term success.

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# The **role of people** in utilising technology

When new processes and systems are implemented, you may be asking some of your team to change decade-old habits, so be sensitive to how change is introduced. Employees need to feel empowered by tech, not scared by it, which is why a people-approach to tech is key to success.

**Communication is crucial.** Leaders need to listen harder to teams and involve employees from the outset of any new process or system. Discover the current challenges faced by every role in the firm and ask for ideas and feedback without assuming the answers. This will help alleviate fears and encourage teams to stay open to adopting and improving habits.

A people's approach to tech puts humans at the heart of processes to ensure employees and clients benefit and are empowered by the digital tools. When people feel connected and included this can be felt in a company's culture.

To optimise operations successfully **the gap between technology and legal processes needs to be bridged.** This requires assigning the right person / people at the firm to take responsibility for implementing and adopting legal technology to improve operations.





# The importance of the **legal operations** role

In its recently published [white paper](#), Wolters Kluwer found that in firms running small departments (teams of 1-10 people), over three quarters of them (77%) don't have a dedicated legal operations professional – that is, someone who focuses on optimising the delivery of legal services to add value, maximise productivity and streamline processes through technology. With the absence of this role in most SME law firms, it's likely they are struggling to compete with their larger counterparts, where half of firms with large departments (more than 21 employees) have a dedicated legal operations professional.

It's clear from Wolters Kluwer's research that firms recognise the importance of prioritising their legal operations, with most practices agreeing that they will have a dedicated person in place within the next few years. Given the speed of change that the sector has experienced in recent months, there's a real risk of firms being left behind if they fail to act. However, for such a move to be successful, firms need to commit resource and budget, which smaller firms may struggle to do. However, all firms can implement small, effective changes as a means of benefiting from the improved legal

operations, such as identifying an individual who can harness technology to streamline their operations, improve efficiencies and look at ways to add value.

Having someone at the firm taking responsibility for legal technology adoption, assessing what you need and why, and measuring its impact, over time, will facilitate the implementation of good habits to achieve a streamlined operation. Building effective digital habits across your firm will help to reduce errors, over-heads, and the cost of being compliant. You'll also increase employee happiness, sales opportunities, enhance client service, and importantly, achieve your goals quicker.

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The benefits can be realised by building good business habits through technology, which 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.

With dedicated individuals driving good habits through technology, and ensuring they become part of the firm's culture, resource isn't wasted,

and time is freed up for building marketing strategies, working on your pipeline, or building client relationships.

So, identifying the *right* person – whether that's the operations manager, managing partner or practice manager - is an important first step in taking charge of your legal operations to ensure your firm's future success.



# How SME law firms can implement the legal operations role

Hiscutt notes that SME firms have set up successful models where each department has a 'super user' who "gets to know the legal software well and can implement new processes, workflows and oversee compliance. They build a closer relationship with the software supplier and are an important point of contact for continuity."

Issues can creep in when some senior management don't buy into the concept of legal operations, warns Hiscutt: "It's essential that there's buy-in right across the firm to ensure that accounts, support staff and managers are all behind shared goals." She notes that whilst it can be difficult for fee earners and others to juggle their workloads alongside the responsibility for adopting legal tech, this can be overcome by creating a good working relationship with your supplier from day one and "where everyone across the firm can easily access training and support."

Hiscutt says that where firms don't feel they have the right person for such a dedicated role, and hiring someone isn't possible, a third option is to build legal operations into the job description of practice managers, c-suite executives, and heads of department roles. "Without legal operations being high on the agenda, it won't ever form part of a firm's culture or become a priority for continuous improvement."

It's important that **everyone across the firm takes some level of responsibility of legal operations**, says Hiscutt. "It's all very well having a tech person set up an amazing system that does everything, but if staff don't buy in and take responsibility for using it then it's going to fail."

She points to this being a wider issue of firm culture, since "firms that are truly inclusive recognise that each job role, no matter what it is, has an important part to play in the firm's overall success."

**"It's essential that there's buy-in right across the firm to ensure that accounts, support staff and managers are all behind shared goals."**

# Creating the right environment for success

For long-term success, legal operations professionals need to foster an environment that enables effective habits to flourish while reducing inefficient ones. Achieving this requires aligned goals, accountability, effective tools, and the right mindset.



Discover more about how to create the right environment to improve the effectiveness of your firm.

[View guide](#)



## Aligned goals

Aligned goals help you to focus on what it is you want to achieve. If you know your goals and your purpose, you'll be able to design the most effective processes for the job, monitor performance, and communicate the plan to your team for firm-wide support.



## Accountability

If your firm or team aren't held accountable for their daily responsibilities, they'll never be motivated to complete the necessary tasks. It can be easy to slip back into old habits, but with specific targets, individuals or teams are held accountable for adopting new processes to meet the wider goals. Performance can be monitored, and areas of improvement can easily be identified for continued development.

When reviewing operational decisions, leaders need to consider things like encouraging staff to be open to embracing new software or technology features; placing importance on staff taking regular training to ensure the best use of technology; and continually assessing how best to adapt existing processes to maximise its impact. These regular reviews of your processes will help your firm achieve more with the same resource and put you on the path towards excellence.



## Effective tools

Do you have the right technology, infrastructure, digital tools, and people skills to achieve what you're aiming for? Can you utilise the resources you already have, or does it require investment for long-term success?



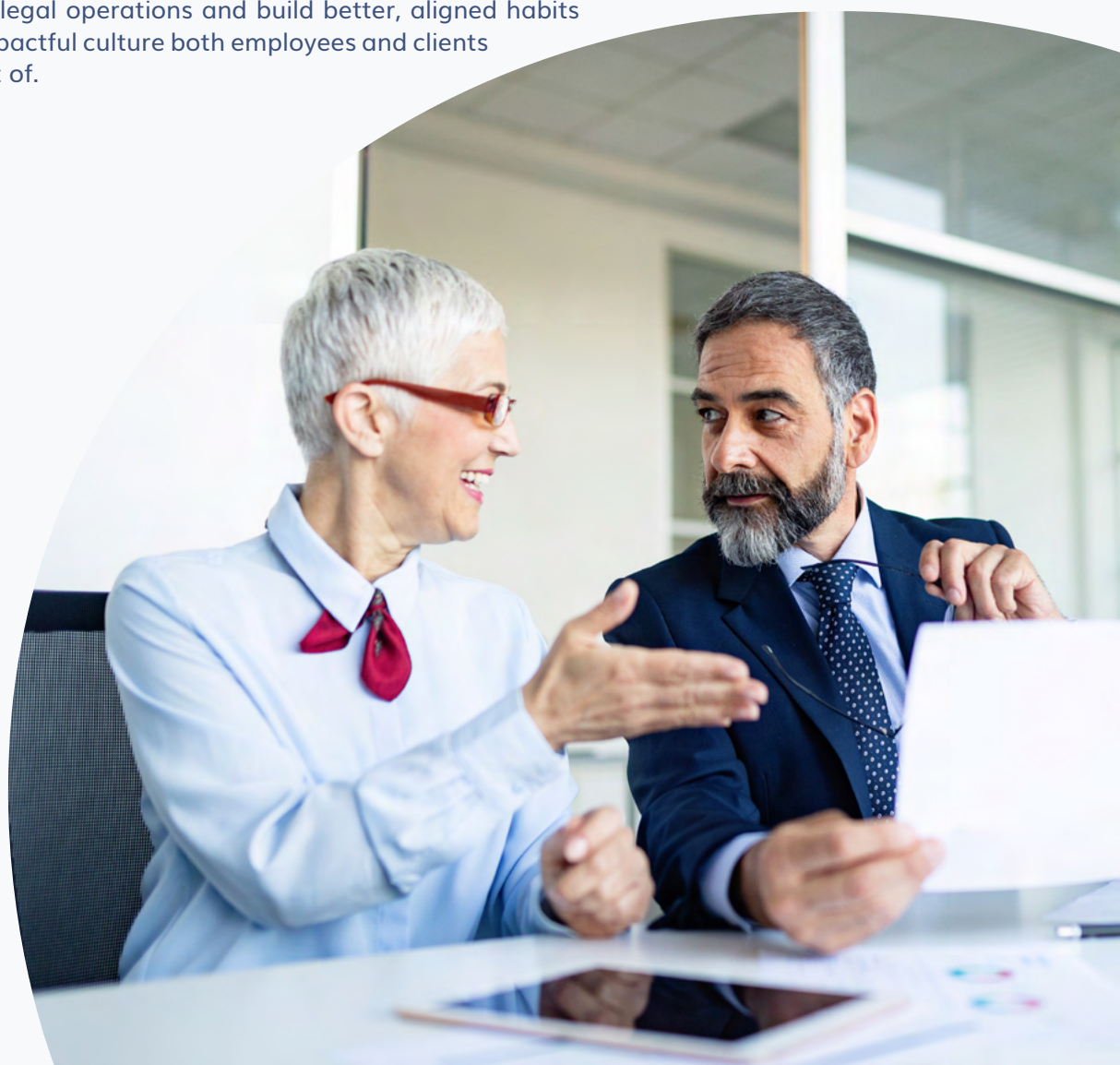
## The right mindset

This refers to the motivation and mindset of your entire firm. As the saying goes, you're only as strong as your weakest member, so ensuring your team has the right mindset for improvement, to manage change, and for optimisation is crucial to building the right environment for success.

# Take control of your legal operations for your **firm's culture to thrive**

To build a thriving culture within your law firm - to help attract and retain client and employees - you need to start by asking yourself what is important to you. Determine what your values and associated mindsets are. When you know what's important you can begin to implement daily habits and processes, utilising technology, which align and help you to reach your goals and follow your values.

Everyone in your firm is responsible for its culture and long-term success. All habits and behaviours determine a company. But never before has the legal operations role come into its own as a means of driving forward positive change. When everyone is striving for the same goals there is a sense of connection and purpose - the components that help shape a culture. Start with the fundamentals of legal operations and build better, aligned habits that create an impactful culture both employees and clients want to be a part of.





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