

Stay competitive with a digital operational strategy

How modern law firms can implement a digital-first mindset to improve long-term success.



Episode 1
of the
**Build Better
Habits Series**

Build effective **digital** habits

For episode one of the **Build Better Habits webinar series**, we were joined by Cecile, partner lead at Coadjute, David, head of marketing at Quiss, and Alex, new business manager at The Law Factory. Our expert panel shared their practical tips and advice on how law firms can successfully implement a digital strategy, its benefits, and how to maximise value.

A common theme throughout the digital habits episode is the importance of connecting a firm's people, processes, and technology. A clear vision and effective firm-wide communication will ensure firms reap the benefits that legal technology can provide whilst also maximizing returns on investments.

In this guide we discuss exactly what it means to be a digital-first law firm and the reputational – and importantly financial – benefits you can achieve with this mindset. Whether you're looking to implement new technology into your firm, or better utilise the systems you have in place, this guide will provide practical advice and top tips for running a successful modern law firm.

In this guide we cover:

What a digital-first mindset is

The importance of implementing a digital operational strategy for long-term success

The benefits you'll achieve and habits to adopt

How to improve technology utilisation across your firm

Meet our panel of legal experts



Cecile Papin – Partner Lead

Coadjute aims to connect the property market. Their intelligent and open network connects property software systems via one simple integration. This enables all parties involved in the property transaction to rapidly and securely share messages and documents, and synchronise events with other parties on the network.



David Ricketts – Head of Marketing

Quiss has been delivering IT support services since 1988 with the aim to help organisations of all sizes and complexity to exploit technology and applications to gain or increase competitive advantage.



Alex Simons – New Business Manager

The Law Factory provides a comprehensive legal accounts service for solicitors. Their extensive experience in the legal market helps firms nationwide including large legal aid firms, private client, and charities, to smaller niche practices.

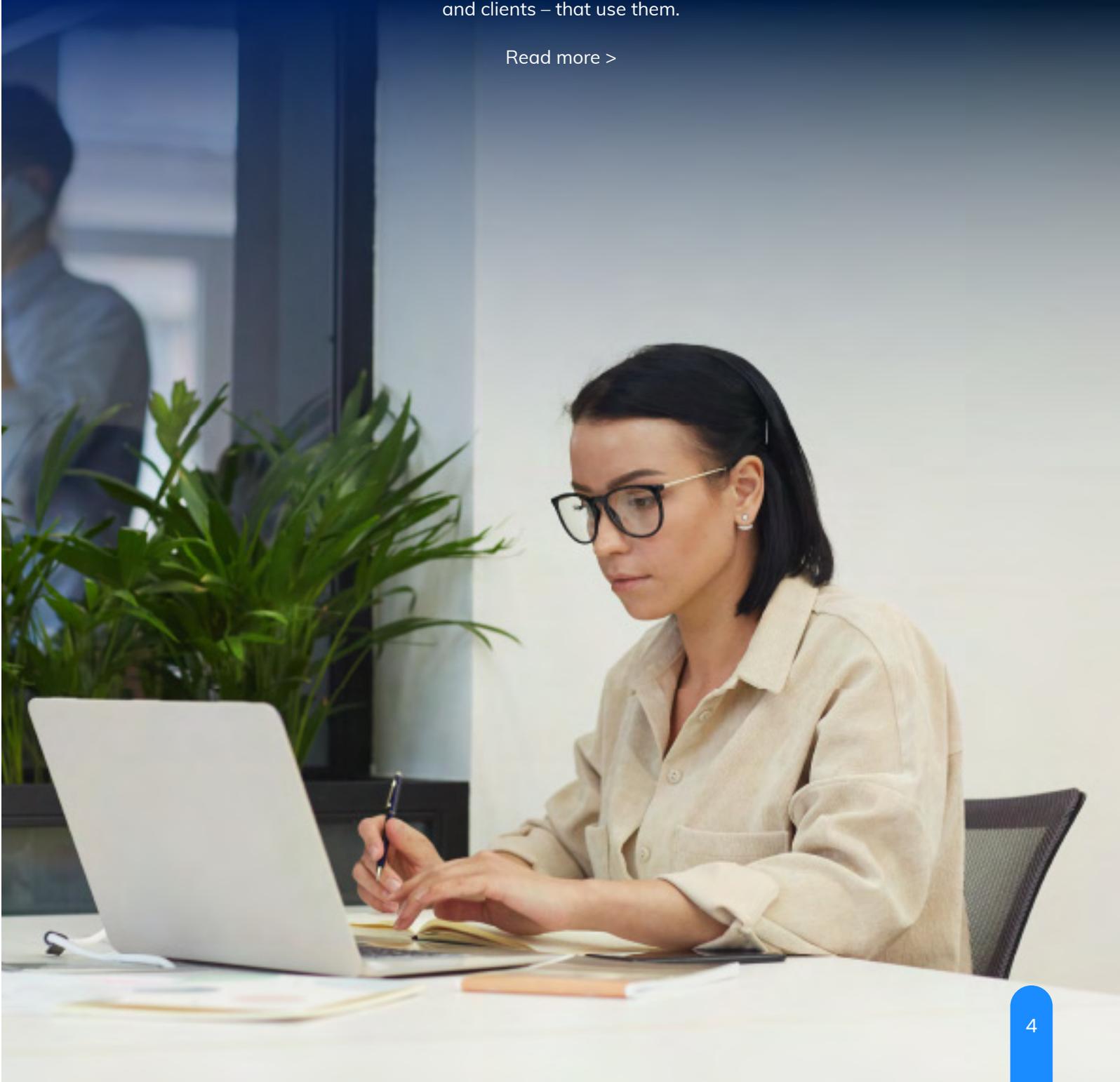


1

What does a **'digital-first'** mindset mean?

We began by asking our panellists what a digital-first mindset means for modern law firms, and they all agreed it's not about specific technologies or digital tools, but always about the people – employees and clients – that use them.

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What does a 'digital-first' mindset mean?



"For me, being a digital first company really means utilising the tech to help you run your business more efficiently, to streamline your processes, to enhance productivity, to provide you with a new way of generating opportunities, and to stay ahead of the competition.

"But something that is really important to note is that digitalisation is not primarily about the use of a special piece of tech. It's really rather about the organisational change that is related to people, to processes and to competitive dynamics. And then you use the tech to serve that organisational change that you want for your firm."



"We deal with a lot of law firms every day, and the main focus of the ones that are being really successful in this digital space is one, the drive for simplicity and two, putting the customer at the centre of what they're doing. You should have the mindset that any challenge or opportunity you have, the solution that you're going to put forward should be as digital as possible. Customer centricity is massively important because things are changing really quickly, the way clients are engaging has changed dramatically in the last 24 months."



"I'd say it's about taking advantage of the opportunities made possible by technology. It's looking at who you are at the moment and where you want to be. That starting point is probably the most important point of taking advantage of new technology. It's seeing that "Okay, where are we deficient? Where could we improve?" and then looking at different pieces of software to help you.

"It's not just about the software, it is also about the people that you've got to bring with you. If you've got people who are unhappy and stressed and are not on board with it, it's a real problem."

2

What **challenges** does being 'digital-first' help SME law firms overcome?

Law firms with a digital-first strategy can more easily connect their employees, clients, and processes to ensure an effective and scalable operation that can provide a valuable, but profitable service. Our experts discuss how utilising digital tools can help SME law firms overcome their top challenges including profitability, client expectations, and staff retention.

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What challenges does being 'digital-first' help SME law firms overcome?



"I've got six bullet points on this for challenges that SMEs face..."

"Operational efficiencies is always a big play. With everybody we speak to, a lot of organisations are inefficient in many respects, some are brilliant, others aren't.

"Product innovation; we've seen new products come out from law firms. The adoption of technology has enabled firms to scale with the people they've already got, especially if they understand the customer and how the customer wants to engage.

"Recruitment and retention of new talent or existing talent is a big play. There are big numbers being offered by lots of firms, so people are being targeted all the time. Even if you haven't got the right laptop or the right tools for the job, sometimes that can be the difference between staying and going.

"The way that customers are engaging is a challenge for a lot of firms because the customers are getting younger and the way they want to engage has changed.

"And finally, it's potential margin erosion. If you're inefficient and you're not doing things in the way customers want, some customers can be unprofitable. It's a real consideration."



"The biggest challenge for everybody is time constraints. It's massive. The problem we've got is that time literally is money. I know that it's a real cliché, but with legal it's true.

"If you're a conveyancer doing fixed fee work, but your firm is generally inefficient and you're not thinking digital first, or putting these really good processes in place... this is why firms lose money.

"This is also where, in my experience, a lot of staff are generally unhappy. Sometimes, if the firm won't move forward or give employees what they need to be less stressed, happier, and feel like they're making a difference, they reluctantly have to leave to then go somewhere else. That's when you start losing that good talent, these people that have been around for a long time."

What challenges does being 'digital-first' help SME law firms overcome?

"I think wanting to become digital first is already usually beneficial because at the point that you need to digitalise, you have to start by having a deep look at your processes in order to establish what needs to be automated, what needs to be transformed, and what goals you want to achieve. That really enables you and your team to realign on priorities and goals and to go through a strong refocus collectively.

"And then you can start measuring the benefits of digitalisation through a variety of KPIs. It's important to measure qualitative KPIs as well. For example, employee satisfaction, which is so important for our partners because a lot of firms identify recruitment and retention as massive pain points. The list is long, and you can really choose the KPIs that matter the most to you and your business model."



"The law firms that are successful in a digital space are those that drive for simplicity and put the customer at the centre of everything they do."

3

What are the **key habits to adopt** to successfully become a digital-first law firm?

To maximise value from your tech investments our panellists discussed the habits all law firms should adopt to fully utilise digital tools and successfully run a digital operation. The experts agreed on six key habits...

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Six habits law firms should adopt

1 Communicate your vision

To successfully implement any new business strategy or digital tool, David says that responsibility and ownership are key for success and that “every firm needs to have a clear vision from the leadership team,” so that they understand how the technology can benefit them and the implications for the firm long-term. This makes it easier to choose the right partner, solution, and measure success.

2 Be client-focused

Always have the client in mind when implementing new processes or digital tools. This requires an understanding of clients’ needs, knowing what drives them, and how firms can provide value.

3 Keep it simple

David explains it’s important not to, “overcomplicate the relationship between technology and commercials.” Ensure the tools invested in will help the firm to fulfil its vision and business goals, and meet your clients’ and employees’ needs, without adding additional layers of complexity.

4 Protect your data

Law firms are a high-risk industry for cybercrime, so when digitalising your operations ensure that it protects both the firm’s and clients’ data. Cecile advises to, “have data security at the heart of everything you do. We know the impact that a security breach can have.”

5 Standardise your processes

Before investing in any new software, law firms should start by reviewing and documenting existing processes so it’s clear how the digital tools will help to standardise, automate, and enhance. Alex comments that, “[case management] software is a great tool to make daily tasks easier for you, but you need to get your processes documented.”

6 Stay on system

Law firms will only achieve a return on their software investment if its capabilities are fully utilised. Alex stresses how important it is that law firms involve their team at the beginning of the process to ensure they’re confident using the system: “Take the time to learn the capabilities and take advantage of training which is free for Osprey users. That way you make sure you’re using what you’re paying for every month.”

4

How can law firms **improve tech utilisation** across their team?

To end our discussion, we asked the experts for their advice and best practices on improving firm-wide tech adoption, increase utilisation to get the most from their investments, and to help firms change their habits.

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How can law firms improve tech utilisation across their team?



“For any firm looking to change software, you’ve got to get your accounts team involved because it’s the nuts and bolts of almost all of your COFA compliance.

“My main driving point for today is to bring people with you. Ensure your accounts team is involved is the biggest one for me and review the changes and get the demonstrations done properly so that everybody has a chance to voice their opinion.

“I agree with David earlier, he said someone needs to take control of it and own it. I 100% agree with that, but as part of that, they need to then say, “right, this what we’re looking at. These are the three software providers we are considering and I want you, as a team, to tell us what you think of them and highlight any pitfalls that we could come across here.” That way, it becomes a team effort and everyone’s driving towards the same thing and it becomes this really great positive things.”



“Some of the difficulties we see is that there’s an 80:20 ratio where 80% of people do adopt technology, and then you always have that 20% who are laggards. They still do things the old way. So you have a real disconnect, and that’s where efficiencies in the firm have problems.

“You’ve got to have a clear strategy, people leading the way, and ownership. Once you have that, communicating with your staff the reasons why you’re doing what you’re doing is critical.

“Once you’ve done that, the onboarding and the adoption of the nice piece of technology is massively important. How you do the little things is how you do the big things.

“And the final piece of advice is training, training, training. It is critical; ongoing training. Because you need people to form new habits quickly, and without the training, without being told what it’s for and the vision, and without being onboarded properly, you might as well put your money in the corner and set fire to it.”

How can law firms improve tech utilisation across their team?

“I totally agree with the points that were raised. I think that the adoption of any new tech should really be a collective decision that is made by as many teams as possible. I think that the fewer the stake holders involved in the decision making process, the more difficult and slower it is going to be to have the tech adopted.

“On top of that, I think that it’s really important to establish a culture of innovation within a law firm and making it stick. So for that, you really have to assess how the firm will react during periods of experimentation. Which structures, behaviours, and goals must be put in place before to enact innovation.”



“It’s really important to establish a culture of innovation within a law firm. You have to assess how firms will react during periods of experimentation.”



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