

# Implementing continuous improvement

How modern law firms can improve long-term success



Episode 3  
of the  
**Build Better  
Habits Series**



# Build effective **continuous improvement** habits

For episode three of the **Build Better Habits webinar series**, we were joined by Sarah Keegan, co-owner at The CS Partnership, Laurence Sutton, practice manager at Brevitts Solicitors, and Rich Dibbins, owner at Staxton Digital. Our expert panel shared their practical tips and advice on how law firms can successfully implement a culture of innovation to stay competitive and improve long-term success.

The discussion centred around optimising for the future and the importance of ensuring your internal goals and operational strategy guide innovation and continuous improvement across the firm. Ultimately, all with the aim to maximise value from your investments, reduce risk, empower employees, and satisfy clients.

Our expert panellists discuss what problems could occur if firms don't adopt a continuous improvement mindset, how to successfully implement the mindset, and the key habits all modern law firms should adopt for long-term success.

In this guide we discuss exactly what a culture of innovation means and provide practical advice for adopting the fundamental optimisation habits that will provide financial and reputational gains.

## In this guide we cover:

What a continuous improvement mindset is

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Why law firms should adopt a continuous improvement mindset

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How law firms can successfully implement a continuous improvement mindset

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The top habits law firms should adopt to foster a culture of innovation

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# Meet our panel of legal experts



## Sarah Keegan – Co-owner

The CS Partnership are consultants for law firms that help teams create a harmony between technology and legal practice. Helping practices run a modern law firm and incorporate new habits that streamline operations to meet their goals.



## Rich Dibbins – Owner

Pulling together the expertise of business development and digital marketing to help support law firm's digital strategy. Staxton Digital help practices manage their social media, digital media, marketing reviews, and digital channels.



## Laurence Sutton – Practice Manager

Birmingham-based private client law firm that has been servicing clients for over fifty years. Aiming to provide a practice where clients feel welcome and at ease, Brevitts specialises in securing peace of mind for their clients across a range of estate planning and probate services.



**1**

# What does a **'continuous improvement'** mindset mean?

We begin by asking our panellists what a continuous improvement mindset means for modern law firms, and they all believe it is about optimising for the future. The panellists discuss having an operational strategy and internal goals that guide the continuous improvements and innovation across the firm.

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## What does a 'continuous improvement' mindset mean?



"Continuous improvement is not just about us being up-to-date, it's about being ahead of the game. It's about being engaged in the practical process of change and the impact that it has on what you do and how you do things.

"It's become part of our mindset and it's started to seep into the culture of not only the management, which is small, but also the staff that work for us, because without their engagement, it's not as effective. It doesn't need to be elegant and it can be simple and straight forward."



"For me, I always describe it as a lazy brain. In other words, I don't like wasting everyone's time, and I really hate wasting my time. In the CS Partnership, we concentrate very heavily on eliminating busy for busy's sake, which is effectively continuous improvement, isn't it?

"Laurence was absolutely bang on, yes we help firms do massive changes, but it's about the little changes. It's about the 1% change every week or every day, that is repeated that brings in change and therefore improvement all of the time in what you do."



"With digital, continuous improvement is every day. Digital moves at an extreme rate, and every time I've read something new and gone to implement it, there's another thing that's come out. So, I would say that continuous improvement is looking at things that will work for you and not looking at all the shiny things and trying to implement all of them."



## 2

## What **problems could occur** if firms don't adopt a continuous improvement mindset?

A continuous improvement mindset helps law firms to overcome key legal sector challenges including hiring and retaining top talent, risk management, personal indemnity insurance (PII) rising costs, and increasing client expectations. Our panellists discuss why modern firms should adopt a culture of innovation.

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## What problems could occur if firms don't adopt a continuous improvement mindset?



"The world's changing. Pandemics cause massive development bursts after they've happened. Not just because we were all stuck at home, but because robots can't get sick. Digitalisation can't get sick and it causes a massive upsurge in how we want to look after each other, how we communicate, and how we deal with things.

"But as well as that, law firms need to pay attention because risk is growing exponentially. We are being more regulated as a profession than we ever were before, and so that needs to be looked at and reverse engineered into your processes and procedures, and then consequently into your technology - into Osprey - and how you report on it."



"What the future lawyer wants is a modern way of working. We don't have an infinite amount of time. So you need to make your firm appealing to them, and technology is going to be one of those areas to attract talent and improve on if further.

"I think somebody said to me that 90% of legal work is mostly admin and process, and 10% of it is actually doing the legal work. If you could just streamline that admin process, that 10%, that's the bit where you get to call the client. You actually speak to them; you have a meeting with them."

## What problems could occur if firms don't adopt a continuous improvement mindset?

"I spoke to one of our insurance companies and they said that one of the things that they look at, in terms of automation, is the fact that you take out some of that element of mistake. When you actually prescribe and you pre-supervise what people will be doing and how they will be doing it you set standard operating practices that help mitigate risk.

"Mistakes will happen. Sloppiness will set in, but digitalisation and case management for us has meant that compliance and the quality of our standards has improved. I'm not saying that the quality wasn't there before, but it was all very much hard work."



**"We are being more regulated as a profession than we ever were before, and so that needs to be looked at and reverse engineered into your processes and procedures, and then consequently into your technology."**



# 3

## How can law firms **successfully implement** a continuous improvement mindset?

We asked our panellists for practical advice and best practices for ensuring a continuous improvement mindset sticks throughout a law firm. The resounding response is to ensure clear communication with the team and keep the strategy people focused.

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## How can law firms successfully implement a continuous improvement mindset?



"The best way that I've implemented it is basically is storytelling.

"It's an organic process of demonstrating why they need to do this, how they can do it, and what the benefits are going to be moving forward."



"Communicate, communicate, communicate in all process improvement, and when you've think you've done it, and surely everybody in the world has heard your story, do it some more.

"My biggest tip is make sure that from the top down, you're implementing and adopting and are behind it. The top down don't need to be implementing particularly, but they need to be behind the change."



"If you ask the team rather than tell, it starts to generate that conversation and I think that's a very important part of all of this work. It's all people centred, processes are important, but the processes are being shaped by the people. It's important to keep an open mind.

"It's not about top down for me, it's about bottom up and about being endorsed and sponsored and told that it is alright to make suggestions and to change things up. So, that's a key starting point for me, seeing that engagement and that's really valuable for all firms."

# 4

## What are the **key habits** law firms should adopt to foster a culture of innovation?

The panel agree that modern law firms should focus on the following habits when implementing a continuous improvement mindset:

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## Eight habits law firms should adopt

### 1 Make innovation a priority

Sarah recommends, “making it somebody’s job to lead the mindset. You can’t expect a head of department, for example, who is also carrying an entire workload, to take on the role of continuous improvement – it never works because the client comes first every time.”

Ensure innovation is part of someone’s job title to ensure it’s a priority in the day to day running of the practice.

### 2 Improve communication

2 To increase the adoption of any new mindset or process it’s important to have clear communication on the goals and objectives. But, as Sarah states, it’s important to ensure there’s communication across the firm for continuous improvement to have the biggest impact. “You’ll be amazed how many firms will make a change in only one area of the firm. For example, the billing takes three days in one department, but you talk to the family team, and it takes them just hours. And you ask, ‘did you not tell the rest of your partners how you improved this process?’ Always share what is and isn’t working across the firm.”

### 3 Identify risks

Laurence suggests your continuous improvement goals should prioritise reducing risk, “look at ways to mitigate risk and secure quality so that compliance and case management work efficiently. That should be a habit across the firm.”

### 4 Empower employees

It’s important to connect your people, processes, and technology for an effective operation. As Laurence explains, it’s empowering your employees with knowledge and freedom that will help promote a culture of innovation. “Engage, empower, and entrust your employees, don’t restrict them. Delegate effectively, give them authority, and hold them to account.”

### 5 Partner with your tech supplier

Build a reliable partnership with your software supplier to reap the benefits of your investment. Laurence says that it’s important to “build a good relationship with your supplier so you can be in the driving seat, and you can trust they’ll make the magic happen.” Rich agrees and recommends taking advice from external providers and consultants rather than going it alone because they have the expertise and years of knowledge to suggest best practices.

## Eight habits law firms should adopt

### 6 Have a clear focus

Rich advises that, “instead of focusing on all the new shiny stuff, focus on the things that work for your firm and double down on it.” It can be easy to get distracted and spend time and money on the latest technology, but it’s important to identify a clear strategy first. Then you can focus on what tools and processes will help you reach those goals.

### 7 Start with your weaknesses

It can be hard to know where to start with continuous improvement because it affects every part of your firm. Rich advises, “don’t stick your head in the sand by realising your weaknesses and then ignoring them. The biggest weakness for law firms is their reviews... please don’t ignore them; it can be detrimental to your brand.” Take the feedback from your reviews, good and bad, and look to improve your processes from your customers’ perspective.

### 8 Understand the connection between reputation and brand

Continuous improvement helps you firm stay competitive because it regularly optimises your operations to better meet your goals. Rich emphasises the connection between your reputation and your brand and how important it is to recognise that any client touchpoint can affect how you’re perceived. “Lawyers say they don’t sell, but if you speak to a client, you sell – you’re representing your firm.” So, look to optimise your client touchpoints and that will elevate your brand against the competition.



*4-PART WEBINAR SERIES*

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