



A guide to the fundamental business habits that modern law firms need to adopt

How to master the basics to stay competitive and succeed

This guide covers:

Mastering the basics

Building successful habits

Fundamental digital habits of a modern law firm

Mindset 1: Think 'digital-first'

Mindset 2: Be client-focused

Mindset 3: Continuous improvement

Mindset 4: Empower employees

Technology facilitates better business habits



Mastering the basics

We're all familiar with our own bad habits. They tend to be the ones we pledge to ditch as the new year comes around. But many businesses are often unaware of the bad habits that appear across their firm - habits that often hinder growth, progression, or change.

Daily processes can become so engrained in a firm that they remain unchallenged; it's the way things have always been done. So, over time, it's hard to recognise the good habits from the bad. What behaviours and processes are helping you meet your goals and which are holding you back?

Building effective operational habits creates freedom to focus on the bigger picture and wider goals. It frees the team from being occupied by the daily tasks and provides the luxury of time and space to continuously improve and drive your firm forward.



Building **successful** habits

Even the smallest habits, when combined, have a great impact on overall performance and therefore the longevity of a firm. That's because the actions and behaviours of your team, and the processes you have in place, determine how you're perceived by employees and clients. Good or bad, your habits affect the talent you hire and the clients you win.

Without good operational, compliance, and client service habits in place, legal professionals are inflicting unnecessary restrictions on themselves, hindering their chances of meeting their goals, exceeding client expectations, or having a stress-free workload.

What is a business habit?

Business 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, business reputation, and how you're perceived. Habits serve basic needs and goals, but also form part of your bigger ambitions and build out the characteristics of your business that you hope to portray to your employees, clients, and prospects.

The **fundamental digital habits** of a modern law firm

Without purpose, habits don't stick. The processes and habits you implement need to connect with your firm's wider goals and ambitions otherwise, your team may easily slip back into older, less effective habits.

Habits help to shape your firm's brand and defines how you're perceived by your employees, clients, and prospects. This is why we've categorised the key habits law firms should adopt into four fundamental mindsets needed for these habits to stick, be sustainable, and have an impact.



Mindset 1:

Think 'digital-first'

Having a digital-first strategy sets the foundation for all subsequent habits. To operate successfully, directors and partners need to have a digital-focused operational strategy that is more than simply a 'working from home' policy. Thinking digital-first is about adopting an Anywhere Operations strategy that ensures your business can operate, collaborate, and service clients without the reliance on physical locations, infrastructure, or processes, providing the ultimate flexibility and continuity.

This mindset should help your firm identify transformational changes you can make to your daily habits that embraces technology to make daily workloads easier, hybrid-working simpler, and going paperless the aim.

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Habits to adopt:

Work primarily from your case management solution

Your case management solution should be the first thing you open every day and the platform the team spends 90% of their day on. Integrate and connect your additional business tools – like your Outlook, Microsoft Word, search platforms, e-signature tools, accounting software etc - to create a single source of truth that reduces movement, duplication, and disparate data.

Implement standardised workflows

Whether it's for the entire case management life cycle or just individual processes, look to implement automated workflows to create a standardised, compliant, client-focused, and on brand processes that all teams can follow.

Offer a secure web portal to all clients

Digitalise your internal and client-facing communication and collaboration tools so you can effectively and securely service clients no matter where they are based.

Create dashboards and scheduled reports

When all your data and processes are stored digitally you can take advantage of more accurate and real-time reporting and dashboards that help you to monitor and manage a hybrid team.

Integrate compliance tasks into daily activities

Embrace technology to implement compliance tasks into your daily workload, rather than front load them, which increase risk and error. Integrate them into your workflows for simplicity.

Digitally record time

Streamline billing and accounts processes by ensuring everyone records time digitally, straight into your case management solution.

Mindset 2:

Be client-focused

The success of any modern law firm will rely heavily on the quality of customer service you can provide. A key benchmark of the value you have delivered to your clients is how timely, convenient, and personal the service is – regardless of the legal support you have offered. Implementing digital client-focused habits will help you to reduce friction in your clients' experience so you can stand out from the crowd, win and retain new business, as well as compete with larger firms, who 54% of SMEs believe are their biggest threat.

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Habits to adopt:

Collaborate with clients through a web portal

Regardless of the area of law you specialise in, offering your clients a secure web portal to communicate and collaborate on should always be the standard practice. Encourage clients to share data, documents, sign contracts, message, and view updates online to improve the security and effectiveness of their experience, but also to streamline your internal operations.

Switch to e-signatures as standard

A common pain point of the client journey is printing, signing, and scanning documents back to lawyers. Integrate a secure e-signature tool to your case management solution and easily set up and send documents for electronic signature.

Capture your client's data online

Avoid confusing and unsecure email chains or inconvenient office visits by creating easy to use questionnaires that can be sent to clients via the secure web portal to streamline data capture.

Digitally onboard clients

A resource heavy step in the case management life cycle for both parties is onboarding. Optimise the process by digitally onboarding clients using a web portal, e-signatures, questionnaires, and digital ID verifications.

Utilise text messaging

All case milestones should be communicated via text message to your clients to enhance visibility and transparency. SMS messaging has a higher open rate than emails and so provides a more convenient service for clients.

Mindset 3:

Continuous improvement

To run a continually effective operation, your fundamental processes need to be reviewed so habits don't become stale and inefficient. When a task becomes a habit, it can easily be over-looked and therefore can become ineffective to your firm as technology, clients, and goals change. Having a continuous improvement mindset will ensure you're always optimising for the best outcome, whilst preventing your firm from becoming irrelevant.

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Habits to adopt:

Document processes

The first step to successfully implementing a continuous improvement mindset is to document existing processes and habits. Knowing how things are currently done will enable you to identify current challenges and areas for improvement and will highlight how tech can enhance each process. Once documented, this should continue to be updated as things evolve.

Schedule regular firm-wide updates

To ensure team buy-in on this mindset it's important to communicate the business' goals effectively, how this will benefit the team, how they can contribute, and updates on performance. This will encourage participation and help to motivate.

Encourage ideas for improvements

Offer regular one-to-one meetings with team members to understand their current challenges and encourage ideas for how they can improve their current set up to increase productivity or enhance client service.

Create dashboards and scheduled reports to monitor real-time

Continuous improvement efforts are only recognisable if you can monitor how they've impacted your overall goals. Use the data in your practice management solution, from across your business, to monitor performance in real-time to understand how the changes are affecting client satisfaction, profitability, new business etc.

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Implement a CI mindset

Download our guide to discover the five-point continuous improvement plan that'll help you to successfully implement the mindset into your firm.



Mindset 4:

Empower employees

With your processes, technology, and clients taken care of, the final mindset is to empower employees. 76% of SMEs believe recruitment challenges pose the biggest impact to their business strategy; empowering your employees to perform their best and achieve their goals is crucial to the longevity of your firm. As one of the biggest investments you'll make for your business, look to empower your team with the right digital tools and freedom to grow to be a successful modern law firm that will attract the best talent.

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Habits to adopt:

Implement regular reviews

Regular one-to-one time with the team will provide a safe space for feedback and discussion. This will inevitably link to the continuous improvement mindset, where employees aren't just asked to feedback on improving processes but also their own skills and performance. Encourage openness and honesty for a thriving team.

Schedule time for training weeks in advance

Finding time for training around other fee-earning activities can feel impossible, but it's about priorities. Schedule small chunks of time for training, well in advance, and treat that space as you would a client meeting – whether that's a course on compliance or a session with your software supplier on the latest efficiency-boosting updates.

Automate admin-heavy tasks

Free up your team from admin-heavy processes to focus on fee-earning work or client-focused tasks that will drive the business forward with automation. Utilise the technology on offer to help reduce the daily workload of teams that will help empower employees to focus on more fulfilling tasks.

Provide the right digital tools

With the right tools to do their job effectively, your employees will be more productive and autonomous, which leads to increased satisfaction. Ensure that staff have the right device to enable working from any location; cloud access to your case management solution and client data; mobile apps for time recording; and access to emails and client communications.

Technology facilitates better business habits

No matter your firm's goals, practice and case management software provides the digital tools and centralised platform to implement effective business habits. With the fundamentals and essentials running smoothly with legal tech, you and your team can focus on driving the firm forward. To succeed as a modern law firm, you'll need to adopt and implement efficient digital, tech-driven habits that help to improve profitability, empower employees, and deliver quality client care.



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