MOBILE MATTERS

Do SME firms need to be more flexible to be successful?
Today's lawyers spend much less of their working life at their desks. For several years now, law firm workers have been able to work from home and occasionally from client sites - but now expectations are increasing. Employees working remotely want the same access to their firm's practice and case management solution that they'd have at their desk.

Millennials joining the workforce also have an expectation of mobile working - although some partners from the baby boomer generation may be resistant to the need for that way of working. There is, however, a growing realisation that firms need to keep up with rivals when it comes to flexibility if they're going to offer competitive service levels and attract talented staff.

Employees' immediate priorities for the corporate information they need on the move are easily met. Most solicitors want access to their work email from a mobile device and many firms have been enabled to do this through discrete, secure email access via a Microsoft Outlook or Exchange app. Providing equivalent access to the firm's core practice and case management system is more of a challenge, especially for small IT departments.

Practice and case management solutions were traditionally locked-down on-premise solutions and weren't designed with secure mobile working in mind.

And when firms are looking to purchase new technology to enable mobile working, security is often the number one concern. When asked for LPM's Legal IT Landscapes research: "Is cybersecurity high on your firm's management meeting agenda?", 94% of legal leaders responding said it was.

In the latest mobile systems, however, there is nothing of value on the mobile device itself - it simply enables a secure view of the data held centrally on practice and case management systems. Compared with carrying around a

Richard Higgs, sales director at Tikit, delves into the benefits and considerations of setting up a flexible working structure
mass of confidential client files on paper, having locked-down mobile access to well-secured systems arguably presents less of a risk when it comes to loss or breach of confidential information. If an employee loses their mobile device, it can quickly be shut down and wiped before anyone has chance to have a crack at the password.

**INTEGRAL INTEGRATION**

There’s also a pressing need to implement a range of well-integrated technologies to deliver the breadth of features lawyers need to work effectively on the move. Without integration, it’s not going to be possible to achieve desired flexibility and mobility.

Full integration is necessary to eliminate duplication of information and make applications easy to use. Risk considerations relating to data aren’t just about loss or theft - it’s important to avoid situations where data is updated in one place and not in others, or where conflicting data is held. Not only does this have repercussions for customer service, but it may also have far-reaching compliance consequences. Best practice is to have one central source of reliable data, with all associated applications drawing on that.

SME law firms with a one or two-person IT department or an outsourced facility face a resourcing challenge in integrating new solutions for mobility. It’s a good idea to tap into the expertise of the firm’s practice and case management system supplier to source additional applications that will work well with the core system. Tikit’s approach is to choose best-of-breed examples in each area - from Workshare for document comparison solutions and BigHand for dictation to Mimecast for email management – to supplement the features of its core practice and case management system.

Employees sitting on a train don’t want to have to trawl reams of documents and data to find the information they need about a client. They need to be able to access a summary or a subset of information, including: the matters clients have with you, the balance of their account, and who the main contacts are associated with that client. Tikit’s Partner for Windows (P4W) practice and case management application provides all of that alongside time recording, accounting, billing and compliance features. It’s common to see lawyers at their desk catching up on three days’ worth of time recording they couldn’t do on the go. The mobile version of Tikit’s Carpe Diem enables both time recording on the move and provides access to summary information held in P4W on their clients and matters. Carpe Diem is available as a mobile app that sits just as happily on the desktop, smartphone or tablet. With cloud-based delivery of the time-recording software platform, it’s possible to be working from a desk, record some of the time you’ve spent, leave the office and then get on the train and pick up the activity in the same place you left it.

This way of working couldn’t be achieved with traditional mobile apps that work independently and don’t integrate with the main practice management system. The risk with these traditional apps is that data could be recorded twice or time-recording data won’t be captured by the firm’s core systems. But Carpe Diem is now available on Microsoft Azure – providing a cloud option with the same functionality, but none of the on-premise infrastructure and management which could prove prohibitive for the smaller firm.

**MAXIMISING MOBILITY**

Historically, replacing a practice and case management system was a huge investment of time, money, and change management. But today, retaining the core solution and bolting on fully integrated functionality is much less disruptive.

For many growing SME firms one of the highest overheads is premises. Law firms with growth ambitions could benefit massively from mobile technology, as it can underpin hotdesking and remote working that reduce the firm’s requirement for expensive physical desk space. Furthermore, the flexible, mobile-enabled law firm is far more attractive to tech-savvy young lawyers and to clients who are looking for lawyers, who are working with modern collaborative technology. A 24/7 economy also means that clients are increasingly demanding self-service technologies, such as Tikit’s FormShare module, so they can complete forms and submit information electronically to their lawyer on the go. Secure access to data is also key to the future success of any law firm.
UPWARDLY MOBILE

Richard Higgs, sales director, and Adrian Jones, product and development director at Tikit, speak to LPM about seizing a competitive edge with all-encompassing flexibility.

Businesses in the UK are becoming increasingly agile by adopting technology that makes them more adaptive and flexible. SME law firms have traditionally been resistant to such change, but are now recognising the need to adapt to their surroundings if they want to survive in an ultra-competitive, post-Brexit market.

Tikit’s sales director Richard Higgs and product and development director Adrian Jones say that consumer demands have changed enormously in recent years and firms need to look at becoming more agile if they want to attain competitive advantage.

Jones says: “The days when firms could open at 9am, close for lunch, and finish at 5pm are long gone. Consumers are more mobile and expect legal services to be the same. They don’t want to wait to progress a matter until their lawyer is back in the office – they want to progress it as soon as possible.”

Mobile working delivers multiple benefits to firms, but for Higgs its key outcome is driving productivity across the business.

“The time that fee earners spent travelling was traditionally unproductive – which was tough for firms whose fee earners travel regularly.” He adds that he’s not alone in this view – 81% of SME firm managers surveyed in LPM’s 2017 Legal IT landscapes research agreed or strongly agreed that mobility technologies were fundamental to making law firm employees more productive.

Although firms could become agile with on-premise software, for Higgs and Jones the key to truly agile working is adopting cloud-based software.

Higgs says: “There are enormous opportunities to having legal tech in the cloud, including greater flexibility and security – those that aren’t in the cloud may be missing a trick.”

He adds that having systems in the cloud not only allows law firm staff to work remotely but helps the business to scale easily and gives some access to solutions they previously couldn’t afford.

“SME firms now have access to the same tools as the big legal players – which can drive efficiencies through automation and better collaboration and enable cost savings that can be passed on to clients.”

Jones adds that perhaps the most important aspect of cloud-based solutions is that they foster unity and can be tailored to the business. Employees work on the same systems over multiple devices, and managers can pick and choose solutions to suit different departments.

“Firms pay for cloud solutions on a per-user basis – so if they want a document management tool for just the commercial department, they only pay for the number of people to have that solution. One of the strengths of the Tikit Partner for Windows (P4W) platform is that all matters and data still exist in one central database – so the rest of the firm still has access to those files.”

MOBILE ADVANTAGE

Improving productivity is often a key goal for SME firms – 60% of respondents to LPM’s 2017 Cloud leaders research said productivity was a key benefit of cloud IT. Higgs says this is because some firms have always needed to be mobile – and without the right tools, have suffered from poor productivity. Other firms, however, want to become more flexible to improve their client service but fear productivity will suffer.

He adds that firms shouldn’t expect employees to be able to do everything from a mobile device, but work such as document reviewing and comparison, time recording and data capture could be done remotely.

Jones says that time recording is often a key concern for law firms, since doing it badly could have significant repercussions for profitability.

“Finance and operations teams may rely on recorded-time data for timely billing and cashflow, and to price legal solutions to ensure they’re profitable as well as price-competitive – but fee earners sometimes fail to accurately record time if they don’t have the tools to do it in real time or if they need to prioritise

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remunerated work.” But, he adds, cloud-based solutions such as Tikit’s Carpe Diem enable solicitors to record time across any platform from virtually anywhere – which facilitates accurate and efficient time recording.

But perhaps an equally crucial area of work that could be done remotely more often is document production. Higgs says organising and editing documents in a productive manner not only drives efficiencies across the business but keeps firms compliant – which is particularly important as the EU’s General Data Protection Regulation is fast approaching.

“NetDocuments, which is available with P4W as a third-party integration solution, is entirely cloud-based and massively extends the capability and flexibility of remote workers. It allows them to easily organise and edit documents on the go – so they can spend more time on client service when they’re back in the office.”

Jones adds that the opportunities around mobile document production aren’t limited to editing. Law firm workers can also foster greater collaboration with colleagues and clients by comparing documents on the move with solutions such as Workshare.

“Cloud-based document comparison solutions enable workers to go through the process of comparing various versions of documents when out of the office.” He adds that many solutions offer this capability, but a benefit of Workshare (also available as a third-party integration solution with P4W) is that staff can selectively upload documents from a P4W case file to the Workshare Connect portal and invite clients to review or update those documents.

Capturing client and matter data is another area where significant efficiencies can be gained. Higgs says that Tikit’s FormShare enables workers to send out PDF forms to clients which they complete and send back.

“The beauty of FormShare is that it automates client data capture – which maximises efficiency. Fee earners can use travel time to complete or send out forms to clients and, when they’re submitted, the product automatically extracts the data, puts it into the P4W database and can generate other processes such as conducting ID and anti-money laundering checks.”
AN EASY SCALE
But the benefits of agile working don’t stop at increased productivity. According to Higgs, cloud-based software solutions enable firms to scale easily with minimal additional costs.

“Employees can access the same tools as their colleagues from home – so firms could implement a hotdesking policy which would allow them to expand their workforce without bringing on the costs of a larger workspace.” He adds that a flexible working set-up could have the added benefit of improving recruitment and retention by giving staff a better work-life balance.

Jones adds that legal businesses also don’t need to worry about the costs of expanding their IT provision because they’re calling on external resources. They can bring on more staff, open a new office, or even downsize operations without incurring significant additional costs.

“Cloud solutions give firms enormous flexibility in their IT infrastructure. They can increase their provision if they have a big project and decrease it when the project’s finished and don’t have to invest in new servers if they open a new office.”

But perhaps the most important cost-saving aspect of cloud-based solutions, according to Higgs and Jones, is that they drive down the associated costs of legal tech and give firms access to solutions they previously couldn’t afford – according to LPM’s Cloud leaders report, the cloud enables 34% of respondents to afford or choose systems or services that they would not otherwise have used.

Higgs says: “In the past, if firms wanted a document management system like NetDocuments they would have had to shell out for service and hardware costs as well. With these third-party integrations being offered as part of Tikit P4W, firms don’t need to invest in servers or people to run them.” As such, he adds, the hardware costs that were once a considerable barrier to tech for SME firms have been knocked down.

Jones adds that cloud-based solutions can easily be budgeted for by a firm’s finance department.

“Solutions such as NetDocuments are priced on a SaaS basis. Firms pay for exactly what they use and know exactly what it will cost them every month.” He adds that the price of these solutions includes regular automatic updates – which eliminates the cost of buying an updated software package and the time it would take for employees to reinstall it across the business.

SAFE IN THE SKY
Firms could also benefit from improved security by adopting cloud-based legal tech. Higgs says that firms have traditionally been reluctant to put data or systems in the cloud for security reasons – but cloud computing gives SME legal businesses a level of online security they might otherwise be unable to afford.

“With Tikit, for example, security is always a key focus. We spend a lot of time and money that the average SME
“If all of your systems and data are stored on an internal server then your business is vulnerable. Imagine what would happen if a flood or fire destroyed that server.”

Adrian Jones, product and development director, Tikkit

firm simply couldn’t on making sure our solutions are secure. If you take Tikkit’s FormShare as an example, the forms sent to the client can be password protected and there are other layers of security in there – so it’s much safer than traditional data capture methods.”

Jones adds that in terms of disaster recovery and business continuity, cloud computing offers considerable advantages over on-premise solutions.

“If all your systems and data are stored on an internal server then your business is vulnerable. Imagine what would happen if a flood or fire destroyed that server – it could ruin the business.”

He adds that business continuity is built into cloud-based solutions because they keep data and systems safe and secure away from the office, and ensure that if the business loses access to the office, employees can simply work from home.

FLEXIBLE SOLUTIONS

Although it’s fundamentally about greater productivity, cost savings and security are enormous advantages of cloud computing. Perhaps the key advantage of Tikkit’s solutions is that they’re part of a package that’s completely flexible and can be tailored to the individual business’s needs.

Jones says that some of Tikkit’s solutions may be more useful to some practices than others, or might be more beneficial to different departments within one business.

“Cloud computing enables firms to pick exactly which products they want and operate them in the P4W platform. For example, if a firm’s commercial team wants to use Carpe Diem as a more flexible solution, they can do that.” He adds that the beauty of the system is that no matter which solution is used, the data is stored in a central database that’s accessible across the business.

Higgs adds that Tikkit P4W’s ability to incorporate third-party integrations such as Workshare and NetDocuments makes the system even more flexible.

“There are law firms or departments such as commercial that don’t see themselves as sitting in a case management silo. They want document management – so if they already have P4W they can easily integrate that into that system.” He adds, however, that third-party integrations are also available individually.

“If a firm is quite happy with its case management system but wants a document management system for commercial work, it can buy NetDocuments from Tikkit without having to buy P4W as well.” He adds that this is also the case for other Tikkit modules such as Carpe Diem and TikkitConnect CRM.

The great advantage with having multiple solutions integrated into the P4W platform is that it unifies businesses and makes them more collaborative, says Jones.

“P4W is the centre of an IT ecosystem, making everything easily accessible to people across the business. Data from multiple systems is stored in the same place and employees can access those systems from one platform across multiple devices.”

Many SME law firms are looking to become more agile – and the key to that, according to Tikkit’s Jones and Higgs, is mobility. Tikkit’s solutions not only make firms more collaborative but enable significant cost savings and increased security. But the key benefit of its products is firms’ ability to choose exactly which systems they want and integrate those into one platform that’s accessible from virtually anywhere, at any time.
Dynamic and ambitious law firms choose Tikit P4W to help them achieve these common goals.

Over 600 firms are already enjoying the benefits of the most functionally rich PMS/CMS/CRM solution in the legal market.

Making technology work for you...

It’s time you joined them