



Six steps to increase  
your billable hours,  
attract new clients  
& become a tech-driven  
**LAW FIRM**



**GATHER**  
TECHNOLOGY

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# Introduction

The most successful law firms are constantly on the lookout for ways to use technology to improve their service to their clients, not only in terms of efficacy but also in cost. They recognise that this approach gives them a competitive advantage over firms who are behind the curve.

The continued success of your firm depends on the decisions that you are making today regarding technology. *The worst decision that you can make is to do what you've always done.* Contrary to the famous quote, it won't give you what you've always got, it'll leave you behind!

Technology is a tool that, when used correctly, can enable optimal performance but when used incorrectly, can be a massive drain on financial and mental resources.

Our experience of supporting law firms combined with our expert knowledge of technology gives us a unique perspective on the best, and the worst, ways to do things.

In the most successful law firms, technology is openly recognised as one of the most influential factors that can accelerate growth. The cold hard fact is that in the long term, firms that don't adapt will struggle to survive.

**These six steps aim to help you transform your firm into a tech-driven business that will not only survive the new normal but thrive in it.**

# The Six Steps

Our six steps to increasing your billable hours using technology are:

- 1 Set a budget!  
*How much should I be spending on IT?*
- 2 Choose the right case management system.
- 3 Get remote working right.
- 4 Buy technology that is better than you need.
- 5 Make sure that your IT Support is on point.
- 6 Attract new clients with technology.

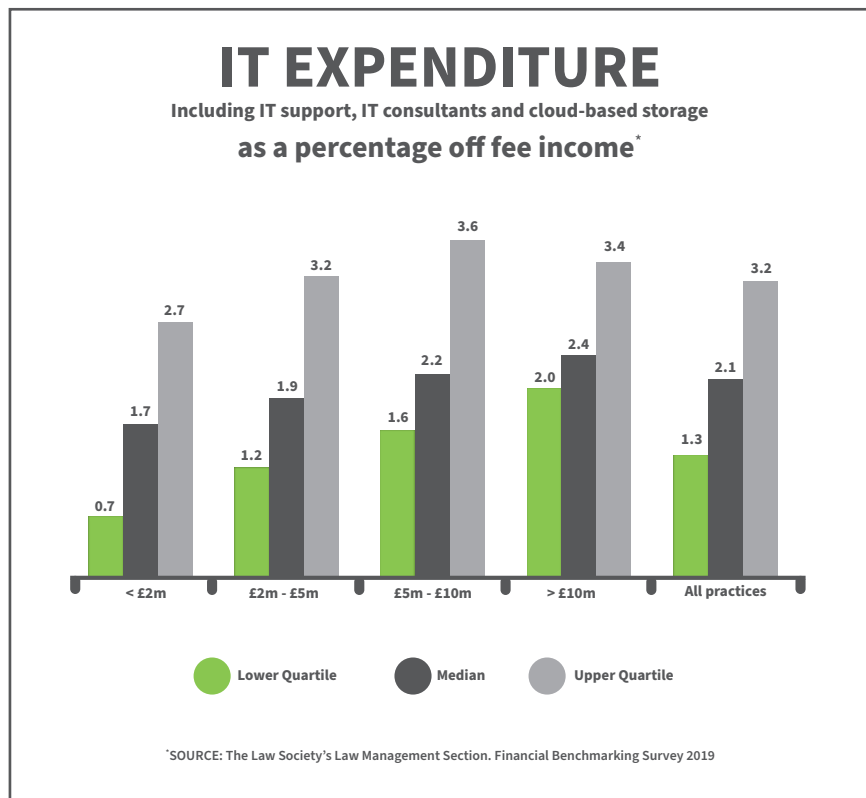
There is no particular order to the six steps and, depending on the circumstances of your firm, and where your current frustrations lie, you might decide that some of them are not relevant to you at the moment. You won't be missing out if you just skim over these to the content that you are most interested in.

It is my sincere hope that you'll be able to get something actionable to take away and immediately improve your firm's approach to technology.

# Step One

## SET A BUDGET

How much should you be spending on IT? The same as last year? Plus a small percentage for contingency? Oh, and then there is that refresh project that we need to do and the printers are due for replacement, maybe we can save some money there...  
*Does this sound familiar?*



**Then you need to take a smarter approach to budgeting!**

According to the Law Society's financial benchmarking survey report in 2019, the median amount across all practices is around 2.1% of fee income.

Notably, the bigger the firm the higher the median percentage. There could be several reasons for this, arguably one of these is that bigger, more successful firms recognise that technology is not just a cost, it is an investment.

When used correctly, it is an investment that can play a key role in the success of a firm.

# Step One

## SET A BUDGET

### Set a budget based on your fee income.

My advice would be to look at the table below and pick the fee earning segment that you want to be in, then set your budget based on that. For example, if you are currently doing £3m in fee income but you'd like to be doing £6m, set your IT budget between 2.2-3.6% of your fee income, rather than 1.9 – 3.2% of your IT budget.

Once you have your budget, put in the costs you know and then, once you've allowed some contingency, discuss with your partners how you could invest the remainder in some new technology to help support the firm's goals for growth.

FEE INCOME	LOWER QUARTILE	MEDIAN	UPPER QUARTILE
< £2m	037	1.7	2.7
£2m - £5m	1.2	1.9	3.2
£5m - £10m	1.6	2.2	3.6
> £10m	2.0	2.4	3.4
All Practices	1.3	2.1	3.2

The other five steps should provide you with some ideas! If you are already spending more than this, with not much to show for it, then it might be time to conduct an IT review, to work out where the money is going.

### ACTION

**Set a budget and work out how much you could invest in technology.**

# Step Two

## CHOOSE THE RIGHT CASE MANAGEMENT SOFTWARE

I am not going to try to tell you which case management software you should choose: The market is saturated with choices and you know the key functionality that you need to run your business.

More often than not, it comes down to how the software is used more than the software itself. There are a few *key factors* that will determine whether the software is a success in your business:

### **Decide who is going to own the software.**

The majority of case management software is not offered as a managed service and, once the initial implementation is complete, it's up to you to look after the work flows and customisations. Make sure that whomever in your firm is responsible for this is competent at this, or outsource it.

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### **Select the product that works for your business without you making lots of changes to your processes.**

Software should fit your business, not the other way around. Not only is this common sense but it will make successful adoption among your users much more likely than if they have to do everything differently than before.

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### **If possible, choose software that is based in the cloud.**

In this day and age, the cloud is almost always the way to go for reasons that don't need to be explained here – if a vendor is still trying to sell you an on-premise solution and they don't have a cloud option, that should be a red flag.

# Step Two

## CHOOSE THE RIGHT CASE MANAGEMENT SOFTWARE

### **Ask the vendor where your data is going to be held!**

Most cloud solutions are built on established platforms such as Amazon Web Services or Microsoft Azure, both are world class but they do have data centres all over the world. Be careful to ask the questions, where is my data held and what are the legalities associated with this location?

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### **How secure is the system?**

This is where you are storing your clients' data and personal information. Make sure that the software you're choosing has adequate controls for accessing this data.

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### **One of the biggest costs associated with most case management software projects is the migration of legacy data.**

This is unavoidable but make sure that you are getting all of the data and that it's going to be done for you! It's one thing to run a legacy system during a transitional phase but you don't want to be keeping it indefinitely.

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### **Work out how you're going to access the system remotely.**

In a post-pandemic world, this should be obvious but don't take it as a given. If you're going to a cloud based system, this ought to be straightforward but if not, you might end up needing some pretty complex infrastructure to support remote working.

# Step Two

## CHOOSE THE RIGHT CASE MANAGEMENT SOFTWARE

### **How does it integrate with the technology that you're already using?**

There will invariably be some level of integration with your current software stack so make sure it works before you commit!

### **Ensure that your current work flows will work post migration.**

Especially the most important ones, for example, will you automatically be prompted to record time after sending an email to a client? If you need to upload a file that you're working on to a client's file, what's the process for that? Small details can cause a huge amount of pain if not considered in advance.

Investing in the right choice of case management software can improve efficiency, drive productivity and actively help you to grow your firm by engaging clients and employees in an optimal user experience – don't make the mistake of underestimating the importance of this decision.

#### **ACTION**

**Assess your current system against the above list. How does it stack up?**



# Step Three

## GET REMOTE WORKING RIGHT

The pandemic has highlighted the importance of remote working to us all but looking beyond that, there is another reason why remote working is key for law firms:

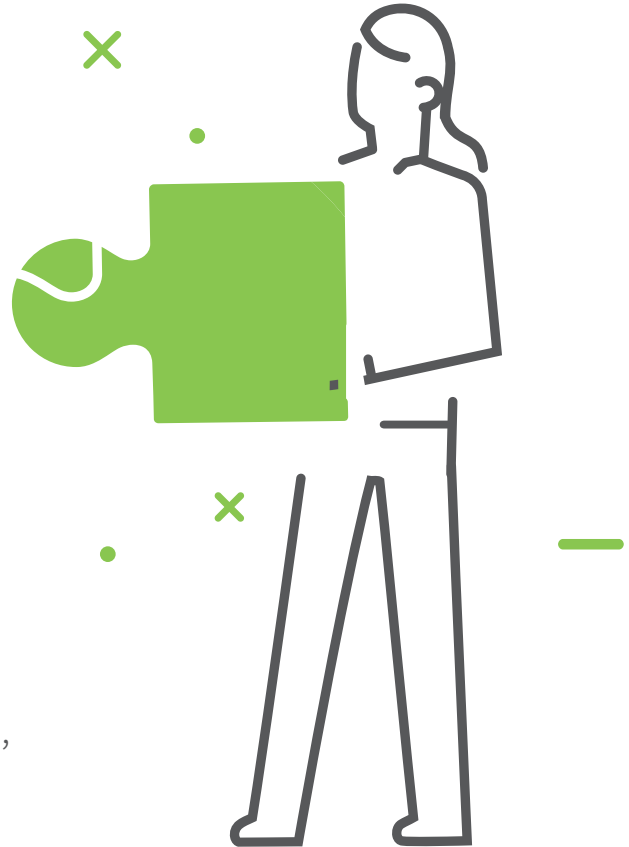
### **Lawyers tend to be workaholics!**

When you choose to be a lawyer, you know that you are choosing a career that comes with stress, pressure, and similar challenges.

That is enough stress, without technology adding to it! Nothing is more frustrating for a lawyer trying to get work done than when technology lets you down.

It should help us to be more productive and more efficient. In the same way as a bicycle helps us get from A to B faster and more efficiently, so a computer should help us to complete our work faster and more efficiently.

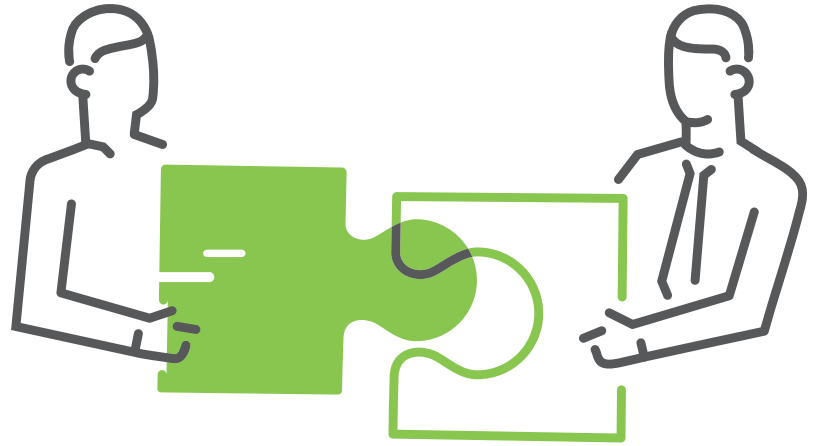
Having the right solution for remote working means that even when your fee earners aren't in the office they can still be cranking out the billable hours. Whatever hours they choose to work!



# Step Three

## GET REMOTE WORKING RIGHT

Flexible working is here to stay. Embrace it and make sure you have a setup that enables you to be fully operational, wherever you might be working from.



Remote working solutions are usually *slightly different* for everyone but there are two key attributes that they should all have:

### **Security**

This has to be priority number one because there is no point risking a breach for the sake of convenience.

### **Performance**

Whatever you choose, it has to work quickly, all of the time. This should go without saying but I've lost count of the number of times I've listened to people explain a complete car crash of a remote working set up as though it's normal – it's not! It should just work.

### **ACTION**

**Ask your fee earners about the current remote working setup and find out how good it really is.**

# Step Four

## BUY TECHNOLOGY THAT IS BETTER THAN YOU NEED

IT hardware has gradually gotten cheaper over the last ten years and you can now get a lot more for your money. It's false economy just to buy the cheapest hardware when you employ really smart people and you want them to do their best work!

Buying them technology that is much faster than they actually need is the best long-term approach. It doesn't cost that much more (especially relative to how much you are paying the person who is using it) and as anyone who has ever sat in front of a computer that is on the go slow will know, it's incredibly irritating!

**The slowest part of the process should be the person, never the computer!**

How do you know what to choose? Every piece of software that you run should have a list of minimum requirements and a list of recommended requirements. My advice would be to take the highest recommended requirements from your list and then double them!

And how much should you spend? For a medium to high end laptop, we're talking less than £50/month over three years. There are many purchasing options available these days and by spreading the cost you can make a solid business case for getting the best tech for your lawyers, without using up all of your IT budget.

### ACTION

**Find out how much a top spec laptop would cost you per month.**

# Step Five

## MAKE SURE THAT YOUR IT SUPPORT IS ON POINT

Before you skip this part, I promise it's not a shameless plug for our services. (Although, as all of our customers would tell you, they are fantastic!)

**When a fee earner is unable to work, you are losing productivity and billable hours.  
When multiple fee earners are unable to work, the costs can rack up frighteningly quickly!**



Whether you opt for internal IT, outsourced IT or a combination of the two, you need an IT team that responds and reacts quickly when you need them to.

This level of IT Support isn't always the cheapest option, nor should it be! Having top notch IT Support is an insurance policy against time lost on outages that with the right IT Team, could be avoided completely or resolved promptly.

**How can you build this team and make sure that it's fit for purpose?**

The first thing to do is refer to your budget and work out how much you should be spending on your IT Department. Once you have this number, it'll give you a very good steer on if employing your own team is financially viable.

# Step Five

## MAKE SURE THAT YOUR IT SUPPORT IS ON POINT

For most firms with less than 100 users to get a team, rather than a person, you're going to be heading down the outsourcing route.

For the premium level of IT Support we're talking about here, I would budget approximately £10,000 per month based on a fee of £100/user/month for an outsourced IT department, which should probably include an IT person on-site at your offices full time: You'd be getting the best of both worlds.

If you do decide to employ your own staff, you're going to need *at least* two people. And probably allow for some outsourced help as well, given that it's impossible for two people to know everything about all your IT – they will need help with some problems and issues.

So let's say we have two people, a junior and a senior, we're probably talking salaries of £30,000 and £45,000 respectively. If we add in employment costs and a contingency for outsourced help when needed, the cost for a 100 user firm would be about the same - £10,000 / month.

Whichever route you decide to go down, hold them to account if they aren't delivering – outages should be explained, issues should be resolved quickly and you should be involving your IT Department in business planning. If you don't feel comfortable doing so, you're missing out on an important perspective.

### ACTION

**Review your current IT Team costs and performance. Are you getting value for money?**

# Step Six

## ATTRACTING NEW CLIENTS WITH TECHNOLOGY

The first five steps cover setting a budget and making decisions about some of the most common costs associated with that budget.

Step six is all about how you can invest in technology to help grow your business and attract new clients.



Let's first think about the type of clients that we're trying to attract: Millennials and Generation Z.

These are clients who might be looking for their first lawyer! What will help you to stand out with them?

Well, the first thing that I think needs to be considered is what do they want from a lawyer? They want to be able to interact with them quickly and effortlessly through their screens. When asked if they could only keep the Phone app, or a Messaging app on their smart phone, 73% of millennials said they would choose the Messaging app. Why?

**Millennials hate using post or calls because they are so accustomed to sending texts and doing things online.**

They want to manage their interactions with you, securely upload documents, track progress and ask questions of their lawyer without ever having to pick up a phone or schedule a meeting. This method of communicating would be unthinkable to some but it is what Millennials want!

# To increase your appeal to this demographic, technology is **the answer.**

## **Invest in a customer facing portal**

Having a customer facing portal is a massive advantage! It is the *most persuasive factor* between winning those first-time buyers or not.

A lot of case management systems will now include this functionality as an add-on, or even as a standard. It will enable you to offer your clients a secure method of uploading and signing documents, a quick way of seeing the status of their case and a much more efficient way of tracking identity verification and other onerous regulatory processes.

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## **Build an App**

If you're going to go to the trouble of creating a customer facing portal, it is worthwhile considering if you can deliver the same functionality through an App.

People are busy! They don't have the time, or the inclination to phone a secretary and compare diaries. If they can easily book in half an hour with their lawyer via an app, they are *far more likely* to do so. Through an app, they will be able to see a lawyers diary and select a time to suit them – more appointments equals more billable hours!

# Step Six

## ATTRACTING NEW CLIENTS WITH TECHNOLOGY

### **Social Media**

Using social media effectively doesn't have to require a huge investment but it can bring huge rewards. It's where Millennials spend their time online so if you're going to advertise somewhere, why not target *exactly* who you're after. While the power of Facebook advertising is a little scary, *it is relatively cheap and guaranteed to reach your target audience*. You can communicate exactly what you want to who you want, for a small amount of money.

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### **Go Paperless!**

Electronic document signing is the way to go. Not only is it more efficient, but it is also good for the environment. The appeal of this is twofold. *First, it is just easier*: No hard copies sent back and forth in the post. Second, a firm's green credentials are *essential* to Millennials and Gen Z. Whether it's the food they buy or the technology they use, knowing companies care about the environment is a *big factor in their decision making*. There is a range of excellent paperless options already available! Going completely paperless might not be possible, but getting an electronic document signing solution in place will improve your firm's carbon footprint and enhance your customers' experience.

### **ACTION**

**Review your IT budget and invest in technology that appeals to new clients.**



# Conclusion

Law firms that have followed our six steps have increased their billable hours, or, at the very least reduced their wasted hours! Once you have implemented the six steps, you'll be able to be confident in your use of technology *because*:



You will have a clear budget and know that it's in line with your ambition.



You will know that you are using the right case management software.



Working remotely will be simple and secure for all your users.



You'll have the best hardware and it won't cost you a fortune.



Your IT Department will be working for you and adding value to the business.



Your firm will be growing and attracting new clients using the technology you've invested in.

This process isn't easy and it is vital to one's sanity to remember that change takes time. Evolving your firm into a tech-driven firm won't happen overnight but you have to start today. Just take the first step and, if you are struggling, don't be afraid to ask for help! Please get in touch for helpful advice and an informal chat with no-obligations attached.