

2022 Case Study

Law Firm Operational Improvements

Prepared by;

FlowPlus

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Summary: Key improvements made at London Law Firm



24%



Increased Fee-Earner Productivity

Through the elimination and reduction of non-value add tasks, fee earners will have 24% more time. Using a combination of process re-engineering and technological advancements, tasks that don't directly add value to the client are either automated or the process improved so that it takes significantly less time, improving the resource efficiency of the firm.



43%



Reduced Matter Waiting Time

Improving the flow of matters through the system leads to a 43% reduction of matter waiting time. This reduction in waiting time directly impacts the client, providing a more competitive, faster service. The time saving can be used to add more value and personalised service to each client.



17%



Increased Quote Acceptance

Improving the quote acceptance rate through a structured pricing model that uses historical data and machine learning to maximise revenue. Improved customer satisfaction in line with expectation, along with the data-driven value pricing leads to higher acceptance rate and increased profitability.

Introduction

The law firm and some background

A boutique London law firm

The organisation described in this case study is a medium sized law firm based in London specialising in personal, property and commercial legal matters. Established in 1979 by two partners, the firm has grown organically and through mergers over the years, now with over 70 legal professionals working from their central London office.

With continued growth and profitability in mind, partners set out to provide more value to their clients while improving cost effectiveness of their legal work. They looked to FlowPlus, experts in operational improvements, to help achieve this.

FlowPlus have vast experience in operational improvement transformations across a wide variety of industries, from manufacturing to public services. Understanding that the legal industry has its unique challenges, a transformation process was designed taking inspiration from Lean, Six Sigma, Operation Excellence and Legal Process Improvement.

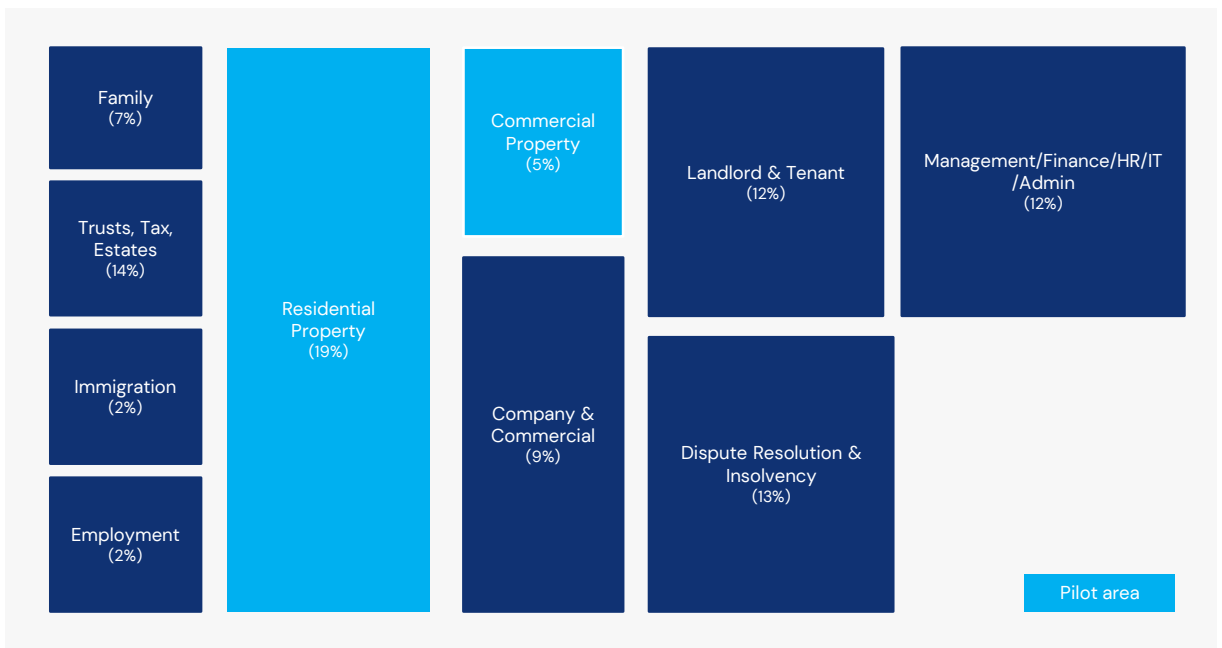
The transformation follows a collaborative approach, where experts in the legal process, the solicitors at the law firm, together with experts in process improvement, FlowPlus consultants, learn to work in smarter ways.



Discovery

Establishing a holistic picture of the law firm

Improvement efforts start with a discovery stage, providing a holistic view of the law firm's operations. First understanding the organisational structure, then investigating the high-level performance of each department. The area with the greatest scope for improvement is selected as the pilot area for a more detailed assessment, in this case it was the property department.



Pilot area chosen after evaluation in the following criteria:

- Productivity of department
- Financial Performance
- Operating costs
- Repeatability of matters
- Shared processes with other departments
- Responsiveness to change

Assessment

Gaining a thorough understanding of the pilot area

Assessment process

Having selected a pilot area, a thorough 5-day assessment is conducted on-site. Multiple FlowPlus consultants worked with staff in the property department to gain a deep understanding of their processes and challenges. The aim is to further uncover & quantify improvement opportunities.

Process Mapping	Legal processes or workflows are mapped - in this case the main processes are the sale of a residential property and the purchase of a residential property. The journey legal matters take through the process is understood and data is collected for each process step e.g. process time, waiting time, quality issues, rework time, total resource needed and more.
Time Studies	Time studies of fee earners and support staff are conducted to understand the tasks carried out and whether they are value add or non-value add (and can be automated or eliminated).
Work Management Study	Investigations are carried out to understand how work is distributed and prioritised and the effect this has on matter waiting times.
Quality Investigations	Data is collected on how frequently process steps are re-worked due to errors, incomplete information or hand-offs.
Data Analysis	Time recording data is analysed with machine learning to understand the breakdown of fee earners time and how long matters are in the system for.
Workshops	Workshops are conducted with fee earners to understand what they believe are the largest problems and hinderances to productivity.

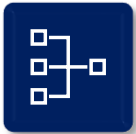
Assessment results

The assessment identified 6 key areas for improvement. These have been split into Holistic Improvements; i.e. improvements that can be implemented to have an impact firm-wide, and Process Improvements; i.e. improvements specific to the processes in the property department.

Holistic Improvements

Improvements that impact the whole firm.

Holistic improvements are improvements that impact the whole firm. These include things like systems, shared processes or shared working practices. Learnings are taken from the assessment in the pilot area and applied to the whole firm for the largest improvements.



Case Management System

The assessment revealed that a new case management system (CMS) would improve how work was being managed, visibility on the progress of matters and the ease of accessing matter information & documents.

- 22% of time spent on emails involved sending or receiving work instructions.
- 28 minutes per day spent understanding progress of matters
- >50% of matters waiting due to incomplete documents.



Files & Precedent Organisation

An excessive amount of time was being spent on searching for precedent in precedent manager. Improved organisation of files and templates in the manager, removing duplications & old version of precedent and implementing a structured naming conventions are all part of a structure organisation regime which helps boost productivity.

- 32 minutes per day spent searching for precedent in the precedent manager.



Training

It was found that training of new starters, be they paralegals, secretaries or trainee solicitors, was very unstructured. Much of the rework that had to be completed due to errors was due to incomplete training. A structured training program with official modules, progress tracking and time constraints will improve both the quality of work and productivity of the firm.



Quoting

With no clear structured pricing model in the property department, quotes were provided by fee earners using their best guess and personal experience. This led to high variation in quotes between fee earners and missed revenue for the business. A structured pricing model based on historical data and a variety of inputs will increase the profitability of matters while also increasing quotation acceptance rate.

Specific Improvements

Improvements that impact a single department or workflow

Specific improvements refer to improvements of individual processes or workflows. Their impact is much smaller in nature however there are much more of them across the firm and they are less capital or time intensive to implement.



Workflow Improvements

To make improvements to workflows and specific legal processes, each process is systematically mapped, simplified and then standardised. Consultants work with members of each team to alleviate problems and inefficiencies that are specific to each workflow, with quick implementation within that team. This could be changing the order of workflow steps to reduce waiting time or changing responsibility of tasks from fee earner to paralegal in order to best use senior resources.



Automation

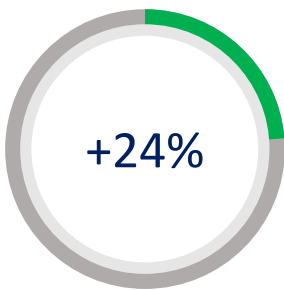
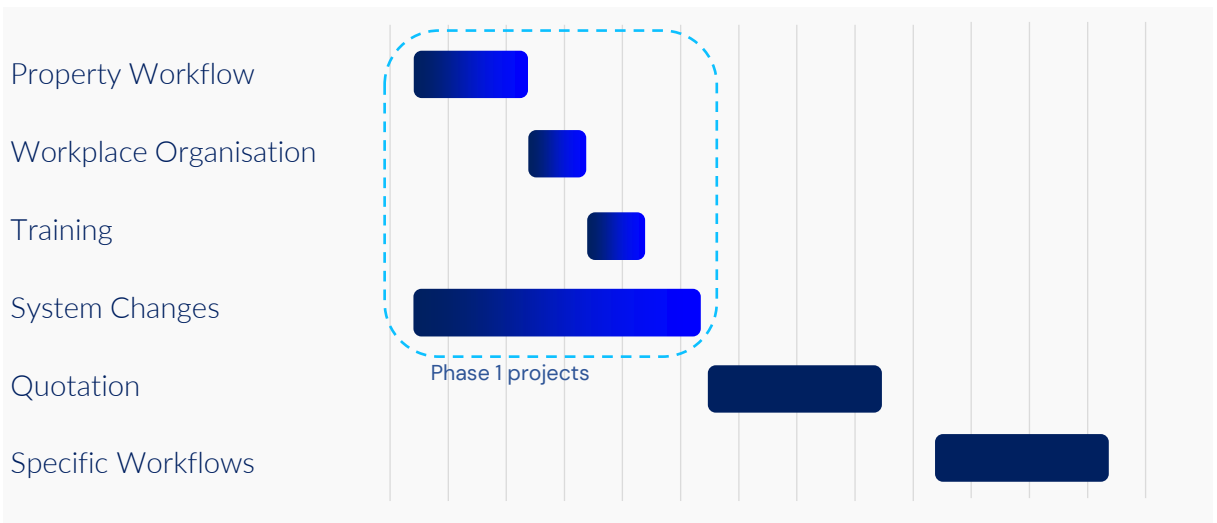
Within each workflow there is often tasks that are identified as non-value add and do not require any “intelligent” input – i.e. “copy and paste” style repetitive tasks. With the use of smart technology many of these tasks are automated so they don’t have to be completed at all or part automated to reduce the time spent on them.

Actions & Results

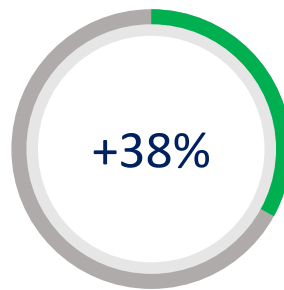
The action plan generated & the predicted results.

An implementation plan is created with holistic improvements prioritised, followed by specific improvements across the firm. It is decided that phase one would involve a new CMS system, improvements to the property workflows and during CMS migration, organisation of precedent and files would be improved.

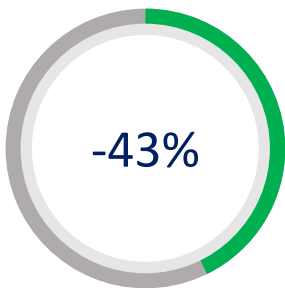
Implementation Plan



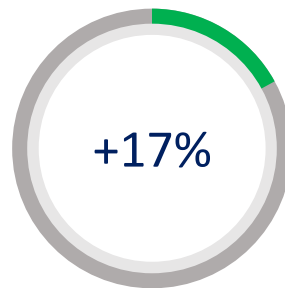
Fee-Earner Productivity



Non Fee-Earner Productivity



Matter Waiting Time



Quote Acceptance Rate



FlowPlusTM

Helping clients work smarter

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