



## BUSINESS PROCESS IMPROVEMENT & EFFICIENCY

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The  
Strategic  
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Essential Risk & Business Insight for Law Firms

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**In our latest White Paper, our guest author David Green, Co-Founder of The Strategic Partner, outlines the vital key areas which contribute to Business Process Improvement and Efficiency.**

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Business Process Efficiency or Improvement is a term often used and often misunderstood. It is certainly not something that should only be considered by large firms or those firms who handle bulk legal services.

Achieving an efficient way of working and through doing to reducing expenses or increasing profits should be a goal for every firm regardless of size of the type of work undertaken.

Understanding where to start, how to identify improvements and how to implement change is the challenge.

## The Challenge

Much of the work performed by Solicitors is often difficult to automate or systemise as it needs technical expertise and skill to deliver the right advice to the client.

However, there are a number of routine tasks performed across all legal services (case opening, money laundering, updating the client, closing/archiving etc.) and there are a range of legal services (conveyancing and debt recovery) that largely follow the same path from case commencement to conclusion.

Establishing more efficient ways of processing such work is not complex and any spend needed will deliver a return on investment and improve profitability.



Medium to Large firms often have the budgets to fund technology to gain efficiencies that technology can bring to business processes. Smaller law firms are often unaware of the technology available or believe the costs of implementation are prohibitive (often not the case)

It is important not to confuse process efficiency (working smarter) with work flow case management (step by step case guidance enabling bulk legal work and routine tasks to be undertaken by systems and junior case handlers and a directed supervisory structure)

Business process efficiency is about identifying routine tasks in your firm and developing process systems, support or introducing technology to reduce time spent on routine tasks without deteriorating service delivery. Importantly improved efficiency delivers increased profit through better use of resource or removal of unnecessary resource.

Implementing process efficiency is not just about building systems or using technology to remove headcount. Whilst this may be a by product of achieving a more efficient way of working but it can also result in the freeing up of time for case handlers or support staff to concentrate on other important tasks. In particular increasing the amount of fee earning legal work for your case handlers is the cheapest way of improving profits of your firm as you are using resource that is already paid for.

If a firm has not considered what technology is available or what systems they can implement to improve efficiency they should do so. A walk through the firm from how a new client is processed through to the final billing of a client is a worthwhile, revealing and important task to undertake.

Through looking at the processes adopted by your staff and talking to them about how they do their job and what frustrates them will immediately reveal where your firm can improve what it does.

Whether engaging an independent and impartial expert or doing this from within the firm it is a process that every firm should undertake annually.

The benefit of using an external expert such as the Strategy Partner, to help you identify where efficiency can work for you firm, is that you will gain their wider experience of the market and delivery of legal services.

An internal review may not have the desired impact as the review itself and the result may not prove to be impartial.

At The Strategic Partner we have worked with a number of firms of all sizes to help them identify where they can make savings in their business and achieve smarter ways of working to help fund growth or simply reduce expenses.

### Some areas to consider:-

**Outsourcing** – Firms should consider outsourcing routine tasks. Outsourcing is only appropriate if you cannot undertake a task yourself or managing a task in house is not cost effective due to the internal need not justifying the recruitment of an individual or team. For example if you have a busy conveyancing department why spend the time on routine post completion work when you could outsource such work and direct case handler time to handling more work which earns fees and therefore increase their case load.

Some other examples areas where outsourcing can assist

- Reception overflow
- Case opening and closure
- New business enquiry processing
- Case audit and risk assessment
- Cashiering

These are all important areas of law firm operation and management that do not generate fees but you can reduce expense through a quality outsource arrangement.

**Case Management** – Ensure you use your case management properly. It is there for a reason and case management system used properly and appropriately within a firm will assist with case control and visibility. If you or your staff are unimpressed by your case management system or find it cumbersome this will be because it is wrong for your firm or there has been insufficient training on its use. Both can be resolved. Regardless of firm the size of the firm a case management system is a must for efficiency and law firm management and control and does not have to be expensive.

**New Business** – How do you manage new business enquiries? Each time your firm receives an enquiry for delivery of a legal service it must be recorded, monitored, engaged and closed. Too many firms allow reception to record basic information and pass a new enquiry to a case handler who is responsible for engaging the client and trying to convert the enquiry into new work. Once the fee earner has control of that enquiry visibility disappears and conversion of that enquiry is not appreciated? It is assumed that the enquiry has been processed and if the client did not proceed then it is because they did not want to. A simple review of new enquiries into your firm over the past 2-3 months and what happened to them may alarm you..... Introduce an effective system to ensure that all new enquiries are handled properly:-

- Engage the customer and record their details
- Find out how they found out about your firm.
- Ensure the right person handles the enquiry and speaks to the client
- Ensure that all enquiries are followed up in writing. A simple email of the discussion and a written quotation is infinitely better than just leaving the potential client to reflect on your conversation.
- If a client is sent a quotation and they do not respond, re-engage them. Find out why and if they decline your service again, find out why.

- Record the outcome of each enquiry
  - Case opened
  - Lost contact
  - Quote declined (and why)

You can learn from this information and implement change to increase conversion.

The Strategic Partner has a number of outsource services that work to assist law firms in driving efficiency.

**Administration and support** – are you secretaries, junior staff and general support fully utilised, have you assessed what they do and how they do it. Have processes and jobs in the firm being assessed for the value they provide today as opposed to when they were implemented?

**Technology** – Take some time to find out what technology exists in the market today and how much it will cost. There is a significant amount of low cost solutions that can help with processes improvement and efficiency but you need to find out what they are and how they make work in your firm. Companies like The Strategic Partner have knowledge and access to technology and understand how effective they can be in the different types of law firm and legal environments.

## Conclusion

It is healthy to look at your business and identify your strengths and weakness and investigate and deliver solutions that improve your efficiency.

Our recommendation is that this is a task that should be performed annually. A firm can change a lot in a year and it is incumbent on the owners and management of that firm to ensure they address where change is needed.

Efficiency is about profit improvement. Whether that is removing unnecessary expense or improving staff's ability to handle more work to support a growth plan they are both goals that every firm should work to achieve.

For more information about how The Strategic Partner can work with you to identify areas of improvement and deliver solutions contact us on 02078421830 or email us at [info@thestrategicpartner.co.uk](mailto:info@thestrategicpartner.co.uk).



## About The Author

David Green is a co-founder of The Strategic Partner. After many successful years in the Insurance and Legal Sectors, he now works across a portfolio of businesses as an Investor and Owner, providing strategic support, financial management, operational input, business development and general consultancy and guidance.



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