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Legal Sector Breakfast Briefing

Hull
2 November 2021

Working with
The Law Society

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Legal Sector Breakfast Briefing

Welcome and introduction

Tom Blandford, Legal Sector Partner
Armstrong Watson

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Legal Sector Breakfast Briefing

10:00	-	Welcome
10:05	-	Briefing
11:00	-	Q & A
11:30	-	Close

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Planning for the Future

How to make better technology decisions that move your firm forward

Helen Daly
Senior Associate

- Science/Law at Sydney Uni
- Big Four trained with EY
- 5 years with Thomson Reuters
- Joined JHA in 2018
- Leads our Legal Sector business

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Leadership
Acting as CTO or non-exec IT Director, advising Exec, creating and maintaining a benefit-focussed 12-24 month rolling IT plan

Analysis
Examining firm-wide and departmental challenges and identifying solutions based on our wide knowledge of best practice

Procurement
Writing specifications for new systems, checking the market, then selecting and appointing the right provider for the job

Oversight
Acting as your advocate providing informed oversight over suppliers, internal resources and projects

Today

1. Planning post-pandemic
2. Why have a plan?
3. What is an IT roadmap?
4. How to build your IT roadmap
5. How to successfully execute your plan
6. How to move forward

slido

What has been the effect of COVID on your firm's IT Operations?

ⓘ Start presenting to display the poll results on this slide.

slido

What areas of IT/technology is your firm focusing on now?

ⓘ Start presenting to display the poll results on this slide.

Planning post-pandemic

Why have a plan?

Direction and Progress

Transparency and Visibility

Confidence and Trust in Leadership

Consider Compatibility

Budget appropriately

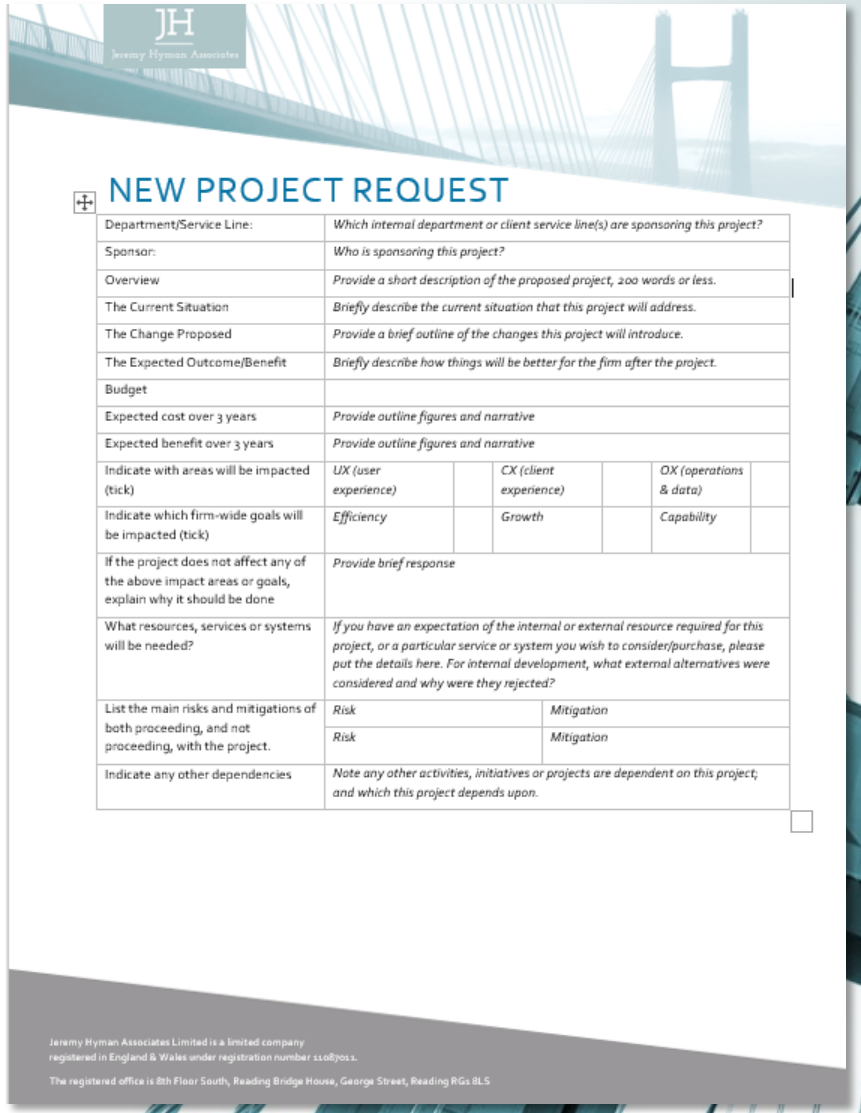
Measure Achievement

What is an IT Roadmap?

- ✓ A plan for what we are doing and when we are doing it
- ✓ Must be aligned with commercial strategy / business objectives
- ✓ Timing of projects according to priority, budget, and resource availability
- ✓ Includes budget and resource requirements
- ✓ Approved and endorsed by the business
- ✓ Communicated to the firm in terms that they understand
- ✓ Incorporates project and change management

Building the plan

1. Start with the business objectives
2. Understand the business problem you are looking to solve
3. Be rigorous and stay focused
4. Have a consistent framework for project selection and initiation
5. Establish the outcomes you want
6. Specify the deliverables and success criteria
7. Allocate priority, timeframe and resource



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NEW PROJECT REQUEST

Department/Service Line:	*Which internal department or client service line(s) are sponsoring this project?*					
Sponsor:	*Who is sponsoring this project?*					
Overview	*Provide a short description of the proposed project, 200 words or less.*					
The Current Situation	*Briefly describe the current situation that this project will address.*					
The Change Proposed	*Provide a brief outline of the changes this project will introduce.*					
The Expected Outcome/Benefit	*Briefly describe how things will be better for the firm after the project.*					
Budget						
Expected cost over 3 years	*Provide outline figures and narrative*					
Expected benefit over 3 years	*Provide outline figures and narrative*					
Indicate with areas will be impacted (tick)	*UX (user experience)*		*CX (client experience)*		*OX (operations & data)*	
Indicate which firm-wide goals will be impacted (tick)	*Efficiency*		*Growth*		*Capability*	
If the project does not affect any of the above impact areas or goals, explain why it should be done	*Provide brief response*					
What resources, services or systems will be needed?	*If you have an expectation of the internal or external resource required for this project, or a particular service or system you wish to consider/purchase, please put the details here. For internal development, what external alternatives were considered and why were they rejected?*					
List the main risks and mitigations of both proceeding, and not proceeding, with the project.	*Risk*	*Mitigation*				
	Risk	*Mitigation*				
Indicate any other dependencies	*Note any other activities, initiatives or projects are dependent on this project; and which this project depends upon.*					

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The registered office is 8th Floor South, Reading Bridge House, George Street, Reading RG1 8LS

Qualifying IT projects

Necessity

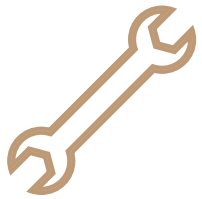
Clients

People

Time

Quality

Necessity



Necessity

- Forced change
- Change in law or regulation
- Product going end of life
- Diminishing expertise

- Compliance
- Agility
- Foundational changes
- Awareness and planning

Clients

Clients

- Clients have increased choice in the market
- Hard to attract and retain
- Vote with their feet

- Client experience
- Responsiveness and proactivity
- Value for money
- Frictionless interaction
- Communication
- Leadership

People

People

- Staff are expensive to recruit and hard to retain
- Liquidity in the workforce
- Recruitment reach

- User experience of tech
- Mobility
- Flexibility
- Training
- Performance and rewards

Time

Time

- Time is finite: Once its gone you can’t get it back!

- Efficiency
- Productivity
- Automation
- Workload management
- Prioritisation of work

Quality

Quality

- Quality is what differentiates your firm from others
- Perception of value

- Clear and comprehendible presentation
- Easy and assisted access to knowledge resources
- Leveraging high quality data to drive activity
- Using tools appropriately

Review current projects

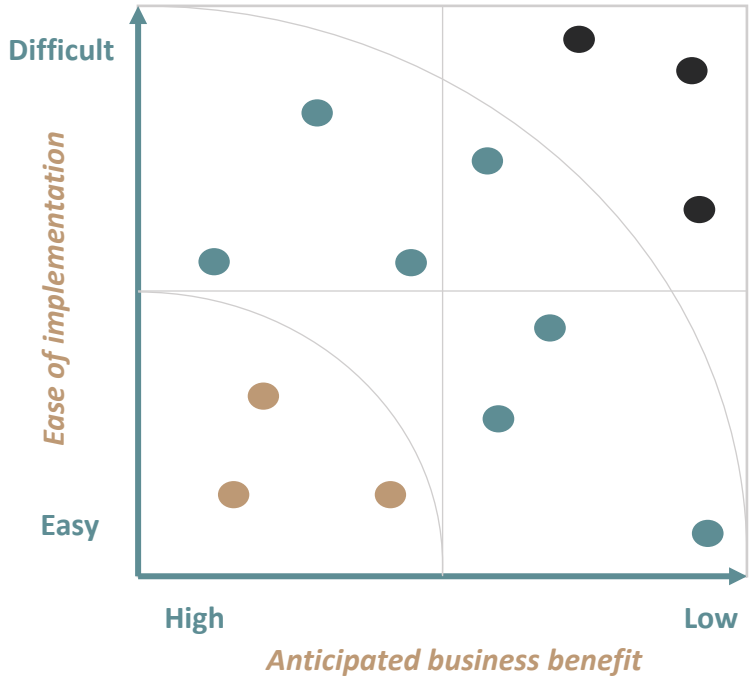
Prioritising projects

Consider:

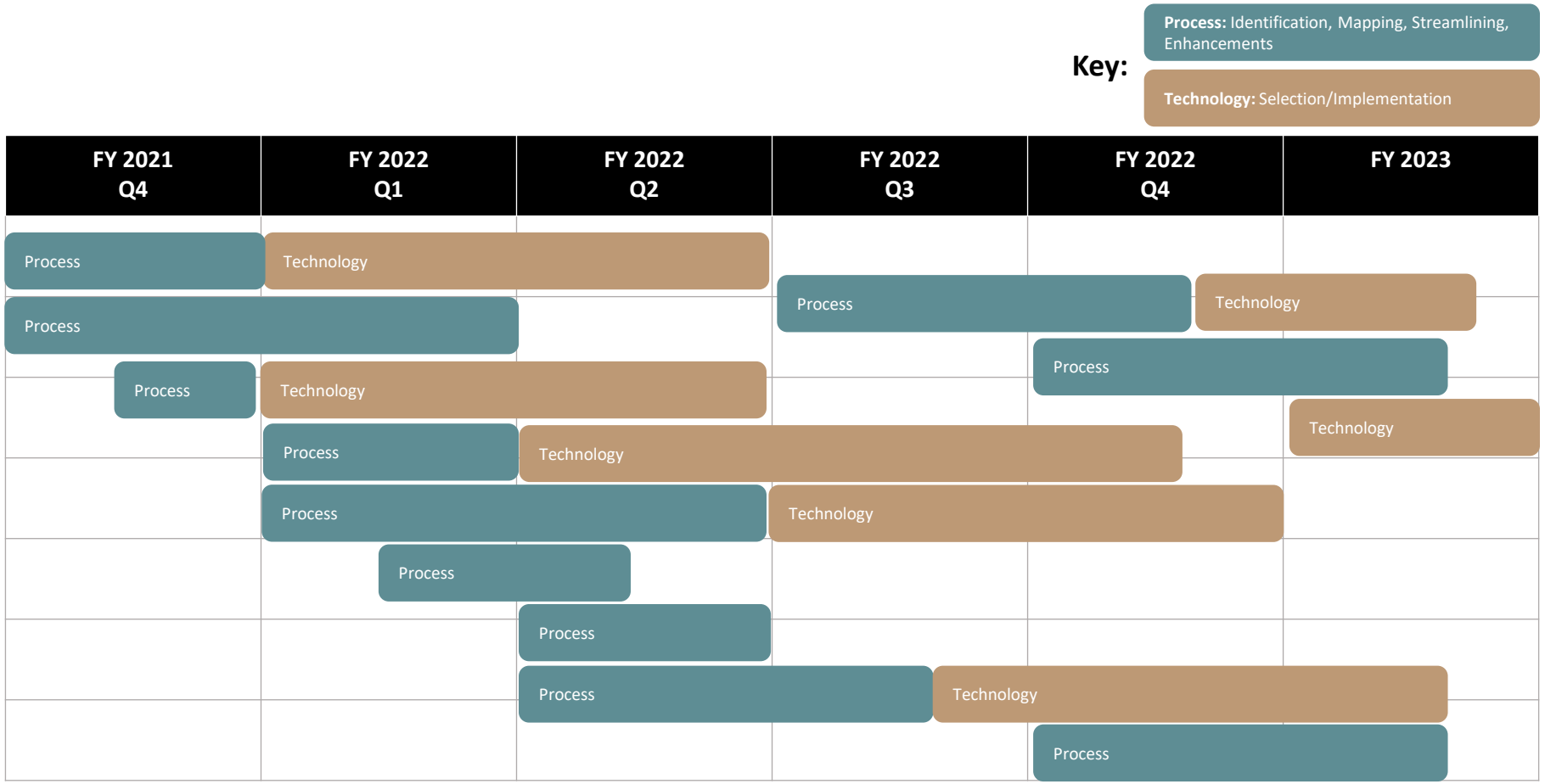
- Expected timeframe
- Resource requirement
- Deadline for delivery

Score:

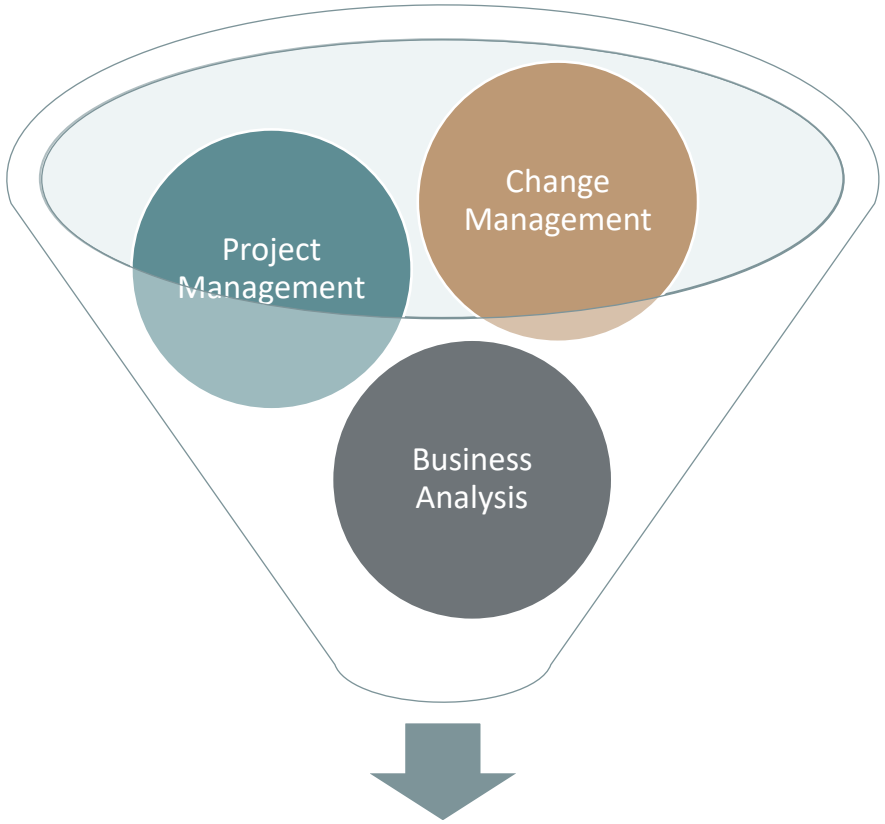
Necessity	0/5
Clients	2/5
People	4/5
Time	3/5
Quality	1/5
Total Score	**10/25**



Sample IT Roadmap



Resourcing projects



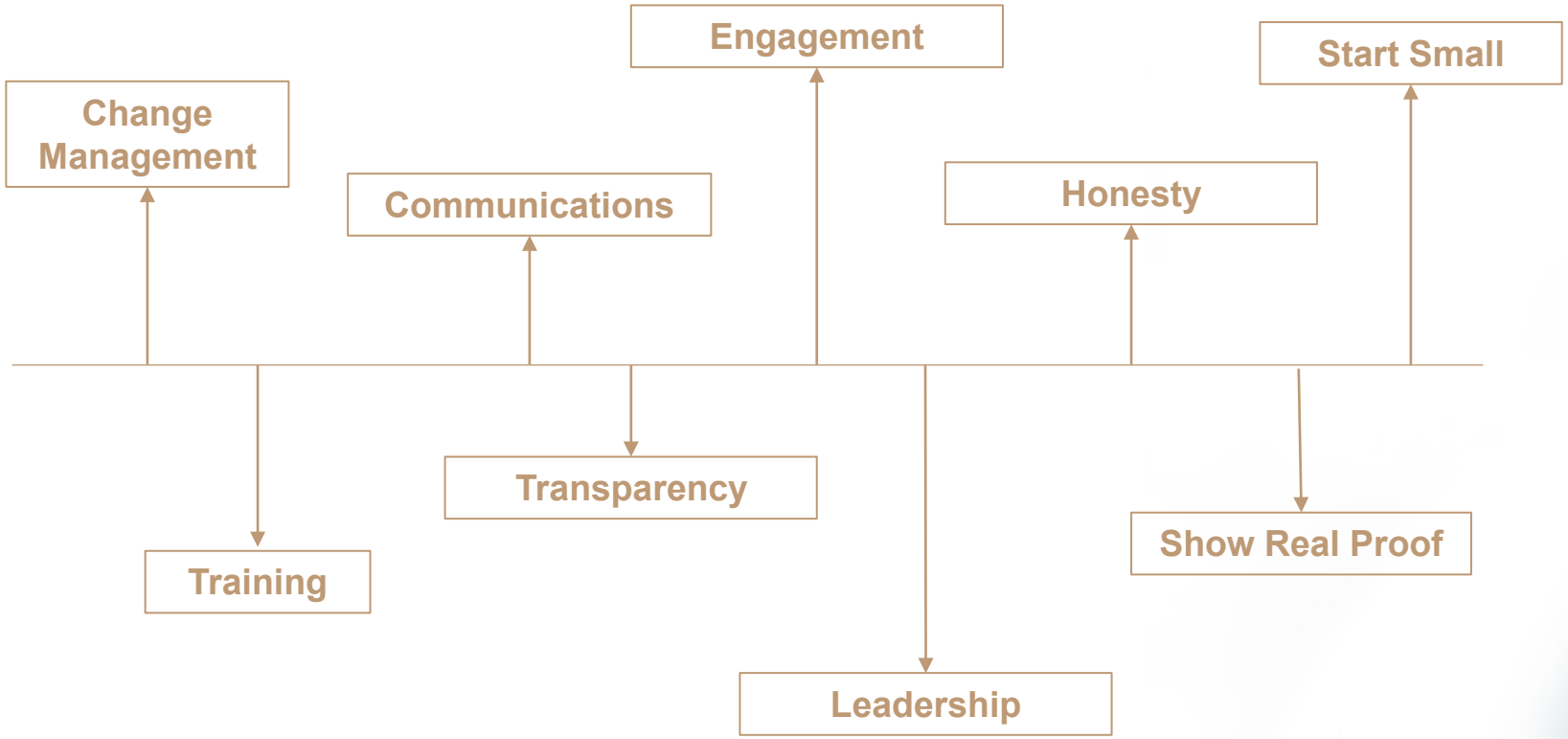
Effective Project Delivery

Recruit

Upskill existing staff

Bring in external expertise

Engagement and adoption



How to move forward

"That's all really easy, I already knew all that."

"We think we know what we are doing but we would appreciate some external validation of our plans."

"We aspire to do all this but its all too hard and we don't have time."

Talk to us.

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Questions & Conclusion

Lisa Whitworth, Relationship Director
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