



## Legal Sector Breakfast Briefing

Wednesday 21 October 2015

**ArmstrongWatson**  
Accountants, Business & Financial Advisers  
A track record of providing solutions to the legal profession



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## Legal Sector Breakfast Briefing

Welcome

**Simon Campbell**  
Relationship Manager – Commercial, Clydesdale Bank

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## Legal Sector Breakfast Briefing

**Andy Poole**  
Legal Sector Partner, Armstrong Watson

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Wednesday 21 October 2015

- 8.00am - Arrival and breakfast
- 8.30am - Welcome
- 8.35am - Briefing – Alternative Sourcing
- 9.30am - Q & A
- 10.00am - Close

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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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**OMCPartners**

**Briefly, who are OMC?**

- Management consultancy focussed on operational efficiency in professional and legal services
- Deep experience in all forms of alternative sourcing (including outsourcing & offshoring) and including legal process re-engineering
- Partners and associates combine 'big-4' consultants and former lawyers from leading international firms
- Experienced across most sectors and services, and currently focus on all legal practice and business support areas
- Clients include:
  - Leading law firms
  - Professional services firms
  - Financial Services organisations
  - FTSE 250 corporates
  - Public sector authorities

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### What is Alternative Sourcing?

- Alternative Sourcing is NOT just about outsourcing
- It IS about:
  - The right person → Doing the right task → At the right time → In the right location → At the right cost
- It IS about having a more nuanced resource mix at your disposal
- Resource delivery model could be:
  - “Make” or “Buy” i.e. do it yourself versus get someone else to do it
  - long term or short term
  - onshore, nearshore or offshore
  - a mix of all of the above

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### What are the Benefits and Opportunities of Alternative Sourcing?

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Alternative Sourcing – Getting Things Started

1. Identify the "As Is"
  - "how do we do things around here"?
  - process mapping i.e. identifying tasks performed
  - best practice comparisons and benchmarking
2. Identify the Opportunities, including:
  - process transformation and improvement
  - optimal resource mix
  - improved control and risk management
  - margin improvements / cost savings
3. Work with stakeholders to create "To Be" processes – KEY to change management
4. Build a **Compelling** business case to lead to a Go/No Go Decision
5. Implement to deliver the benefits

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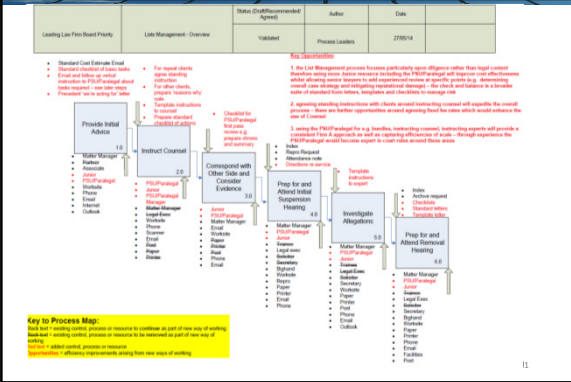
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Implementing Projects Effectively – Some Key Considerations

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| What project resource is required?     | <ul style="list-style-type: none"> <li>• What are the skills required?</li> <li>• Internal and external mix?</li> <li>• What management input is needed?</li> <li>• Are other stakeholders involved e.g. clients?</li> <li>• Are there other competing priorities?</li> </ul>               |
| What are the costs?                    | <ul style="list-style-type: none"> <li>• Financial</li> <li>• Is there a budget?</li> <li>• Time as a cost</li> <li>• What are the opportunity costs?</li> <li>• Are there other risks to consider?</li> </ul>  |
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Some "Get Rights" to Managing Complex Change

- Use a consistent methodology and approach
- Get Senior Leadership support early
- Appoint a respected Project Champion
- Empower the project team
- Obtain buy in – "Consult, consult, consult"
- Focus on the big ticket business benefits AND benefits to your staff
- Maintain a constant "drum beat" of communications
- "Plan Big; Implement Small"
- Underpinning it all - remain flexible and responsive to change

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Conclusions?

- Alternative Sourcing is here to stay
- The benefits are substantial and proven – both in law and other sectors
- Significant margin improvement and cost savings are available
- Effective project management is key to delivering the benefits

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QUESTIONS?

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**Contact Us**



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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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### OMC Partners

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### OMC Partners

#### What are the Benefits and Opportunities of Alternative Sourcing?

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    graph TD
      A[Improved Margins] --- B[Net Cost Reductions (30%+)]
      B --- C[Release Capacity]
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Alternative Sourcing – Getting Things Started

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  - "how do we do things around here"?
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- Identify the Opportunities, including:
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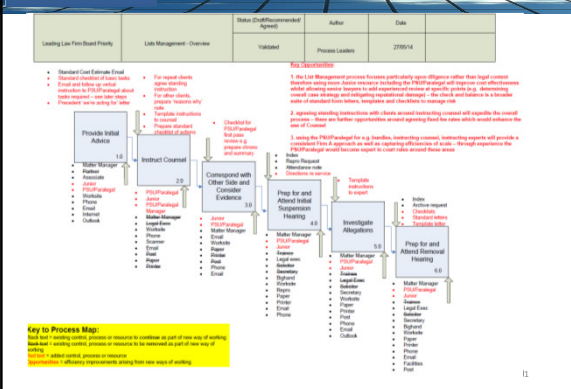
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Implementing Projects Effectively – Some Key Considerations

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Some "Get Rights" to Managing Complex Change

- Use a consistent methodology and approach
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Conclusions?

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### Questions and Conclusion

Simon Campbell  
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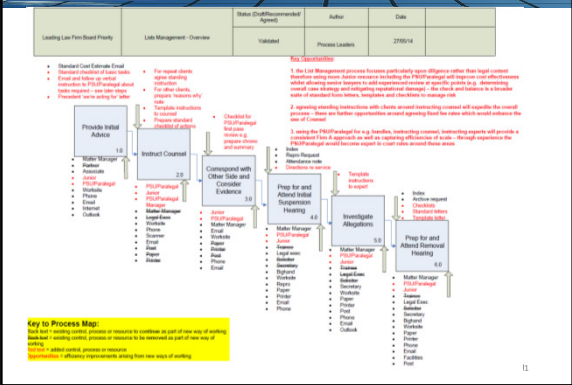
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### OMCPartners

#### What are the Benefits and Opportunities of Alternative Sourcing?

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    graph TD
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      D --- G
      B --- E
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Alternative Sourcing – Getting Things Started

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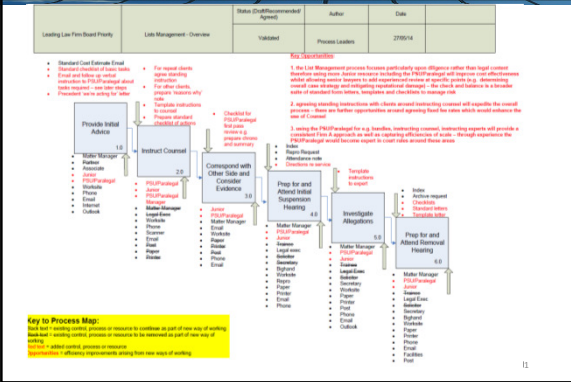
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Implementing Projects Effectively – Some Key Considerations

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Some "Get Rights" to Managing Complex Change

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Conclusions?

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QUESTIONS?

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**Contact Us**



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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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# Legal Sector Breakfast Briefing

Wednesday 21 October 2015

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Welcome

**Simon Campbell**  
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# Legal Sector Breakfast Briefing

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Legal Sector Partner, Armstrong Watson

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Wednesday 21 October 2015

- 8.00am - Arrival and breakfast
- 8.30am - Welcome
- 8.35am - Briefing – Alternative Sourcing
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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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**OMCPartners**

**Briefly, who are OMC?**

- Management consultancy focussed on operational efficiency in professional and legal services
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### OMCPartners

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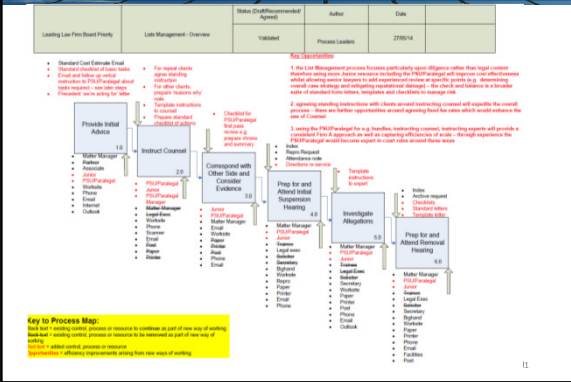
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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
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### What are the Benefits and Opportunities of Alternative Sourcing?

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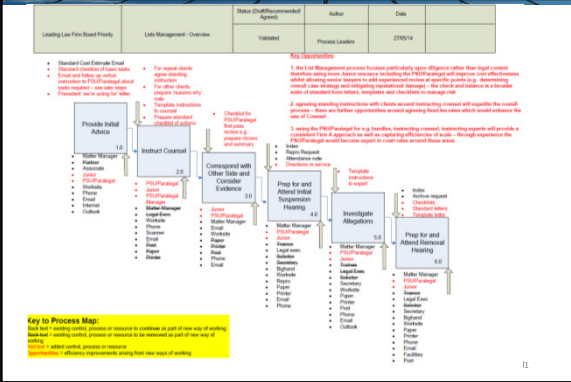
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### Conclusions?

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# QUESTIONS?

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## Legal Sector Breakfast Briefing

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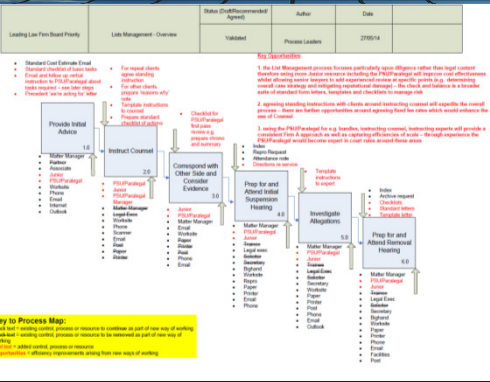
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Some "Get Rights" to Managing Complex Change

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Conclusions?

- Alternative Sourcing is here to stay
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QUESTIONS?

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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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## Legal Sector Breakfast Briefing

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## Legal Sector Breakfast Briefing

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## Legal Sector Breakfast Briefing

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Wednesday 21 October 2015

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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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**Briefly, who are OMC?**

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### What are the Benefits and Opportunities of Alternative Sourcing?

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Alternative Sourcing – Getting Things Started

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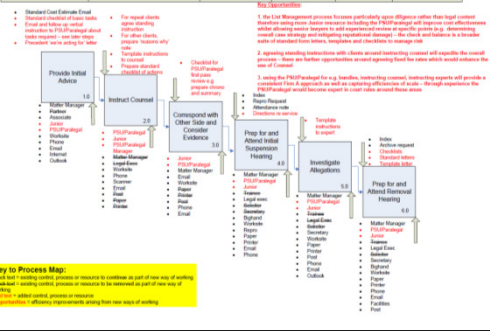
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| Leading Low-Fee Based Priority | Links Management - Overview | Status (Draft/Implemented/Agreed) | Author        | Date     |
|--------------------------------|-----------------------------|-----------------------------------|---------------|----------|
|                                |                             | Validated                         | Process Leads | 27/04/14 |




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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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# Legal Sector Breakfast Briefing

Wednesday 21 October 2015

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# Legal Sector Breakfast Briefing

Welcome

**Simon Campbell**  
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Legal Sector Partner, Armstrong Watson

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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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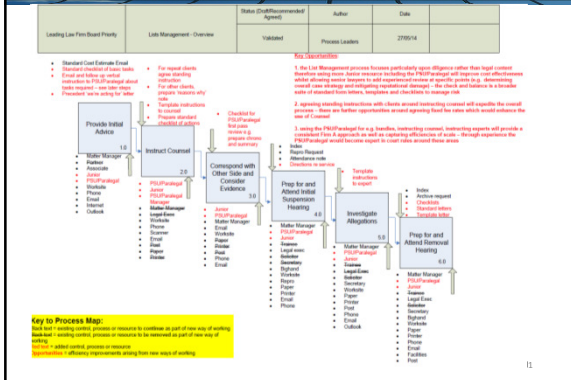
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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
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Wednesday 21 October 2015

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### OMCPartners

#### What are the Benefits and Opportunities of Alternative Sourcing?

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    graph TD
      A[Improved Margins] --- B[Net Cost Reductions (30%+)]
      B --- C[Release Capacity]
      D[Improve Morale / Better use of resource] --- E[Better Manage Risk]
      E --- F[Service Consistency]
      G[Meet Client Demands e.g. Fixed Fees] --- H[Remaining "In the Game"]
      A --- D
      D --- G
      B --- E
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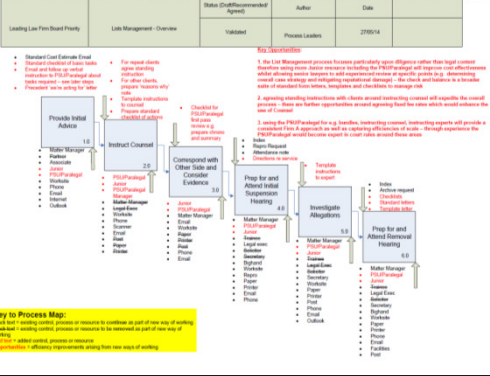
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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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## Legal Sector Breakfast Briefing

**Andy Poole**  
Legal Sector Partner, Armstrong Watson

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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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**OMCPartners**

**Briefly, who are OMC?**

- Management consultancy focussed on operational efficiency in professional and legal services
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### OMCPartners

#### What is Alternative Sourcing?

- Alternative Sourcing is NOT just about outsourcing
- It IS about:
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- It IS about having a more nuanced resource mix at your disposal
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### OMCPartners

#### What are the Benefits and Opportunities of Alternative Sourcing?

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      F --- H
  
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**OMCPartners**

### Alternative Sourcing – Getting Things Started

- Identify the “As Is”
  - “how do we do things around here”?
  - process mapping i.e. identifying tasks performed
  - best practice comparisons and benchmarking
- Identify the Opportunities, including:
  - process transformation and improvement
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  - margin improvements / cost savings
- Work with stakeholders to create “To Be” processes – KEY to change management
- Build a **Compelling** business case to lead to a Go/No Go Decision
- Implement to deliver the benefits

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Leading Low-Flex Based Priority      Lists Management - Overview      Status (Draft/Implemented/Agreed)      Author      Date

Validated      Project Leads      27/04/14

**Key Objectives**

- The List Management process focuses particularly upon diligence rather than legal control and/or other areas to add expertise in order to identify, provide for, and manage the overall case during and following operational disruption. The check and balance to a broader suite of standard form letters, templates and checklists to manage risk.
- By working involving stakeholders with clients around existing, current and specific cases, there are further opportunities around agreeing fixed fee rates which would enhance the rate of Counsel.
- Using the POC's developed for e.g. handles, controlling internal, controlling reports will provide a controlled flow of reports to and an ongoing effectiveness of order - through experience the POC's will become expert in cost rates around these areas.

**Key to Process Map:**  
 Green box - existing activity process as currently in operation as part of normal day to day work.  
 Blue box - existing activity process in operation to be retained as part of new way of working.  
 Yellow box - activity process in operation from new way of working.

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### Implementing Projects Effectively – Some Key Considerations

|  |   |
|--|---|
| What project resource is required?     | <ul style="list-style-type: none"> <li>What are the skills required?</li> <li>Internal and external mix?</li> <li>What management input is needed?</li> <li>Are other stakeholders involved e.g. clients?</li> <li>Are there other competing priorities?</li> </ul>               |
| What are the costs?                    | <ul style="list-style-type: none"> <li>Financial</li> <li>Is there a budget?</li> <li>Time as a cost</li> <li>What are the opportunity costs?</li> <li>Are there other risks to consider?</li> </ul>  |
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Some "Get Rights" to Managing Complex Change

- Use a consistent methodology and approach
- Get Senior Leadership support early
- Appoint a respected Project Champion
- Empower the project team
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Conclusions?

- Alternative Sourcing is here to stay
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QUESTIONS?

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## Legal Sector Breakfast Briefing

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Welcome

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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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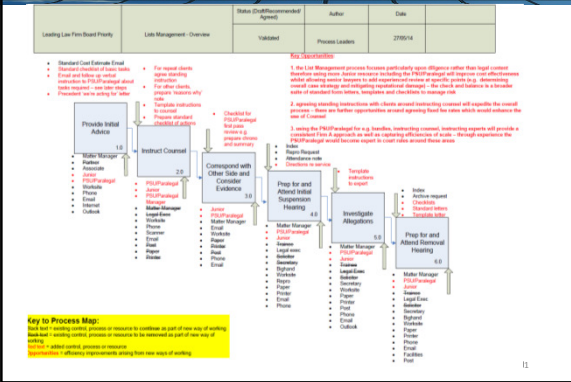
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Conclusions?

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QUESTIONS?

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## Legal Sector Breakfast Briefing

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Simon Campbell  
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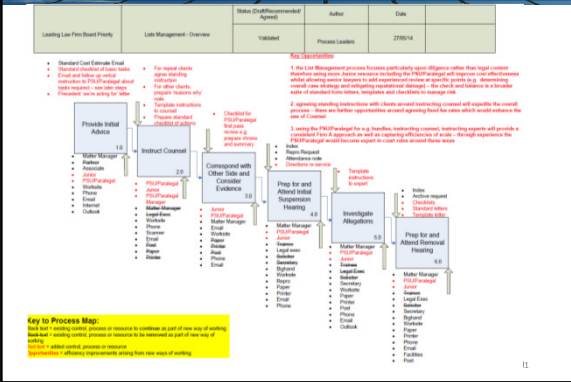
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**ArmstrongWatson**  
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## Legal Sector Breakfast Briefing

**Andy Poole**  
Legal Sector Partner, Armstrong Watson

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Wednesday 21 October 2015

- 8.00am - Arrival and breakfast
- 8.30am - Welcome
- 8.35am - Briefing – Alternative Sourcing
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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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**OMCPartners**

**Briefly, who are OMC?**

- Management consultancy focussed on operational efficiency in professional and legal services
- Deep experience in all forms of alternative sourcing (including outsourcing & offshoring) and including legal process re-engineering
- Partners and associates combine 'big-4' consultants and former lawyers from leading international firms
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### OMCPartners

#### What is Alternative Sourcing?

- Alternative Sourcing is NOT just about outsourcing
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### OMCPartners

#### What are the Benefits and Opportunities of Alternative Sourcing?

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      A[Improved Margins] --- B[Net Cost Reductions (30%+)]
      B --- C[Release Capacity]
      D[Improve Morale / Better use of resource] --- E[Better Manage Risk]
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      C --- D
      F --- G
  
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### Alternative Sourcing – Getting Things Started

1. Identify the “As Is”
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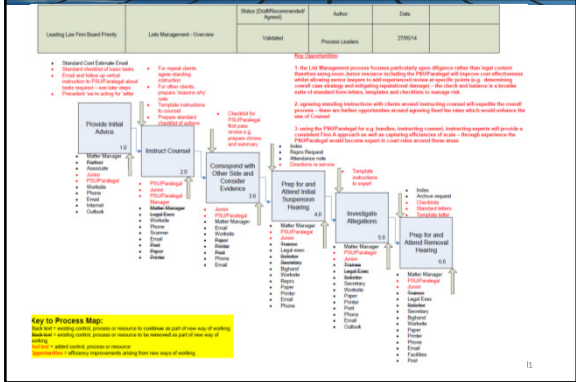
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Some "Get Rights" to Managing Complex Change

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Conclusions?

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QUESTIONS?

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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
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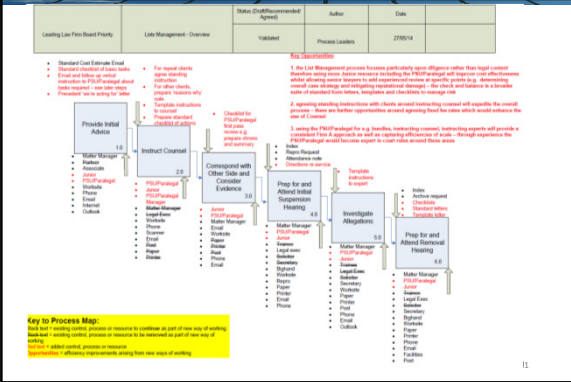
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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
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# Legal Sector Breakfast Briefing

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Welcome

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# Legal Sector Breakfast Briefing

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### OMCPartners

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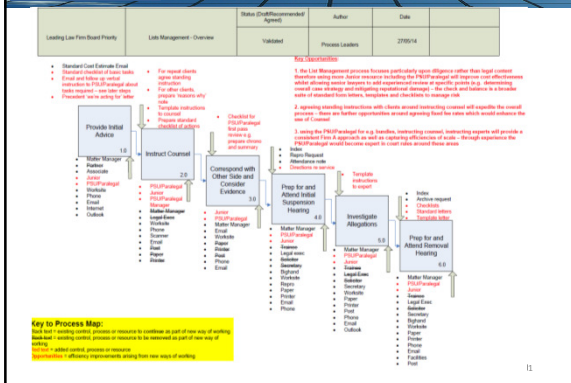
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Some "Get Rights" to Managing Complex Change

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Conclusions?

- Alternative Sourcing is here to stay
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QUESTIONS?

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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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# Legal Sector Breakfast Briefing

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Welcome

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# Legal Sector Breakfast Briefing

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Legal Sector Partner, Armstrong Watson

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Wednesday 21 October 2015

- 8.00am - Arrival and breakfast
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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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**OMCPartners**

**Briefly, who are OMC?**

- Management consultancy focussed on operational efficiency in professional and legal services
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### OMCPartners

#### What is Alternative Sourcing?

- Alternative Sourcing is NOT just about outsourcing
- It IS about:
  - The right person → Doing the right task → At the right time → In the right location → At the right cost
- It IS about having a more nuanced resource mix at your disposal
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### OMCPartners

#### What are the Benefits and Opportunities of Alternative Sourcing?

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    graph TD
      A[Improved Margins] --- B[Net Cost Reductions (30%+)]
      B --- C[Release Capacity]
      D[Improve Morale / Better use of resource] --- E[Better Manage Risk]
      E --- F[Service Consistency]
      G[Meet Client Demands e.g. Fixed Fees] --- H[Remaining 'In the Game']
      A --- D
      B --- E
      C --- F
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      E --- H
      F --- H
  
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Alternative Sourcing – Getting Things Started

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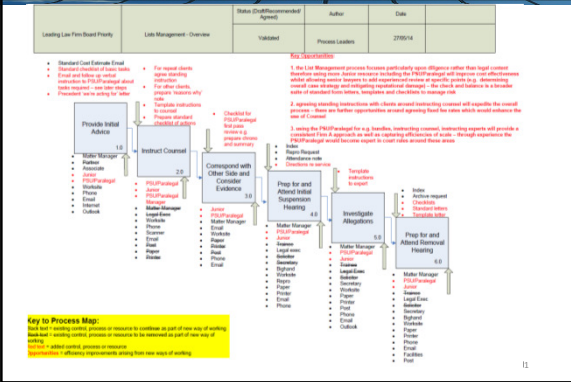
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## Legal Sector Breakfast Briefing

### Questions and Conclusion

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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
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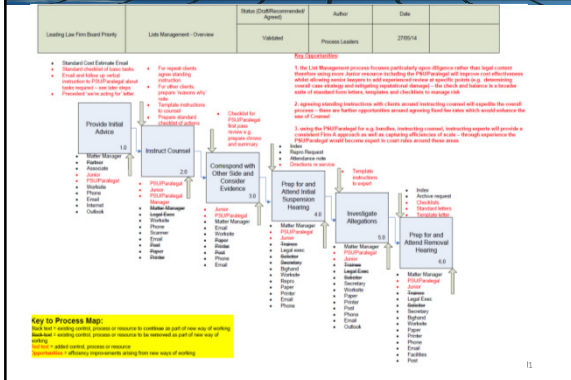
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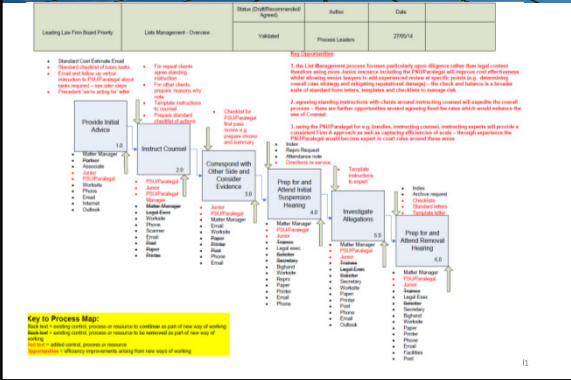
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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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# Legal Sector Breakfast Briefing

Wednesday 21 October 2015

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# Legal Sector Breakfast Briefing

Welcome

**Simon Campbell**  
Relationship Manager – Commercial, Clydesdale Bank

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# Legal Sector Breakfast Briefing

**Andy Poole**  
Legal Sector Partner, Armstrong Watson

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Wednesday 21 October 2015

- 8.00am - Arrival and breakfast
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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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**OMCPartners**

**Briefly, who are OMC?**

- Management consultancy focussed on operational efficiency in professional and legal services
- Deep experience in all forms of alternative sourcing (including outsourcing & offshoring) and including legal process re-engineering
- Partners and associates combine 'big-4' consultants and former lawyers from leading international firms
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### OMCPartners

#### What is Alternative Sourcing?

- Alternative Sourcing is NOT just about outsourcing
- It IS about:
 

The right person

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Doing the right task

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At the right time

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In the right location

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At the right cost
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### OMCPartners

#### What are the Benefits and Opportunities of Alternative Sourcing?

Improved Margins

Improve Morale / Better use of resource

Meet Client Demands e.g. Fixed Fees

Net Cost Reductions (30%+)

Better Manage Risk

Remaining “In the Game”

Release Capacity

Service Consistency

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Alternative Sourcing – Getting Things Started

1. Identify the "As Is"
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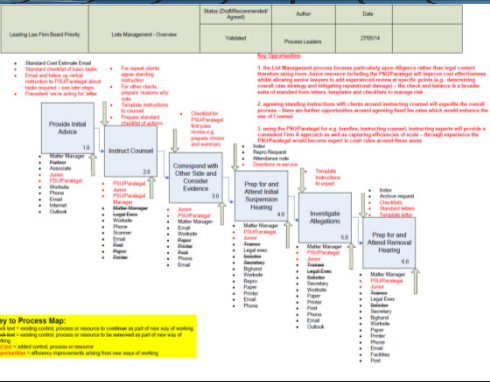
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Implementing Projects Effectively – Some Key Considerations

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Some "Get Rights" to Managing Complex Change

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Conclusions?

- Alternative Sourcing is here to stay
- The benefits are substantial and proven – both in law and other sectors
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QUESTIONS?

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**Contact Us**



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## Legal Sector Breakfast Briefing

### Questions and Conclusion

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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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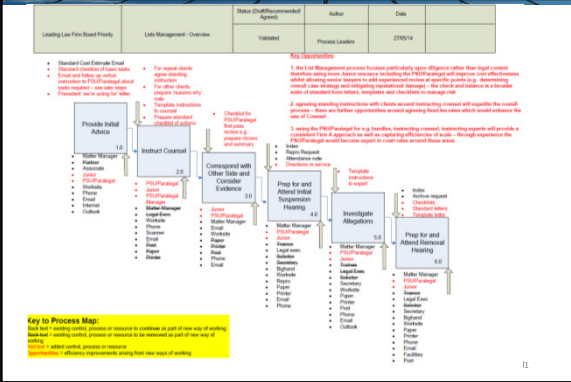
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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
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### What are the Benefits and Opportunities of Alternative Sourcing?

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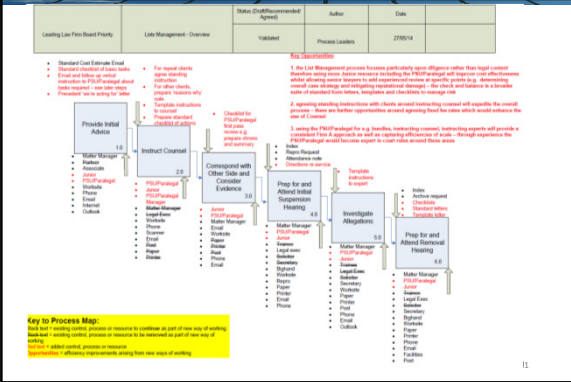
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### Some "Get Rights" to Managing Complex Change

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### OMCPartners

#### What is Alternative Sourcing?

- Alternative Sourcing is NOT just about outsourcing
- It IS about:
 

The right person

→

Doing the right task

→

At the right time

→

In the right location

→

At the right cost
- It IS about having a more nuanced resource mix at your disposal
- Resource delivery model could be:
  - “Make” or “Buy” i.e. do it yourself versus get someone else to do it
  - long term or short term
  - onshore, nearshore or offshore
  - a mix of all of the above

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### OMCPartners

#### What are the Benefits and Opportunities of Alternative Sourcing?

Improved Margins

Improve Morale / Better use of resource

Meet Client Demands e.g. Fixed Fees

Net Cost Reductions (30%+)

Better Manage Risk

Remaining “In the Game”

Release Capacity

Service Consistency

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### Alternative Sourcing – Getting Things Started

1. Identify the "As Is"
  - "how do we do things around here"?
  - process mapping i.e. identifying tasks performed
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2. Identify the Opportunities, including:
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  - margin improvements / cost savings
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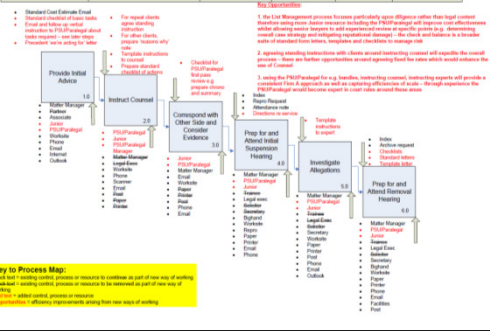
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| Leading Low-Flex Based Priority | Links Management - Overview | Status (Draft/Implemented/Agreed) | Author        | Date     |
|---------------------------------|-----------------------------|-----------------------------------|---------------|----------|
|                                 |                             | Validated                         | Process Leads | 27/04/14 |



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Some "Get Rights" to Managing Complex Change

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Conclusions?

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QUESTIONS?

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**Contact Us**



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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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# Legal Sector Breakfast Briefing

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Welcome

**Simon Campbell**  
Relationship Manager – Commercial, Clydesdale Bank

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# Legal Sector Breakfast Briefing

**Andy Poole**  
Legal Sector Partner, Armstrong Watson

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Wednesday 21 October 2015

- 8.00am - Arrival and breakfast
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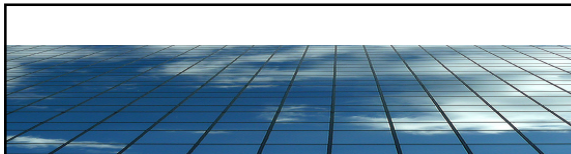
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## OMCPartners

**Alternative Sourcing: The Benefits and Opportunities  
 (implementing lean projects effectively whilst managing complex change)**

**Matt Peacock, Partner, OMC Partners**

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## OMCPartners

### Briefly, who are OMC?

- Management consultancy focussed on operational efficiency in professional and legal services
- Deep experience in all forms of alternative sourcing (including outsourcing & offshoring) and including legal process re-engineering
- Partners and associates combine 'big-4' consultants and former lawyers from leading international firms
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### OMCPartners

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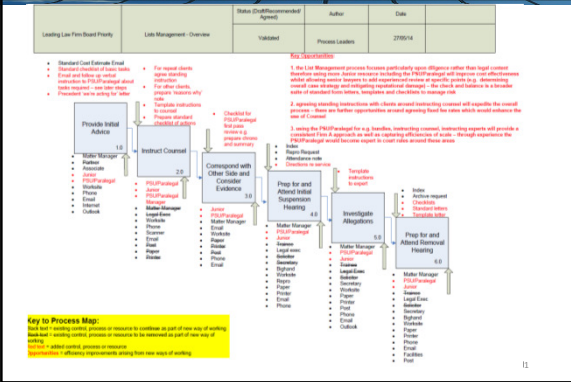
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QUESTIONS?

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## Legal Sector Breakfast Briefing

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Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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## Legal Sector Breakfast Briefing

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**OMCPartners**

**Alternative Sourcing: The Benefits and Opportunities  
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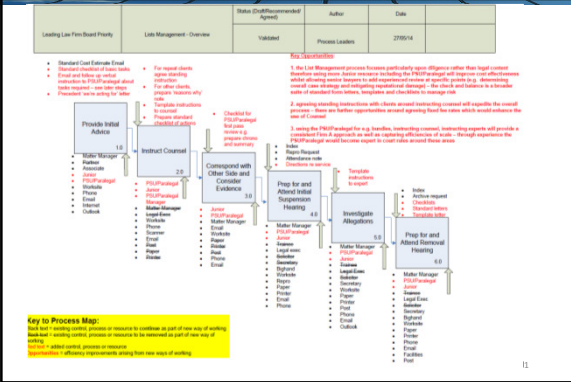
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## Legal Sector Breakfast Briefing

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Simon Campbell  
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# Legal Sector Breakfast Briefing

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  - margin improvements / cost savings
3. Work with stakeholders to create "To Be" processes – KEY to change management
4. Build a **Compelling** business case to lead to a Go/No Go Decision
5. Implement to deliver the benefits

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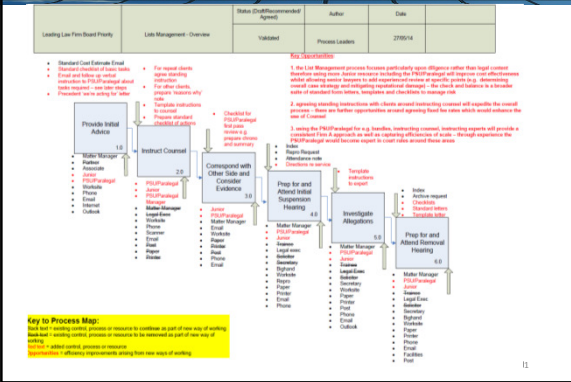
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Implementing Projects Effectively – Some Key Considerations

|  |   |
|--|---|
| What project resource is required?     | <ul style="list-style-type: none"> <li>• What are the skills required?</li> <li>• Internal and external mix?</li> <li>• What management input is needed?</li> <li>• Are other stakeholders involved e.g. clients?</li> <li>• Are there other competing priorities?</li> </ul>               |
| What are the costs?                    | <ul style="list-style-type: none"> <li>• Financial</li> <li>• Is there a budget?</li> <li>• Time as a cost</li> <li>• What are the opportunity costs?</li> <li>• Are there other risks to consider?</li> </ul>  |
| Has the project been properly planned? | <ul style="list-style-type: none"> <li>• What are the scope/deliverables/objectives?</li> <li>• What are the milestones and what's the pathway?</li> <li>• Are there key dependencies?</li> <li>• Have Communications been thought about?</li> <li>• How can risks be mitigated?</li> </ul> |

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Some "Get Rights" to Managing Complex Change

- Use a consistent methodology and approach
- Get Senior Leadership support early
- Appoint a respected Project Champion
- Empower the project team
- Obtain buy in – "Consult, consult, consult"
- Focus on the big ticket business benefits AND benefits to your staff
- Maintain a constant "drum beat" of communications
- "Plan Big; Implement Small"
- Underpinning it all - remain flexible and responsive to change

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Conclusions?

- Alternative Sourcing is here to stay
- The benefits are substantial and proven – both in law and other sectors
- Significant margin improvement and cost savings are available
- Effective project management is key to delivering the benefits

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QUESTIONS?

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## Legal Sector Breakfast Briefing

### Questions and Conclusion

Simon Campbell  
Relationship Manager - Commercial, Clydesdale Bank

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