The BigHand Tool Kit

Achieving operational excellence in your support services - regardless of your firm size.

Tool Kit Contents

Introduction:

Why Law Firms of All Sizes Need Visibility into their Support Staff Function

As a result of social distancing measures bringing remote working practices into play, law firms of all sizes are looking to **streamline non-billable tasks** more than ever before, in an attempt to save costs and deliver effective and speedy client service.

It's fair to assume that the economic effects of the global pandemic will increase client demand of 'more for less', and under these growing pressures, the need has never been greater to shine a light on the back office to achieve much needed **operational efficiencies in support services.**

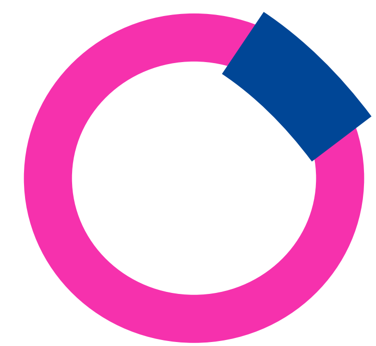
For mid-sized firms, this is fundamental to the agility they boast. Being more nimble may be the very thing that gives you an edge over the larger firms, so the **entire client service process should be nimble** too – with internal support being an integral part of that.

The root problem with inefficient support teams often lies in a **lack of visibility and clarity around task delegation.** Support staff are often overworked, but operational management rarely have the full picture of which lawyers are delegating tasks, and whether the right resources are working on them. This problem is now exacerbated with silos of work suddenly buried in individual mailboxes or in hastily set-up shared mailboxes, leaving lawyers no **visibility of what support resource is available** to them for urgent client requests.

Our recent Support Staff Survey supports this and found that almost three quarters (73%) of participants have to move work internally from one resource to another at least once a week, with 20% saying it's due to **tasks being incorrectly delegated in the first place.** What's more, just 3% of respondents believed that all the tasks they are sent include all of the necessary information to be completed accurately the first time.

For medium-sized law firms, this problem can be much simpler to solve than for the Top 100, without the need for budget-busting technology or lengthy change management projects.

The aim of this tool kit is to provide valuable insight into how other law firms have successfully achieved operational excellence, with some handy project management tips thrown in that we've learned along the way.



Just 3% of Support Staff believe the tasks they are sent include all of the information they need to complete.

Step One: Asking the Right Questions

Establishing your Project Needs

Getting visibility of real-time workflow data is vital for making **informed business decisions** to achieve streamlined processes that decrease task turnaround and increase client service output.

So where should law firms begin when setting out to improve their support services? The answer **doesn't always lie in transformational business change projects**. It can be surprisingly simple and straight forward to put both structural and technology-based measures in place.

A good place to start is by asking the right questions:

- How is our support work being delegated?
- Which resources are doing the work?
- Which lawyers do their own admin work?
- How long does it take to complete each task?
- What is the impact on our client delivery?
- What is the cost to the business?

If you're unable to answer any of these, include them in your project outline.

Step Two: Winning your Case

The Importance of Goal Setting for Gaining Internal Buy-In

So, you have established the need for efficiency gains in your support services. Now you need to gain internal buy-in to get the green light for your project. A vital step is to have clear goals in place that clearly outline the benefits for your internal clients (the lawyers) and external clients.

Use the following list as a starting point, and mark your ideal goals:

- [ ] Understand our support costs and value to the firm
- [ ] Give lawyers visibility of workloads to better set expectations with customers for returning documentation
- [ ] Maximize utilization of all staff by getting them focused on the things they are best suited to
- [ ] Engage senior EA/PAs in client facing work by reducing or reallocating their routine admin tasks
- [ ] Encourage and enable lawyers and paralegals to easily delegate so they can focus on chargeable work
- [ ] Gain access to support services data to enable intelligent resource decision making
- [ ] Share work among teams more readily, removing peaks and troughs of work
- [ ] Cut hours of wasted time by staff who live in spreadsheets trying to track people's time
- [ ] Remove constant interruptions for task instructions to be clarified
- [ ] Shorten turnaround times for client work by having visibility and effort estimates on work
- [ ] Set achievable but visible internal SLAs for the completion of certain critical tasks

Step Three: Finding the Right Technology

How the Right Solution Can Solve your Challenges

Understanding which tasks your support teams are spending time and resources on should be imperative when looking to implement better processes. With **support teams often accounting for a third of a firms overall expenditure**, without transparency you may be incurring unnecessary and costly admin overheads.

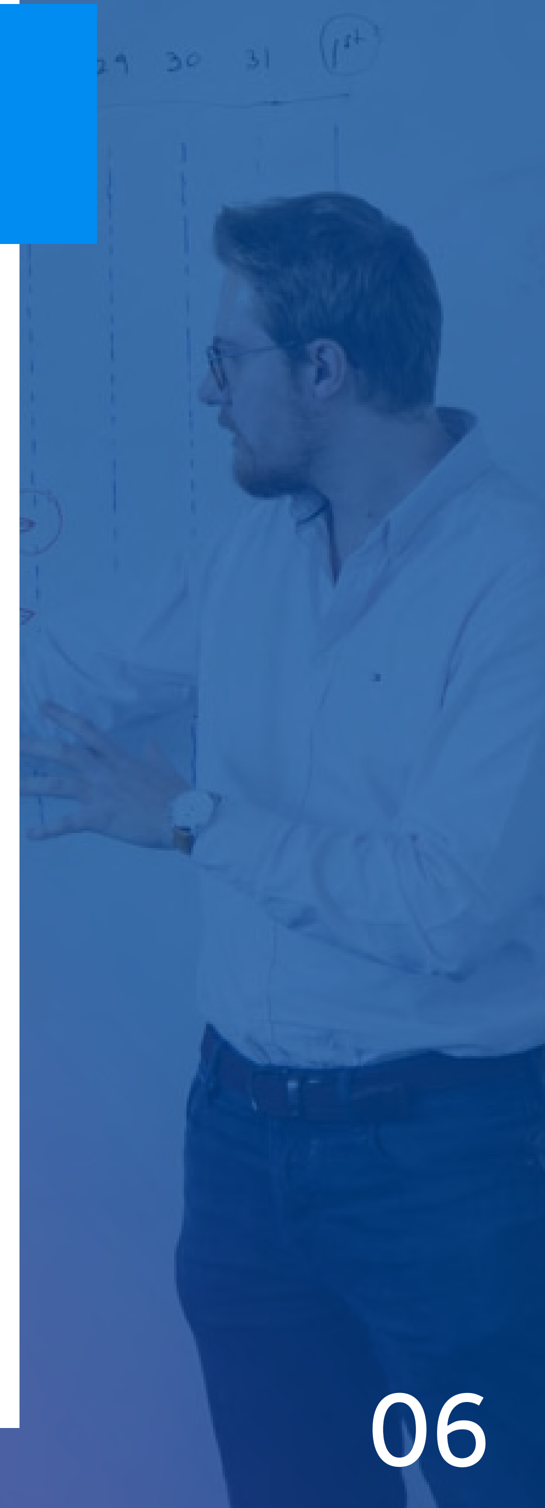
Does your law firm have the technology basics in place to gain this understanding, and for your staff to operate effectively on a day-to-day basis? From our conversations with clients, we're often surprised to find the answer to this question is 'no'.

A workflow tool is a fundamental piece of the modern law firm's technology stack, and should **provide visibility of the current delegation process** in the firm, to gain the insight needed to start making informed decisions to improve support efficiencies.

When looking for the right workflow solution, consider the following:

- Is it designed with law firms in mind, making it **easy for the lawyers to use**?
- Is it **quick and easy to implement**, with minimal IT requirements?
- For management, does it give a **clear view of team capacity** and how evenly work is being distributed to help fully optimize resources?
- Does it have the functionality to **optimize the effectiveness of the legal support function** by ensuring work is routed to the right resource, at the right time?

Remember, **one size does not fit all.** Whichever technology solution you decide to implement, have your goals clearly defined, and make sure it works for you and your firm's requirements.



Step Four: Successful User Adoption

Top Tips for Success in the Short and Long Term

Change as an enabler

The remote working transition was relatively pain free for some law firms, and perhaps a little rockier for others. What is evident is that firms were forced to suddenly embrace something that many had resisted for some time – change. That traditional blocker has now flipped to become a key enabler.

Who's got this?

Ensuring the project has an identified and engaged owner from day one is critical. Is this an HR, Operations or IT project? Who knows most about what needs to happen? Who has the internal credibility? And how will you partner with your supplier? Pick someone with the time to dedicate to the project, who can see the final vision.

One size does not fit all

When it comes to communication, training and adoption, it's best to remember that people are different – not just in how they work, but in how they learn and listen. Some people will happily read a document, while others would rather listen to a speaker, and the remaining group will want to look at a diagram. Use a mix.

Implementation doesn't just happen once

Remember to keep an eye on user adoption numbers after the initial implementation to ensure these don't start to trail off. Keep encouraging feedback from your product champions so you can stay on top of any adoption problems, and continue to communicate the long-term benefits to the end users, and tailor these to how it will help in each job role type!

Step Four: Successful User Adoption

Top Tips for Success in the Short and Long Term

Adoption is King

If nobody uses a new software system or new way of working, no benefits can be generated. While any adoption strategy starts with the early communications, an ongoing and dedicated adoption plan is useful. How will you ensure users adopt the solution? How will you monitor and track usage? What are your plans to see if usage is tailing off?

What usage should I track?

Here are some broad measures:

- Number of people using the software
- Frequency of usage of those users
- What are they using it for?
- Positive or negative experience of those users - anecdotal feedback.

Why track it?

Addressing adoption challenges is easier if caught early. Old habits change slowly, and if change is being implemented, tracking how well it is progressing is important.

Not knowing adoption has dropped (or never started) months into the project is an expensive thing to remedy.

How to track it?

Generating reports from the system on a regular basis will provide the data you need. Capturing that at regular intervals provides a trend. This can be done at a macro level or at a more granular level by team.

This will give you some comparative data and highlight where additional energy might be needed. Leaning on your provider or purchasing adoption packages / services can assist if you are tight on internal resources.

The Real World

An example of how a law firm got its project off the ground

Goodell DeVries

How the mid-sized firm future-proofed the support service offered to its attorneys with "the Future Staffing Initiative" and BigHand Now

Goodell DeVries Leech & Dann LLP is a leading US law firm with over 60 attorneys and offices in Baltimore and Philadelphia. Forward-thinking in its adoption of technology, the firm has implemented BigHand's **task management solution**, BigHand Now, to **optimize the effectiveness of its support services** and client delivery turnaround.

Back in 2015, the firm began working on a project called "the Future Staffing Initiative", in light of the legal secretarial challenges in the market. David Roden, Director of Technology at Goodell DeVries explains, "It became very apparent that the traditional Secretary to Lawyer relationship was not a sustainable support model and the rise in legal delivery technology, teamed with the challenge of a shrinking talent pool, meant that we needed to make **changes in order to future-proof the firm's support services** function."

Goodell DeVries created a new division of the support team, called the Document Services Team, to handle administrative document requests so that the senior support staff could focus on higher-value or **billable work.** David continues, "Once the Document Services Team was established, we needed a way to move work around, which ensured that the right type of work was delegated to the right resource, with all the necessary instruction the first time."

> "The right type of work was delegated to the right resource, with all the necessary instruction the first time"

Robust Task Management Solution

“It soon became clear that BigHand Now was the only task management solution in the market built **specifically for law firms.** It also helped that the software could be implemented with a simple upgrade from the existing dictation technology that the attorneys were already used to, allowing for the delegation of voice and other kind of tasks”

Tasks are sent with a form that captures all the instruction upfront, entered into a workflow and **automatically routed to the right resource**. Once in the system, the tasks can be tracked through to completion. The solution provides the firm with visibility of key measurables such as what types of tasks are being requested from different teams and **what team capacity is like at any one time**.

David explains the impact of BigHand Now at the firm, “We always knew that everyone was busy, but **we didn’t know what busy actually looked like**. With BigHand Now, we have transparency of what work is being sent, and to which resources in the firm.”

David concludes, “We have already received great feedback on BigHand Now and the clarity it gives our Document Services Team, as well as our management, so we can **optimize the service** we offer to our attorneys.”

“We always knew that everyone was busy, but we didn’t know what busy actually looked like”

Ready to Take the First Steps to Operational Excellence?

BigHand Now, a task delegation and workflow tool developed specifically for law firms, ensures that the right work is sent to the right people at the right time.

With the additional visibility and accountability that BigHand Now offers, firms are not only able to ensure their people are **busy**, **efficient and productive**, but that support staff are empowered to make better use of their time and skills, and play a more significant role in serving clients and solidifying future success for their firm.

For more information on how you can implement simple changes to improve the efficiency of your Support Teams, or to find out more about BigHand Now, get in touch with us today.

Get in Touch

Thank You.