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One for all

Moving to Microsoft-powered, cloud-native enterprise resource planning system LexisOne was a big change for Fieldfisher. It brought new ways of working for the finance and development teams, as well as the lawyers, says finance director Mike Giles

W hen the time came for Fieldfisher to reappraise the value of its practice management system, it faced a true choice – go with the status quo, or become one of the very first to try something really innovative. Incumbent provider Thomson Reuters Elite is phasing out Elite Enterprise for its 3E solution, and as that change would have been a complete new installation rather than an upgrade, says finance director Mike Giles, it was an ideal opportunity to review the market. Alongside the usual suspects, there was an alternative road they could try – new LexisNexis enterprise resource planning system LexisOne.

"As we were exploring our options, the system was still very much in development. One message we heard was that it was more conceptual than complete," says Giles. But rather than being daunted, Giles was attracted by the opportunity this presented to differentiate the firm's approach to data. "One thing that has always frustrated me is when the first change-related question asked is 'what would another law firm do?' I prefer to focus on trying to find the best thing to do.

"The idea that 'law is different' has allowed some vendors to dominate the market for a long time. Challenging that idea also allows you to challenge customs and practices that have evolved over the years, sometimes as a result of the limitations of the systems firms are using."

Indeed, a big LexisOne selling point was that the change presented an opportunity for the firm to look afresh at where and how it could improve its own preferred processes and practices, such as in pricing and invoicing. "There was now a strong opportunity to improve aspects of billing management as we move further away from time-based working. That had previously been a struggle," says Giles.

Heads together

As it is an ERP system, of course one of the most obvious potential gains was the opportunity to enter a more closely integrated world view, taking in much more of the business data stored across the firm's various functions.

"As law firms are so often described as 'people businesses', it's quite surprising HR data has traditionally been separate," says Giles. "You can even find that HR and finance will come up with completely different figures for a firm's total headcount." Taking on LexisOne was a chance to tackle that situation as well. Add into the mix that this is a firm that had been on a course of steady and continuous international expansion – including through several mergers – and the appeal of a harmonisation effort ought to be even clearer.

And then there's the fact that it would involve moving business to the cloud – powered by Microsoft Dynamics in Azure, and offering the collaborative working and business insight possibilities of Office 365. It was this, says Giles, which finally sealed the deal. "At the outset, the plan was only to be an early adopter of the on-premise version of LexisOne. But once we understood the Dynamics 365 proposition, it became evident that the potential benefits outweighed the risk."

Overall, however, the argument centred on what the firm could achieve with its better-managed big data, rather than on some significant cost savings (an estimated £1.76m over five years).

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something that would do things better, rather than just cheaper," Giles explains. "The opportunity to ask both fee earners and business services employees what they wanted in a system brought out insights about how people currently worked, and how they might be able to work more efficiently and effectively in future."
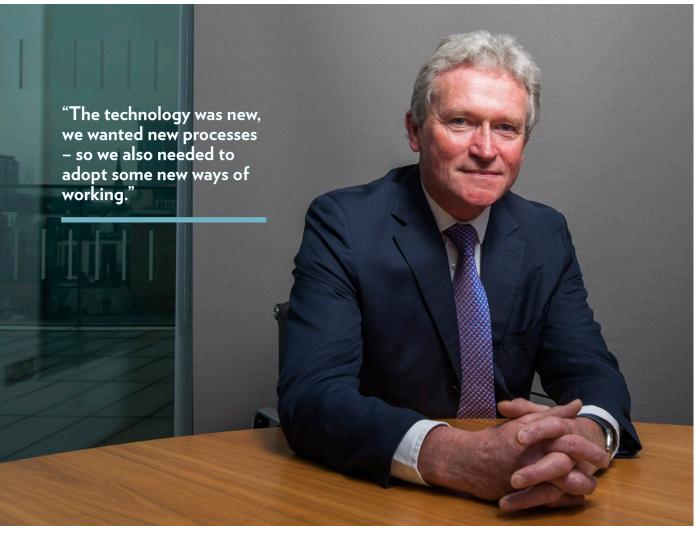
New designs

In the event, the firm audited the effectiveness of around 100 processes across 21 functional areas, from opening and rescoping matters to assessing business risks and partner performance – plus, of course, looking at ledgers and digging into debtors.

"But what we deliberately didn't do was begin with a full list of existing specifications – that way we would just have created the same old thing again," Giles laughs. For example, the firm's lawyers helped to refine the time-recording system through several iterations, complete with pop-up mobile app. "The technology was new, we wanted

new processes – so we also needed to adopt some new ways of working," he says.

"For example, guided by LexisNexis, we avoided the traditional waterfall implementation process to embrace more agile principles in an iterative deployment model. LexisNexis opened the door to its processes and approach, and we embedded ourselves fully as partners – rather than the usual vendor-supplier transactional relationship." Daily calls, weekly trips and open dialogue were par for the course, he says.

This was also critical to hitting the project's ambitious 12-month deadline, he adds. "Active involvement in the development process helps you to appreciate how challenging one particular request might be to meet. It led us to be more pragmatic about what we wanted and to prioritise what was most important." A by-product, moreover, was a more open and honest chain of conversation in getting to that point. "There's less documentation, and more trust."

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There were also some 25 system integrations to manage, such as with CRM InterAction, iManage, and, of course, the migration from data centres to the cloud – but these proved surprisingly straightforward. Perhaps one spot of breathing space was gained by splitting the switch into two phases. In a first wave, only the UK, US and the Netherlands employees were transitioned – the other European offices in the network will follow throughout 2018.

Flexible muscle

The switch was strictly speaking a 'big bang' – covering absolutely everything needed by HR, as well as time recording, disbursements, invoicing and cash collection. However, the firm didn't need to include every piece of possible functionality from the off – the cloud deployment means some enhancements could easily be added later.

"It's infrastructure-light, and the reality is you can't know for sure how some things will play out until you try them in practice," says Giles. "Some things work as expected, and some don't, but new ideas come up as well – and with the regular release cycle it's convenient to add new features and functions over time." In fact, Fieldfisher has

already made 15 upgrades since LexisOne went live. "We've managed to move to a model of more rapid development and release, where another benefit is that business users can experience the improvement immediately."

In at least one respect, the project also brought the firm together physically. "A core full-time deployment team of six came from a real mix of disciplines. There were accountants, of course, but also specialists from HR, data migration and reporting.

"We just ramped up with extra IT, or external, people when needed – such as for testing and training. Even partners spent quite a lot of their time testing too!" It may have helped partnership buy-in to the cause that managing partner Michael Chissick previously headed the firm's technology group, he adds.

The first phase of the move came in on time and under budget, the data-migration effort took under 72 hours, and 800 people internationally were trained simultaneously.

Learning as you go

Of course, a change-management effort doesn't end there. The board and partners may have been

fully behind the idea, but the ultimate measure of success is the right level of understanding and adoption on the ground.

One advantage of an entirely new system was the chance to stop people doing certain things outright – the opporunity to say, "we just can't do it that way anymore," Giles explains. "There aren't as many ways to tailor a bill now, for example, and that's by design – we don't want people changing things as much as they would in the past for the sake of consistency and productivity.

"However, we also spent a lot of time and effort initially winning over the PA community, as greater happiness there tends to make lawyers' lives easier."

Another buy-in journey was waking people up to how some new 'self-serve' options, such as running key reports at any time, could make working days more productive. "We've essentially given people a much bigger toolbox to play with – and that can take them out of their comfort zones. Initial training is quickly forgotten, so you need to keep returning and reinforcing the message and benefits.

"I liken the learning journey to shopping at Ikea. On your first trip, you have to go all the way around the whole store to get out. There's no other way. But once you've been a few times you can learn the shortcuts and skip entire departments.

"As you grow more comfortable with the ways of LexisOne, there's a lot you can achieve a lot quicker. The finance team especially has become smart at doing that already."

Meanwhile, the system can also be configured to give process alerts and pointers onscreen as people work their way through tasks, with different levels of detail guiding you to completion.

Room for improvement
Results in terms of productivity and efficiency really depend on successfully driving the way users behave with the system, Giles explains.

"LexisOne is a more disciplined system than some – we now require people to get the data right in the first place to make the most of it. However, one immediate effect has been users proactively asking for more metrics, more frequently. They're starting to show more appreciation for the benefits of data, and I think we can already see some impact of that on the quality of decision making."

Complicating cost-benefit calculations at this stage is Fieldfisher's recent growth spurt. "The

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truth is that if we were a more static business it would probably be easier to measure results, but as the business keeps growing, keeping track of the level of improvements is more of a challenge. The fact that we haven't lost anything in the change process, and growth has been maintained while investing further in business support, is quite encouraging in itself.

"I certainly believe we'll see significant incremental improvement in lockup over the next six months – and should also see improvement in utilisation. In recent years there hasn't been much change in utilisation. We ought to be capturing more time, and calculating it faster against the available data."

And in the longer term, benefits should include using the firm's more connected datasets to better predict, and prepare for, the future. "We already see lots of data showing what has happened, but not as much about why things happen." For example, Giles would like to know more about bill-payment patterns.

"Some clients regularly pay within 60 or 30 days on the day, while some are completely irregular. The client conversation should probably be somewhat different in each case. But the first step is understanding what's behind the randomness or particular behaviour. This is where we expect the AI in the Dynamics platform will bring future value.

"I'm also especially looking forward to digging into HR data analysis that has effectively been hidden, such as how it connects to longer-term strategy and success. Are we better at recruiting and developing people from specific law schools, and why? Are we optimising work allocation in line with skillsets and tackling diversity at different levels in the firm?"

Now one big investment decision has been made, it's decisions about matters like these that will determine how well the firm uses its new data powers in future. ◢

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