



FIVE TIPS
TO MODERNIZE
YOUR PRACTICE

**AND DELIVER MORE VALUE
TO CLIENTS**



BY LUCY BASSLI

I wrote [The Simple Guide to Legal Innovation](#) to bring more clarity around the barrage of articles, blogs and media on the various aspects of modernizing legal practice. Since implementing changes can be overwhelming to someone just getting started, this report is a practical guide for taking those first steps.



TIP 1

Personalize Your Innovation

Define what innovation means to you because there is no single definition. I like to think that if you do something differently now than the way you have always done it in the past and it results in an obvious benefit to the recipient of your legal service, or you create an efficiency -- BINGO you have just innovated!

Take note of that change. What did you change and why? Write it down.

Writing it solidifies the change and actually sets you up for the next step:



EXERCISE:

Figuring out what innovation looks like for you.

Below are some questions to start with. Print this report out and fill in the answers or jot them down on a piece of paper.



What is the most frustrating aspect of your work?



Can you implement a change to that aspect on your own or is there a dependency on others?



Who else will be impacted by such a proposed change?



If you could change one thing about how your clients interact with you, what would that be?



Is there information you wish you could easily access?



Are there particular data points that would be helpful to your practice?

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TIP 2

Map the Processes

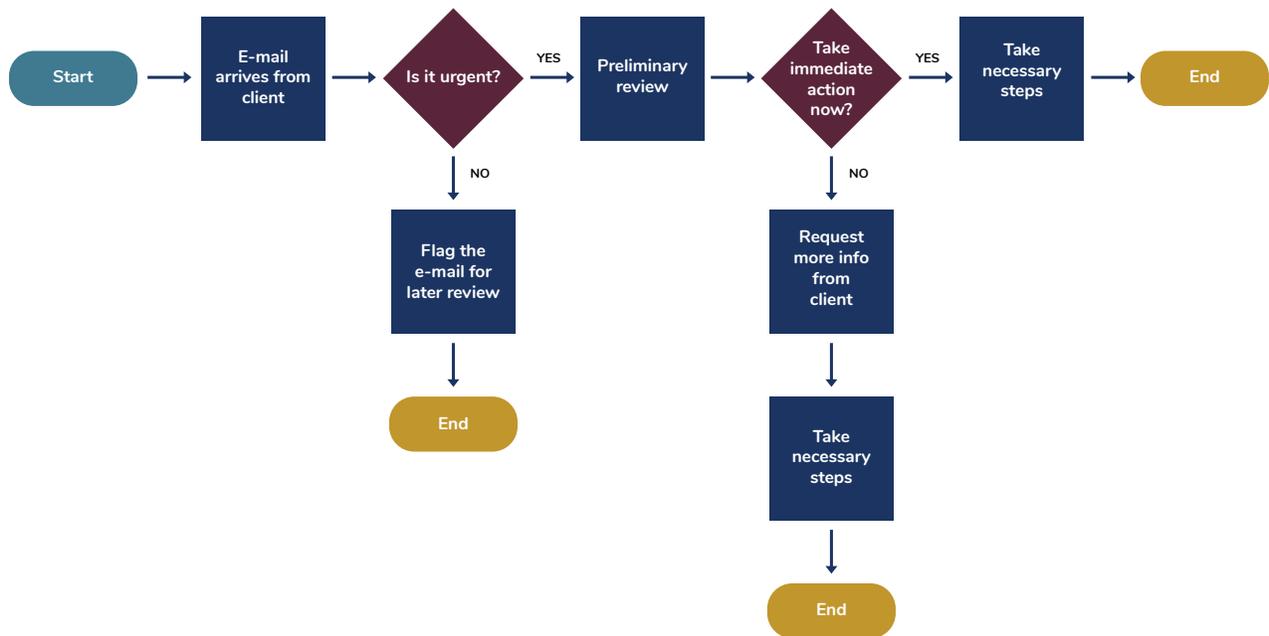
I work with clients to map their current state, identify inefficiencies, uncover opportunities, and define a better future state.

Let's get started. Think of your job as a combination of many processes. Pick a series of steps that you regularly take daily or weekly and begin to evaluate through them methodically and patiently. For example, how does your work come to you? Break down every aspect of how work arrives on "your plate."

Look at the sample flow chart below. Use this as an example and trace your steps on every matter that comes in from a client.

Think about the different ways in which work is initiated and the thought process you go through as soon as the work comes in. Jot down that current "process." Count the number of steps you take before you are actually able to begin work (this could be an eye-opener).

Ask yourself if each step is absolutely necessary and if so, if it is done in the most effective way.



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Notes for each step:

- E-mail Arrives:** What is the process you go through when a new email arrives.
- Urgent:** What makes an email more urgent than others? Is there a set of prioritization questions you run through in your mind? Are there external factors?
- Prelim Review:** What goes into an initial review?
- Action:** When taking steps, are they efficient? Do they involve technology?
- End:** Is there a final output? Where is it stored? Do you make note of its completion?

Mapping the process and asking these questions is a great place to start.



TIP 3

Technology Review

Review the various technologies you interact with on a daily basis. If there is one you are curious about becoming more proficient with, or one that you are frustrated with, this is the time to make changes. Search online for free training for that tool. Check out YouTube; undoubtedly there is a how-to video that may answer your questions. It should be a quick lesson or video that will shed light on how to leverage the tool better or clarify a problem you are having with it. Reality is that there are some baseline technologies that most lawyers should have already embraced. Then there are those that are more advanced with many bells and whistles. It comes down to value. The technology has to serve a purpose and bring value. Value can come in many forms: time savings, better organization, data insights, effective communication, etc.

Below is a checklist of the most common technologies that have made their way into legal departments and law firms. Which do you already use?

- Cloud-based file storage place (see Tip #4)
- Knowledge sharing platform (ie., intranet website)
- Spend management or eBilling system
- Video conference calling capability
- Online collaboration and document exchange
- Instant messaging (ie., Slack)

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TIP 4

Protect Your Work

If you are still storing any work documents on your computer's hard drive—start moving them to the cloud ASAP! Relying on a hard drive that is always at risk of damage by being dropped, coffee spilled on the keyboard, hard drive failure or a virus is a serious liability. Why let it happen?

An online document storage of some kind is the safest place for your work product, in every aspect of the word "safest." Once in the cloud, try sending a shared link to the document, rather than attaching it to an email. Or invite a client to view a document online.

You should be familiar with at least one of these cloud-based document storage solutions:



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You may be thinking “what about security in the cloud?” Allow me to put your concerns at ease. The trend is finally hitting the legal industry and even law firms are moving to the cloud. In this [article](#), Microsoft addresses the security issue.

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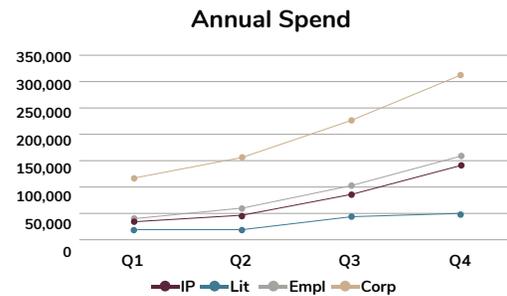
TIP 5

Leverage Data to Delight Clients

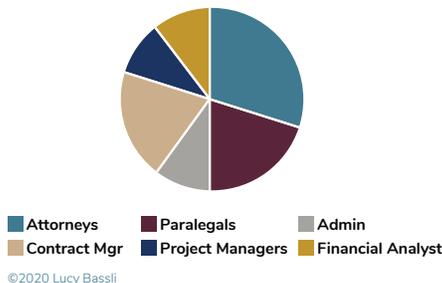
Data allows you to always be able to answer your client's or your boss' most basic questions about the legal work: How many? What kind? How much?

Look for ways in which data can make you more effective, and delight clients with insights they don't currently have. As providers of a service, if there is some aspect of your work that is repeat business from a client, there are always valuable insights that the client may not have access to. Think about the work you've done in the past for the client. Perhaps the client would enjoy a nice summary, with some visuals, that clearly outlines these basic data points: how many matters, what types, total fees, applicable discounts, etc.

Example of Visualized Data Points



Assigned Roles to Matter



Resource Allocation



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Beyond those operational aspects, are there more substantive data points that would give the client some perspective that they have only anecdotally? If there are natural categories that the work falls into, and any aspects about the outcomes of those matters, there is no doubt the client would benefit from seeing a summary view of those outcomes.

Leveraging and communicating in a concise way relevant data allows you easily answer your client's or your boss' most basic questions about the legal work: How many? What kind? How much?

I hope you implement the tips in this report to help modernize your practice today.

Can I help you?

Reach out to me @ info@lucybassli.com



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