This Month

- **IT added value – includes AI that works and AI that doesn't**
- **Some essential added values**
    - **Some distressed recruitment methodologies**
    - **Some recent added value suggestions at the right time**
        - **WBT – value – asset and revenue, client satisfaction – proper service**
        - **Forsyte – risk assessment/compliance/regulation/money**
        - **Lexidesk – conversion of enquiries/value/satisfaction**
- **Outsourcing considerations**
- **Compliance consideration**

Over the last few months we have written a lot about the management of law firms with responsibilities needed to be taken by all in a firm - from performance, compliance, profitability, working capital management, risk, business development, conversion of enquiries and client satisfaction. Return on investment.

Clarity of strategy, performance, recovery, exploitation have to be owned by certainly key participants in a firm.

The management, development and acquisition of staff is also key - as that is where so much performance comes from and we need to acquire, develop and hang on to the right people.

AI is beginning to help many firms with all of the potential added value – knowledge, communication, information and so on. As you will see later there are some key added value activities that are beginning to benefit from the right IT support.

However

- **Distressed Recruitment Methodology**

The reality, is however, an area where law firms are generally struggling is in the acquisition of new and necessary staff. As well as their development and motivation to stay of key stars. During August there has been a lot of publicity where AI is being used and with a very negative affect. Even dismissing applications through gender, age and ethnicity definitions.

I have reviewed this with www.linkedin.com/in/peter-manners-9471a010/ a very experienced consultant and recruiter within the legal sector.

- He says "The rapid integration of AI into recruitment is fuelling friction between law firms and agencies, with candidates using AI to create inflated, highly tailored CVs that mask poor skills, causing trust issues and reputational damage to recruiters. Simultaneously, firms using AI screening tools have been found to be filtering out qualified candidates through rigid algorithms and encountering severe bias as they lack the human view and client values highlighted by cases like the The iTutorGroup

EEOC Settlement: While not a law firm, this landmark case set the ultimate legal precedent for recruitment software. The company's automated hiring software was caught automatically rejecting female applicants over 55 and male applicants over 60. The EEOC forced a $365,000 settlement.

As Peter says – law firms are being inundated with some AI generated CVs directly or through recruitment companies, causing a great deal of friction. Excellent candidates, some picked by good agencies get rejected because of AI methodologies.

- **The fundamental minimum**

This is an area where there is a lot of merit in going back to real basics – unfortunately even before AI not necessarily being used by all firms as a whole or by department

- Hopefully we have our three year business strategy being reviewed every year
- Hopefully year 1 becomes the firm's budget for the year
- This is then reviewed every month by department so that actions about recovery or exploitation of opportunities are being made
- Staff performance is being fairly reviewed and communicated well regularly and expectations from management are clear
- Assuming performance is ok Staff retention and people development is high on the agenda. Not just dependent on the annual appraisal but also the following development programme
- Staff believe in the firm's image
- Above all it is essential that people are interviewed across all the necessary criteria
    - Job profile (performance)
    - Candidate profile (often unfortunately forgotten). What we are looking for
        - Personal profile – background experience
        - Communication skills
        - Intellectual skills
        - Management skills
        - Objectives and ambitions and motivation
        - Emotional factors – commitment, timing, geography

Can we check that this basic is in place and is part of annual appraisals in order to develop our staff into being key performers.`

Some recent Added value options beginning to have an impact

In July and August I have made mention of some added value options including the use of AI but also the integration with existing software.

The firm's management team would really benefit from reviewing these options

The Messenger August 2026 Management Matters page 86 - 88, The Messenger July 2026 Management Matters page 84 -86. This newer technology is beginning to break through

- **WBT**

Certainly moving forward with more and more firms seeing the added value benefit available in their Will Bank WBT I Bring your Will Bank to life without all the hassle Client support and satisfaction, added value from value of the cleansed database from asset to revenue. Plus ShareSmart Ltd: Overview I LinkedIn really sorting out secure communication with clients.

Solicitors in Runcorn I Law Firm in Cheshire I Rowlinsons have signed up for the solution plus a few others – so a take off underway

Another firm - Solicitors in Altrincham I Personal & Business Law I mlplaw is a declared ambitious, multi-service firm that has set out to use technology as a genuine point of difference — not simply to modernise for its own sake, but to give its people more time and its clients a better experience. That ambition has shaped an evolving programme of work with WBT, spanning Approach - digitisation, data and practice management systems, Digitising MLP Law's physical Wills store into a secure, accessible digital record. Working within the firm's PMS to improve the quality and usefulness of existing client data.

Objective - Secure, digital access to historic Wills, removing much of the manual burden of physical storage and retrieval. A stronger, more usable foundation of client data within PMS to support day-to-day work. Increased capacity for MLP Law's teams to focus on client service, and a clear roadmap for further technology-led improvement.

- **Forsyte**

The Risk Management Platform For Law Firms - Forsyte I Forsyte Utilisation of the latest technology including AI enabling the evaluation of risk potential across the firm and activities with compliance and regulation risk as well a business performance. Already signed up for 40 law firms and many more in the pipeline. One includes a new firm into Manchester Ison Harrison Solicitors - Award Winning Law Firm I Leeds, Yorkshire & The North with c450 staff in 20 offices – mainly Yorkshire based. It is employee owned.

Dan Kenworthy who is the lead partner for IT Innovation says he "would recommend Forsyte to any firm that is serious about getting a proper handle on risk and compliance"

- **Lexidesk**

I have for many years gone on about how important the handling of in-bound calls – many enquiries about services and from working with firms have a lot of evidence of those not taking it seriously achieving a conversion rate of only about 20% whereas those taking it seriously achieving a 65% conversion rate. If you get say 500 enquiries a month – the difference is 100 a month compared to 325 and say just £500 per file £160,000 outstripping £50,000. Over 12 months – nearly £2million compared to £600k. Certainly covering the cost of business development, generating GP and cash and providing the right image about the firm.

Offering the latest technology support 24/7 AI Intake for UK Law Firms I Lexidesk is with us. Achieving the conversion rates and even 70% plus conversions when the system is back to the prospect within 10 minutes. The recording of communications and data is invaluable.

Manchester, Birmingham and London based solicitors About Us I IMD Solicitors are advocates of the solution. Even a case study IMD Solicitors Case Study I 109% More Qualified Enquiries I Lexidesk supported by the managing partner Marcin Durlak.

Outsourcing

Going forward over the next month or so I will be doing further research into another potential added value and that is adding outsourced resource to businesses to maintain and enhance performance. This can include so much from skilled lawyers, part time resource for legal, financial advice from accountancy teams – profit/working capital/investment, Accounting – all or part where skills and resources are essential (whole thing or just client accounts), the right management information, business development programmes, document production, inbound calls handling and enquiry management, staff training and development, compliance and regulation.

Potential early warning for smaller firms Brian Rogers post on COLP/COFA changes Cost, recruitment and trust: separating fact from social media alarm on the COLP/COFA split I LinkedIn Need to be alert.

Bill Kirby is a director of www.professionalchoiceconsultancy.com offering advice to firms on business issue from strategy, planning, business development, the effective use of IT applications and IT hosting for compliance, business continuity and DR. He can be contacted at billkirby@professionalchoiceconsultancy.com and www.linkedin.com/in/bill-kirby-ab01632