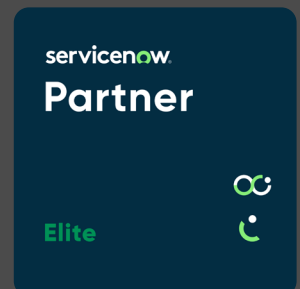


IMPROVING SERVICE DELIVERY IN THE LEGAL SECTOR WITH SERVICENOW

Automating and streamlining processes
through the power of ServiceNow



CONTENTS

Efficiency and growth in a changing sector

Disparate systems are slowing things down	4
Effective does not mean efficient	6
Lack of digitisation leads to inefficiency	7

Automating processes with ServiceNow

Make it a breeze to access pool resources	8
Remove the mundane from onboarding clients	9
Supercharge your marketing delivery processes	10
Automate everything	11
How can ServiceNow help	14
UP3 by your side with ServiceNow	15



58% of lawyers expect investments in software to increase over the next 12 months

Source: 2021 Wolters Kluwer Future Ready Lawyer Survey Report

DELIVERING EFFICIENCY AND GROWTH IN A CHANGING SECTOR

Like any sector, the legal industry is faced with an increasingly urgent need to digitally transform.

Customer expectations are evolving. Hybrid working is offering both rewards and challenges. And, like many sectors, the legal industry has found that recruiting the right talent is becoming harder.

Many legal organisations have embraced technology for specific purposes, but that can still lead to siloed information and processes.

To really seize the transformation opportunity, barriers must be broken down between systems, departments, and business entities.

In this short guide, I look at how ServiceNow can underpin digital transformation, empower employees and improve service delivery for all legal organisations.



Rebecca Copley

Head of Customer Engagement

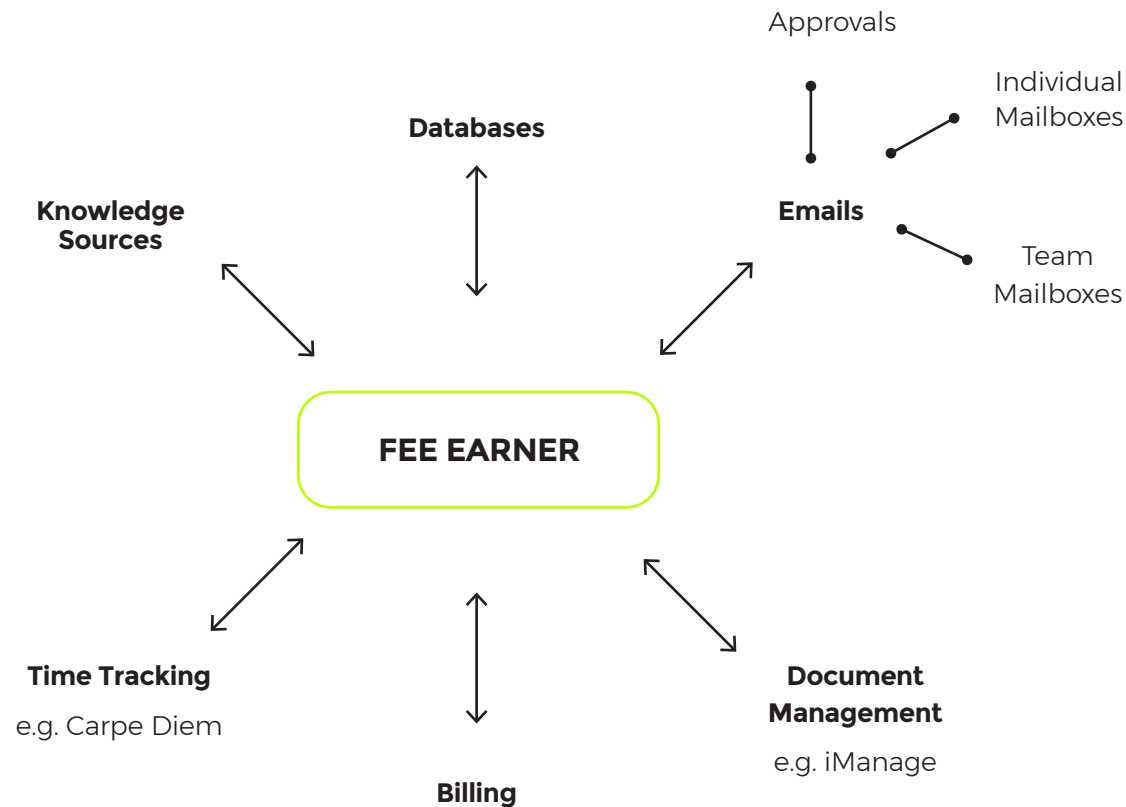
Benefits

- ✓ Greater compliance
Full auditability at every stage
- ✓ More efficient
Speed up slow, manual processes
- ✓ Improved satisfaction
From both employees and customers
- ✓ Unified data
A single version of the truth

DISPARATE SYSTEMS ARE SLOWING THINGS DOWN

This is a picture that may well be all too familiar to you.

We have the firm's resource at the centre – someone whose main goal is to provide a service to clients. To get them the support they need, multiple people have to gather a whole wealth of knowledge and information from several disparate sources. They're collating all this information across systems and then in turn are storing information in any number of repositories.



DISPARATE SYSTEMS ARE SLOWING THINGS DOWN

There may be time recording systems, document management systems, client databases, regional databases, and inboxes – and this is not even mentioning the amount of tacit information that is often stored in people's heads.

Unfortunately for the person at the centre of it all, this involves a lot of back and forth with multiple teams, applications and external parties and it makes the process complex. It makes it slow and from time to time it may also be incredibly stressful.

This is often made more difficult and time consuming by the fact that none of these systems talk to each other, and they don't share information. There will be conflicting sources and conflicting data which increases confusion, and that in turn increases the number of tasks that it takes to achieve what could be potentially simple outcomes.

The bottom line is more tasks means longer timelines for client delivery.



EFFECTIVE DOES NOT NECESSARILY MEAN EFFICIENT

So with all this being said, you may be thinking, “Yeah, but we get the job done and it works for us”. The question is: does it? Are you effective or are you efficient?

Anyone who successfully manages to execute a process that gets them from where they are to where they want to be, has been effective. You've completed the task. However, you've not necessarily been efficient.

As an example, if you drive from London to Cardiff, you are just as effective in achieving the end goal of getting to Cardiff if you drive directly than if you drive via, say, Edinburgh. But the latter journey is certainly not efficient or desirable. It's longer, it's more expensive and the detour adds nothing to the outcome. It also increases your risk by spending more time on the road and more time in the car. The exact same can be said for our working processes, by taking the longer route, we introduce more resources, more risk, more potential for errors and more cost.

69% of organisations say their motivation for pursuing automation is to increase staff focus on higher value tasks

Source: Infotech tech trends 2023



LACK OF DIGITISATION LEADS TO INEFFICIENCY

The way to achieve efficiency is by taking the most direct, simple, cost-effective and goal-focused route possible.

What is the easiest way to get the desired outcome? At UP3 we assist our clients – whatever their sector – in identifying the inefficiencies they experience. We then use ServiceNow to eradicate them so that they can continue to provide the best service to their clients whilst protecting their time and ultimately their revenue.

With ServiceNow at the centre of your operations, you can start pulling everything together. You're providing your teams with one single place that they can go to gather all the information that they need, and they can rely on that information and trust it. This is known as a single pane of glass.

Read on to find out how we're automating and streamlining processes for our legal customers through the power of ServiceNow.

At UP3 we assist our clients – whatever their sector – in identifying the inefficiencies they experience.



AUTOMATING AND STREAMLINING PROCESSES THROUGH THE POWER OF SERVICENOW



1. MAKE IT A BREEZE TO ACCESS POOL RESOURCES

Picture your process for requesting pool resources such as secretarial.

I would guess that currently your request goes into a central inbox and then effectively disappears from your life forever. You'll have no view of whether it's been processed or whether it's even been read. You may have an automatic response stating that it's landed in the inbox and that it will be responded to at some point, but that could be the extent of the service you receive. You have no idea at this point whether the resource is available and whether your request can be fulfilled at the time that you need it.

Now imagine a world where you can access a list of all resources, their availability and even what skills and specialities they have so that you can select the right resource, at the right time and for the right job, all confirmed on the spot. Think of the efficiencies this gives you.

We can then take this one step further: the cost of the resource is then stored centrally, which then updates the budget and the billing for that case you're working on, so you have full visibility at all times of the burn rate of your budget and what this is costing the firm and the client.

That in turn informs finance departments so they can have full visibility of the invoicing required with minimal overhead.

Your pool resources are some of your most valuable assets: with ServiceNow you better understand, utilise and analyse them to supercharge delivery across the organisation.

Our legal resource management application enables you to manage your entire pool resources process in a single application, built on ServiceNow.

Benefits

- ✓ Easily see available resources
- ✓ Understand skills and specialities
- ✓ Speed up client project delivery
- ✓ Understand budget utilisation
- ✓ More productive fee earners

WATCH VIDEO

2. REMOVE THE MUNDANE FROM ONBOARDING CLIENTS

Imagine having a place where you can go, submit what you know and trigger a process which is managed by a platform and not you as an individual.

According to McKinsey, poor onboarding, engagement and customer service make up 52 percent of the reasons customers leave in the first 90 days.

Think about when you're onboarding a client or starting a piece of work for an existing client. How much time do you currently spend on initial checks such as money laundering, conflicts, gaining approvals, getting visibility of those special considerations etc? Not to mention, the confusion the whole process can cause regarding what needs to be done, in what order and by who.

What can you delegate? What can't you delegate? Where in the process are you? What tasks are outstanding? The longer this process, the longer it will take for you to realise the revenue from that engagement.

Imagine having a place where you can go, submit what you know and trigger a process which is managed by a platform and not you as an individual.

Activities required will be identified based on the data that you have provided, so if there's data missing the system will automatically assign a task to the right person to gather that information. These groups or individuals then have one place to go to see what is expected of them and what tasks are outstanding.

By utilising a single pane of glass mechanism via ServiceNow, all data required is gathered instantly and automatically through an ecosystem of integrations bringing all the disparate systems together and collating data in one place.

The key here is not to replace that human element completely, but to remove the legwork which adds no quality to the process or the result. Workflow digitisation on a platform like ServiceNow is all about removing the "mundane".

Let the application take care of those small menial tasks. Remove the overhead and free up your skilled team members to do what really matters: providing value and service to your client.

Benefits

- ✓ Automate requests to teams
- ✓ Accelerate onboarding
- ✓ Remove work that doesn't add value
- ✓ Free up your highly skilled staff
- ✓ Add value to fee earners and clients

3. SUPERCHARGE YOUR MARKETING DELIVERY PROCESSES

How efficient is the process when creating new collateral in your organisation?

With many teams often involved including business development, knowledge and marketing teams the processes can be very manual. Again, the work can suffer from a reliance on inboxes and sending requests with no understanding of where they are then in the process and little control on the information being provided.

With no central way to manage the assets being created, it's very easy to request a piece that already exists, leading to duplicated effort and unnecessary costs. Often within this space, assets from completed projects can be reused or refined to suit a new client need but without centralised visibility, this is not possible, so timelines and costs continue to grow.

Imagine instead a system with automated workflows and centralised data. A portal where all requesters within the firm can go and select items that are already provided as part of the catalogue and fulfillers can showcase previous projects for reuse and inspiration.

This prevents the design team from starting from scratch, enhances the output and reduces the requirements for review and rework. Standard request templates will gather all relevant information in the first iteration, preventing the need for back and forth between teams. This will deliver direct time and cost savings by significantly reducing the delivery timeline while ensuring the same level of quality.

In this use case, the intervention of technology once again removes the tasks within the process that add time and frustration for both fulfiller and, more importantly, requester.

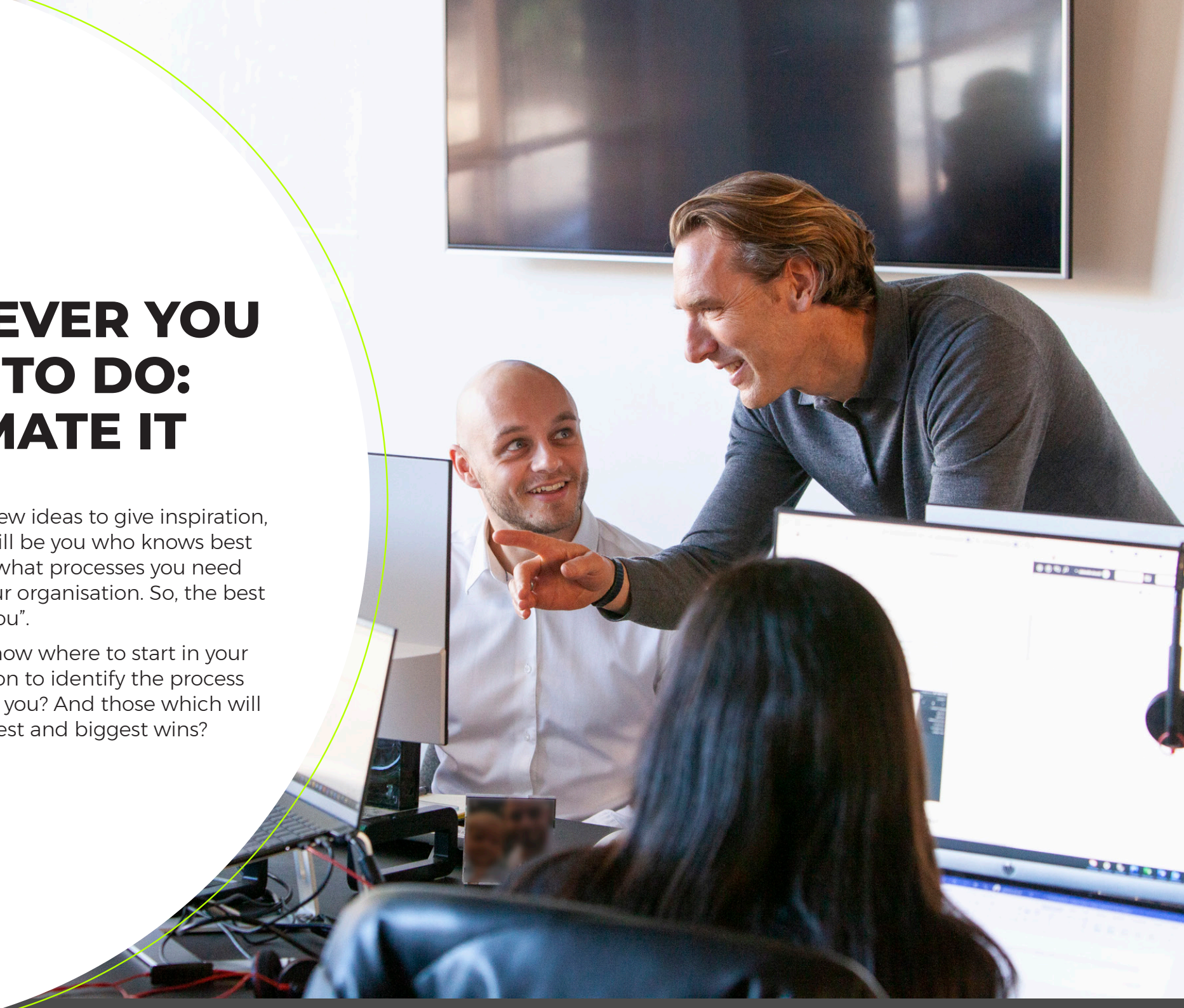
Benefits

- ✓ Faster collateral turnaround
- ✓ Less 'reinventing the wheel'
- ✓ Visibility of existing assets
- ✓ Speed up marketing initiatives
- ✓ Improve job satisfaction

WHATEVER YOU WANT TO DO: AUTOMATE IT

I have provided a few ideas to give inspiration, but ultimately it will be you who knows best when it comes to what processes you need to automate in your organisation. So, the best advice is “you do you”.

But how do you know where to start in your specific organisation to identify the process most important to you? And those which will give you the quickest and biggest wins?



STEP 1: IDENTIFY THE RUNNERS, REPEATERS AND THE STRANGERS

It's these processes that you need to focus on first.

Start by making a list of all the processes you interact with and then sorting them into runners, repeaters and strangers.

If you do not believe you follow or interact with any processes, keep a diary for a week of what you do day-by-day, the activities you complete and people you interact with. These are your processes.

Runners are the processes which you go through all the time. The ones you are running on a daily basis and are the core of your operation.

Repeaters are the activities that you do very regularly but not necessarily daily. An onboarding process, for example.

Strangers are the activities where the processes exist, but are used rarely. So, e.g. the annual appraisal process or the process of off-boarding a client.

Once you understand what your processes are, you can then identify those which amount to being the most mundane.

Ask yourself

- What takes the most time over and over and over again?
- Which are high cost in resource saturation but contribute little to revenue?
- Which are the most boring and a waste of your skill set?
- Which ones hold you up the most from delivering?

It's these you need to focus on first.

STEP 2: THINK ABOUT WHERE YOU WANT TO BE

For each of these processes, ask yourself: Where do we want to be? What does our nirvana look like with regards to this process? Write a list and get it all down on paper.

Walk through your process step by step and write it down as if you were explaining it to someone for the first time. Identify areas that you could/would like to automate. How can it be simplified? What can you get a system to do? Walk through your process and highlight the steps you want an application to cover.

The goal here is to take the thinking out of the process. Have it run itself. A lot of customers that we work with simply don't know or understand the art of the possible, because they've never built a workflow application before. It's not their area of expertise and why should it be?

But the one thing you need to avoid at this stage is your wish list becoming a re-creation of what you do today but with a nice-looking report coming out at the end of it. You need to really critique your process, remove the "that's how we have always done it" steps, strip out the fat and get down to the absolute musts. You shouldn't automate a bad process.

The goal here is to take the thinking out of the process. Have it run itself.



STEP 2: SET YOUR PRIORITIES

You then prioritise these requirements. My favourite saying is, “If everything is critical, then nothing is”.

You need to identify what your Minimum Viable Product (MVP) is. This is the base standard of what you can tolerate to go live with.

We often advise that this should be a newly improved and streamlined process, centrally managed in ServiceNow with some elements of automation that give you that foundation to improve on in the future and repeat this process.

At this point, revisit your problem statements, and those which you marked as critical. Have you solved them with this solution? If you haven't, you need to go back to the beginning of this process because you haven't reached MVP.

THE ART OF THE POSSIBLE

WEBINAR SERIES

Build connected digital workflow apps fast with App Engine

[WATCH WEBINAR](#)



A man with long brown hair, wearing a black quilted jacket, is smiling and gesturing with his hands while talking to another man. The second man is seen from the back, sitting at a desk with a computer monitor. The background features a brick wall, a large green plant, and a whiteboard with some writing. The scene is set in a modern office environment.

HOW CAN SERVICENOW HELP?

ServiceNow is the connector. It's the connector between all your data and your processes. It can reduce and, in some cases, even eradicate manual activities which currently swamp people in the legal industry.

It will allow for more head space for creativity and success which can only add to growing your brand and developing your services and offerings. And within all of this, client experience is key.

That is what we are all here for. Whether you work in IT support or the legal sector providing frontline services to your clients, it's providing that unified experience and a consistent way of doing things via an engagement layer.

Empower your employees, make them great and ultimately keep your clients happy and coming back for more.

UP3: BY YOUR SIDE WITH SERVICENOW

Legal organisations like yours are turning to UP3 to help them accelerate their digitalisation initiatives using the ServiceNow platform.

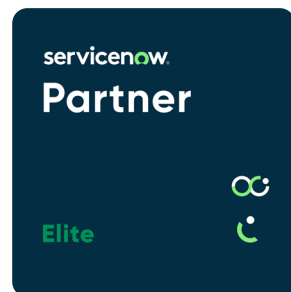
Many organisations have the ambition to improve, but having the right internal capacity and skill sets to make the most out of a workflow solution like ServiceNow can be challenging – that's where we can help.

The heart of our approach is our expertise in the legal industry and our team of innovative UP3 problem solvers who work with you to reach the most beneficial outcome. We understand that technology has its part to play, but it's a deep understanding of your team, processes and goals that matters.

We've outlined a high-level overview of how we work with our legal customers on the next page.

And, our support doesn't need to end there. We offer a Managed Service for our customers taking on the entire management, support and development of your application so you and your team can focus on higher value work.

Find out more about our Managed Service [here](#)



GETTING STARTED WITH UP3

Working with us on your workflow application needn't be time consuming or a heavy lift on your side.

Here's a high-level overview on how we work with our legal customers.





TALK TO US

Technology has its part to play, but it's a deep understanding of your team, your processes and goals that matters.

Talk to one of our experts today to discuss the challenges you're facing and how we can help.

Get in touch:

Email: hello@up3.co.uk

Call: 020 3432 1432

Or click on the link below to request a call back

GET IN TOUCH