distinctive partnerships

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For help & advice on any of the courses please contact us on 01244 571440.

Business Building for Solicitors
a new approach

I am delighted to introduce the DP **"Action and Solution Based Training Courses"** - a new and unique concept for solicitors to enable them to develop business skills.

The DP courses will help you to create your business knowledge and acquire skills through **action and solution based** training in the working environment.

The Action and Solution based courses are unique in terms of their approach, style, and delivery.
There are 5 key points which differentiate Action and Solution Based training from other forms of training available.

1. They are bespoke and adapted to the particular issues facing the participant's Firm at the time the training is delivered. In other words current business issues are addressed as part of the training programme.
2. The training is provided by tailored one to one management Tutorials.
3. All the courses are practical, and theory is limited to that which is required to acquire knowledge and understanding of the topic in relation to current issues within the Firm.
4. Tuition support is provided by telephone Tutorials delivered throughout the course at previously agreed times to suit the participant.
5. The DP team of Recognised Tutors represents the most eminent experts in their particular fields both in terms of their knowledge and their practical experience. Page 8 gives you their details.

This brochure contains details of over 40 individual courses that focus precisely on business issues facing Law Firms. The courses have been developed to provide solicitors with the skills and knowledge to build better and more successful businesses in the face of increasing competition from within and without the legal sector.

All of the courses are accredited by the SRA for CPD, and any one course will cover a minimum of 75% of the annual CPD points required. It may be that there are grants available to meet two thirds of the cost of the individual courses through Business Link, or the Welsh Development Agency for Firms based in Wales. Where they provide these grants, I understand that the only constraint is for them to check that the particular course meets the needs of the individual participant at that particular time.

I believe that the courses within this brochure cover the whole range of business issues facing Firms in these changing times where much of the competition is likely to be from non-legal organisations. If there is a business issue which is not satisfactorily covered I hope you will let Course Director Gail Biddulph know (her email is gailbiddulph@distinctivepartnerships.com). We are continually designing and developing additional courses to meet the needs of solicitors and their businesses.

Please contact us on 01244 571440 if you wish to check whether a course will address a particular issue.

The legal profession is already facing serious competition from non-legal organisations and this will only increase. Competing with some very recognisable brands is unavoidable. Never has it been more important for solicitors to enhance their business skills. The DP Action and Solution based training courses are rooted in work based learning ("WBL") and will play a vital part in the future development of law practices and transforming them into successful businesses.

WBL is growing fast in popularity across all sectors. Some distinguished authors believe that WBL will soon become the cornerstone of competitive ability across all sectors. Studies clearly demonstrate that WBL extends the skills and abilities of people at every level. The learning outcomes emphasise the need for the participants to broaden their knowledge and understanding and to apply theories in the workplace setting, and thereby enhance their skills through action on problem based projects.

In recent years there has been growing demand from Law Firms for training in business skills, and also for management consultancy services. The problem with the former is that the training is usually at a hotel venue with many other delegates (sometimes from competitor Firms) and the topics may or may not be directly relevant to the needs of the delegate. The title of the training course and the short description of the content may well mean a wasted day out of the office. Many solicitors tell me that the best they can hope for is to come back with a couple of ideas they can implement in their practice. Apart from cost, the problem with consultancy is that when the consultants have undertaken their task, there is little knowledge or skill left behind in the practice for the future.

This is where the work based learning approach to business building suddenly begins to make real sense. In my experience, solicitors usually wish to learn the minimum theory to enable them to carry out their responsibilities. These courses are action and solution based and there is no need to burn the midnight oil studying "the power of archetypes" in building extraordinary brands! This is one feature that distinguishes WBL from distance learning.

WBL is learning "through work" in the working environment, whereas distance learning programmes are about "learning for work".

- Martin Read, Director

Client Testimonial:

"We now have a working management system in place, a clear vision of where we want to take the firm, and a sense of purpose which simply did not exist and would not exist were it not for your help. I would unreservedly recommend your services to anyone wishing to operate a successful legal practice in the 21st century"

- Managing Partner, 5 Partner Firm

About
Distinctive Partnerships Ltd

DP was set up in March 2003 by Gail Bidduph and Martin Read to provide business services to the legal profession. The DP mission is to create a distinctive partnership between a Law Firm firm and its clients.

Gail Biddulph, *Managing Director*

Gail Biddulph is a specialist in business process management, qualified in Organisational & Business Psychology and the co-founder of Distinctive Partnerships Limited. As a Senior Manager and Director for over 20 years in the Legal and Insurance sectors, she has a track record of success, balancing manpower with business processes to increase sustainable profitability. After running her own business consultancy for Insurers, she teamed up with Martin Read and developed a range of innovative standards, processes, measurements and controls for the legal profession.

Gail has an intuitive understanding for the delivery of practical solutions for improving the operational performance of Law Firms, enabling them to deliver a consistent, quality legal service whilst at the same time as improving profitability.

Martin Read, *Director*

Martin Read was a practising solicitor for over 20 years, including 10 years as managing and then senior partner of a commercial firm based in Leeds. He is a past Chairman of Companies within the software, poultry processing, food manufacturing, and print and media sectors. He has also worked within the leisure industry.

He was appointed to a management professorship at Leeds Metropolitan University in 1989. From 1991 to 1997 he wrote a monthly management column for the Solicitors Journal. During the 90's he was author and editor of "Professional Management of a Solicitors Practice" published initially by Longman, and later by Sweet & Maxwell.

He spent most of the 90's advising law Firms on management issues, particularly relating to strategic issues and quality systems. During 1997 and 1998 he was (part time) CE at Weightmans (Birmingham, Manchester & Liverpool).

Since 1998 he teamed up with Gail Biddulph and focused his attention to performance and profitability issues within Law Firms. He developed new benchmarking and file reviewing techniques for the legal profession (now implemented in many Firms). He is credited with taking waste out of the process of delivering legal services to clients, and re-engineering the way in which Defendant legal work is undertaken for Insurers.

Distinctive Partnerships provide services which include:

Training

The unique Action and Solution based training courses as set out in this brochure.

Outsourcing of File Reviews/ File Audits

(File reviewing is of course now compulsory under Rule 5)

By out sourcing file reviews to us, we offer a way of improving the performance of all fee earners and managing the service delivery (and reduction of risk and regulatory non compliance on client matters) in a sustainable, streamlined, consistent manner across the whole firm. Many firms of solicitors have reaped the benefits of our specialist approach. These include cost savings, improved profitability, greater client attraction and the ability to demonstrably support their brand in the market place.

Regulatory Compliance

Regulatory Compliance Audits. There are Standard and bespoke Regulatory Compliance Audits available to enable Partners to "sleep soundly in their beds"! The audit includes a pre-audit desk study, file audit and an on-site audit. A report is provided that identifies any breaches together with recommendations for change.

See back page for more details.

Taking a course – what to expect

The courses are designed to help an individual develop skills through tackling a working problem with support from a knowledgeable and experienced Tutor.

If you are interested in taking a course and want to learn whether it meets your current development needs, please contact the Course Director Gail Biddulph or the Course Manager, Janet Heath.

Once you have decided which course to take and completed the application form we will arrange your initial telephone Tutorial.

You will receive a course pack containing the course programme information and the individual tutors will provide additional course material/templates as and when appropriate.

The first telephone tutorial is where you and your tutor will discuss the particular business issue or issues and agree what you will need to do to bring about a solution. An important element of all these courses is that they are adapted to suit each individual. The desired outcome is agreed at this stage.

During each course you will have access to Management Tutorials by telephone at key intervals, thus providing technical guidance and support at appropriate times.

As part of the course you will be carrying out work related activities in your Firm with a defined target or outcome which will be agreed with the Tutor at the outset. As part of the programme you will from time to time be asked to submit documents to your Tutor for assessment. These will be directly relevant to the business issues for which the solutions are required. Each course will qualify for CPD points provided you complete the course.

At the end of every course you will have a Tutorial to summarise performance and review how you applied knowledge to resolving the business issue. A confirmatory letter will be sent to you within 20 working days of the end of the course.

In addition to enabling you to resolve business issues, all these courses have three main aims:

1. To demonstrate that you can achieve outcomes by working with others in the Firm
2. To show that you have good communication and liaison skills
3. To demonstrate effective leadership and planning skills

For help & advice on any of the courses please contact us on 01244 571440.

Meet the Tutors

DP has a distinguished Team of expert tutors all of whom are specialists in their chosen fields.

Please see below for details of each Tutor.

Nick Jarrett-Kerr

Nick Jarrett-Kerr LL.B is a specialist adviser to law firms world-wide on issues of strategy, governance and leadership development as well as all important business issues facing law firms as they compete in difficult market conditions. In the last seven or eight years, Nick has established himself as one of the leading UK and international advisers to law firms. He was a founder member of the (England & Wales) Law Society's Law Management Section and served as its Chairman for two years. He is also a member of the UK Association of Partnership Practitioners.

He is a regular writer and speaker on management and leadership topics with an emphasis on strategic and business planning, as well as issues of governance and structure and partner compensation. He also has a particular interest in management/leadership development, financial management, business development and project implementation as well as partnership performance criteria and partner development. Prior to becoming a consultant, Nick (who is a solicitor by training) was for eight years the Chief Executive Partner of Bevan Ashford, a leading regional firm in Great Britain, during a period of enormous growth starting in the depths of the 1989-1992 recession.

Nick's practice is international; in 2007 to 2009 he has consulted to firms in nine different countries on three different continents.

Nick is the author of Strategy for Law Firms; After the Legal Services Act to be published by Law society Publications in November 2009. He is also joint author - with Friedrich Blase and Michael Roch of Kerma Partners – of the recent Managing Partner Best Practice Report on Financial Management in Law Firms. Nick is also is a module leader for the Nottingham Law School strategy modules and a core MBA faculty member.

Fiona Westwood

Fiona has 20 years experience working as a solicitor in private practice. From 1987 to 1993, she was an equity partner in large legal firm with offices in Glasgow and Edinburgh in charge of provision of wide range of quality commercial client services, leading a team of solicitors. She was also a member of its management team and Business Development Partner with responsibility for marketing and implementation of the growth of the firm.

She established Westwood Associates in 1994 as a management and training consultancy specialising in strategic planning and management development for professional firms in particular. Its services include business planning, management and client development projects. For more information see www.westwood-associates.com.

McGraw-Hill nominated her book, Achieving Best Practice – Shaping Professionals for Success, as their September 2000 Book of the Month. The revised edition of her second book, Accelerated Best Practice – implementing success in professional firms was published in November 2008. In addition, she writes regularly for business and professional publications, including The Journal of the Law Society of Scotland, and Managing for Success as well as speaking at business conferences throughout the UK.

She has served as a co-opted member of the Practice Management and Client Care Committees of The Law Society of Scotland, as CPD Project Leader of their Education and Training Review and is a member of their current Working Party on Professional Standards.

She has been a part-time Post Graduate Tutor at Edinburgh and Dundee Universities and Senior Lecturer at the Glasgow Graduate School of Law on the Diploma in Legal Practice and Professional Competence Course.

Andrew Hedley

Andrew Hedley advises the leaders of law firms on strategy, business development and change projects that deliver immediate and sustainable improvements in performance.

In addition to strategic projects, Andrew is a sought after strategy group guide, partner retreat speaker, workshop facilitator and coach. He is a contributor to specialist management publications, a regular conference speaker and the author of Developing Strategic Client Relationships.

Initially an Architect, Andrew completed an MA followed by an MBA in the late 1980s, both focused on professional firm strategy. Since then, having exchanged the drawing board for the board room, he been the director of a number of professional firms (including nine years as Business Development Director of two international law firms) prior to establishing Hedley Consulting in 2005.

Andrew sits on the Advisory Board of both Managing Partner and Legal Marketing magazines and is a judge of the MPF European Practice Management Awards.

He is a visiting tutor on the Nottingham Law School MBA in Legal Practice and the Course Director of Cambridge Marketing College's Professional Diploma, the world's only CIM accredited professional services marketing qualification.

Hedley Consulting (www.hedleyconsulting.com) is widely recognised as one of the leading boutique consultancies focused on the legal services sector.

Lloyd Barrett

Lloyd has specialised for over 10 years in Ecommerce with particular emphasis on SEO (Search Engine Optimisation).

With a traditional marketing and business background Lloyd travelled to America to become one of the first to undertake search engine workshops and is accredited at "advanced level". The growing on-line environment enabled him to become a TMB (Technology Means Business) advisor, which is an independent accreditation and the mark of quality endorsed by the Government. Lloyd is also an eCIC accredited eCommerce advisor.

Dovetailing with, and using his experience in more traditional marketing methods which were gained with Companies at the forefront of technological evolution Lloyd:

- Develops integrated online marketing strategies that meet and exceed clients' business objectives putting their online businesses at the forefront of their marketplace
- Identifies new ways of extending the influence and effectiveness of client's online content for example using affiliate marketing and partnerships
- Devises & implements strategies to generate e-prospects & valid customer contact details
- Develops online promotional activity
- Develops sales and lead generation through websites, including the creation of online marketing plans
- Manages search engine optimization for natural/ organic search
- Analyses Webstats, using the information effectively
- Devises, implements and manages PPC campaigns.

Ewan Sturman

Ewan is of the UK's few Certified Network Trainers, with a track record of over 10 years in the "word of mouth" marketing arena. He is widely recognised as one of the UK's leading word of mouth marketing consultants. Using his previous business experience he helps business people to develop a referral marketing strategy and obtain more business from people they know.

As a specialist in networking and referral marketing Ewan's skills are fully utilised as a Director of the BNI (the world's largest and most successful business referral organisation). He runs workshops to build skills specifically in how to get more business through referrals. He is experienced in working on a 1 to 1 basis with professionals and business people. Ewan speaks on a national and international platform to referral organisations and businesses alike. His book on "why people don't get the referrals they deserve" is to be published shortly.

www.distinctivepartnerships.com

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Peter Scott

Peter Scott is a solicitor and was for eight years until 2000 the Managing Partner of Eversheds London and European offices. He acts as an advisor, trainer and coach to many law firms and other professional firms in the UK and abroad in relation to their financial, strategic, management and risk / compliance issues, with particular focus on helping clients to improve their competitiveness through effective performance management. One of the roles he is most often asked to carry out for clients is to act as a 'discreet mentor' to managing partners and CEOs.

Peter is Editor of Practice Management Handbook (Law Society Publishing) now in its 2nd edition and a member of the Editorial board of Legal Compliance Bulletin published by the Law Society. He is a frequent speaker at conferences for lawyers and other professionals and his articles are published in a number of well known legal and other professional journals. He circulates a monthly newsletter entitled "Briefing Note" to his wide client and contact base. His presentations, published articles and monthly Briefing Note can be viewed at www.peterscottconsult.co.uk

Joy Harcup

With over 15 years' learning and development experience in the professional services sector, Joy specialises in learning and development consultancy, leadership and management training and executive coaching - aligning changes in process with changes in behaviour.

Formerly a solicitor, Joy had previous management and strategic responsibility for learning and development as Head of Learning and Development at the City law firm Berwin Leighton Paisner. She managed the integration of the learning and development function, following the firm's merger, and also a strategic review of the function. She successfully introduced and implemented leadership, and talent management, training programmes at senior levels.

Joy is accredited as a coach by the International Coaching Federation. She has undertaken over 250 hours of coaching training with Coach U and other leading coach training providers. She is also a licensed trainer of the Coaching Clinic, a programme that trains leaders to adopt a coaching style of management.

Joy has MBA (Distinction) from Bath University, where she researched how coaching achieves individual and organisational learning in professional service firms, for her final dissertation. She is also qualified to administer a range of psychometric tests and assessments including Bar-On EQ-i (measuring emotional intelligence) and MTQ 48 (assessing mental toughness).

A past chair of a national lobbying and best practice group for learning and development in the legal sector, Joy has sat on a number of regulatory learning and development committees. She is also an author of academic text books and a speaker at learning and development conferences.

Keith Harper

Keith is a management consultant and trainer, who for the last 10 years has focused his attention solely on law firms. He has a wide range of clients, from small partnerships to international firms whom he has successfully helped to develop management skills and create and implement business strategies.

After graduating in economics from Birmingham University, Keith built a wealth of practical business and management experience working in a series of senior management roles in large corporations, before becoming a director of a legal training provider (now part of the BPP group). Whilst developing and delivering management development programmes for solicitors, he gained a real insight into how to apply management ideas and techniques to the legal profession. With this experience he set up his own practice (Harper Professional) in 2000. Keith regularly writes articles on law firm management issues, and speaks at conferences and events. He is a Fellow of the Chartered Institute of Marketing, and a member of the Law Society Law Management Section.

Martin Read

Martin Read was a practising solicitor for over 20 years, including 10 years as managing and then senior partner of a commercial firm based in Leeds. He is a past Chairman of Companies within the software, poultry processing, food manufacturing, and print and media sectors. He has also worked within the leisure industry.

Since 1998 he teamed up with Gail Biddulph and focused his attention to performance and profitability issues within Law Firms. He developed new benchmarking and file reviewing techniques for the legal profession (now implemented in many Firms). He is credited with taking waste out of the process of delivering legal services to clients, and re-engineering the way in which Defendant legal work is undertaken for Insurers.

For further information about Martin please see the About Distinctive Partnerships section on page 6.

Geoff Dearing

Geoff became a partner specialising in litigation in 1974 in what is now Brachers. He was Managing Partner from 1996 to 2004.

Following retirement as a partner Geoff has specialised in risk management, regulation and compliance, and anti-Money Laundering. He also lectures extensively in these subjects, and works as part of DP in carrying out Regulatory Compliance Audits for Law Firms.

He is on the board of an Insurance Company that underwrites professional indemnity cover for Law Firms, and is also a Director in a software company. Geoff is the author of a book on anti-money laundering and is both a Past President of Kent Law Society and a former chairman and director of an AIM listed Company.

Edward Hodgson

Edward is an experienced risk management consultant who has worked with law firms for nearly twenty years. After a long career in IT, working with private and public sector clients, he started his own consulting business, Seven Nine Ltd in 2004 and has since worked with many law firms including a number of top 100 law firms by size, helping them review and improve their business continuity and information security programmes.

An early project was the introduction of a business continuity programme for Irwin Mitchell Solicitors, whose provisions were successfully put to the test during the Sheffield floods of 2007. The firm was subsequently nominated for Recovery of the Year at the 2008 Business Continuity Awards.

Edward is currently working on a range of projects with a number of law firms.

Client Testimonial:

"Since the restructuring and despite not having managed to hire the people we wanted to [our] team in the last quarter of the financial year shot to the top performing slot. Thanks for your help with making this happen." *Partner, 20 Partner Firm*

Courses

A list of the courses currently on offer is described on the following pages although more are being developed to meet changing markets. More information on each course and a full list of current courses can be found on our website **www.distinctivepartnerships.com**

Each course can be taken individually but some subjects have two or three parts and those opting to take a second or third part only will need to satisfy the course tutor that they have the necessary background experience and resources to do so. The cost of each course is exclusive of VAT.

Special Note for Strategy Topics

Strategy is one of the key areas for law firms and courses on this topic are in much demand. We are therefore pleased to have two distinguished tutors on the DP Team, Nick Jarrett-Kerr and Fiona Westwood, each delivering a series of three courses in this topic which provides the foundation for a successful business. Whilst both are providing courses covering similar issues the middle courses provide an alternative option for solicitors depending on their particular requirements. In addition, Andrew Hedley has a series of courses supporting a firm in "Mergers and Acquisitions" from identifying targets to implementing the plans for an integrated Firm.

Further details of these courses can be found on our website www.distinctivepartnerships.com

Breaking with the Past
The Strategic Planning Process

Nick Jarrett-Kerr - £1395

This is the first of three in a series on strategic and business planning and will enable participants to understand how they can compete to win.

Successful strategy needs a proper understanding of the options available to the firm, as well as an understanding of the aspirations of partners and overall firm goals. It also requires a thorough understanding of the marketplace in which the firm operates and the competitive forces which affect the firm. This course will guide the participant through the essential research and preparation which is necessary to enable the firm or department to make the right strategic choices. The course will give the participant the strategic tools and methodologies to help gain strategic insight and to enable the firm or unit to make the right strategic choices to break away from the past whilst continuing to benefit from past success.

Standing Out from the Crowd
Differentiation & Competitive Advantage

Nick Jarrett-Kerr - £1395

This course is the second of three in a series on strategic and business planning and will enable participants understand how they can compete to win.

One main purpose of strategic planning is to work out how to beat competitors. It will assume an understanding of the strategic planning process (Breaking with the Past - The Strategic Planning Process). Building on the research and analysis covered in the strategic planning process, this course will help participants to understand how they can compete to win. Participants will learn how to position their firms or units so as to beat current and future competitors by differentiating themselves and their services in their markets.

Participants will learn how to develop and harness their intangible resources and capabilities for success. Sector based strategies will be considered alongside niche specialisms, and strategies for client segmentation and pricing. The laws of dominance are also considered as well as the art of differentiation through strong client relationships.

Getting the Rubber on the Road
Business Planning & Implementation

Nick Jarrett-Kerr - £1395

This is the final course in a series of three on strategic and business planning and will enable participants to understand how they can compete to win. Note that the course will assume an understanding of the principles covered in the first two courses and will assume that the groundwork and analysis covered in these courses will already have been carried out.

This course will guide the participant through the business planning process for a law firm, law firm office or department. Starting with an assessment of the current practice, the course will work through the practical frameworks and tactical plans which will enable the firm or unit to meet agreed strategic goals.

There will be a concentration and focus on harnessing the necessary strategic analyses, the framing of objectives and the identification of key success measures and milestones. The course will give the participant the tools and methodologies to write a compelling business plan.

Strategic Market Analysis

Fiona Westwood - £1395

This is the first in a series of three practical work-based courses designed to enable participants to create a Vision and Strategy bespoke to their personal business requirements. The courses can be taken individually as stand alone courses or consecutively.

This first course on Strategic Market Analysis will take the participant through the process to carry out a detailed analysis of the marketplace and present a written report on the opportunities and threats facing the firm to its key stakeholders.

This course will allow the participant to develop a written report analysing the marketplace and current pressures to change. This will be based on a comprehensive review of the market, direct and indirect competitors and possible future directions. It will increase the understanding of and confidence in a range of strategic analysis tools and techniques and allow the participant to discuss these with key stakeholders. This in turn will ensure that the firm has an improved and comprehensive understanding of the marketplace so that it can make future decisions on a well-informed basis.

Creating the Vision

Fiona Westwood - £1395

This is the second in a series of three practical work-based courses designed to enable participants to create a Vision and Strategy bespoke to their personal business requirements. The courses can be taken individually as stand alone courses or consecutively.

This second course allows the participant to develop an agreed Vision for their business and based on their comprehensive Market Analysis, agree its long-term objectives.

This course on Creating the Vision will give the participant a clear and agreed vision of their firm, based on its core values and long-term priorities. It will allow participants to debate and identify a commonality of purpose across the whole firm and to ensure that people are clear about its future direction.

Agreeing the Strategic Plan

Fiona Westwood - £1395

This is the last in a series of three practical work-based courses designed to enable participants to create a Vision and Strategy bespoke to their personal business requirements. The courses can be taken individually as stand alone courses or consecutively.

This third course allows the participant to identify and formalise the most appropriate strategic option for the firm based on the outcomes of the first two courses (ie comprehensive market analysis, agreed core values and long-term priorities.)

This course on Agreeing a Strategic Plan will give participants a clear and agreed formal plan that identifies the strategic development option for their firm. It will allow participants to directly involve and obtain agreement from all key stakeholders are to how that option will be implemented.

Building the Business Case
Mergers & Acquisitions

Andrew Hedley - £995

The first of three in a series which will help participants to chart a successful route through a merger or acquisition process.

Long range economic indicators suggest that consolidation amongst firms will be a significant force driving change in the legal sector over the coming years. This course equips law firm leaders with the knowledge needed to create a strategic business case for a merger or acquisition which will allow them to articulate the logic which suggests the merger route as the most appropriate option for their firm. Acceptance of this business case is also the signal for a process of identifying and benchmarking potential merger candidates. This will be done on the basis of objective criteria which will enable the firm to achieve its ambitions. This course provides the tools by which this process can be undertaken and allows participants to create their own bespoke assessment model and documentation.

Delivering the Deal
Mergers & Acquisitions

Andrew Hedley - £995

The second of three in a series which will help participants to chart a successful route through a merger or acquisition process.

An appropriately structured negotiation process is crucial for the successful delivery of a merger or acquisition. Developing a clear understanding of the other side's business, operating model, client base and long term profitability outlook underpins the negotiation. Getting due diligence right is crucial to enable a fair and objective negotiation to be undertaken. Ultimately the opportunity needs to be set out in a prospectus which will both put forward the facts and the potential benefits of the deal. Allowing participants to explore these core components in the merger and acquisition process form the content for this second course in the series.

Implementing for Success
Mergers & Acquisitions

Andrew Hedley - £995

The third of three in a series which will help participants to chart a successful route through a merger or acquisition process.

The negotiation team will have a broad and deep understanding of the merger or acquisition opportunity that is being presented. The knowledge of the firm's other Partners or Members will necessarily be much more superficial. In order to secure the mandate to proceed, the leadership team must be able to build a broad consensus that the proposal offers the best opportunity of those available to the firm. It must also be able to demonstrate that business risks have been identified and thought through. Gaining buy-in and doing the deal form the core components of this final course in the merger and acquisitions trilogy.

However, "doing the deal" cannot be regarded as the end of the process. Implementation planning and using the first six months of the life of the new firm effectively will be the key factors in guaranteeing ongoing success. Putting this implementation plan in place to ensure that, in the first instance, the firm hits the ground running and, secondly, opportunities are identified and acted on, concludes this course.

Business Development

Developing your business through gaining new clients, managing your existing clients better and entering new markets or specialist areas is key to the health of Law Firms. These courses will enable you to better understand and develop your business.

Where are we? Gaining a True Perspective
Business Development & Marketing Strategy
Andrew Hedley - £995

The first in a series of three that will enable participants to create and implement highly effective business development and marketing strategies.

This course introduces participants to the fundamentals of a Business Development & Marketing Strategy enabling them to plot their firms current and desired competitive position, understand better the opportunities and challenges that they face. Using recognised tools, tuned for the legal sector, candidates will analyse their current market position, understand the longer term prospects and evaluate competitive forces. There will also be a consideration of the impact of changes to the market for legal services and how these will impact on the business development and marketing strategy.

What next? Strategy & Choice
Business Development & Marketing Strategy
Andrew Hedley - £995

The second in a series of three that will enable participants to create and implement highly effective business development and marketing strategies.

Making choices about what to do (and what not to do) lies at the heart of strategy. Participants will be encouraged to evaluate the options for development open to them in an objective and critical way in order to arrive at the best options for their firm given its competitive position, client opportunities and core skills.

Using a framework for the evaluation of their range of options, participants will be encouraged to make choices based on likely return on investment, market size, competitive mix and prioritisation of limited resources. The creation of an actionable Business Development & Marketing Strategy in which stretching objectives are set and measures of success agreed up-front will conclude this course.

Driving Implementation
Business Development & Marketing Strategy
Andrew Hedley - £995

The third in a series of three that will enable participants to create and implement highly effective business development and marketing strategies.

Creating a stretching but achievable Business Development & Marketing strategy which will deliver sustainable competitive advantage in itself will not deliver success. Implementation is key. An average strategy well implemented will deliver much more benefit to the firm than a truly ground-breaking one which cannot pass muster when it comes to delivery on the ground.

This final course in the trilogy focuses on effective implementation and the sort of change management techniques which are often necessary to bring about enduring strategic change. Beginning with a consideration by candidates of how they will drive engagement in the strategy implementation across their firm and all stakeholders, the course will enable them to fully consider all relevant implementation issues and make active choices in terms of priorities, budgets and resources in order to create a measurable action plan.

Structuring for Success
Designing a Client Relationship Management Programme
Andrew Hedley - £995

The first in a series of two that will enable participants to create, launch and manage a client relationship management programme within their firm.

The course will explore the importance of Client Relationship Management with a series of practical examples showing how firms can adopt a more client oriented approach to their business. An initial evaluation of current practices, successes and failures will be used to identify the areas in which the firm should focus its efforts most strongly. The course centres on the creation of a bespoke framework for client relationship management which reflects the candidate's firm's unique market position and client base.

Delivering the Client Relationship Management Approach
Designing a Client Relationship Management Programme
Andrew Hedley - £995

The second in a series of two that will enable participants to create, launch and manage a client relationship management programme within their firm.

Systems and processes are necessary to underpin any client relationship management programme. However, to ensure good uptake with busy lawyers these processes must walk the thin line between "as much as necessary" and "as little as possible". From a cultural perspective, the creation of rewards, recognition and sanction will also play a key part in the client relationship approach. With a focus on developing a strategy and detailed implementation that is appropriate to the firm, this course focuses on those elements crucial for success. As well as shaping the client relationship strategy, the participant will also consider what is needed for the launch and maintenance of the programme as well as agreeing suitable ways of measuring progress from both an internal and external perspective.

Shaping Up for Key Client Management
Managing Key Clients
Andrew Hedley - £995

The first in a series of two that introduces the fundamentals of key client management and enables participants to develop a simple but effective programme for their firm.

Many firms rely on a small number of clients which deliver a disproportionate percentage of overall revenues. The need to secure and develop this crucial part of the client base forms the focus for this two course series. Participants begin with an evaluation of their own client base in order to understand better its dynamics and the how the principles of key client management can be applied. Exploring the economic drivers of a key client programme using real life examples will be used to create a series of scenarios which illustrate the impact on both revenue and profit of a range of key client scenarios. The development of a key client framework and supporting systems which are appropriate to the firm will form the core output of the course.

Rising to the Implementation Challenge
Managing Key Clients
Andrew Hedley - £995

The second in a series of two that introduces the fundamentals of key client management and enables participants to develop a simple but effective programme for their firm.

Having designed the key client framework the challenge that must then be addressed is how to create a successful launch.

This course considers the range of implementation challenges that must be overcome in order to embed a key client programme. As well as functional implementation issues, the importance of communication will be highlighted in ensuring that each person in the key client team and the wider firm understands the role that they have to play. Ongoing maintenance will also be addressed as well as candidates considering how the firm deals with the thorny subjects of rewards, recognition and sanction as part of its approach to key clients. The course will also ensure that participants consider the most appropriate way of measuring progress using both internal and external metrics.

Making Service Excellence King!
Effective Client Service in Law Firms
Andrew Hedley - £995

The first in a series of two which sets out the key service issues faced by law firms, enables participants to measure their own performance and to develop appropriate service improvement initiatives.

A strategy based on service differentiation coupled with advanced relationship management techniques presents one of the few viable options for building a strong and sustainable competitive advantage. In a world in which law firms in the same "weight class" are largely undifferentiated, this course will help candidates to identify the key service dimensions on which to complete and to put in place a client feedback programme. Participants will explore client experiences at the numerous and diverse touch-points with the firm and to evaluate the extent to which added-value is created by the service delivered. Participants will develop a service model which is appropriate to their own situation and the competitive pressures which they face.

Creating a Continuous Service Improvement Approach - Effective Client Service in Law Firms
Andrew Hedley - £995

The second in a series of two which sets out the key service issues faced by law firms, enables participants to measure their own performance and to develop appropriate service improvement initiatives.

What happens when service goes wrong? What procedures are in place to identify and rectify service failures? Can the firm create a client satisfaction uplift by the way in which it deals with service failures and responds to client concerns and complaints? How can the firm learn from what has gone wrong in the past in creating a culture of continuous service improvement?

These are the key issues which participants will address in the second component of the Effective Client Service in Law Firms course. They will explore service failure using proven models and propose simple but effective methods to improve the consistency of service experience within their firm, coupled with a programme of continuous improvement which engages the whole firm in a commitment to service excellence.

Are your clients happy? How to find out
Client Perception Testing 1 & 2
Andrew Hedley - £1395 Part 1 and £995 Part 2

Successful management of your operational performance will significantly improve your profitability. These courses will help you to measure client perceptions effectively and understand the key performance standards required by the business and the appropriate actions required to fill the gap between current performance standards and those required by clients.

The first course deals with the process is analysing and evaluating the way in which existing clients perceive the firm. Understanding your clients and delivering a quality, cost effective service is key to retaining and gaining new clients. It covers the regulatory requirements and reviewing the existing quality of the provision of service standards to clients.

The second part of the course guides participants through the practical implementation of the client perception testing programme.

Make the Web Work for You
Lloyd Barrett - £1395

Knowing how to leverage maximum benefit from your investment in your web site can differentiate you from your competitors.

This course focuses on how to make best use of technology so your prospective clients choose your firm over your competitors.

An effective web strategy is an integral part of your marketing and business plan. While many businesses now use electronic communications and have Web sites, few really understand how to integrate their Web-based efforts into a cohesive business development strategy, or how to utilise the available technology to manage this aspect of their marketing endeavour.

This "Make the Web Work for You" course will give you a clear understanding of where and how your Web presence fits into your overall business plan. It will provide you with knowledge in a no-nonsense, practical, common sense way to understand how to manage the design, commissioning and on-going management of a successful on-line presence.

Acquiring New Clients from Referrals
Ewan Sturman - £1395

One of the oldest ways of acquiring new business has been brought into the present day and "networking" and "word of mouth referrals" are phrases that are in use every day.

This course will show you how to develop focused business networking skills for the sole purpose of obtaining referrals and good quality fee paying clients.

This course will enable your Firm to acquire additional business by:

- Presenting yourself more effectively
- Getting introducers to refer you more often, and to better clients
- Acquiring an understanding of why your clients do not refer you, and what to do about it
- Evaluating your current network
- Tracking referrals received.

Financial Management

An essential skill for all partners is to understand how financial performance affects their business and profitability.

These courses are a comprehensive introduction to analysing and understanding financial performance in relation to your own firm.

Financial Management for Lawyers 1 & 2
Peter Scott - £1195 per course

Strong financial performance will underpin a law firm's ability to develop the resource necessary for it to gain competitive advantage. The courses focus on the two key areas of:

- Accelerating cash flow in your firm; and
- Improving profitability in your firm

The first course on Financial Management for Lawyers will provide you with an in-depth understanding of the factors in your firm which may be causing weak financial performance and in particular slow cash generation and poor profitability and which are hurdles to being able to effectively compete. You will develop practical methods of financial analysis, measurement and reporting to help manage your firm more effectively.

The second course will guide you through the process of working with a team to implement the new financial management reporting process in your Firm and monitoring the results post implementation. It will also provide you with practical skills for managing the internal processes of change which may be necessary if you are to successfully deliver results in these critical areas.

Toning up your Financial Muscle
Long Term Funding and Capitalisation
Nick Jarrett-Kerr - £1395

We enter the second decade of the twenty-first century with many law firms at the limits of their ability to increase their capital base or actually under-capitalised. Most firms continue to be sufficiently well capitalised to remain liquid – in other words to convert their work into cash sufficiently quickly to cover current liabilities - and to fund partner drawings and distributions.

They however lack the capital base to invest, to grow or in some cases to compete in the new world.

This will undoubtedly affect the ability of the majority of UK law firms both to continue to develop and compete as traditional law firms and to face or embrace the new competitive pressures and business models in play following the Legal Services Act.

This course will enable participants to understand balance sheet issues and to consider and optimize the capital 'shape' of the firm. It will help them work through the long term funding needs of the firm and to understand how new projects may impact on balance sheet strength as well as future profitability. The course will also help participants to balance their capital needs between equity (partners capital) and coherent levels of borrowing as well as understanding the advantages and disadvantages of seeking external investment.

Leadership and Managing People

Every day Law Firms rely on their people to provide the skills and services that their clients and business require. These courses cover a wide range of topics that develop your leadership, communication and people skills.

Leading High Performance Teams
Joy Harcup - £1395

This course on Leading High Performance Teams will give you the understanding and skills to get the most out of those that you work with, whatever the skills and experience of individual team members. It will provide you with the tools and techniques, as a team leader, to ensure that your team works better together and is highly motivated.

The knowledge and skills that you gain from the course will allow your team to deliver better results to clients, increasing client satisfaction and the potential for further client work. It will also improve team morale and the job satisfaction of lawyers and support staff in the team, so that they are loyal to the firm leading to increased retention rates and cost benefits.

Tapping into your Talent
Joy Harcup - £1195 Part 1 and £995 Part 2

Learning and Development Strategies provide the opportunities in your firm for staff to learn and development is the key to the attraction and retention of talented people, who can deliver high quality client service. The first part of this course helps you to provide a learning and development strategy, for your firm or team, and to design training solutions that help the firm ensure that your lawyers and other staff reach their full potential and the firm sustains a competitive edge.

The second part of the course gives you the skills and abilities to implement the strategy and evaluate its effectiveness in satisfying your firm's current and future business needs and the individual development needs of your staff.

Change Management
Working with People to Effect Change
Joy Harcup - £1195

Dealing with change is one of the certainties of legal business! Whether you are instigating change at a departmental or firm level, this course provides actions and solutions to the typical stages of transition. It provides you with the tools and skills i) to implement change through new processes/procedures and the engagement of your staff and ii) to overcome the barriers to doing so.

Developing a Learning Organisation to Effect Culture Change
Fiona Westwood - £1395

This practical work based course is designed to allow your firm to develop a learning organisation to effect culture change. It focuses on tackling culture change through leading and managing people especially at a time when morale and motivation is at a low ebb. With training budgets under pressure, it will allow you to maximise the learning that occurs in everyday practice. This course covers the challenges of leading and managing professionals as well as identifying the key Actions needed to introduce a learning orientation to effect successful culture change. It will allow you to review the range of leadership, managing people and change management techniques that are available, select those most appropriate to your firm and present your findings to your partners to agree which to adopt.

Managing and Supervising Trainee Solicitors
Keith Harper - £1195

Trainee solicitors are not only the future of individual firms, they are also the future of the profession. It is therefore critical to encourage, develop and motivate trainees so that those with the necessary aptitude will want to stay with the firm, and contribute to its future. The SRA have extensive guidelines to help with the development of trainees – this course delivers the practical tools to build upon the guidelines in order to maximise the potential of your firm's trainees. The course will help you to create clear plans and objectives for training contracts, including the clarification of responsibilities and time requirements.

The programme will also enable the development of the key skills required to implement the plans, specifically in the areas of coaching and performance management.

Improving Team Leader Performance
Keith Harper - £1395

Leading and managing teams well is crucial in maximising the potential of a modern law firm. Good team working leads to improved motivation, and delivers increased efficiency, and profitability. Some professionals do not embrace the benefits of team working easily, and careful attention must be paid to overcoming the problems this may create. This course will deliver the practical tools team leaders need to really make their teams work well, and will address the 'live' issues facing them within their team.

The course will enable you to clarify your role as a team leader. Through a detailed analysis of your team and your environment, you will be able to create a strategy and clear objectives for the team, in addition you will be able to build key leadership and management skills, including delegating and communicating effectively, and managing the performance of the group.

Improving Personal Effectiveness and Time Management
Keith Harper - £1195

The ability to manage time and prioritise effectively is the most important business skill for anyone to develop because it is central to all that we do at work (and outside it). It is of course particularly important in the legal environment, where the cost of time is so visible. In this environment those with management responsibilities face particular challenges in allocating their time between 'fees now', and their duties to the development of the practice and the people they manage.

This course takes a highly personalised approach to improving the effectiveness of the individual. Starting by analysing your role, and how you use your time over a number of weeks, and what influences your decisions, the course will enable you to establish clear priority areas and short and long-term goals within them.

By then applying techniques which suit you and your environment to the allocation of your time, (and of that of those you manage), and further techniques to deal with the things which seek to interrupt and derail your plans, you will become more effective, and probably less stressed!

Developing the Effectiveness of the Firm Through Improved Internal Communication
Keith Harper - £1395

Very few law firms have excellent internal communication, and often difficulties in this area translate in to motivation problems, and reduced productivity. Strong internal communication acts as the lubricant of the engine of the business, and ensures that the business runs smoothly. Internal communication of course is central to cross selling, and as such can make a big difference to the business development effort.

This course will enable you to audit and analyse the effectiveness or otherwise of internal communication within your firm, and then to address areas of weakness by creating a clear communication strategy. It will help you to decide what type of information should get to whom at what speed and by which method.

It will enable you to understand the cost and effectiveness of meetings, and to consider the extent to which time needs to be allowed for one to one line manager discussions. Finally it will enable you to launch and implement your strategy effectively and to see the difference.

Developing an Effective Recruitment Strategy
Keith Harper - £1195

People are of course at the very heart of professional service organisations. Law firms rely on individuals to make them successful, and place a great deal of trust in them. Making recruitment mistakes can be extremely costly, as a great deal is invested in the recruitment process as well as the salary of the individual once they are engaged.

This course will help those with responsibility for recruitment within their firms to analyse their needs at a strategic level, and understand the nature of the people they want, not only in terms of technical ability but also with regard to how to concentrate and develop the culture of the firm. Participants will then be enabled to audit and adapt job specifications and interviewing procedures and make decisions to use the most appropriate recruitment and testing methods for their firm.

Partnerships & Partners Responsibilities

Partners have unique responsibilities within a law firm and these courses provide the foundation for any partner whether they are new to the position or established partners.

Governance

Harnessing Your Might

Nick Jarrett-Kerr - £1195

Law firms – along with every other commercial organisation – need to decide how best they should organise themselves to be successful. In addition, more and more external stakeholders – such as banks, insurers and regulators – are reviewing the internal management hierarchies and partnership structures of law firms to help them decide whether or not the firm is well coordinated and managed and employs a coherent governance structure.

This course will enable participants to review the structure, governance and organisation of their firm and adjust or transform it to meet current and future needs as well as to align it to the firm's strategy. Corporate structures will be considered as well as the more traditional partnership and LLP structures.

Increasing Partner Contribution

Joy Harcup - £1395

Partner coaching individually tailored over 6 months to ensure that the participant increases his/her contribution to the Firm by carrying out Partner responsibilities more effectively.

This course has a special relevance for newly appointed Partners as well as established partners who are undergoing a change of role or otherwise wish to increase their effectiveness. It can help you to focus on your priorities, make changes and accelerate the achievement of your goals in areas such as leadership, team building, business development, personal effectiveness, life balance and mental resilience.

For example for new partners the transition to partnership is a rewarding but challenging time for new partners. For this course you will be mentored by Joy Harcup through the initial period of transition. New partner coaching provides individual tailored support during the first 6 months of the transition, so that you become more effective as a partner quicker.

Operational Management

All law firms rely on the myriad of skills and areas of expertise that are required to run any organisation. These courses are delivered by tutors all of whom will help those with little or insufficient experience develop the necessary skills to manage their chosen area.

Benchmarking Performance Standards

Martin Read - £995

It has never been more important for Law Firms to support their "brand" in the market place with consistent service delivery to clients. This course will enable the participant to identify and understand the key performance issues relating to service delivery. It also covers performance standards for reducing risk and achieving regulatory compliance on client files.

The participant will learn how to draft and successfully implement a short and measurable Benchmark document that is in user friendly format for all fee earners. This is the first step in improving operational performance by implementing standards that will add to the accessibility and credibility of the Firm in the market place in which the Firm operates.

Effective File Reviewing

Martin Read - £1195

Under Rule 5.03 (1) and (2) of the 2007 Code of Conduct file reviewing is compulsory. This should not obfuscate the substantial business benefits that are achieved by the relatively few Firms that understand how to manage the process effectively. There are many misunderstandings which this course will dispel. The course will enable a Firm to provide the information it needs to improve standards of service/delivery and outcome for clients; achieve consistent standards of service across all fee earners, departments, and offices; review technical quality simply and cost effectively, simplify and improve career development for fee earners; improve reputation in the market place; improve opportunities for increased work; reduce the number of client complaints and the risk of losing clients to competitors; reduce the risk of breaches of regulatory requirements; reduce the potential for negligence claims and annual professional indemnity premiums. Prior to delivery of this course the participant's Firm should have in place written measurable performance standards relating to service delivery, and risk and regulatory compliance on client files (or have taken the Benchmarking Key Practice Performance Standards course).

Managing Credit Risk

Geoff Dearing - £1195

This Credit Risk course will give the participant the knowledge and ability to reduce credit risk, target lock up and improve both operational performance and profitability as a result.

The knowledge that the participant will gain from this course is fundamental to any successful business The course will further enable participants to improve their skills in the management of risk which will aid compliance with regulation as well as an improvement in profitability.

By the end of this course each participant will be able to demonstrate the ability to measure business-wide perceptions of client related credit risks, to understand the key performance standards when assessing the risk as required by the business, to consider the steps to be taken to mitigate the risk and improve performance standards.

Client Complaints

Geoff Dearing - £1195

This course on dealing with client complaints and claims will provide vital information into the effectiveness of current client claims procedures and understand the compliance requirements relating to complaints handling. It will provide participants with the knowledge to make the procedures as effective as possible in improving communications with clients in assisting with client retention and the reduction of risk of the escalation of complaints.

Client Acceptance Procedures

Geoff Dearing - £1195

This course on client acceptance procedures will provide the participant with a useful and helpful insight into the consistency of client acceptance procedures within your firm over and above issues of "know your client".

The insight gained from this course will be fundamental to ensuring the consistent application in client acceptance procedures. One of the key areas for claims and complaints against solicitors stem from inadequate and inconsistent procedures and there can be a serious impact on costs and therefore income if this area is not properly addressed. It is a prime area for risk management as well as good practice. This course will provide a framework for measuring the key areas of performance to meet the risks inherent from client acceptance procedures.

Management of Entity Based Regulation Rule 5 of the Solicitors Code of Conduct

Geoff Dearing - £1195

This course will concentrate on the key supervision and management responsibilities to ensure compliance and considered best practice including the following areas:

- Supervision of staff
- The Money Laundering Regulations
- Key Regulatory requirements
- Identification of conflicts of interest
- Rule 2 (client relations) on client care, costs information and complaints handling
- The management of Risk
- The control of undertakings
- The safekeeping of documents and assets entrusted to the Firm
- Compliance with equality and diversity (Rule 6)
- The training of staff to ensure competence
- Financial control of budgets, expenditure & cash flow
- Business continuity
- The checking, with reasonable regularity, the quality of work undertaken for clients & members of the public

On completion of this course the individual will be aware of, and be able to put into practice, the issues of supervision and management required by Rule 5.01 of the Solicitors Code of conduct 2007.

Anti-Money Laundering (AML) and Counter Terrorist Financing (CTF)

Geoff Dearing - £1195

This course will look at the requirements of The Proceeds of Crime Act 2002, the Terrorism Act 2000 and the Money Laundering regulations 2007. Best Practice will be reviewed and recent changes will be considered in addition to the threat of Money Laundering in areas of every day practice. The treatment of cash will be considered together with regulatory compliance under the Money Laundering Regulations 2007.

Business Continuity Management 1 & 2

Edward Hodgson - £1395 Part 1 and £1195 Part 2

This is a two part course that will enable you to implement a business continuity programme for your firm.

Part one of this practical, work based learning course will take a participant through the steps required to have published a business continuity strategy that has been agreed by the firm and has the necessary management and financial support to enable it to be implemented successfully. It covers the analysis of the firm's recovery needs, and the development of a suitable continuity strategy. This is a prerequisite for part two.

Part two covers the development, implementation, training and testing of your business continuity plans. These plans will cover all of your legal teams and support services

Protecting your Valuable Information 1 & 2

Edward Hodgson - £1195 per course

This course on Information Security will enable you to review and improve your firm's working practices in line with the Law Society's 2008 Practice Note.

Information is an asset which has value to an organisation and needs to be suitably protected. It can be electronically stored, printed or written, transmitted by post or electronically. Information security is the preservation of:

- Confidentiality – Ensuring that information is accessible only to those authorised to have access.
- Integrity – Safeguarding the accuracy and completeness of information and processing methods
- Availability – Ensuring that authorised users have access to information and associated assets when required.

By the end of this course you will have:

- Reviewed your firm's Information Security position
- Put in place suitable Information Security policies and practices
- Made appropriate changes to IT systems.
- Identified certain risks that may not be cost effective or practical to remove and ensured that the firm's management have understood and accepted those risks
- Ensured your firm is compliant with the Law Society's guidelines.

Successful Project Management

Joy Harcup - £1395

This course on Successful Project Management will give you the opportunity to develop and hone your project management skills so that you successfully manage matters from the client's, the firm's, your own and your team's perspective.

It will provide you with the knowledge, skills and abilities to respond effectively, and in a controlled way, to whatever might happen during a project.

The course will be tailored to help you manage internal firm projects or your client transactions. It will cover planning, managing those affected by the changes through to implementation and monitoring post implementation.

Where client matters are involved, the course will help you to ensure that the service provided to the client during the transaction exceeds their expectations, whilst also being profitable for the firm, enhancing the firm's reputation and ability to attract further work. The skills and knowledge obtained from the course will also assist you in building a motivated team.

Regulatory Compliance Audits

The profession is facing entity based regulation for the first time in its history. DP offers regulatory compliance audits so that "Partners may sleep soundly in their beds". SRA spot inspections have been very unpleasant experiences for some Firms.

- Are you confident that you are complying with all of the rules?
- Are you compliant with the Data Protection Act?
- Are checks made with those to whom documents are sent and are undertakings obtained to protect against information being misused?
- Is your complaints policy sufficiently robust to deal with the new challenges posed by the Legal Services Act and the Office for Legal Complaints for next year?
- Are you satisfied that your system for dealing with costs estimates, as required by Rule 2.03, are going to stand up against recent decisions by the courts?

Our audits comprise of a preliminary check of all relevant procedures, a review of samples of files, an on-site visit, and a report identifying areas of non-compliance and recommendations for change where appropriate.

Please contact us on 01244 571440 to obtain a fixed fee quote.

We will need to know if you require the complete audit or whether some rules should be excluded (e.g. Rule 9 relating to referrals if you do not pay for referral of work). We will also need to know numbers of those with care and conduct of files and also the number of offices.

Outsourcing File Reviews

Under Rule 5.03 (1) and (2) of the 2007 Code of Conduct file reviewing is compulsory. This should not obfuscate the substantial business benefits that are achieved by the Firms that outsource the reviews to DP.

Our file reviews will enable a Firm to:

- provide the information to improve standards of service/delivery and outcome for clients;
- achieve consistent standards of service across all fee earners, departments, and offices;
- simplify and improve career development for fee earners;
- improve reputation in the market place; improve opportunities for increased work;
- reduce the number of client complaints and the risk of losing clients to competitors;
- reduce the risk of breaches of regulatory requirements;
- reduce the potential for negligence claims and annual professional indemnity premiums.

Our file reviews are independent, objective, and reported in user friendly format. They have been used by Firms for winning tenders/beauty parades and for supporting business development generally.

Please contact us on 01244 571440 to arrange a meeting to discuss your requirements and enable us to quote for undertaking the reviews.

Client Testimonials

"Working in partnership with DP to ensure that we meet and exceed our clients' expectations is crucial to the success of our business".

Managing Partner, 3 Partner Firm

"Gail Biddulph thinks and looks outside the box! She has volunteered advice and support to us which was beyond the scope of our instructions, but which has proved highly beneficial to the Firm."

Managing Partner, 6 Partner Firm

"Your input has proved to be invaluable in driving our own processes forward and being able to deliver a high quality service to our clients."

Partner, 80 Partner Firm

"You have worked with us for some two years, and in that time have played a major role in helping us transform the firm in culture, structure, performance and business outlook."

Managing Partner, 5 Partner Firm.

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