



# CoreLegal

Exclusive services for the legal profession



## *The Team*

# Upholding The Law

[www.CoreLegal.Net](http://www.CoreLegal.Net)

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# The ‘One Stop Shop’ Principle

The Legal Profession is facing uncertain times and it is important to keep up, or you will be left behind. Small firms have never been under so much pressure. They need to keep overheads down and yet continue to perform to a very high standard.

It takes time to find a reliable outsourcing firm. With all the pressures they are under, solicitors need a “one stop shop” support organisation to reduce their administration to a team they can trust. Cue: Core Legal.

The small firms may never ‘match the big guys’ in terms of weight, but we want to help them operate at a higher level so that their size and operational efficiency actually becomes an advantage.



*‘Operations’ [Insurance, Coach, Merger]*



*‘Marketing’ [Research, Marketing, Copywriter, PR]*

This booklet brings together some inspiring stories plus tips and advice to help you improve the performance of your legal practice. We hope these examples from our legal support professionals will encourage you to make the next steps, on your way to raising your game, and to contact us in the strictest of confidence, if there is anything that you need help and support on.

**Shelley White** is listed as a Leader at the Bar in *Chambers* and as a Leading Junior in the *Legal 500*. She is known for her “excellent analytical skills in obtaining equally excellent results in court”. Shelley was included in the *Times* and *Management Today’s* 2008 list of the top 35 women under 35 and is a UK Enterprise Ambassador.

*“It is great to see this innovative group of people bringing together their wide variety of skills to form a ready made support network for those in the legal profession.”*

**Shelley White, Barrister, New Square Chambers**



# Foreword



**L**egal people, whilst having a splendid knowledge of the law – sometimes don't have all the skills necessary to run a successful practise. Marketing the firm, keeping the books, growing the business, etc; I've learned that you can't do things by yourself. You need a team of good people around you.

**This is where Core Legal can help you.**

The Core Legal members are all experts in their respective fields. If you require help in any area outside your own main expertise of law – then please do get in touch with us. We are a group of legal support providers who have come together to save solicitors time and to offer them an alternative. If finding reliable, cost effective, professionals who understand your needs and maintain your standards has always been difficult - Core Legal aim to make it much easier. This booklet gives you a little bit of background about the members of Core Legal – told in their own words.

**Lisa Newton**  
**Entrepreneur & Founding Member**

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Coach, Trainer & Mentor

**Roger Gould**  
Copywriter

# Dave Mort

**Years in the game:** 20

**Business:** Research/Client Satisfaction Surveys for Law Firms

[www.irn-research.com](http://www.irn-research.com)

[research@corelegal.net](mailto:research@corelegal.net)



David Mort formed IRN Research (trading name of IRN Consultants Ltd) in 1991. IRN has a strong track record in running client satisfaction surveys and market research projects (e.g. surveys of specific markets, competitor reports etc) for law firms and solicitors. Innovative law firms know that these surveys not only measure client satisfaction but can identify other client demands and highlight possible new sales opportunities. IRN is also a partner in a new web site

[www.legallybetter.com](http://www.legallybetter.com) enabling law firms to put their reputation online by using their client feedback to reach a wider potential audience.

**What's the biggest challenge you've seen a solicitor face?** Legal market liberalization, regulatory upheaval, and increased competition, mean that the biggest challenges have still to come .... but forward-thinking and flexible law firms will survive.

**Do you work alone?** No, we have a team of experienced researchers, interviewers, and project managers not only in the UK but also overseas.

**What's it like to work with solicitors?** Sometimes frustrating, sometimes enlightening – contrary to some public perceptions not all solicitors are the same.

**How have you overcome any obstacles that you've faced?** Hard work, talking to others, revisiting and adapting the services we offer to changing market conditions.

## David's Top Tips

### **Don't treat market research as a luxury**

It is a key part of the business planning process .... and the first place to start is with existing clients.

### **Budget sensibly**

Research fees vary from hundreds to thousands of pounds so you don't have to make a big hole in your budget. But be realistic, don't cut corners, and use a Market Research Society member.

### **Act on research findings and maybe use it for PR**

Don't let research results gather dust ... act on key research findings whether you like the results or not! If appropriate, use any non-confidential results for PR & publicity about your firm.

# Irene Danso & Lisa Newton

**Years in the game:** 20 & 6 respectively

**Business:** Legal Cashiers / Bookkeeping

**www.boogles.org**

**cashier@corelegal.net**

Lisa Newton formed Boogles Ltd – a bookkeeping service in 2004, in the same month that she graduated from university. Over the years, Boogles had an increasing number of enquiries from solicitors who wanted their books to be done. Seeing an opportunity to become leaders in this niche sector, Lisa teamed up with Irene Danso to run the legal bookkeeping arm.

Irene Danso, a Legal Cashier for almost 20 years has worked in a variety of different sized law-firms and has been instrumental in the setting up of and improvement of accounts departments.

## **Who has been the greatest inspiration to you?**

Warren Buffet & Oprah Winfrey.

## **What's the biggest challenge you've seen a solicitor face?**

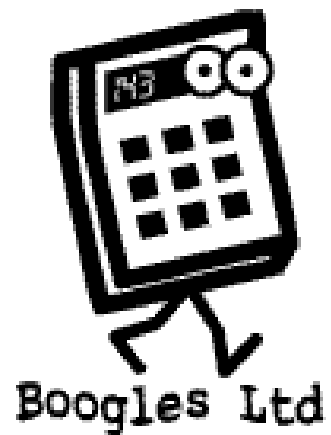
Corrupt cashiers who've breached the Law Society's rules left, right & centre – and then disappeared. Switched off their phone and that was that.

## **Do you work alone?**

No, we have a team of approx 20 bookkeepers who we supervise and to whom we provide support.

## **What's it like to work with solicitors?**

Challenging.



## **Boogles Top Tips**

### **Check the credentials of your cashier**

Many cashiers are operating as one-man bands, or they're IT people who are chancers. Know who you're dealing with.

### **Have systems in place**

Good systems reduce your chances of breaching The Solicitors Accounts Rules (SARs).

### **Have a budget**

Try and budget for items. And keep money set aside for a rainy day and for your VAT bill.

# Jason Cobine

**Years in the game:** 20

**Business:** Insurance

**www.cobinecarmelson.com**

**insurance@corelegal.net**



Jason Cobine has helped hundreds of businesses - sole practitioners, managing partners, LLP's, managing directors and charities in London and the home counties get their insurance claims paid. Arranging insurance correctly, being available when clients need help and updating policies avoids insurance disputes. Typically clients may already have insurance but aren't 100% certain that it'll pay out. Jason has developed a unique process that provides clients with reassurance that they have the right cover. This protects clients income and reputation.

## **Who has been the greatest inspiration to you?**

My cousin who has fought more than five bouts of different types of cancer whilst supporting a wife with MS – still going strong and will not lie down.

## **What's the biggest challenge you've seen a solicitor face?**

Failure of a claims department to answer a query about a possible claim in good time leading to increased costs for the solicitor.

## **Do you work alone?**

I have outsourced things I'm not good at, so I spend most of my time with clients, prospects and introducers.

## **What made you join Core Legal?**

Collaboration is something I love and teaming up with other service lead businesses means I can learn from everyone else.

## **Jason's Top Tips**

### **Check what isn't covered.**

Don't be blinded by features you may never need.

### **Always call your insurance claims helpline before you need it**

Check how they respond when you most need help

### **Check if your policy pays for all the defence costs**

The excess may catch you out.

### **Jason's parting thought**

"It's not the strongest or the fittest who survive. It's those with the capability to adapt." I can't remember who wrote that yet I adapt.

# John Brooks

**Years in the game:** 10

**Business:** Relationship Bank Manager

[www.rbs.co.uk](http://www.rbs.co.uk)

[bank@corelegal.net](mailto:bank@corelegal.net)



John joined RBS as a bank manager in the professional services department, and as a result has many solicitor clients. He gets a lot of flack from people who like to joke that RBS is ‘owned by us’ the people – but some bankers out there are very good at their job. John and his team have strong relationships with their clients, and have visited a few firms to understand their set-up and banking needs.

## **Who has been the greatest inspiration to you?**

Margaret Thatcher. She might have had her enemies, but she knew what she stood for – and you either loved her or you hated her.

## **What’s the biggest challenge you’ve seen a solicitor face?**

Trying to reign in spending after years of living in the overdraft and on loans. Sometimes even very successful firms, who turn over hundreds of thousands – are still living hand to mouth. And getting over the culture of having a flashy car and a nice plush office – toning it down a bit – can be difficult.

## **What made you join Core Legal?**

This is one of the most cost-effective ways for us to be introduced to solicitors.

## **What’s it like to work with solicitors?**

Interesting.

## **John’s Top Tips**

### **Ensure your bank manager understands client accounts & office accounts**

You need to keep client monies separate from you own, and you need the facility to open client accounts easily.

### **Have a savings account for Tax**

Keep a separate account for saving – tax , VAT & PAYE can all catch you out, so always be setting money aside for those bills.

### **Review Your Banking Needs**

Do you need a loan? Or an overdraft? Or a credit card? What is most cost effective? Could you move some money into a high interest account? And earn more?

# Jon Hepburn

**Years in the game:** 20

**Business:** Marketing

**www.fedoraconsultancy.com**

**marketing@corelegal.net**

Jon is the founder of The Fedora Consultancy, a specialist provider of marketing and business development services for law firms. Previously Jon worked as Marketing and Sales Manager for an after-the-event insurance company, dealing with a wide range of law firms. The potential impact of the Clementi Review (and subsequent Legal Services Act) led Jon to establish Fedora, specialising in advising law firms (particularly smaller ones). He is a member of the Chartered Institute of Marketing and a Chartered Marketer with over 20 years experience within a variety of marketing disciplines.

## **What's the biggest challenge you've seen a solicitor face?**

The real impact of the Legal Services Act is just around the corner...

## **What made you join Core Legal?**

A meeting of like minds, exchanging ideas and helping solicitors meet the many challenges ahead.

## **What's it like to work with solicitors?**

Rewarding, challenging – worth the effort. Occasionally an expression containing the words 'horse' and 'water' comes to mind...

## **How have you overcome any obstacles that you faced?**

Determination. I am passionate about the power of good marketing practices.



## **Jon's Top Tips**

**Existing clients are your goldmine** They're **your** customers, get in touch. Build a dialogue with them and maximise your reputation.

### **Get involved!**

Online legal services are here now – it's additional business, so get involved!

**HOW you communicate is as important as WHAT you communicate**

Technical excellence alone is not enough.

# Nigel Passingham

**Years in the game:** 10

**Business:** PR

**www.infoplan.co.uk**

**pr@corelegal.net**

**INFOPLAN**  
INTERNATIONAL PUBLIC RELATIONS

Nigel is a Director of Infoplan International. He has a proven track record in devising and implementing high profile, strategic PR Programmes for a wide range of UK and International companies. Infoplan is a well established PR Agency with a particular skill in creating strong corporate reputations for its clients, whether they be small, medium or large in size. The Agency is well equipped to work with legal professionals. Infoplan is also a leading company in Crisis Management in which solicitors very often are involved.

## **Who has been the greatest inspiration to you?**

The MD of my first client.

## **Are you afraid of failure?**

Yes, that is why I'm determined never to fail.

## **Do you work alone?**

I am fortunate enough to have a very good team behind me.

## **What made you join Core Legal?**

I believe the legal profession has much to gain from reputation building.

## **How have you overcome any obstacles that you faced?**

Through determination to succeed and the ability to work all hours if necessary.

## **Nigel's Top Tips**

### **Recognition**

Public Relations should be recognized as an integral part of a practice or business rather than a service tacked on to it.

### **Reputation**

PR is a powerful creative force and is capable of making a major contribution to a practice's greatest asset – its reputation.

### **Essential**

As Bill Gates is quoted as saying, ***"If I was down to my last dollar, I would spend it on PR"***.

# Owen Poole

**Years in the game:** 10

**Business:** Legal Cost Draftsman

**www.law-lords.co.uk**

**costs@corelegal.net**



Since its formation 10 years ago, Lawlords has grown steadily based upon the principles of providing top level customer service and achieving for their clients excellent returns. To complement that growth, Owen was recruited to run the London Office, which trades as “Lawlords of London”. Owen started in law as a fee earner for a leading West End firm of solicitors before being asked to set up their “In House” costs department. Having worked for various firms & independent costs companies he is acutely aware of the needs of solicitors for an efficient & comprehensive costs service.

## **What’s the biggest challenge you’ve seen a solicitor face?**

Maintaining their cash flow in the face of an adverse business environment made worse by poor costs management at the end of the cases.

## **Do you work alone?**

No, we have a dedicated team of costs draftsman and advocates with experience and expertise across all areas of law.

## **What’s it like to work with solicitors?**

It is very satisfying when you see your efforts having such a positive effect on the revenue of the solicitors.

## **How have you overcome any obstacles that you faced?**

By consideration of all the relevant factors followed by detailed planning following by controlled implementation.

## **Owen’s Top Tips**

### **Update your indemnity rates yearly**

If you don’t up date your rates you could be losing out on your hourly charging rates.

### **Agreements as to costs**

Make sure any settlements received or offered are clear as to payment of your costs.

### **Costs Estimates**

Never underestimate your costs on court documents, you may be held to it at a later date.

# Patrick Carmody

**Years in the game:** 25

**Business:** Legal Accounts Software

**www.perfectbooks.com**

**software@corelegal.net**



Patrick formed the company in 1989 with the help of specialist Legal Bookkeepers. Patricks Background is in Systems Development having graduated from Oxford University with previous experience working for IBM. With extensive industry experience and knowledge Patrick has seen first hand many of the scenarios and difficulties that Legal Firms regularly face and has a detailed knowledge of best working practices.

## **What's the biggest challenge you've seen a solicitor face?**

Imminent striking off tends to concentrate the mind. One practice we had contacted us once they had realised that their manual accounts were certain to fail the Law Society Inspection. Within a very strict time frame we managed to get the Accounts on to the software system which made the breaches apparent allowing us to advise in time. Its great when we are able to help like this.

**Do you work alone?** Perfect Software are a team consisting of Developers, Accounting experts and Sales and Support staff.

## **What made you join Core Legal?**

This initiative will offer added value to our clients by putting them in touch with a range of services they can trust through association.

## **What's it like to work with solicitors?**

Like the girl with the curl – when they are good they are very good, but when they are bad...

## **Patrick's Top Tips**

**Don't try and do the books yourself if that's not your strength**

The figures on the system are only as good as the information put in.

**Never be afraid to ask questions**

Its always better to get things right first time.

**Know your data security policy**

Always follow the exact backup procedure your systems provider recommends.

# Ray Fox

**Years in the game:** 15

**Business:** Practice Mergers, Sales and Valuations

[www.bottomlineconsultancy.com](http://www.bottomlineconsultancy.com)

[merger@corelegal.net](mailto:merger@corelegal.net)

The Bottom Line Consultancy

## Ray's Top Tips

### Have an exit strategy

How are you planning to step away from the firm you've built up over the years, when you retire?

### Make A Decision!

You might get it wrong. But procrastination is not healthy for business.

### Enjoy the journey

Ray had been a regular client of numerous law firms and when they heard he was about to start The Bottom Line Consultancy in 1994 they seemed to get mega-orgasmic about having the former Legal Director of Dun + Bradstreet working for them as a consultant.

### In the beginning, what type of work were you doing for your clients?

We were generating commercial clients for law firms. I was appalled at how bad law firms were at running their businesses. They had no idea where clients came from - it was like talking to 8 year olds about where babies came from - maybe the stork brought them!!

### What is your experience of working with solicitors?

Perhaps its my background in Psychology, but I found that many seemed to have similar personalities - so many were introspective, introverted, running isolated businesses, keeping their heads down below the parapet, dotting i's & crossing t's, etc. Then it hit me - when a law firm has a problem, they don't have anybody to go to for help.

### How has your consultancy developed?

Over the years, we've become the largest broker of law firms in the UK and probably the only consultancy offering advice on practice valuations having worked for a total of 520 law firms in all, with about 260 involving Practice Mergers, Sales and Valuations.

# Rebekah Gomez

**Years in the game:** 7

**Business:** Coaching, training and mentoring

[www.coach-london.com](http://www.coach-london.com)

[coach@corelegal.net](mailto:coach@corelegal.net)



Coach London was founded by former corporate lawyer, Rebekah Gomez. Their highly qualified coaches have a wealth of experience in time & target pressured environments. Coach London works with an array of industries and types of clients ranging from start-ups to key management preparing to exit the business. They have programmes for strategy & planning, winning more business, creating a great place to work, workplace confidence, time & career management, & negotiation skills. Rebekah regularly speaks at business events & seminars.

**What's the biggest challenge to success that law firms face?** Breaking from tradition and adopting those principles which can transform the practice.

**What made you join Core Legal?** Just as law firms often require the assistance of other units in order to provide a fully integrated service, Coach London needs the same. By bulking up we now have 14 new departments!

**How have you overcome any obstacles that you faced?** Coaches love obstacles! Identify as many options for moving forward as you can, even if they seem unachievable or outrageous and then choose the one that is the most attractive. If it doesn't work, try another and continue until the problem no longer exists.

## Rebekah's Top Tips

### **You can't hit a target you can't see**

Be clear about what constitutes success over the next 2-3 years and how you intend to achieve it.

### **Ask (with genuine interest) "How's it going?"**

As they reply – remain silent. No matter how long, or how uncomfortable... Make no judgement of their reply.

### **Understand before seeking to be understood**

Successful, more productive businesses recognise individual talents, strengths and motivators. Do more of what you do best everyday and allow others to do the same.

# Roger Gould

**Years in the game:** 6

**Business:** Copywriter

[www.rogerjgould.com](http://www.rogerjgould.com)

[copywriter@corelegal.net](mailto:copywriter@corelegal.net)



Roger J Gould started life as an assistant in the Company Secretary's Department of a multinational corporation. Years later while providing marketing support through copywriting he found that solicitors, while usually literate, well-educated souls, frequently became unintelligible when faced with explaining their particular specialism.

## **Who has been the greatest inspiration to You?**

Roy, Lord Thomson of Fleet, Lord Trenchard

## **What's the biggest challenge you've seen a solicitor face?**

Introducing a Practice newsletter in the face of opposition by the Senior Partners.

## **Do you work alone?**

Collaboration with my client makes that impossible, if my work is to be effective.

## **What made you join Core Legal?**

I enjoy the company of lawyers.

## **What's it like to work with solicitors?**

Like herding cats.

## **How have you overcome any obstacles that you faced?**

Patience, tact & persistence.

## **Roger's Top Tips**

**Any literature that you put out to your audience should be proof read**

Lawyers use Greek and Latin based words, their clients don't.

How readable are your brochures?

**Market your business**

No one else will

**The saddest words I know are, "I didn't know you did that."** Are your clients aware of all your services?

## Useful Links

Barristers - [www.newsquarechambers.co.uk](http://www.newsquarechambers.co.uk)

Delia Venables – [www.venables.co.uk](http://www.venables.co.uk)

Legal Complaints Service - [www.legalcomplaints.org.uk](http://www.legalcomplaints.org.uk)

The Institute of Legal Cashiers – [www.ilca.org.uk](http://www.ilca.org.uk)

The Institute of Legal Executives - [www.ilex.org.uk](http://www.ilex.org.uk)

The Institute of Legal Secretaries & PAs -  
[www.institutelegalsecretaries.com](http://www.institutelegalsecretaries.com)

The Institute of Para Legals - [www.mylegalcareer.org.uk](http://www.mylegalcareer.org.uk)

The Law Society – [www.lawsociety.org.uk](http://www.lawsociety.org.uk)

The Sole Practitioners Group - [www.spg.uk.com](http://www.spg.uk.com)

The Solicitors Regulations Authority - [www.sra.org.uk](http://www.sra.org.uk)



*Picture of Chairman (Jason Cobine - Insurance - holding an apple), surrounded by team. [Merger, Marketing, Cost Draftsman, Copywriter, Software, PR, Researcher, Banker]*

# What's Your Biggest Challenge?

What's the biggest challenge facing legal professionals today ?

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Why ?

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.....  
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Name: .....

Location: .....

Email address or other contact details: .....

.....



The best 'challenges' will get a chance to appear on our website.  
Email a copy of this page to: [info@corelegal.net](mailto:info@corelegal.net)