

Background

Kinsey & Co Solicitors is a sole practitioner firm, founded by Juliette Kinsey, based in Baildon Village outside Shipley. Juliette is the sole fee earner, and she has one staff member who performs secretarial and administrative duties.

Kinsey & Co Solicitors specialises in family law, specifically private client, separation and divorce. The firm offers clients legal advice and representation on the following issues:

- Divorce and financial settlements
- Child Arrangement Orders
- Cohabitation issues
- Child maintenance disputes.
- Mediation
- Prenuptial and cohabitation agreements

In 2008, the firm was one of only seven practices shortlisted throughout England and Wales at the Law Society Excellence Awards in the category of Excellence in Practice Management and Client Care Service.

Juliette has trained as a Lexcel consultant; however, she is not taking on this function at present.

Finding a strategy to demonstrate quality

When Juliette founded Kinsey & Co, she knew Lexcel would be part of the process from the beginning because it would provide her with a framework to deliver a high-quality service to her clients and manage risk appropriately. Having coordinated the process of obtaining Lexcel accreditation in a previous firm she worked for, she decided that Lexcel's policies, plans and procedural requirements would form part of her new venture from day one. She therefore set out in her business plan that Kinsey & Co would achieve Lexcel accreditation within nine months of opening for business.

Through including Lexcel in her business plan; thereby demonstrating she had a clear process in place for risk management and client procedures, Juliette was able to prove to her bank manager (who was familiar with Lexcel) that she possessed a clear business strategy, she had clear goals in place for the firm's growth and a solid knowledge of practice management standards required to run a successful, profitable practice. This helped Juliette secure an overdraft to assist with cash flow in the first year of trading.

Life with Lexcel

The ethos of Lexcel permeates every part of Kinsey & Co's business. Because it was implemented from day one, the firm has reaped the advantages of the time invested in setting up the quality management procedures required.

Professional Indemnity Insurance

With regards to PII, Juliette explains that "For the past eight years, with the exception of one year, our PII quote has remained the same or decreased. Juliette feels strongly that having Lexcel contributes to her low PII insurance, "because any unusual jobs have the risks well mitigated, and as I have a robust complaint's procedure in place if ever needed, insurers have confidence that I am not a high-risk entity".

Marketing, PR, and Sales

Upon opening, Juliette promoted that Kinsey and Co were Lexcel accredited through local newspapers and the firm's website. When asked if Lexcel directly attributed to obtaining more business, she replied, "Lexcel allows me to provide good quality service and run a law practice in a reduced risk way by always keeping risk in the forefront of my mind. As a result of this, I provide good service and my clients are happy". Therefore, I get clients who recommend me as a practitioner who gives quality legal advice and excellent client care".

Lack of Client Complaints

One of the biggest advantages Lexcel provides Juliette as a sole practitioner is she does not find herself wasting precious time on client complaints. "By implementing and following the Lexcel process, nothing gets overlooked," she states. "Case plans, client care letters and following proper processes becomes second nature. For example, all client care letters summarise the advice given in the initial consultation meeting, the fee structure, time-scales, next steps to be taken and terms and conditions. The high level of client satisfaction generated from such rigorous service standards leads to many word-of-mouth referrals".

The time commitment

When Kinsey & Co opened for business, the culture and ethos of Lexcel was already firmly entrenched, allowing Juliette to reach her goal of accreditation within nine months. Because of this, the firm has always adopted Lexcel's practice management standards.. Juliette and her secretary have quarterly meetings to review what is needed to meet Lexcel requirements and Juliette reviews her file management system regularly. She points out that the time needed to maintain Lexcel has reduced over the years, as often, following a review, no changes to procedures are necessary.

One of the keys to making Lexcel work is allowing time to set up the required plans, policies and procedures in a way that benefits the unique circumstances of the particular law firm in question. As far as Juliette is concerned, Lexcel acts as a safety net, ensuring files come back to her, and things do not get overlooked. By investing time to adhere to the Lexcel requirements, steps are implemented that prevent unnecessary errors from occurring.

As Juliette succulently puts it, "time is not saved with Lexcel, but time is not wasted either".

Benefits to the business

Lexcel provides a number of benefits to Juliette's thriving practice including:

- Static or lower PII insurance.
- Increased client referrals.
- Decreases the stress of complying with SRA obligations. Juliette commented, "If the SRA turned up tomorrow to perform a spot check, I would be confident that they would be happy with everything." This confidence comes from investing the time into Lexcel and its formula for effective, efficient practice and risk management.
- The firm has no problem with unpaid client bills. By following the Lexcel process, every bill comes with a breakdown, allowing clients to see exactly what work has been charged for and not charged for.

Being Lexcel accredited and investing in maintaining the accreditation, provides Juliette with the

confidence as a sole practitioner that she is doing a good job for her clients.

Resistance to Lexcel from sole practitioners

Juliette believes a number of sole practitioners and small firms resist applying for Lexcel due to the perceived cost in the number of unbillable hours that need to be undertaken to gain and then maintain accreditation. She also acknowledges that any change can cause unease; for example, she has just moved to version 6 of Lexcel, and as this is a more in-depth program, switching did lead to an initial period of uncertainty, but she was able to meet the standard and is now feeling comfortable again.

As a former Lexcel consultant and principal of a busy law practice, Juliette's answer to overcoming resistance is for small firms and sole practitioners to ask themselves, "what exactly are they are afraid of? After all, the SRA and the Law Society are still going to issue standards, and if anything, the demands on a practitioner to comply with the SRA are increasing. You can either choose to invest in a quality mark and framework to cope with the requirements, or retain the status quo, which can often cause unnecessary stress".

When implementing Lexcel in her previous firm, Juliette made sure she met with everyone in the business and talked about what Lexcel was and how they could play a part in making it succeed. "Never undertake a dictatorial style rollout as it will always lead to resistance."

Kinsey and Co Solicitors provides an outstanding example of how sole practitioners and small law firms can implement Lexcel requirements into their practice management, and thrive on the increase in referrals and the knowledge that they are providing first-class service to their clients whilst maintaining a high level of risk-management compliance.

Are you interested in becoming accredited?

Find all the information you need about applying for Lexcel online: www.lawsociety.org.uk/lexcel.

Download the Lexcel Standard for England and Wales, Scheme rules, and self-assessment checklist.

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