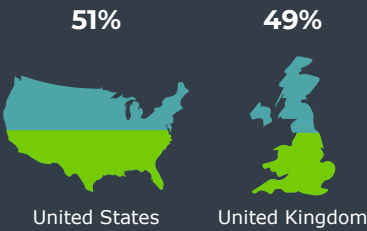


LAW FIRMS: UNPRECEDENTED BUSINESS UPHEAVALS AND PARADIGM SHIFTS

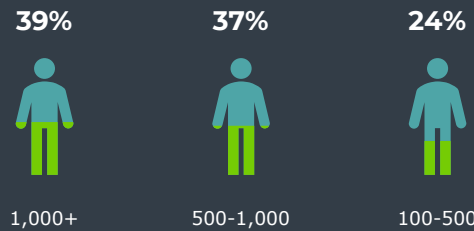
As the COVID-19 pandemic caused disruption on an unprecedented scale, law firms scrambled to enact remote working programs to ensure lawyers and support staff were equipped with the right tools to carry on operations from their homes. This Instant Survey, conducted in May 2020, by Sandpiper Partners and commissioned by Williams Lea, reveals the measures law firms implemented to mitigate the impact of COVID-19 and the plans they are putting in place to protect profits and sustain growth in a post-pandemic world.

PARTICIPANT DEMOGRAPHICS

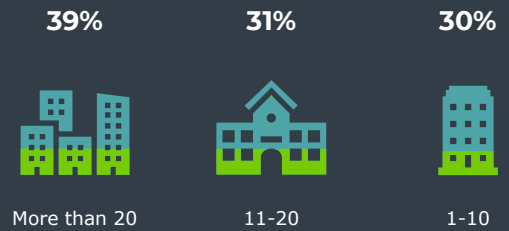
LOCATION



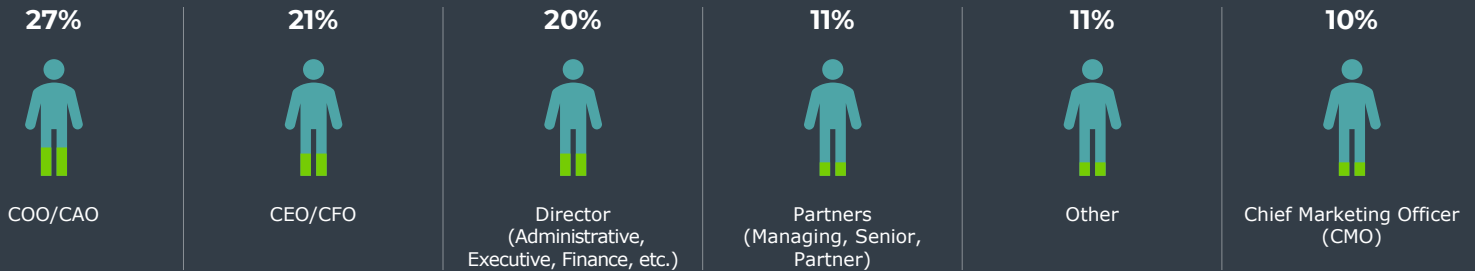
SIZE OF LAW FIRM (No. of lawyers)



SIZE OF LAW FIRM (No. of offices)



ROLE OF RESPONDENTS

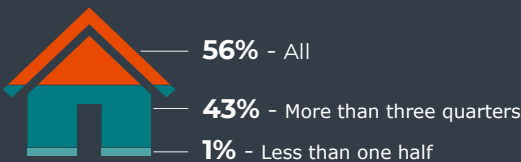


THE VIRTUAL WORKPLACE

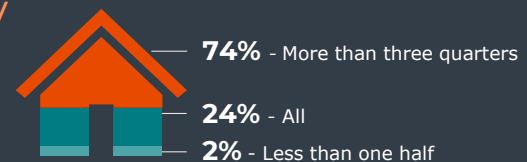
An overnight transition

Deeply rooted in a relationship-based culture that's driven by face-to-face interactions, law firms shifted quickly from the traditional workplace setting to a virtual one almost overnight.

FEE EARNERS WORKING REMOTELY

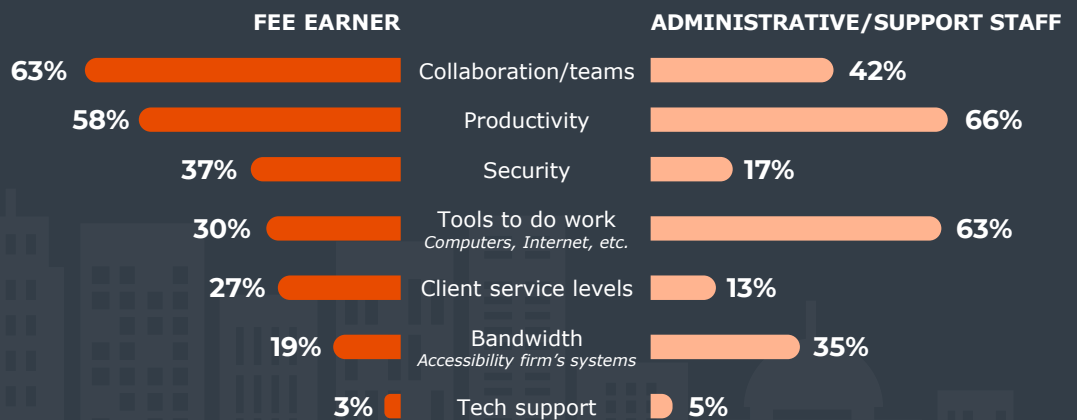


ADMINISTRATIVE / SUPPORT STAFF WORKING REMOTELY



BIGGEST CHALLENGES TO WORKING REMOTELY

Once strongly resistant to flexible working arrangements, law firms were forced to follow new ways of working with mostly positive results. However, this didn't come without challenges for fee earners and support staff. Both groups encountered similar hurdles maintaining productivity and collaborating while working remotely, but the survey results also show stark differences in work challenges among fee earners and support staff populations.



More than one response can be selected. Percentages may add up to more than 100%.

STRICT MEASURES

Mitigating the economic impact of COVID-19

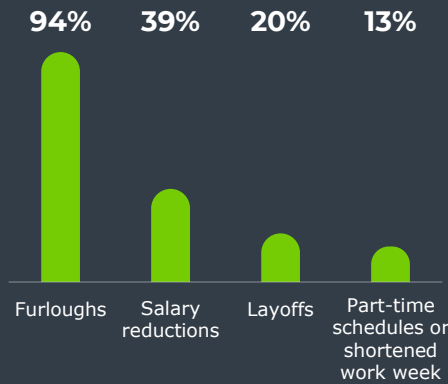
The shift to remote working was just the beginning of a string of responses to minimize the impact of the COVID-19 crisis. The concern over lasting economic fallout is driving law firm leaders toward tough staff reduction and cost-cutting decisions to sustain business operations.

FIRMS INSTITUTING REDUCTION IN WORK FORCE MEASURES FOR SUPPORT STAFF



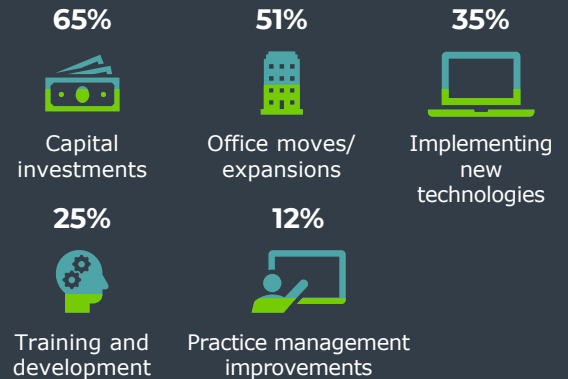
Yes – 52%

TYPE OF REDUCTIONS IN WORK FORCE MEASURES FOR SUPPORT STAFF



More than one response can be selected. Percentages may add up to more than 100%.*

BACK OFFICE PROJECTS ON HOLD



More than one response can be selected. Percentages may add up to more than 100%.*

OTHER COST CUTTING AREAS OF FOCUS



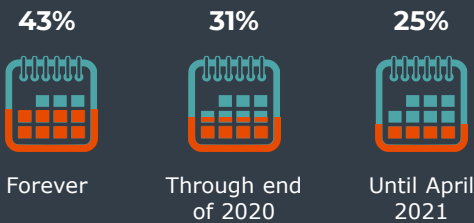
More than one response can be selected. Percentages may add up to more than 100%.*

THE FUTURE

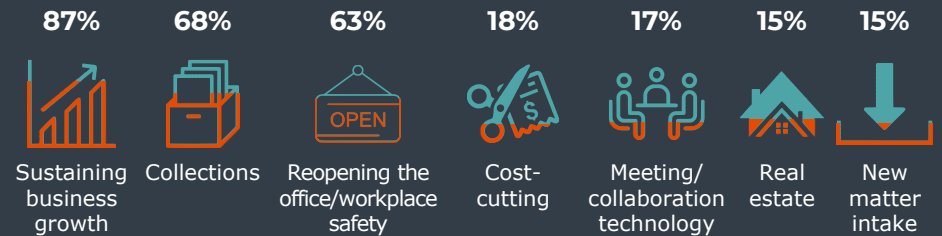
Law firms in a post-pandemic world

There is no doubt the COVID-19 crisis has altered the law firm operating landscape. Firms are looking at the big picture, instituting measures that will enable them to address business obstacles that have emerged from the pandemic and ultimately thrive in a post-pandemic world.

LENGTH OF TIME THE COVID-19 CRISIS MENTALITY WILL AFFECT THE LAW PRACTICE



"MISSION CRITICAL" AREAS OF FOCUS IN THE NEXT SIX MONTHS



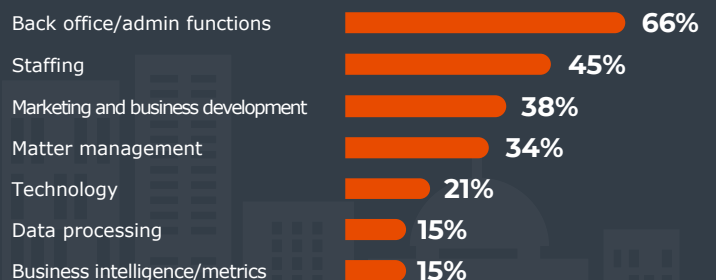
More than one response can be selected. Percentages may add up to more than 100%.*

KEY TARGETS FOR COST-CUTTING



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METRICS DRIVING COST REDUCTION DECISIONS



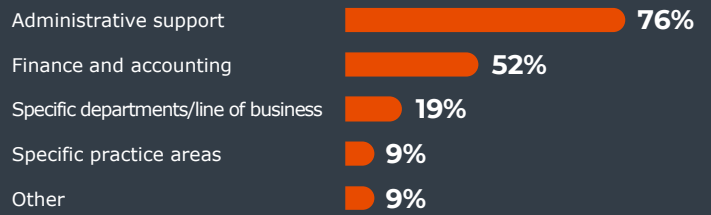
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Law firms are also looking at centralization as a measure to reduce costs through economies of scale, drive growth, and improve their bottom line

FIRMS CENTRALIZING SUPPORT OPERATIONS



SUPPORT OPERATIONS FIRMS ARE PLANNING TO CENTRALIZE



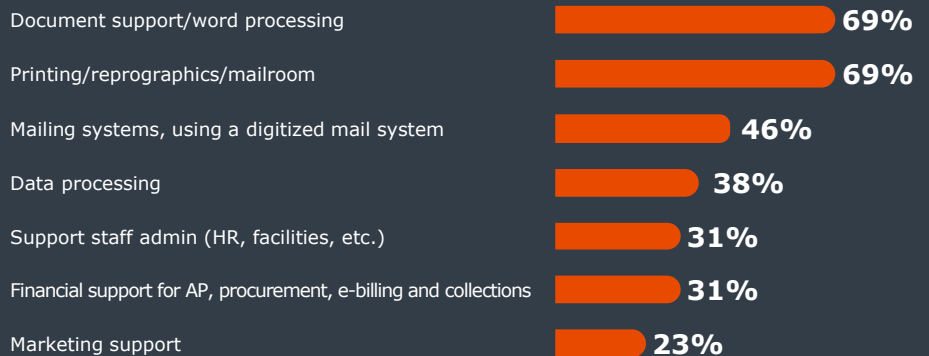
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PROMINENCE OF ADDITIONAL OUTSOURCING SOLUTIONS IN LAW FIRM PLANS IN THE NEXT SIX MONTHS

Outsourcing certain support functions is also a way for law firms to respond to widescale business disruptions, building resilient business operations, and shedding staff and real estate expenses.



SERVICES FIRMS ARE REVIEWING FOR OUTSOURCING



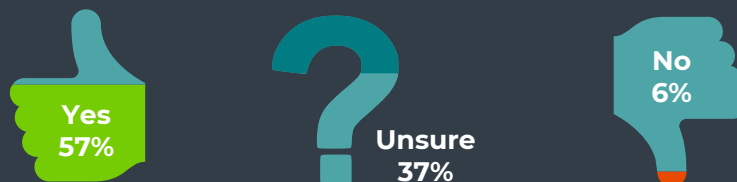
More than one response can be selected. Percentages may add up to more than 100%.*

NEW WAYS OF WORKING

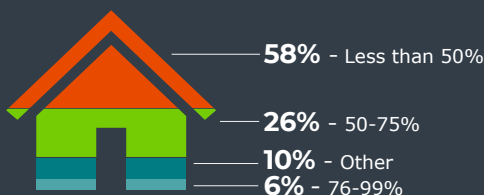
The virtual reality for law firms

The COVID-19 pandemic has put the way we work in the spotlight. With more than half of firm respondents reporting that they plan on changing their remote working policies for both fee earners and support staff by the end of 2020, it's safe to say that the future of work includes virtualized support structures.

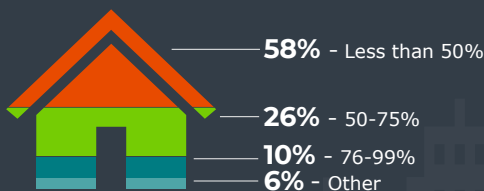
FIRMS PLANNING TO CHANGE REMOTE WORKING POLICIES BY THE END OF 2020



PERCENTAGE OF FEE EARNERS THAT WILL WORK REMOTELY



PERCENTAGE OF ADMINISTRATIVE/SUPPORT STAFF THAT WILL WORK REMOTELY



SUPPORT FUNCTIONS FIRMS ARE CONSIDERING VIRTUALIZING



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