

WEBINAR

legal design thinking

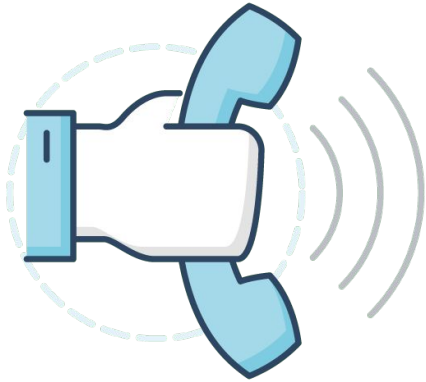
reengineering business intake
for long-term success

with **Chris Bull** Founding Director, Kingsmead Square

webinar brought to you by  **encompass**



housekeeping



your speakers



Scott **Goodsir-Smyth**

Head of Customer Success | encompass



Chris **Bull**

Founding Director | Kingsmead Square

agenda

introducing legal design

- design thinking – what is it?
- legal design
- legal design toolkit
- legal design plan
- legal design best practices

redesigning business intake

- customer onboarding – in need of a redesign?
- KYC policy workshop
- case study – Brodies LLP
- design feedback loop

Q&A

introducing legal design

Chris Bull

design thinking what is it?

- 1 specific approach to innovation
- Deploys the skills & techniques of the design industry
- Human-centred
- Start with Desirability

“
design thinking is about
accelerating innovation to find
solutions to the challenges facing
business and society

Tim Brown | CEO, IDEO

legal design

- Applying design thinking to legal services
- Start with the client & end user and work backwards
- Advent of legal engineers and legal designers
- LegalGeek Design Conference, Janders Dean Design Jams
- But not typically being applied to client intake?

“

to improve how people interact
with the law

Peter Lee | CEO, Wavelength

legal design toolkit

- user research and profiling
- lateral and visual thinking
- ideation
- prototyping and testing
- story-telling



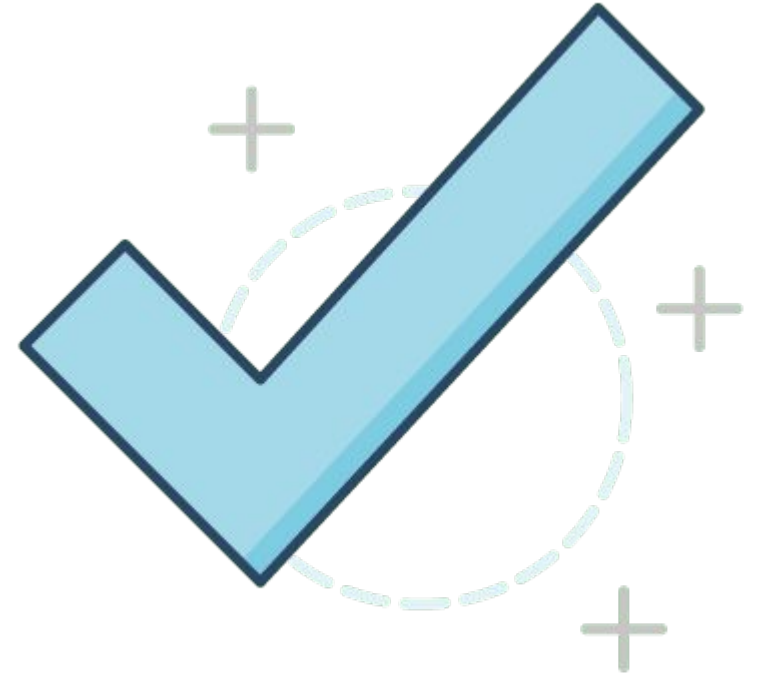
legal design plan

- Start with 'How might we help/enable our client to xxx'
- Field Research [beginner's mindset]
- Form Insights [diverge] [hunches]
- Focus the Challenge [converge]
- Generate Ideas
- Prototype
- Implement



legal design best practices

- Empathy
- Show not Tell
- Bias for Action [fast feedback & agile iteration]
- Collaboration and Diversity
- Prototyping is Experimentation



customer onboarding in need of a re-design?

why firms need to prioritise redesigning customer onboarding

Scott Goodsir-Smyth

KYC policy workshop

- Understand and document your firm's current AML/CTF Procedures
- Process mapping of the current KYC process to understand what can be automated



Brodie's LLP case study

- Scotland's largest independent law firm
- take pride in taking the necessary steps to ensure regulatory compliance whilst maintaining their excellent reputation for client service and continuing growth for business
- Brodie's saw in **encompass** the opportunity to obtain a competitive advantage over other firms

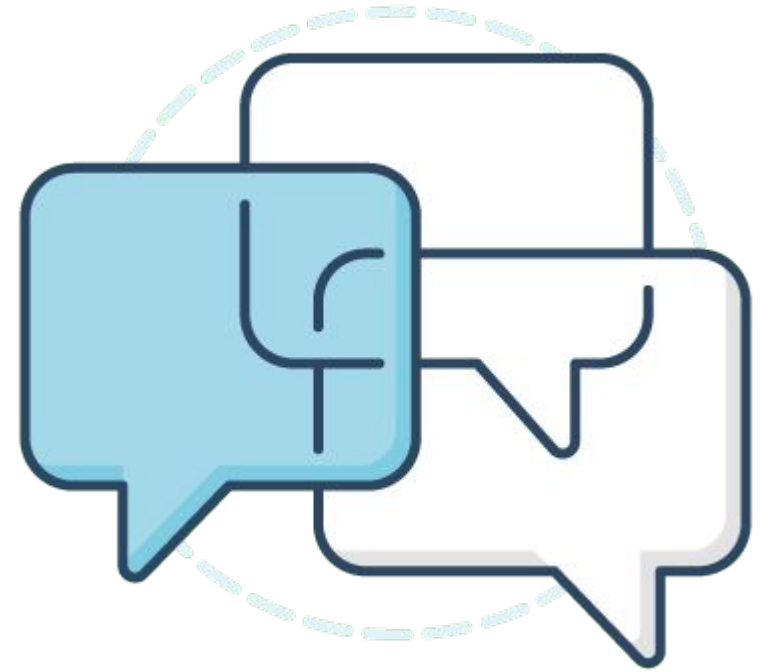


“
our aim is to establish best practice
for compliance in our sector, and we
saw working with **encompass** as a
way to create advantage from a
change in regulations

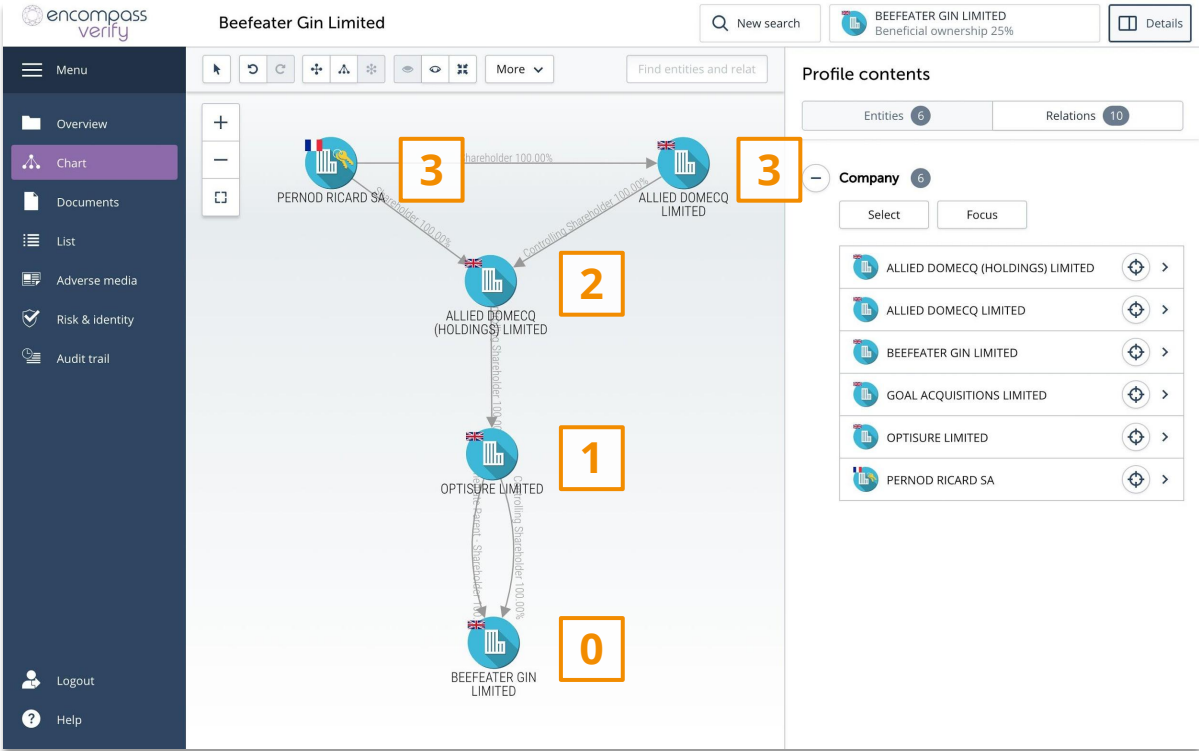
David Edwards | Finance Director, Brodie's LLP

design feedback loop

- discovery process to understand and document Brodies feedback
- mock-ups based on enhanced requirements
- limited release to utilise and test the new feature on real examples



document hierarchy in encompass



encompass verify

Beefeater Gin Limited

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The background of the slide features a light blue overlay on a photograph. On the left, a person's face is partially visible, looking towards the camera. On the right, a hand is shown holding a magnifying glass over a document, with a large 'X' drawn on the paper. The overall aesthetic is professional and design-oriented.

any questions?

Additional Resources

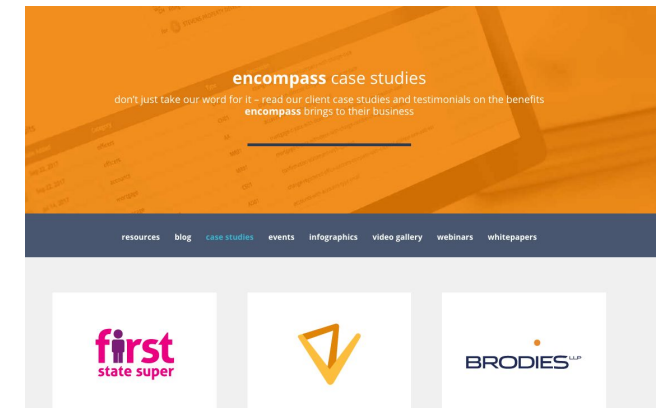
Case Study Brodies



Blog: how to ensure KYC software implementation success

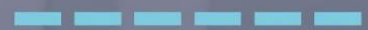


Case Studies: encompass website



A woman with curly hair, wearing a white blazer over a dark top, is standing and gesturing with her right hand towards a wall covered in numerous sticky notes. She is holding a small object in her left hand. The background is a wall densely populated with sticky notes of various colors and sizes, some of which have text on them. The overall image has a blue tint.

thank you!



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