



LEGAL SURVEY REPORT



CHANGES TO THE LEGAL PROFESSION DURING COVID-19 (2022)



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ABOUT TRACUMENT SOLUTIONS INC.

Tracument Solutions Inc. was founded in Vancouver in 2013 and now has offices in both Vancouver and Toronto.

We deliver a web-based suite of products designed to help legal professionals send, receive, and collect documents. This is an area prone to human error and requires a significant amount of non-revenue producing staff time. Many legal professionals are also concerned about meeting their professional obligations with regard to security and client privacy.

Our platform allows professionals to update inefficient legacy systems and methods of delivery, such as fax, mail, and couriers, and provides new and unique ways of sending and receiving documents and files. Our platform centralizes and automates this area of practice giving firms better control and oversight.

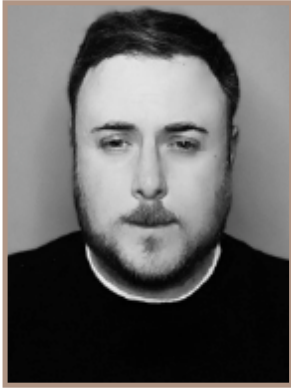
Methods available to law firms to send and receive documents have not kept up with the world outside the legal profession. Tracument is here with leadership, expertise and a solution.

We invite you to check out our Trends & Observations section in this document for our insights on the Survey.





THE TEAM



**DAVID
SWADDEN**

Co-Founder &
Chief Executive
Officer

David is the CEO and Managing Director of Tracument Solutions Inc. and one of its founders.

He previously ran an insurance defence law firm in Vancouver, BC. During that time, his focus was on reducing non-revenue producing staff time and ensuring that all activities undertaken by any level of staff added as much value as possible. He brought in new technology and redesigned processes such that the firm was able to move from a support staff ratio of 1.5 for every lawyer to about 0.75 for every lawyer.

Tracument's platform is an extension of that work.



**CHRISTOPHER
COE**

Co-Founder &
Director of
Business
Development

Christopher is a founding member of Tracument and has previously worked in several capacities across the legal industry.

His record includes time at Swadden & Company (a large Insurance Defence firm now called Meridian Law Group) and the opening of the Vancouver office of an IME provider known as AssessMed. He was later Director of Operations at Virgin Hickman.

Christopher is our Director of Business Development and specialises in determining how our software platform can help your firm.



**HEIDI FAGALDE****Operations Manager**

Heidi has a background in both Economics and Business Administration & Management. Heidi is responsible for day-to-day operations at Tracument and specialises in process improvements, human resources, and program efficiencies.

Heidi joined Tracument nearly five years ago and has worked in almost every aspect of the company, making her an excellent resource for staff and clients alike.

**PEI-CHYI HUNG****Marketing Manager**

Pei-Chyi develops, implements and executes strategic marketing plans for Tracument.

Her experience and creative mind allow the unique voice of the company to be accurately conveyed across diverse platforms.

Her speciality and skill in the digital realm have also assisted companies and charities in both Vancouver and Ontario expand their reach.



INDUSTRY BASICS

The legal profession in Canada has a rich history dating back to before the formation of the Law Society of Upper Canada in 1797. The legal industry has evolved over those 225 years, but the pace has increased recently, culminating in critical changes forced by the Covid-19 Pandemic.

Legal sector workers were sent home to quarantine and many chose to reconfigure to a work-from-home (WFH) or hybrid work model. This unprecedented change propelled the legal field to adopt new technology and new ideas that would previously have taken years.

The effectiveness of traditional legal tools such as paper in binders and facsimile transmission pale in comparison to their newer technological alternatives. Tools such as e-signatures, process automation, and workflow management are among the top technologies firms are embracing in order to meet the challenges produced by Covid-19.



Managers and partners at law firms have always faced unique challenges in running a multi-faceted and complex organization. Now, those challenges are compounded by a global health crisis and, importantly, the changes to longstanding methods and traditions that have been brought about by Covid-19. Firms must keep up or risk losing their most valuable asset--their lawyers and professional staff.



THE DATA

In January 2022, we completed a survey and received 300+ responses from legal professionals across various types of law and across Canada. The intention was to provide insight on the current state of the legal industry, and particularly its response to the Covid-19 Pandemic.

Our survey comprised 23 questions and collected data from all sizes of law firm and all levels of law firm employees. Respondents included those who are clients and a large number who are not. Most respondents practise some form of litigation (due to the nature of our services and the fact that litigation is the most commonly-practised type of law), however, respondents come from all types of practice.

The survey was particularly interested in views on office activity (including location), productivity, long-term impact of Covid-19, and staff views on management's effectiveness throughout the pandemic.

The next section presents the unexpurgated response data for each question.



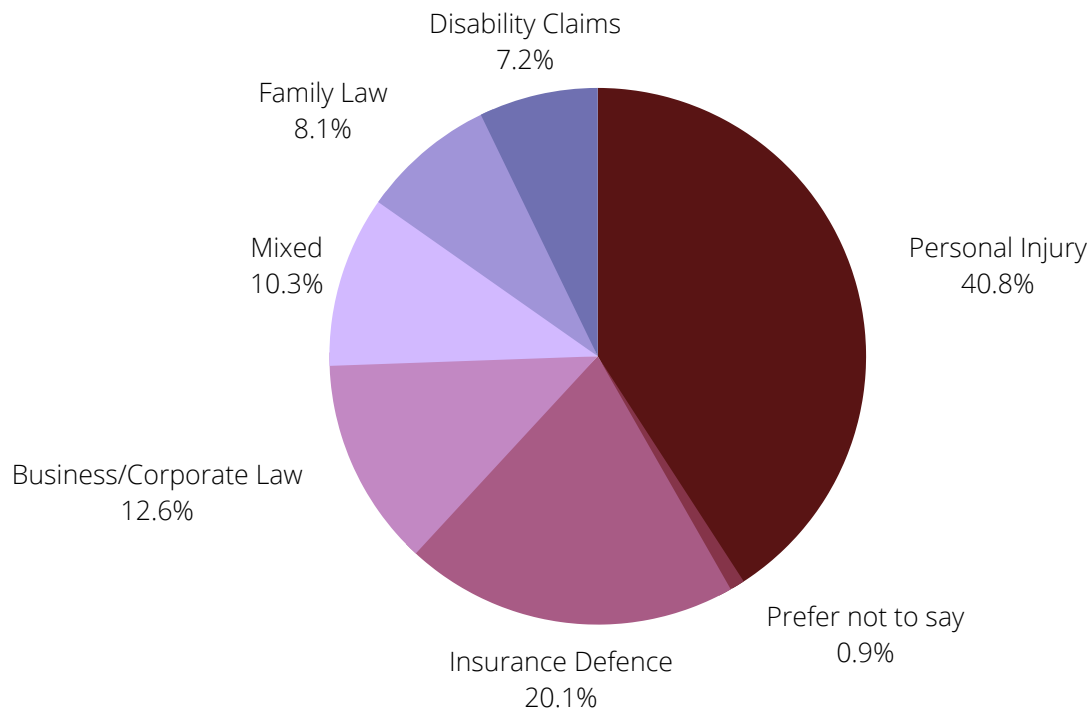


QUESTION 1: WHAT BEST DESCRIBES YOUR FIRM'S MAIN PRACTICE AREA?

40% of participants identified their main practice area as Personal Injury Law.

20% noted Insurance Defence and almost 12% selected Business/Corporate Law as their main practice area.

10% of respondents have a mixed practice.



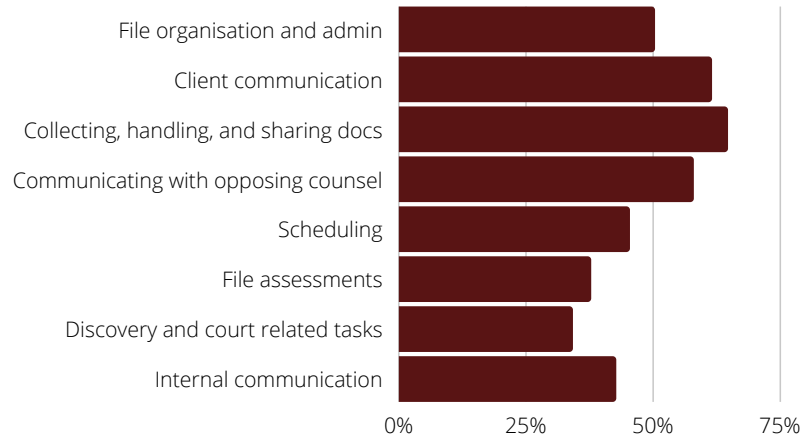
The remaining percentage noted their practice area focuses primarily on Disability Claims (7.2%), Family Law (8.1%), or some other form that they did not wish to convey (0.9%), perhaps signalling a change or shift to the practice in the current or near future.



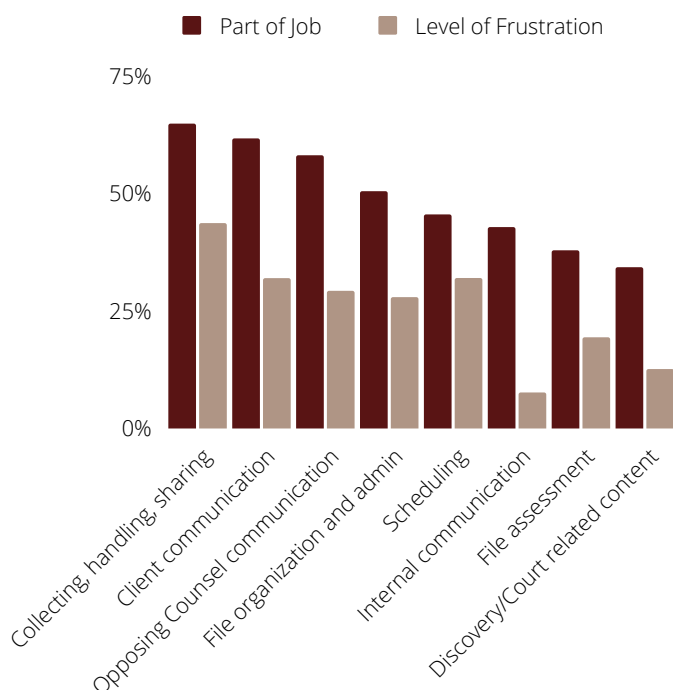
QUESTION 2: WHICH TASKS ARE PART OF YOUR JOB?

64% of participants noted collecting, handling, and sharing file-related documents as the most frequently performed type of task across all jobs.

Communication in some form, whether it be with clients (61%) or opposing counsel (57%), followed closely.



QUESTION 3: DO YOU FIND ANY OF THE FOLLOWING TASKS TO BE TIME-CONSUMING OR FRUSTRATING?



It is not surprising to see that the most common task is also the one where respondents encountered the most frustration, with 43% answering yes. Collecting, handling, and sharing file-related documents is not only manually intensive and time consuming, it can also be repetitive.

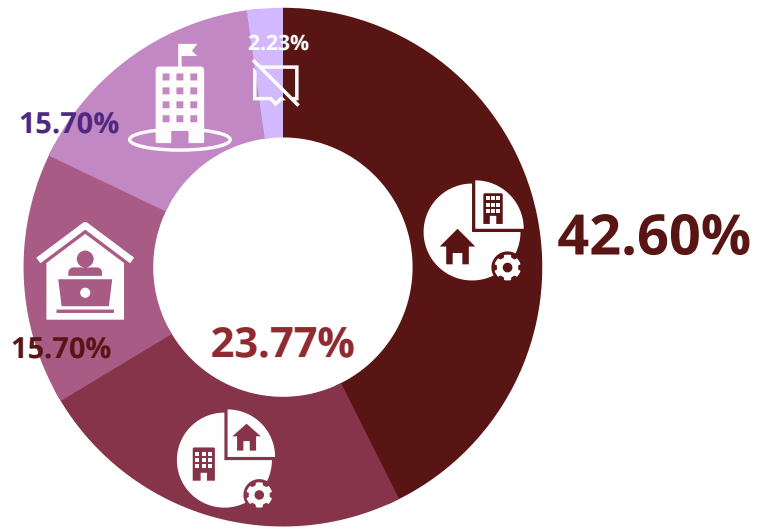
Client communication (31%) and scheduling tied for second place, with internal communication (7%) being the least frustrating.



QUESTION 4: SINCE THE BEGINNING OF THE PANDEMIC, YOUR EMPLOYER HAS REQUIRED (OR ALLOWED) YOU TO WORK...

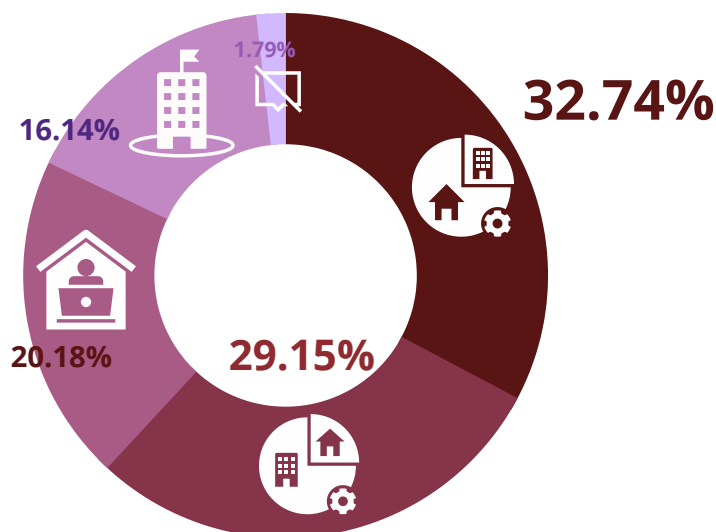
More at home than at the office (but a mix of both) was most popular with 42%

23% noted they were more in the office than at home. 15% noted they were required (or allowed) to work fully in the office and the same amount noted they were required (or allowed) to operate fully at home. 2% noted other, suggesting a remote option.



QUESTION 5: SINCE THE BEGINNING OF THE PANDEMIC, WOULD YOU PREFER TO HAVE BEEN WORKING...

61% would have preferred a hybrid schedule, comprising 32% who stated more at home than in the office, while 29% would have preferred more office than home.



Only 16% would have preferred to work fully in the office.

20% of respondents noted they would have preferred to have been fully operating at home for the entire pandemic.

1% noted Other, perhaps highlighting the possibility of working abroad.

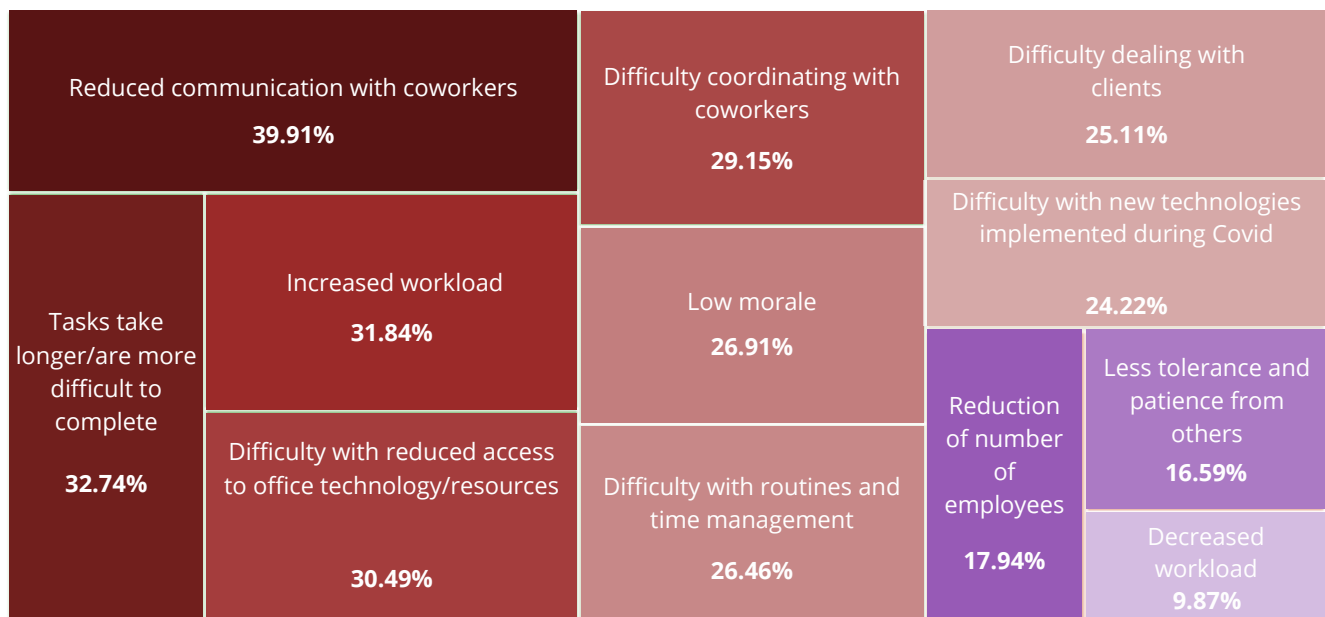


QUESTION 6:

WHAT ARE THE BIGGEST CHALLENGES YOU HAVE FACED SINCE THE BEGINNING OF THE PANDEMIC?

The biggest challenge faced as noted was the **significant reduction in communication** with coworkers. This was felt by almost 40% of participants.

32% agreed that tasks now take longer (or are more difficult) to complete. Another challenge that closely followed was an increased workload with 31% of participants noting this.



Just over a quarter highlighted Low Morale (26%) and a similar number noted they had difficulty with routines and time management during this period.

Interesting to see, were the near 17% who noted there is less tolerance and patience from others.



QUESTION 7: WHAT IMPROVEMENTS HAS YOUR FIRM IMPLEMENTED TO OVERCOME THESE CHALLENGES?

Updated workplace policies (42%) is listed as being the major improvement firms implemented, which is not a surprise to see.

A more interesting result was the second highest improvement (41%), being **the implementation of new technology**.

Flexible employment terms was also highly ranked by participants as 41% noted this was added.

Updated workplace policies 42.15%	Brought in new technology 41.70%	Virtual social events 36.32%	Employee engagement efforts 27.35%	Increased salaries or benefits 24.66%	
	Flexible employment terms (schedule, start time, number of hours/days) 41.26%	Morale boosting efforts 34.98%		Directed staff to mental health resources 19.73%	Directed staff to outside sources of support 16.59%
					Hired more staff 13.45%
					Other

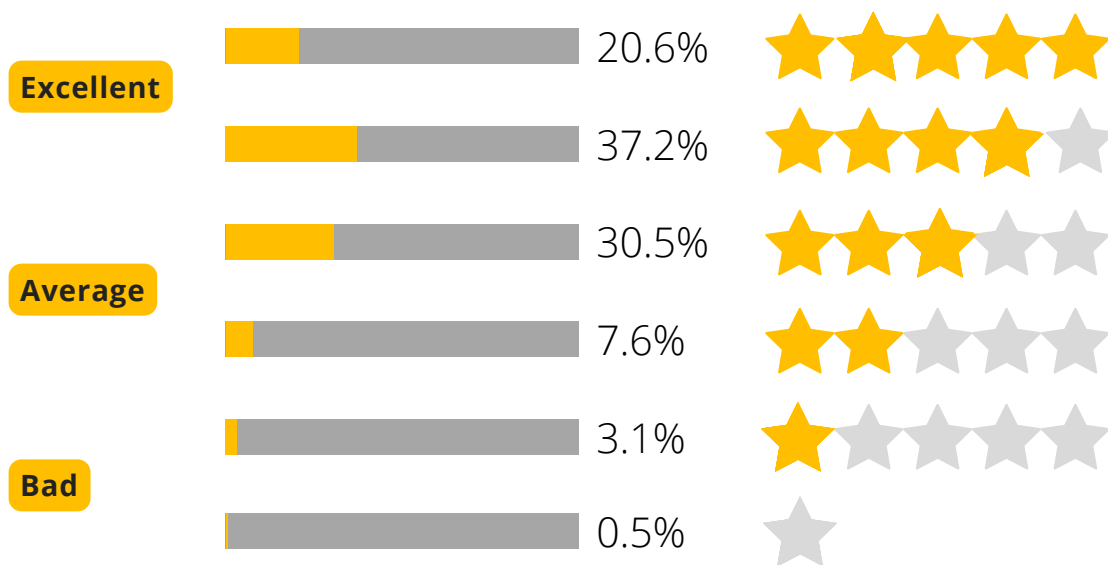
27% noted employee engagement efforts were implemented (perhaps with the aim to improve low morale). Almost 17% noted their firm directed staff to outside sources of support to overcome challenges experienced.

0.45% noted Other.



QUESTION 8: HOW WELL DO YOU THINK YOUR ORGANISATION HAS RESPONDED TO THE PANDEMIC?

Given the mass changes and sudden adjustments needed to be made within the first 12-18 months of the pandemic, only **20%** of participants noted their organisation responded in an excellent manner.



37% noted their firm had a "Good" response.

30% noted an "Average" rating, whereas 10.76% of our 300+ respondents (7.6% + 3.1%) did not hesitate to note their organisation had a "Poor" response.

Almost 1% noted a simple and direct "Bad" overall job was made by their firm.



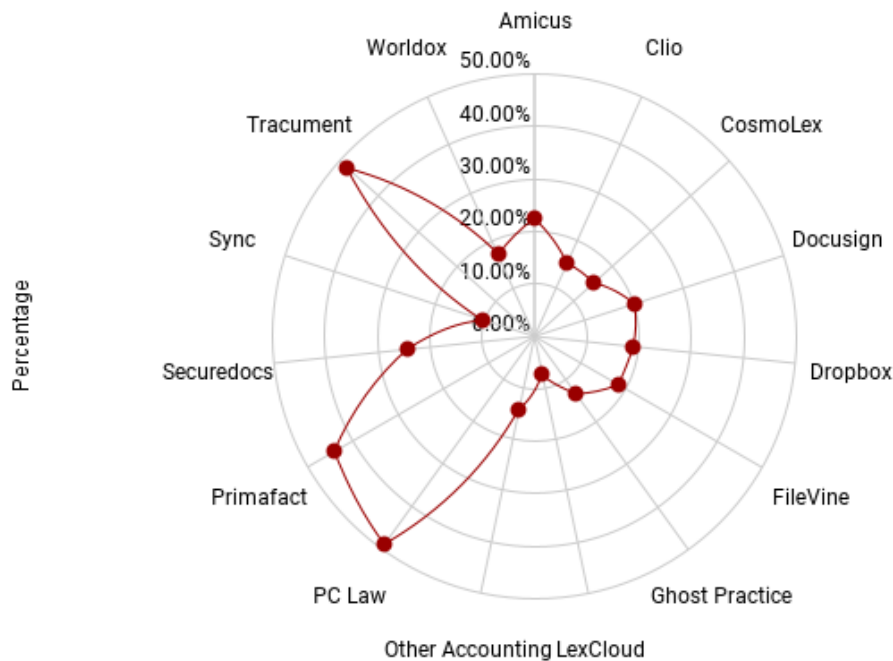
SOFTWARE



QUESTION 9: WHAT SOFTWARE DOES YOUR FIRM CURRENTLY USE?

PCLaw (48%), Tracument (47%) and Primafact (43%), respectively, are the top three listed pieces of software currently being used by law firms.

Other systems such as Securedocs (24%), Docusign (20%) and Dropbox (18%) were noted, and systems like Ghost Practice (13%) and LexCloud (7%) were among the lowest technologies ranked.



The top three software listed here perform billing and accounting services, secure document delivery, and file management processes, respectively. All are necessities when operating a firm, and each is a discipline that can be automated, centralised and increased in efficiency with the use of technology.

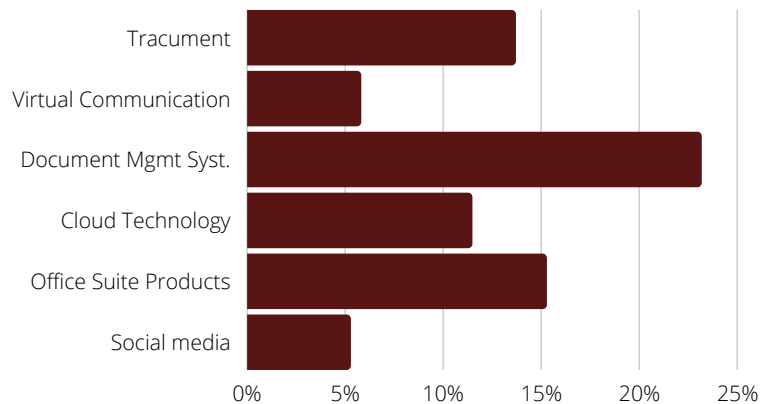


QUESTION 10: WHAT WAS THE MOST USEFUL TECHNOLOGY (OR SOFTWARE) IN YOUR OFFICE BEFORE THE PANDEMIC BEGAN?

23% of participants listed their **Document Management System (DMS)** as the most useful technology *prior* to the start of the pandemic.

13% noted Tracument.

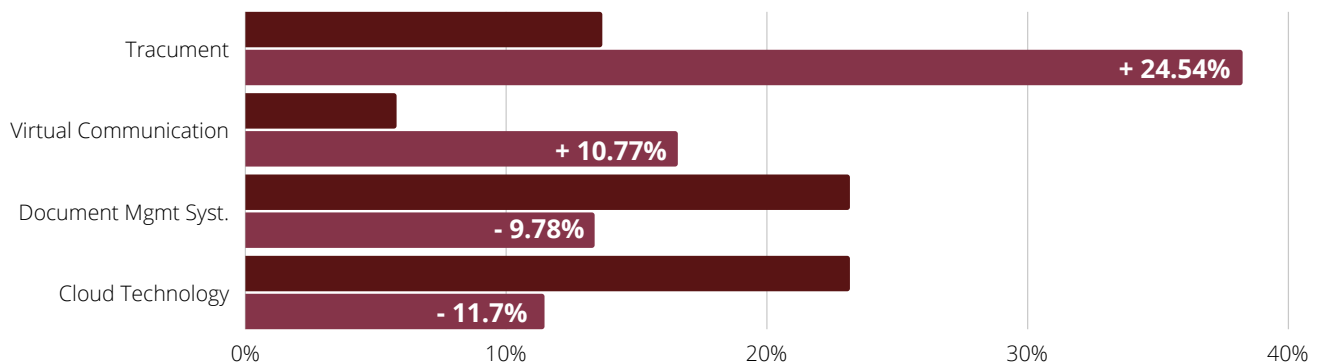
Near 6% were making use of both virtual communication and social media platforms, and just over 15% noted Office Suite Products as the most helpful.



QUESTION 11: WHAT IS THE MOST USEFUL TECHNOLOGY (OR SOFTWARE) YOU HAVE USED SINCE THE BEGINNING OF THE PANDEMIC?

This response shifted to **Tracument**, with almost 40%. Virtual communication platforms, like Zoom, also increased and came second at just under 17%.

These shifts reflect the difficulty of sending/receiving documents and conducting meetings when working from home and social distancing.



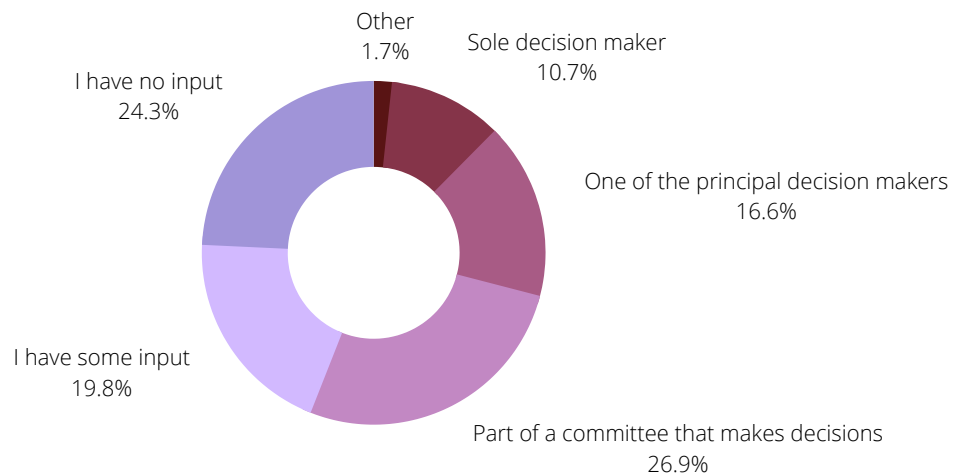


QUESTION 12: TO WHAT EXTENT DO YOU DETERMINE WHAT TECHNOLOGY YOUR ORGANISATION USES?

26% of participants noted they are part of a committee that makes decisions for the firm.

16% noted they are **one of the principal decision makers**.

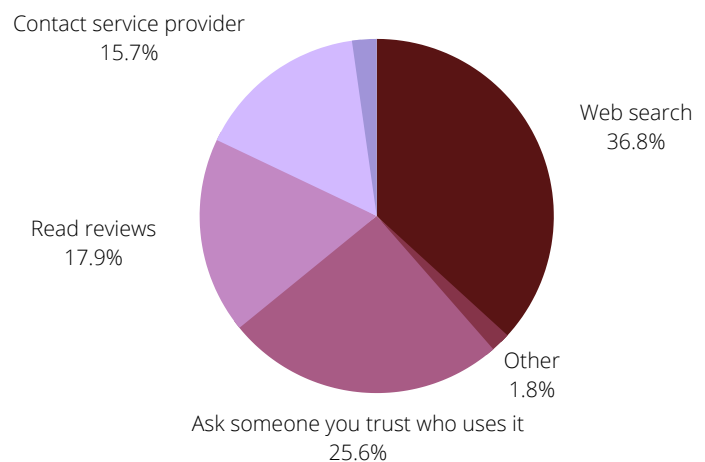
10% were in a sole decision-making position. In contrast, just under 25% noted they knew or saw themselves as having no input.



QUESTION 13: WHEN YOU ARE INTERESTED IN A NEW PRODUCT (OR SERVICE), WHAT IS YOUR FIRST STEP TO KNOWING MORE ABOUT IT?

At 36%, **performing a web search** was the highest rated action to gathering information.

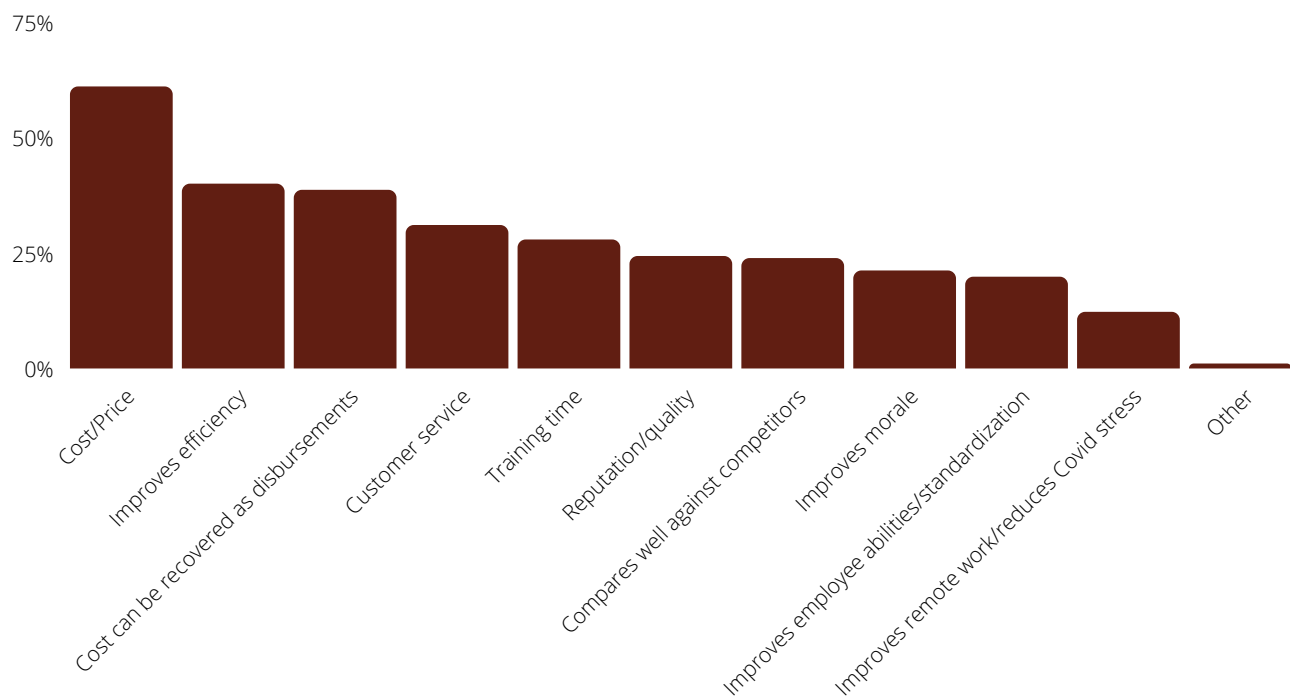
25% noted they would seek the advice of a trusted source, and 15% noted they would contact the service provider first. Reviews counted for about 18% of votes.





QUESTION 14: WHEN CONSIDERING A NEW TECHNOLOGY (OR SOFTWARE), WHAT ARE YOUR TOP THREE CONSIDERATIONS?

With 60% of the votes, it is not surprising to see **cost/price** being the highest factor considered when new technology is being reviewed.



The ability to improve efficiency was second with 39%. The ability to recover costs as disbursements closely followed with 38% and customer service (30%) ranked fourth.

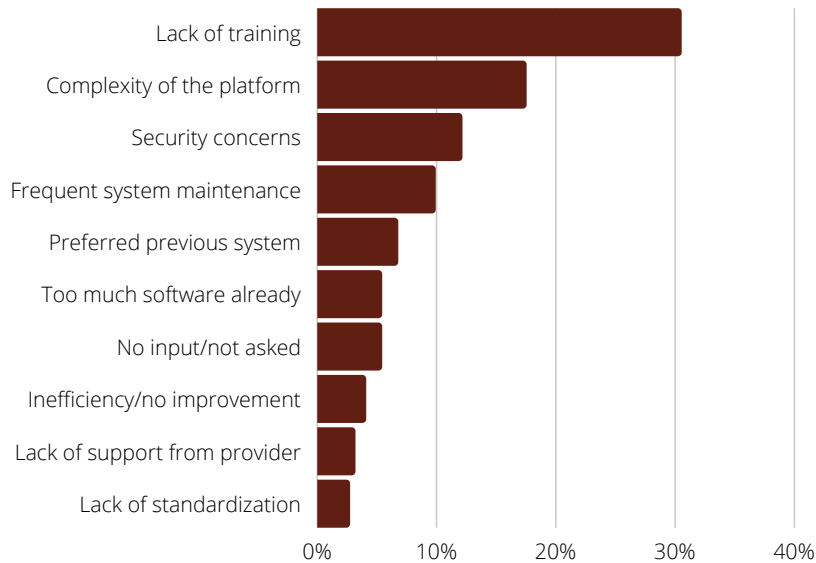
Training time came with 27% of votes and reputation/quality scored 24%.

Improvements to employee abilities/standardisation (19%) as well as improvements to remote work/stress (12%) were among the lowest rated.



QUESTION 16:

WHAT IS THE MOST COMMON FRUSTRATION YOU EXPERIENCE WHEN A NEW TECHNOLOGY (OR SOFTWARE) IS IMPLEMENTED?



The most common frustration noted, with 30% of votes, was **lack of training**.

17% noted that the complexity of new technology as another.

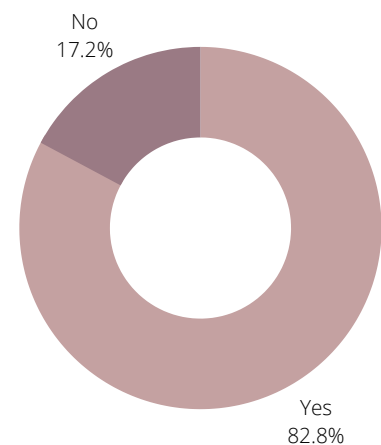
9% noted frequent system maintenance and/or updates and 3% touched on the lack of support from the provider.

QUESTION 17:

DO YOU KEEP UP WITH TECHNOLOGICAL TRENDS AND CHANGES RELATED TO YOUR JOB/FIELD?

Great to see--almost **83% of legal participants noted Yes** when asked whether they keep up with and stay informed on the activity and news associated with their legal field or position.

17.2% stated they did not.







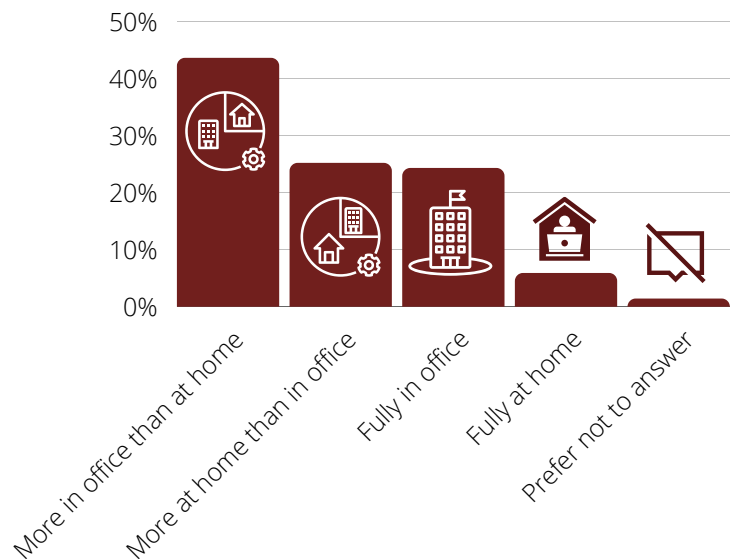
QUESTION 18:

A YEAR FROM NOW, WHERE DO YOU EXPECT YOUR EMPLOYER WILL REQUIRE (OR ALLOW) YOU TO WORK?

43% of participants noted they expect to be **more in the office than at home**.

25% noted more at home than in the office. 24% noted they expect a full return to operating in the office.


Only 5% expect to be able to work fully at home.

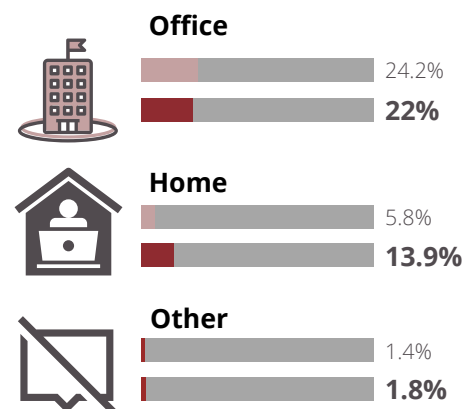
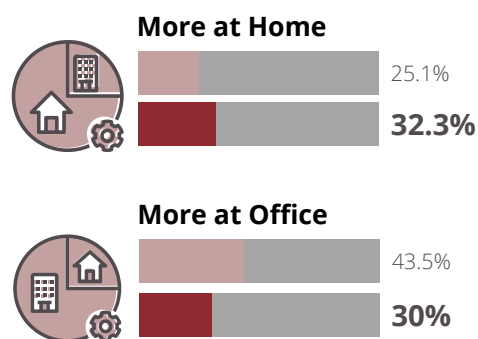


QUESTION 19:

A YEAR FROM NOW, WHERE WOULD YOU PREFER TO BE WORKING?

Only 22% of participants would prefer to be fully back in the office. 32% noted their preference for a more at home than in the office schedule. 13% preferred a fully at home set-up. 1.8% noted another set-up would be preferred (likely remote). 30% noted a more at the office schedule.

 Prediction of Employers' Requirement
 Employees' Preference





QUESTION 20: THINKING ABOUT THE CHANGES TO YOUR JOB BROUGHT ABOUT BY THE PANDEMIC, WHICH DO YOU HOPE TO BE PERMANENT?

Two-thirds of respondents hoped that the changes relating to **when, where and how we work**, would remain permanent.

About 75% of all respondents noted they wanted to keep a hybrid work system of some form. Only 25% noted they wanted to return fully to the office. This was closely followed by a near 20% who touched on the importance and effectiveness of digital tools for communication and document delivery since their implementation. They want those digital means to stay.

Finally, schedule flexibility was another change highly ranked showing people value the ability to have input in their timetable.

QUESTION 21: THINKING ABOUT THE CHANGES TO YOUR JOB BROUGHT ABOUT BY THE PANDEMIC, WHICH DO YOU HOPE WILL GO BACK TO THE WAY THEY WERE, BEFORE THE PANDEMIC?

Just under 74% lost some aspect of a fixed, in-office schedule or the resulting team collaboration and morale, and would like to see this returned. Note this does not necessarily mean full-time in-office work.

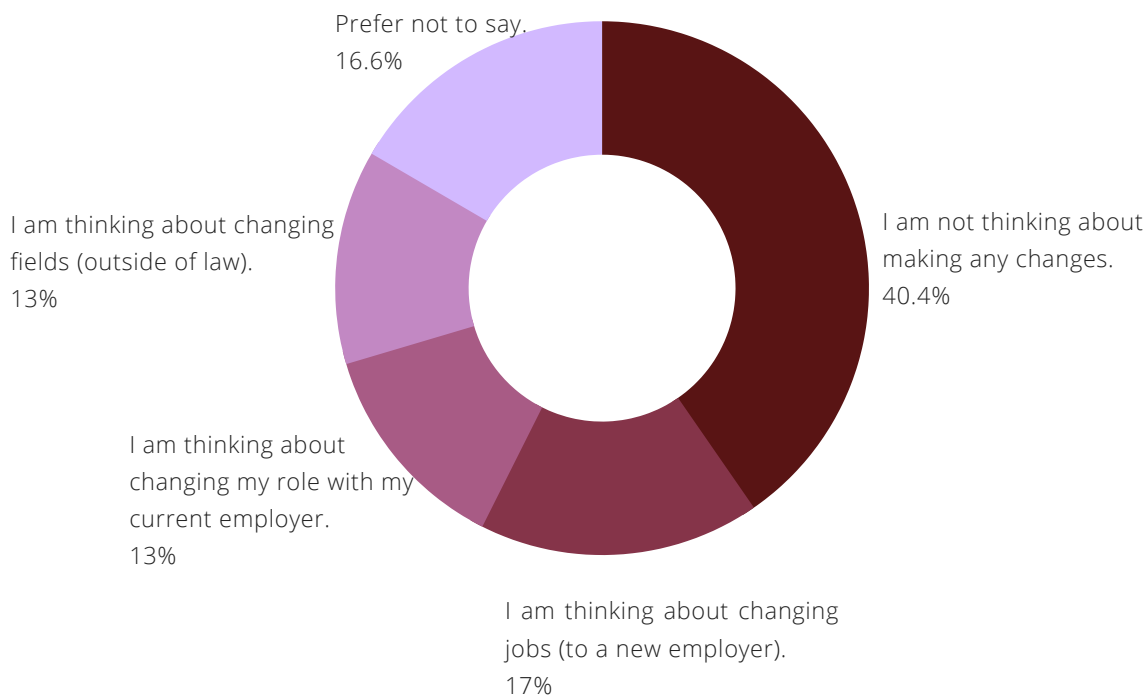
The main activities that people noted they missed most include morale-boosting team activities and interactions. 20% noted they wanted life to go back to "normal" with in-office attendance, no masks etc., while 16% wanted nothing about the current state of affairs to change.

There was tremendous value assigned to **in-office work, team collaboration, and morale** which are not just wanted, but needed.



QUESTION 22: HAS THE PANDEMIC, AT ANY POINT, CAUSED YOU TO THINK ABOUT MAKING A CAREER CHANGE?

Only 4 in 10 respondents said they had no thoughts of making a change. Nearly 17% noted they preferred not to say, which might imply the number of participants who have considered a change may in fact be higher.



Interestingly, 13% are considering changing fields to something outside of law. Another 13% are considering changing their role to another, with their current employer.

Just over 17% are thinking about changing their jobs, to a new employer entirely.



QUESTION 23:

WHAT DO YOU THINK IS THE NEXT BIG CHALLENGE FACING THE LEGAL INDUSTRY?

After categorising the data, four reoccurring themes emerged as the next big challenge facing the legal industry: technology, human resources, court-related issues, and firm finances.

Technology

"Capacity limits when filing large documents electronically and the recipient having access to them"

– Legal Assistant at Personal Injury Practice in ON, Aged 55+

23.11% of respondents referenced a technological issue as the next big challenge. Moving away from paper-based services, communication and cooperation difficulties when working remotely, lack of access to firm resources, and security/privacy concerns made up most responses in this category.

Human Resources

"Keeping employees interested in staying in the legal field, so many options with a lot of business going remote. Opportunities are opening for the normal 9-5 employee with the abilities to venture out into new type of work or fully remote firms. I am considering on moving to a fully remote firm allowing me to move to Ontario to take care of older family members. If I am able to work from home, my abilities haven't changed, only my time difference, but at the same time, I see some paralegals working till midnight (here in BC). If you had employees all over Canada, you could technically be functioning 24/7. Something I would like to bring up with my employer."

– Legal Administrative Assistant with a Personal Injury Practice in British Columbia, Aged 18-36

About **12%** named Human Resources as the next big challenge facing the industry. Questions surrounding their law firm's ability to adapt to a remote world while acquiring and retaining new talent were of concern. Personal development and networking opportunities for legal professionals in a remote world were highlighted. Many made points about restrictions and practice guidelines that might arise in the future (for instance, relating to Law Society governance and professional development).

**Court-related**

"Trials - will they stay virtual, won't they? Can we actually have fair witness questioning over video when so much is involved with body language, vocal intonation etc. Will lawyers want to continue to not be in the same room as a jury? What about judges?"

Also, document management for the courts will likely have some growing pains and will require some changes and adaptations. So far the implementation has been pretty good, but it will have a period of change as we all get used to it."

- Law Clerk with Mixed Practice in Ontario, Aged 37-54

Nearly **18%** of participants thought court-related issues will be the next big challenge. Specific issues relating to the effectiveness of virtual trials, potential changes to the court system, protocols, or even changes to legislation surrounding digital use and integration in the legal field are future worries. What is the ability of the legal profession to keep up with the digital changes as it relates to trials?

Finances

"The rise of AI, introducing no-fault that will inhibit access to justice, and failing to train emerging legal leaders"

- Lawyer with Personal Injury Practice in Alberta, Aged 37-54

Just under **15%** of respondents noted future financial concerns. Many respondents addressed the ICBC no-fault insurance, personal and organisational financial difficulty regarding job loss or difficulty acquiring clientele.

Other

"Being able to keep a routine. Working from home during lockdowns then trying to get used to being back in office is really hard. Was very productive at home with the technology available today; however, having that routine and balance is important as well."

- Law Clerk with Mixed Practice in Ontario, Aged 37-54

There were several challenges that did not fit into any of the above-noted categories. Some stated they did not foresee any challenges to the legal industry. Others had concerns relating to their own private routine or practice quality.



TRENDS AND OBSERVATIONS

FIVE STAR FIRMS: RETENTION CRISIS AND OPPORTUNITY

In January 2022, Tracument completed this survey of over 300 legal professionals across various types of law and across Canada. The intention was to provide insight on the current state of the legal industry, and particularly its response to the Covid-19 Pandemic.

The survey was interested in views on office activity (including location), productivity, long-term impact of Covid-19, and staff views on management's effectiveness throughout the pandemic.

This section will go behind the data to offer comparisons and correlations between various data points in the previous section. It is intended to help your firm make better decisions. Our aim is to deliver a thorough assessment, but feel free to jump directly to the summary at the end of this section if you are short on time (you will not hurt our feelings).

Retention Crisis

We must begin with the most surprising and important question asked—Has the pandemic, at any point, caused you to think about making a career change?. Fully 43% of respondents answered that they were—ranging from a change to their role within their current firm to a move entirely away from the legal field. Another 16.6% of respondents preferred not to say whether they were contemplating a move, which one might take to mean they are at least unsure, or were concerned about sharing a more honest answer (though the individual results of the survey were and are secure and private).

This means that only four in ten respondents stated clearly that they wished to make no change.



This statistic should be alarming. Loss of personnel is one of the most expensive and potentially devastating things that a firm can go through. The American Bar Association, in their 2017 Law Firm Partnership & Benefits Report, reported that the average total cost to a law firm to replace a senior associate is at least \$200,000. This may sound high, but when one considers the lost work product, potential loss of files and/or clients, cost to hire a recruiter, internal costs to hire and train the new associate, and the cost of lost mentorship, it starts to make sense. These costs exist at the professional staff level too. Though they will not be as much as for lawyers, loss of support staff can be highly disruptive.

Turnover can also be associated with a panoply of administrative and cultural ills (leaving aside the actual hard dollar cost):

- Departures can beget further departures, either because friends or key work allies depart, making the job less pleasant for those who stay, or because the recently departed can sometimes lure their friends still with your firm to join their new employer.
- Many employees who decide to stay when turnover is high report a reduction of morale and support and an increase in frustration and mistakes.
- When turnover is high, it can be difficult to keep up with training, causing the quality of work product to decrease.
- Client confidence can fall if personnel who work on their files are constantly being replaced and are not recognisable when your clients need them.

Conversely, if your firm is able to attract and retain good people, the benefits are substantial. Keeping talented people allows you to invest in their development, which causes a number of upward cycles in quality of work product, job satisfaction, firm culture, and even your ability to attract future employees. Firm management is freed from the burden of constantly working to fill vacant positions. Clients are at a reduced risk of growing concerned or departing.

Ultimately, law firms are a business and profit is the goal. Your business is selling your firm's time and expertise, and a high priority should be to keep that engine in place.



Retention Opportunity

We examined the data and compared the information with another question from our survey, 'How well do you think your organisation has responded to the pandemic?' What we found was that just over 20% of respondents gave their firm five out of five stars. One in five firms is a five-star firm in the eyes of their own employees. Four in five are not.

Employees who worked at firms they rated as five stars were 40% more likely to say that they did not have any intention to leave or make a change to their employment compared to all other levels (even those firms rated four stars). This is a significant achievement for those firms, and they will likely have an easier time retaining and attracting quality employees. In short, what we can learn from this survey is that you should aim to be a firm whose lawyers and professional staff give you a five-star rating—it may be critical to your survival.

Looking at the rest of our data, we were able to piece together what makes a 'five-star firm'.

Not every data point correlates, so we have omitted the ones that are inconclusive. This Trends & Observations piece will provide a full picture of those elements that are highly correlated and therefore necessary to be a five-star firm.

Offer Remote Work or Hybrid Remote Work

Offering your employees the opportunity to work from home (WFH) or remotely some or all of the time was highly correlated with five-star firms.

Two statistics belonging to five-star firms:

- 60.87% - The number of employees allowed or encouraged to work some form of hybrid model since the start of the pandemic. A further 19.57% were allowed to work entirely from home, for a total of 80.44% permitted to work some or all of their jobs at home.



- 76.08% - The percentage of employees who expect or understand that their five-star firm will continue to permit them to work some form of hybrid model (or fully at home) into 2023.

Firms that were rated five stars by their employees are 40% more likely to have that employee say they do not plan to leave, and three out of four of those employees expect that they will be permitted to work some portion of their job at home going forward. Moreover, there is a very high degree of forward continuity among five-star firms. 95% of their employees who were working some portion of their job from home expect to continue to do so.

This predictability means employees can expect to continue to enjoy the myriad and obvious advantages of working from home (reduced commute and employment expenses, flexibility with childcare, adjusting hours and routines to those that are more productive, etc.).

You may be concerned that this benefit accrues only to your employees. Not so! Many of our clients report that they have realised competitive advantages in attracting and retaining talent, which present when allowing employees to work from home.

- **Drive Retention**

It can also help you to attract new employees. Tracument works with legal recruitment agencies who report that it is much easier to entice a new employee to join your firm if remote work is offered, and in many cases, it is absolutely necessary.

- **Attract Talent**

Allowing your employees some flexibility to work from home is clearly a retention driver, making it easier to keep the valuable employees you already have.



- **Hire from Anywhere**

You can significantly widen your search radius when hiring. With an effective remote or hybrid work setup, your employees do not need to live within commuting distance of an office they never attend. We have clients in Vancouver who have recently hired a paralegal in Northern British Columbia, and another Toronto firm that hired a lawyer in Alberta.

- **Save Office Space**

Some Tracument clients have (even significantly) reduced their office space, saving a small fortune in expensive cities like Toronto and Vancouver. With their staff working from home, much less space is required and is devoted to board rooms and hot desks, giving those who do need to be in the office at any given time the space and tools they need.

- **Increase Revenue**

Many firms report an increase in billable hours from employees working at home, as they are not spending as much time commuting and office socialising (though interoffice communication has suffered among those working from home, and five-star firms have brought in technology to help—see the next subsection).

Support Your People

By going through our Survey data meticulously, we were able to determine a bundle of behaviours that belong to five-star firms and are all in the nature of supporting your employees in the performance of their job.

If offering fully or hybrid remote work is the first priority for firms, supporting that remote work is a close second. Many respondents, while celebrating their hybrid work arrangement and hoping that it would continue past the Covid-19 Pandemic, were deeply concerned about the lack of office elements that are inherently difficult to access at home.



- **Increase Technology**

Five-star firms were 64% more likely than others to bring in new technology. If your employees are working remotely, they need technology to help bridge the gap between home and office. Much of the law firm has been brought online in the last two decades (document storage, accounting, internal communication, research, and file strategy are all good examples). However, there are a large number of tools that remain in the office. Those working at home likely have no access to fax, mail, couriers, cheques, telephones, and document creation services.

- **Increase Training**

Employees at five-star firms were 25% less likely to cite lack of training as an issue. Lack of training was identified as one of the top frustrations experienced by law firm employees of all levels. This is likely because a lot of new technology may have arrived at once, though many law firms also consistently underinvest in training. Ensure that you offer proper training on these new technologies (and your old ones—never a bad time to brush up!) and on the different processes and expectations arising from WFH.

- **Increase Engagement**

Five-star firms were 69% more likely to engage in employee engagement efforts. Ironically, while your employees love working from home, they do miss the office. Many respondents reported missing out on seeing friends and coworkers, office parties and events, and keeping up with one another's lives. Five-star firms countered these issues by offering a variety of team-building activities ranging from simple events, like virtual hangouts, team lunches, and even specific days when all employees are required to be in the office, to more elaborate parties and even firm vacations.

- **Increase Morale and Mentorship**

Respondents at non five-star firms were 36% more likely to suffer from low morale, 132% more likely to say they had difficulty with daily routines and time management, and 161% more likely to say they felt less patience and tolerance



from others. If you take a population who are working remotely, or during a catastrophic pandemic, or both, it is likely that they will suffer issues with morale, productivity, routine, and that they will feel less patience and tolerance from others. What is absolutely striking is the degree of difference between how much these were felt by those at five-star firms and those who were not. They are some of the largest gaps in our survey. At the same time, many respondents indicated that opportunities for mentorship, community, and basic support from their colleagues and bosses were significantly reduced. Focus your efforts here, as much of what is required has very little cost, but is easy to forget (with dramatic consequences).

Reduce Obstacles

Everyone has aspects of their job that are frustrating, least interesting, or that produce more errors [except at Tracument where we cherish all aspects of our jobs, obviously]. Consequently, these tasks can often be pushed aside, left until last, or simply omitted. This often cycles downward, causing more frustration and anxiety. This is likely true of every position in every firm.

However, during the Pandemic, this phenomenon was exacerbated. 32.74% of all respondents reported that tasks would take longer or were more difficult to complete. However, in five-star firms, only 21.74% of respondents made this complaint. In firms rated four stars and lower, that number was 41.28% of respondents—almost double.

Where does this difference arise? We can see where there is the largest difference between five-star and other firms:

- In five-star firms, 23.91% of respondents found **scheduling** to be time-consuming or frustrating, while this number was 44.89% for all other firms (*an increase of 88%*).



- In five-star firms, 21.74% of respondents found **collecting, handling, and sharing file-related documents** to be time-consuming or frustrating, while this number was 62.98% for firms ranked four stars and lower (astonishingly almost three times as high a response rate).

These two tasks have many things in common. They are rote and repetitive, they are vital to the conduct of a file but do not add legal value or revenue, and they are time-consuming and error-prone. They are also much more difficult to perform when out of the office (lack of phone availability and communication methods for scheduling, lack of sending and receiving for document collection and sharing). There are likely many other tasks that would fall into this category.

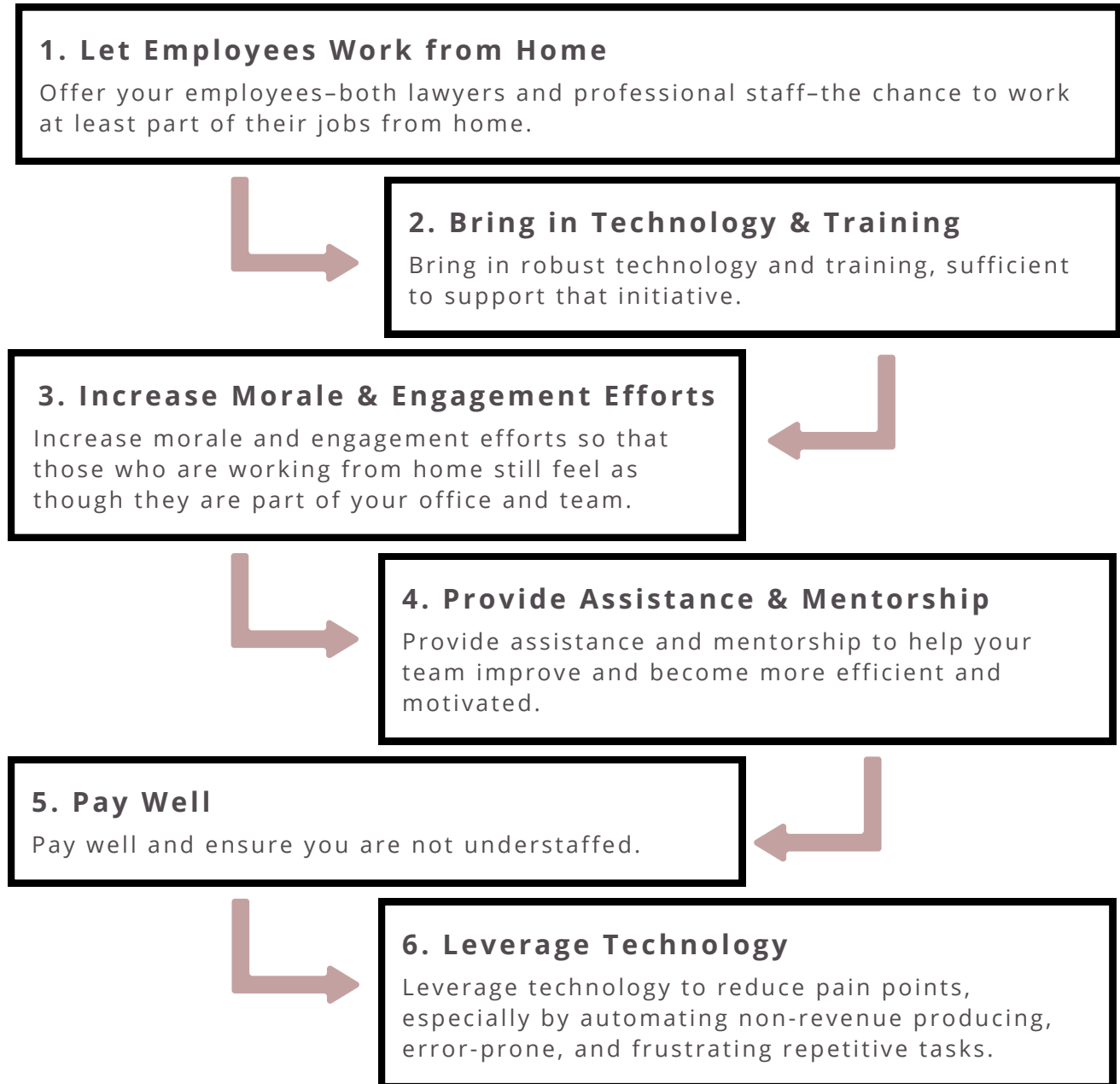
Five-star firms are significantly reducing these pain points for their employees, possibly through process improvement, training, and almost certainly through technology. Our platform, Tracument, is an excellent example of software that automates repetitive tasks and allows a user to do this from home. There are many others out there. Investing in technology, process, and training will reduce the time you spend on these tasks and will reduce employee frustration. At the same time, these investments may also help your employees work from home, making them more likely to stay with your firm.

One final note in this section, five-star firms were 2.5 times more likely to have hired staff during the pandemic, and were nearly 100% more likely to have increased salaries and benefits. Ensuring your employees are adequately remunerated and that your team is large enough is also highly correlated with reducing frustration and inefficiency, and ultimately with retention.



Summary

What does a five-star firm look like in the aggregate? A summary in six steps.



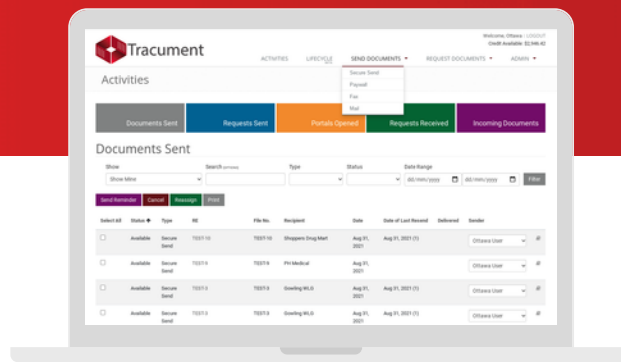
At first glance, this may seem expensive, but our Survey shows that your professional staff will become more efficient and your lawyers will produce higher billings. Your staff will be more likely to stay, and you will be able to attract more and better talent. Finally, you will open up a host of creative strategies that will cause you to lower costs and operate with less risk.



A NOTE ON OUR SERVICES

Built for lawyers

Book a product demo with one of our product specialists to see exactly how it all works.



[BOOK A DEMO](#)

Tracument is a web-based platform that centralises and automates the process of sending, receiving, and collecting documents. We can improve morale and reduce human error. Our platform saves considerable time and material cost while increasing cost recovery revenue for your firm. **65.22% of all respondents who gave their firm five stars use Tracument in their practice.**

Over the past two decades, most firms have moved to store documents paperlessly, however, their methods of sending and receiving documents have lagged behind with very little progress—sensitive material is still emailed, CDs with images are even now written and couriered, faxes are still sent with confirmations still printed, and mail output requires an expensive mailroom or reception station. These methods are inefficient and outdated, but until now were the best available.

Additionally, if your staff are working from home, they lose access to many of these office services, making Tracument absolutely vital. 13.68% of respondents called Tracument the most useful software in their office before the pandemic. **During the pandemic, this number rose to 38.22%—more than any other software listed.** Give your staff the tools they need to work from home effectively, and increase their productivity significantly wherever they are located.



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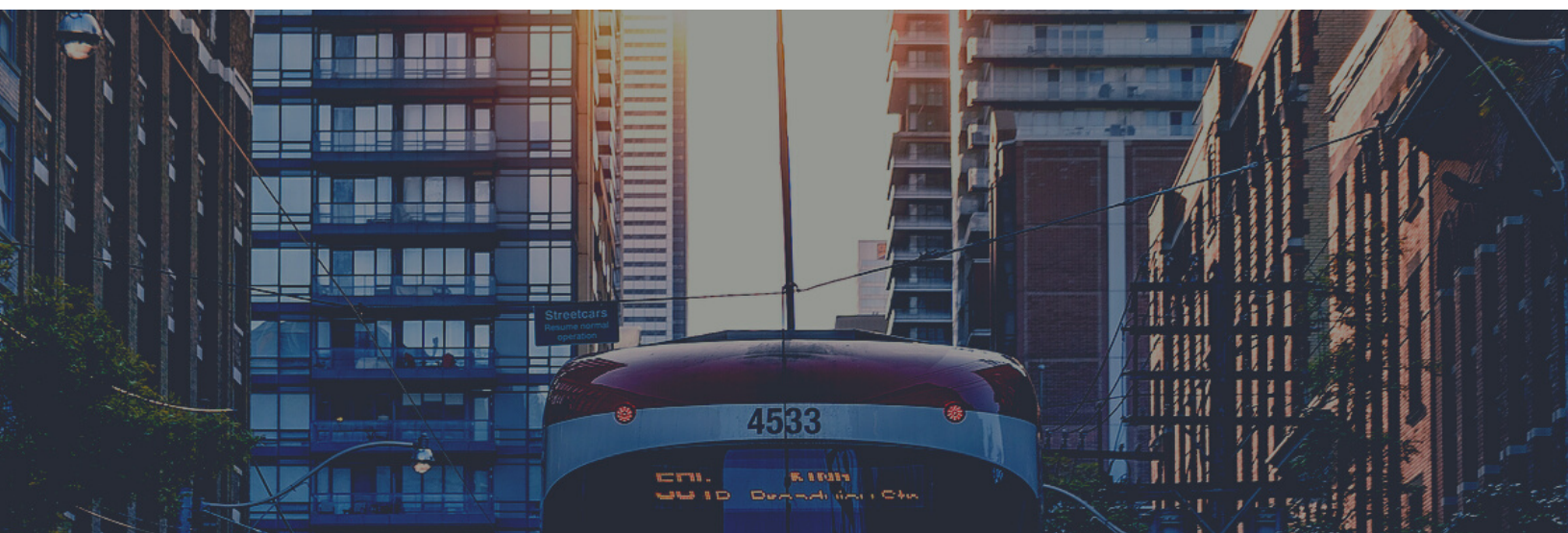
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Tracument Solutions Inc.

TORONTO

311 - 276 Carlaw Avenue
Toronto, ON M4M 3L1
1.888.900.4701

VANCOUVER

170 - 422 Richards Street
Vancouver, BC V6B 2Z4
1.888.900.4701