



Mark Hovell

## Case study: George Davies LLP Implementing a Performance Management System

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

George Davies Solicitors LLP is a leading mid tier law firm based in Manchester city centre. Even though it has been around for more than 70 years it has a young partnership who are very forward thinking. The firm is highly rated in the Legal 500 and Chambers & Partners directories which profile the top law firms in the country.

In 2009 the firm achieved One Star Status from Best Companies to Work For, (only seven firms in the country achieved more than one star), and was the first law firm in central Manchester to achieve the coveted Investors in People accreditation and is also accredited to ISO 9000, quality management standard.

Like many law firms George Davies has traditionally used IT systems in its drive for continuous improvement and to ensure a quality service to its clients. The partners have also recognised the value of IT systems in ensuring a single client system which allows all teams to work on the same client file without requiring access to the paper file and as a means of capturing valuable data about the firm's clients which can be stored centrally so it can be accessed by all staff. In addition, in this heavily regulated profession, good IT systems can go a long way in ensuring that the firm is compliant with these regulations.

Despite utilising IT systems throughout the firm, the partners at George Davies felt that they were not using the systems effectively in relation to staff and monitoring their performance.

As partner Mark Lockett explained:

"Historically, like many practices we concentrated on standard measurements for compliance and financial performance by staff. These included:

- Legal Compliance: Daily supervision, file reviews/audits, ISO/Quality, Law Society/SRA guidelines.
- Financial: Internal controls, fee earning targets, SAR, Audits.

Departments held regular meetings to discuss new business and available resources, each produced annual business plans and held formal appraisals.

This Silo mentality meant that whilst all the elements of performance management were in place, it remained fragmented with a "What gets measured gets attention" operation.

The firm decided it needed to measure, manage and encourage staff activities for:

- **Business development:** Cross referrals/selling, projects such as the GD Dealclub and GDLaw (a link up with other law firms), producing material for the website and other articles/pr opportunities.
- **Operations:** Data Capture, New Business inception, Case Flow-files, document registry.
- **Accounts:** Compliance of internal and external controls
- **HR:** Assigning work at the right level
- **Team work:** Projects and sprint groups

We decided that the best place to record and monitor performance would be through a central Performance Management System that was easily accessible by staff and management. We sort the assistance of Norwel to produce an appropriate system. We worked collaboratively to devise a system that met the performance related requirements of the firm. The outcome was to implement Norwel's Performance monitoring software Prescient MPR

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Norwel's Monthly Performance Review software application.

Designed to support staff and file review processes this application provides a holistic view of performance and the contribution made by each department, team and individual. It allows the individual to insert comments about over and under achievement, providing a historical track of actual performance.

[www.norwel.co.uk/site/private/priv\\_MIS/mpr/](http://www.norwel.co.uk/site/private/priv_MIS/mpr/)

Mark continued:

It's important to recognise that performance can only be improved if you allocate resources to personal development. Performance management systems must be aligned to the firms HRM systems.

The firm has made enormous progress in the continuing use of Monthly Performance Reviews (MPR) for all its fee earners.

The MPR review matrix is completed by both fee earners and heads of department and reports on 5 facets of performance of which only one is financial (e.g. WIP, billing, chargeable hours).

The others focus on business development, personal development, operational and teamwork. It creates the links between strategy, business plans and our HRM system.

Managing partner, Mark Hovell commented:

"The results so far are remarkable and the MPR process has been well received as confirmed by both fee earners who have found it very useful in ensuring they contributed and continued to increase their understanding of their role in the business and management who now feel they have a better handle on the individual fee earner's performance and aspirations. Any issues are raised early and dealt with quickly. Relations between team leaders and their staff has improved as the team leaders are sitting down with individual staff members at least once a month – this was not happening in all teams before.

MPR has been very carefully designed to ensure fee earners are being developed in the long term to ensure the practice remains sustainable and profitable. In fact, our experience has been so positive that we are planning to roll this out to the non fee earning operational staff in the firm in the next 12 months"

Following a recent ISO Audit, the report concluded:

"The Management Principles of ISO 9004:2000 which are implicit in ISO 9001, are being openly demonstrated in MPR (e.g. Leadership, Involvement of People)." Ron Rivans, ISO auditor Moody International.

Alan Richardson Managing Director at Norwel says:

"Prescient MPR has been well received by Norwel's clients. If I were to offer one piece of advice it would be, select a project sponsor and obtain the buy-in from the partners. Accountability is the key to real performance change.

Prompted by the recession, the downward pressure on fees makes it even more important for a firm to measure performance in every way. Firms need to understand how and where they make their profit to know how they will profit the future."

To learn more about how Norwel solutions can help your organisation website at [www.norwel.co.uk](http://www.norwel.co.uk)

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