



ISON HARRISON

5 YEAR BUSINESS PLAN

2018 – 2022



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1. Great Communication
2. Honest Endeavour
3. Respect for Others
4. Accountability
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5 YEAR BUSINESS PLAN 2008-2017 : A REVIEW

At the beginning of 2008 the firm launched its first 5 Year Business Plan. The purpose of the Plan was to identify the objectives, values, and ambitions of the firm as well as set out a strategy for the firm over the coming years. Two plans and ten years later it is again time to review fully the firm's Business Plan and consider whether the firm's values and objectives remain fit for purpose.

2008 Business Values:

1. Great Communication
2. Honest Endeavour
3. Respect for Others
4. Corporate Responsibilities
5. Accountability

2008 Business Objectives:

Continued Success and Growth

1. Keep Changing – Keep Improving
2. Top 10 in Yorkshire
3. A Quality Service
4. A Consistent Service

Have our Business Values have stood the test of time?

Can our Business Values be seen in all decisions made by the firm during the past ten years? Can we expect them to inform the further development of the firm?

In hindsight the objectives for the firm were not particularly well defined. One would imagine that 'Continued Success and Growth' would be the objective of the vast majority of businesses and hardly defines a strategy or key objective for the business. However, the plan was drafted at a time when the firm was operating in the middle of the deepest recession for more than half a century, experiencing heightened levels of competition within the legal sector with the opening up of the legal market to Alternative Business Structures, swingeing legal aid reforms and cuts, heightened regulatory and compliance requirements and internal challenges of succession planning.

At the time of launching the Business Plan we had little idea of the challenges that would be experienced in either the legal market or the wider economy in general. The past 10 years have been extremely tough for businesses.

In 2008 the firm was a medium sized 'all service law' firm primarily based in Leeds but with three branch offices in Chapeltown, Crossgates and Garforth. We have had to deal with the sector specific challenges affecting each of the



different sectors in which we operate as well as develop a profitable and robust business model to allow the firm to continue to survive and thrive. Not all firms have survived the myriad challenges. A number of other local similar sized law firms have struggled, merged or closed.

When, in 2008, we identified that the firm's main Business objective was to 'Keep Changing – Keep Improving' little did we know how true that was going to be. Had we not embraced change in response to economic and sector challenges then we would have doubtless failed as a business.

We are confident that the way in which the firm has responded to the challenges over the course of the past decade sets us in good stead to grow further and build as a business. Whilst our values remain we feel that the firm now has a clear strategy and a place in the regional legal market that differentiates itself from many others.

1. Ownership review

In 2007 the firm's equity partners who owned the firm were Stephen Harrison, Beverley Coates, Jo Trythal, Richard Timperley and Jonathan Wearing.

During 2008 and 2009 the firm successfully ensured an orderly succession such that the firm's owners are now Richard Timperley, Jonathan Wearing and Dominic Mackenzie. The firm has now fully incorporated and operates as Ison Harrison Limited.

Succession planning is never finished. It is an ongoing challenge. The structure of the business is constantly reviewed and we are constantly looking for ways to introduce and involve new partners through internal career progression in the hope that future potential owners are identified.

2. Strategy review

The Leeds law Firm Strategy: 2010-2017

In 2010 the Management Board has developed and rolled out a clear and simple strategy of being 'The Leeds Law Firm'. This strategy was developed through consultation across the whole firm and demonstrated a clear commitment to size, breadth of legal service and the area in which we serve clients. It reflected the firm's unusual diversity of clients, its commitment to the local community and the ambitions to grow in size.

As a law firm we are now able to answer a greater variety of legal enquiries than any other local legal service provider and are more accessible than any other regional legal services provider. We are now in a position to provide a more consistent, competent, professional, and value for money service than any of our current competitors.



How has 'The Leeds Law Firm' strategy worked out in practice?

i. Concentrating on maintaining and developing a local network of offices.

In 2008 the firm operated out of three offices – the large city centre office employing in the region of 100 people and 2 satellite offices to the east of Leeds in Crossgates and Garforth.

Whilst well known in the Leeds legal market the firm was not well known amongst the general population. The firm was limited to its Leeds City Centre office and the two offices to the east of Leeds in Garforth and Crossgates.

Since 2008 we have concentrated on growing the firm's regional profile and have invested in opening branch offices to assist with this strategy.

In 2009 the Chapeltown office operating as Harrison Bunday was formally brought within the ownership and management of the firm.

In 2010 the Ilkley office was opened

In 2011 the Guiseley office was opened

In 2012 the Morley office was opened

In 2014 the Chapel Allerton office was opened

In 2015 the Castleford and Pontefract offices were opened

In 2017 the Pudsey and Huddersfield offices were opened

The template for each of the Firm's branch offices is to offer wills and probate, residential conveyancing and family law services to client on a local level. All other services that clients need are referred to the relevant department at the head office in Leeds. Clients can be seen at Leeds or locally. The effect of the branch network has been to generate work across the board, not just for those areas where there is sufficient demand for them to be serviced locally.

The 'Leeds law Firm' strategy has been crucial in galvanising staff and giving structured direction for growth and responding to opportunities. However, given the growth of the firm and the locations where we now find ourselves based, it is apparent that the strategy needs revisiting. Whilst once the Leeds law Firm helped us to grow a profile it can now be limiting. Our Huddersfield and Castleford clients are not overly attracted to the reference to our Leeds roots. More importantly, now that we have more clients, offices and work areas to manage and co-ordinate, our strategy needs to reflect the importance of consistency of service and price.

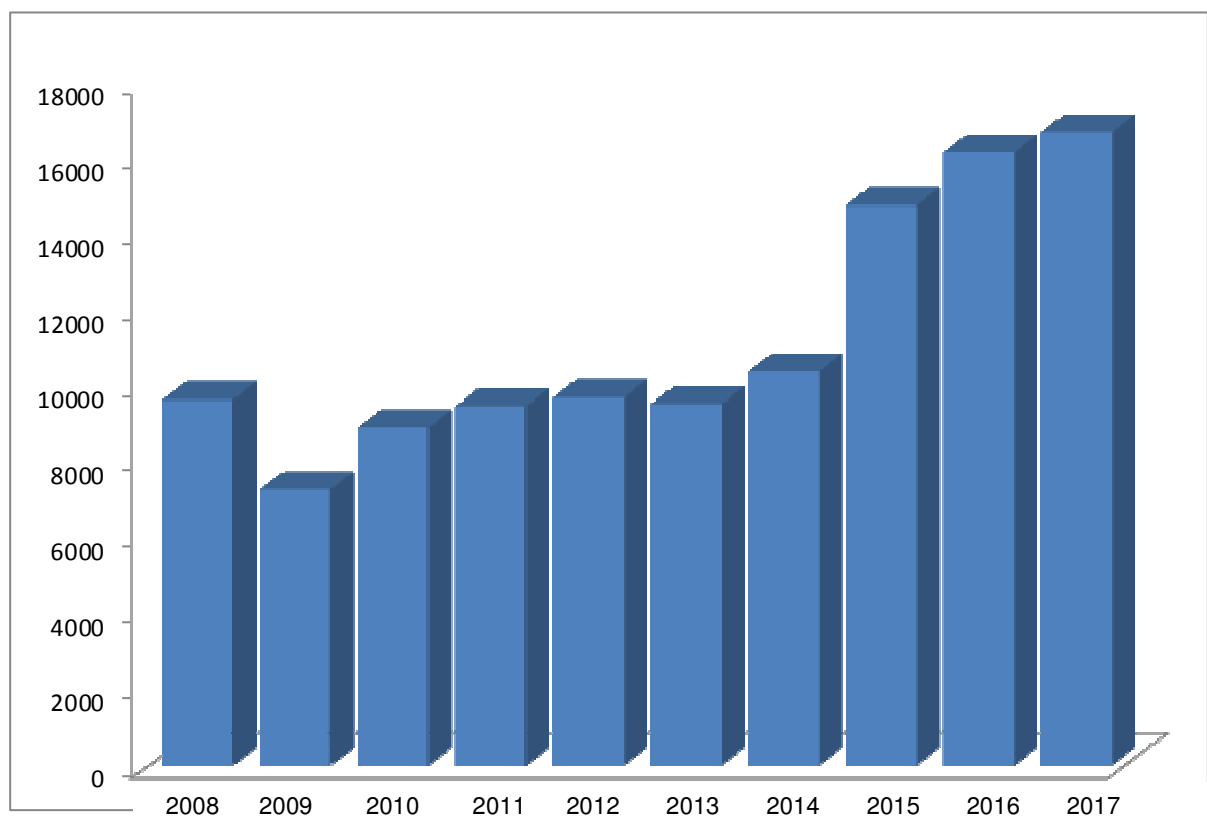
ii. Concentrating on Client Profile



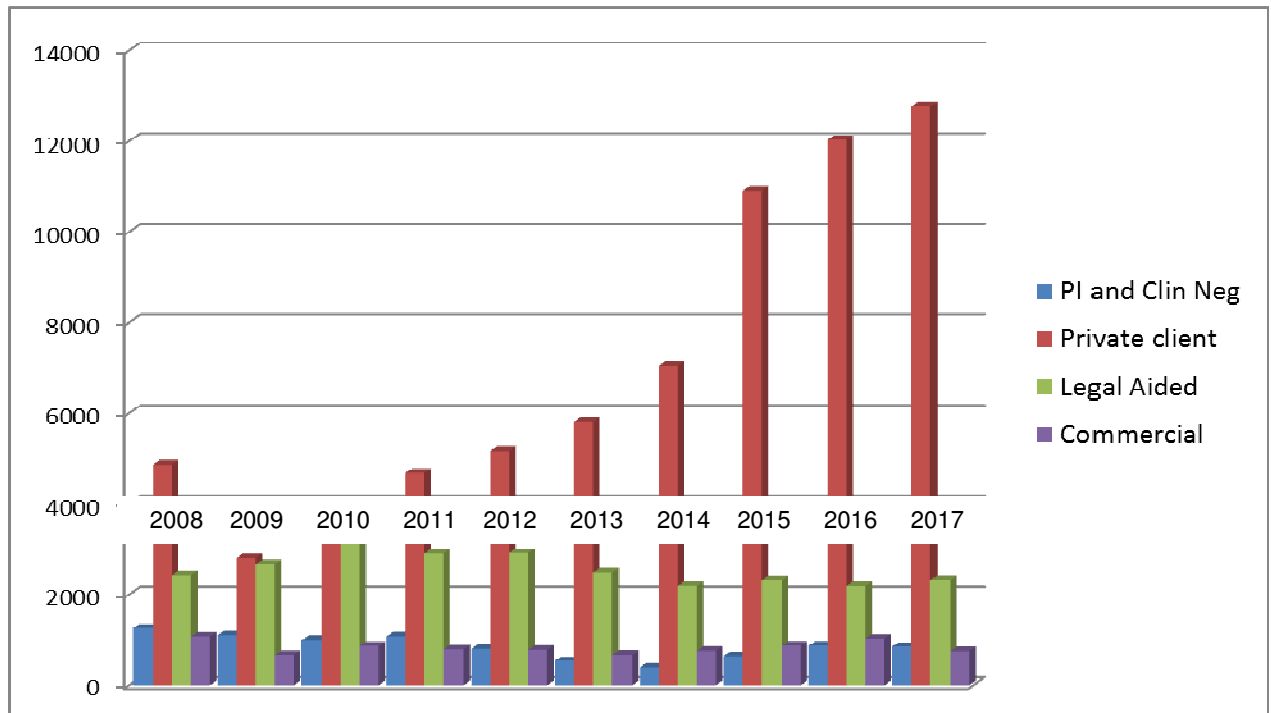
The firm has substantially increased the number of clients that it acts for over the course of the past 10 years. However, as will be seen from the following the charts the nature of the clients has changed as has basis upon which they have instructed us.

A graphical depiction of the actual number of new matters opened by the firm (excluding bulk commercial debt recovery matters) in each of the past 10 years is set out below. In 2009 the firm opened 7254 new matters. In 2017 the number of new instructions totalled 16,675. The number of clients has more than doubled in number over the past decade. However, this is only a superficial view of the firm's changing client base.

Total number of clients 2008-2017



Total number of clients by sector 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
PI/CN	1252	1104	1001	1073	801	535	393	645	873	851
PC	4868	2810	3632	4681	5175	5817	7,044	10,900	12,033	12,772
LA	2431	2673	3392	2905	2921	2484	2,188	2,322	2,185	2,331
Com	1071	667	870	788	780	668	756	873	1,031	750

The growth of the number of clients that the firm acts for has clearly been driven by a substantial increase in private client work. Obviously the amount of work that we attract increased with the opening of each branch but we have also seen an annual increase in the number of returning clients. Put simply, the more clients we act for the more clients are likely to instruct us in the future.

Whilst the *relative* number of personal injury, legally aided or commercial clients have reduced, their *actual* number has remained relatively stable. This is particularly impressive for both the number of personal injury and legal aided clients that we still attract when one considers given the challenges to such areas.

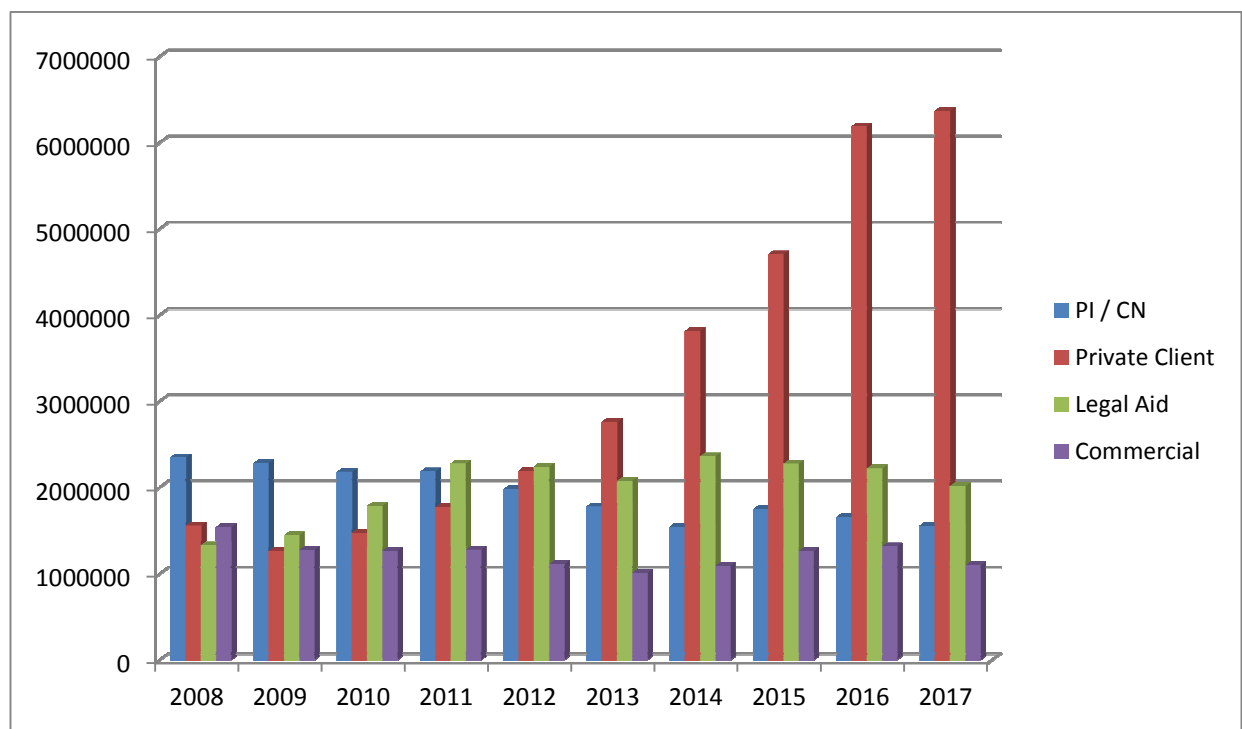
What is not reflected in the graphs above is that the increase is driven by organic growth and non-panel referred work. The firm's strategy has been to move away from any reliance upon panel referred work and as such we have concentrated on attracting clients from local contacts, old clients, recommendations, and obviously through our growing network of offices.



The total number of clients that the firm acts for has increased year on year whilst at the same time the proportion of clients that the firm acts for under panel referral arrangements has significantly reduced (30% in 2008 to 6% in 2017).

The firm has substantially increased its share of the local legal services market. Efforts have been put into attracting clients through the firm's own websites and whilst internet referrals have increased they have done so predominantly on the back of people specifically looking for us or searching for 'Leeds law Firm' / 'Law Firm in Leeds' / 'Guiselley solicitor' / 'Pudsey lawyer' etc.

iii. Concentrating on diversity and breadth of legal offering



The graph above shows the firm's clear commitment to maintaining the breadth of legal services offered by the firm. Each bar on the graph shows the amount of fee-income generated by one of the firm's 'sectors' – private client, personal injury / clinical negligence, legal aid and commercial. The change in performance behind each sector is clear to see.



Personal injury / clinical negligence.

In 2008 the personal injury and clinical negligence work areas of the business drove both turnover and profit. As can be seen this is no longer the case. The firm decided to stop funding the acquisition of personal injury work through marketing consortia or claims management companies in 2005. Since then all clients and income have been generated through direct advertising, recommendations from clients, cross referrals within the firm and across the branch network and also through taking on work from other law firms wanting to exit the personal injury market. We predicted the difficulties now being encountered within the personal injury market and ensured that the firm diversified its reliance upon the area.

Private Client

The growth in private clients (wills & probate, private family and residential conveyancing work) has been matched by the growth in private client fee income.

Legal Aid

Despite the constant erosion to the legal aid budget we are proud that we have been able to maintain the financial performance of each of our legal aid teams over the years.

Commercial

The firm is increasingly known as a high street / personal law firm. Despite this profile we maintain a strong commercial offering as reflected in the graph.

iv. Concentrating on local market consolidation

Offices have not been opened on a whim. Each time a new office has been considered it has been with a view to increase the number of clients and instructions that we receive through an element of local market consolidation. We have greatly benefited from taking in work from other law firms who were either closing or closing specific departments or through merging with smaller firms have taken place.

Below is a summary of the firm's consolidation activity:

2008 – Morley Mitchell – significant levels of personal injury and conveyancing work taken on through the firm entering administration.

2009 – Alison Herbert & Co – significant levels of personal injury work taken on through the firm entering administration.

2010 – Opening of Ilkley office

2010 – Merger with Susan Cuthbertson & Co (Ilkley)



2010 - Merger with James Bloomer and Co (Ilkley)

2010 – Merger with Bowmans Family Law (Leeds)

2011 – Purchase of will bank from Christopher J Greaves (Rothwell)

2011 – Opening of Guiseley office

2011 – Purchase of will bank from Atkinson Dacre (Otley) and
Clapham Turnbull Edwards (Guiseley)

2012 – Opening of Morley office

2012 – Merger with Shaw Gillis (Morley)

2014 – Opening of Chapel Allerton office

2015 - Opening of Pontefract office

2015 – Opening of Castleford office

2015 – Merger with Maurice Smiths (Castleford and Pontefract)

2016 – Raleys solicitors – significant levels of personal injury and
conveyancing work taken on through the firm entering administration

2017 – Opening of Huddersfield office

2017 – Opening of Pudsey office

2017 – Benjamin Roberts solicitors – appointed as agent to deal with
substantial personal injury practice.

All of this activity has allowed the firm both to maintain and build its client base and turnover whilst at the same time reducing its reliance on third party referrers. The firm is now one of the largest legal aid and private client practices in the Yorkshire region as well as maintaining strong reputations in personal injury litigation and commercial work.

Since 2005 the firm decided not to continue to fund the acquisition of personal injury and clinical negligence work through aggressive marketing or through claims management companies due to increasingly high levels of investment required in order to acquire such work as well as the impending uncertainty in the sector.

The firm now holds over 40,000 wills for people the vast majority of whom live in and around Leeds. Despite a reduction in work levels across the legal sector as a whole, the number of local clients that the firm now acts for has never been higher



v. Concentrating the mind

Once we adopted 'The Leeds Law Firm' strategy decision-making became easier, growth opportunities became more obvious and structured and the firm's reason for being became more clearly defined. It helped concentrate our minds. People inside and outside the firm know what we are here for, what we are trying to achieve and what they can increasingly expect from us.

However, we recognise that the model can only take the business so far. We recognise that we need to focus more on consistency and quality and the diverse geographical locations of our growing number of branch offices is stretching the moniker of 'the Leeds Law Firm' to breaking point.

Clearly the strategy needs to evolve.

3. Financial Management - a review

Another area of change and improvement relates to the firm's financial management. The firm has very sound financial management principles as set out in the Quality Procedures Manual. Financial performance reviews are now undertaken by the Finance Partner and each Head of Department on a monthly basis. Levels of new instructions, billing levels, bad debt, outstanding bills and disbursement levels are constantly monitored within such meetings.

The firm has accurate cash-flow forecasting models and billing predictions and always operates within its facility with the bank. It works to ensure an ever-strengthening set of accounts year on year, including retaining a proportion of annual profit to fund future growth. The firm retains significant cash reserves to fund working capital and does not rely upon external funding for either its day to day management or expansion.

4. Financial Performance - a review

During 2008 the economic climate and legal services market changed enormously. The downturn caused by the credit crunch had an immediate impact on the level of property work (both residential and commercial) undertaken at the firm. Until 2008 the firm had experienced year on year increases in turnover for each year that it had traded. The credit crunch and downturn had an immediate and significant impact on the firm's growth projections.

Through the implementation of the Leeds Law Firm strategy as well as a lot of hard work, the firm the firm's turnover has since doubled 2008. This level of growth must be seen in context. Few small to medium sized firms manage to achieve growth, particularly through recessionary times without relying upon external borrowing. We did not. The firm's growth has always been funded through cash flow and through reinvesting of profit.



The steady financial performance of the business has not just been achieved through periods of expansion and growth. It has also been achieved by teams being able to adjust quickly to reduced work and income levels. The downturn in 2008 resulted in a huge reduction in conveyancing instructions which in turn resulted in reductions in personnel within the effected teams. In 2012 the firm experienced similar reductions in work within the personal injury and criminal departments which also meant that staffing levels needed to be reduced in order to remain competitive and commercial.

5. Regulatory compliance - a review

The firm achieved Lexcel status for the first time in 2016 and successfully passes its annual audit reviews each year.

Furthermore the firm has been audited on several occasions during the past 5 years and has performed extremely well. Audits by the SRA, LSC, HMRC, SAR and IIP have resulted in very positive reports with only minor matters being identified.

6. Business Plan Review

Whilst the ambitions of achieving 'Continued Success and Growth' were a fairly vague objective, we have clearly achieved it. The firm has effectively doubled in size and its regional profile increased substantially. The business is both bigger and more successful than it was a decade ago.

Whilst the firm's principle objective has been achieved the strategies utilised to achieve success and growth have needed to develop over the years. The Board of Directors takes some significant pride in the successes achieved in maintaining and growing the firm's market share, the implementation and focus of the 'Leeds Law Firm' strategy and the strong financial performance of the business. In hindsight we needed to define how we were to be measured as a top 10 Yorkshire firm as well as identify how we were to deliver a more consistent and quality service.

We clearly need to articulate new business objectives and develop new strategies to achieve them and this 5 Year Business Plan attempts to achieve that.

The challenge now is to improve what we are doing and constructing a business model and strategy which will allow and encourage further growth across the region without having a detrimental impact upon the consistency of service or quality provided to clients. The annual business plan for 2017 started a discussion about us developing a 'Brilliant Branch Network' and the discussions that followed have helped form the basis of the firm's strategy over the next 5 years. The 'Brilliant Branch Network' strategy recognises the importance of branches to our success but necessarily promotes greater



integration between offices. It recognises that we now operate in communities beyond Leeds. It also recognises that in order to continue to grow we will need to focus more on consistency of service, quality and price.

Whilst the firm's 5 Year Business Plan 2018-2022 contains more clearly defined Objectives, our value remain much the same. Why would a firm change its Values? They should be timeless.

In reviewing the 5 year Business Plan we have considered where the firm presently has great strengths as well as those areas where improvement continues to be necessary for us to compete at the highest level and to continue to grow as a business.

Planning even one year ahead is a long time in the current economic and legal services environment. Planning 5 years ahead is increasingly seen as crystal ball gazing and overly optimistic. At several junctures over the course of the past 5 years the Firm's Business Objectives and Values have been tested. We do not believe that they have been found wanting. It is hoped that the same will be said of what we set out to achieve this new 5 Year Business Plan.

Board of Directors
December 2017



5 Year Business Plan 2018-2022

OUR OBJECTIVES

1. Our reason for being: Best of breed

We want to provide a better high street service whilst delivering a stronger financial performance than any other law firm in its sector.

2. Size: Largest multi-site high street firm in Yorkshire

We want to continue to grow in size and breadth. We want to continue to grow the number of clients that we act for, our range of legal service areas, the number of our branches, and the firm's turnover.

The firm's current turnover in 2008 was £6million. It is currently £12million. We want to achieve a turnover of £15million by 2022 through continued organic growth.

3. Quality: Knowledge and Service

Clients choose their lawyers on the basis of the knowledge and experience that they have but also for the level of service that they can expect.

We want a balanced approach to delivering quality.

We must give equal weight to providing the **best quality of advice** as well as the **best quality of service**.

4. Consistency: A Customer Charter

We want to ensure that we deliver a consistent service across all offices and service areas. The firm can differentiate itself by being more transparent, predictable, fair and consistent with how we treat clients. We shall publish a Customer Charter to enshrine these principles.

OUR MANTRA

Always Changing – Always Improving

Continued success and growth will not just be achieved through honest endeavour, strong management, strategic planning or a commitment to client care. The firm must continue to take pride in its ability to adapt, change and



innovate. Changes should be clear but flexible and always embraced with speed, positivity and enthusiasm.

OUR STRATEGY

A Brilliant Branch Network

We recognise that we could be the best at delivering a broader range of legal services in a more accessible way than other law firms in the region. Not only is this something that we could be best at but we recognise that the combined contributions of all of our legal offerings drives the firm's economic engine and that collectively we are passionate about the service that we provide.

We wish to be the first and obvious port of call for local people and businesses looking for straightforward, efficient, accessible, and value for money legal advice – whatever their legal issue.

1. Developing a Brilliant Branch Network

The firm now has 11 offices each of which attract clients and increase the firm's profile. Each office operates as a local access point for clients requiring advice as well as serving as an advertising board for the range of our legal services. Establishing a model for our network whereby each office is adequately supported and integrated with the rest of the firm and is able to provide the same level of service as other offices is essential for the continued growth of the business.

A brilliant branch network needs to deliver a service that is

- Local
- Accessible
- Consistent
- Broad - full range of services
- Friendly
- Value for money
- Efficient

A brilliant branch network needs to operate

- Efficiently
- Profitably
- Intelligently

We recognise that a Brilliant Branch Network will need to consistently deliver superb service



2. Superb Service – in both quality and consistency

In 2017 LexisNexis published its Bellweather report on the future of law firms. The report focussed on the disconnect between the perceptions of service levels as seen lawyers and clients and what in fact the two thought was important as far as service was concerned.

The report makes for interesting reading. Some of the key findings from the survey of clients and lawyers are graphically set out below:

Over 100 solicitors and clients rate quality of service...



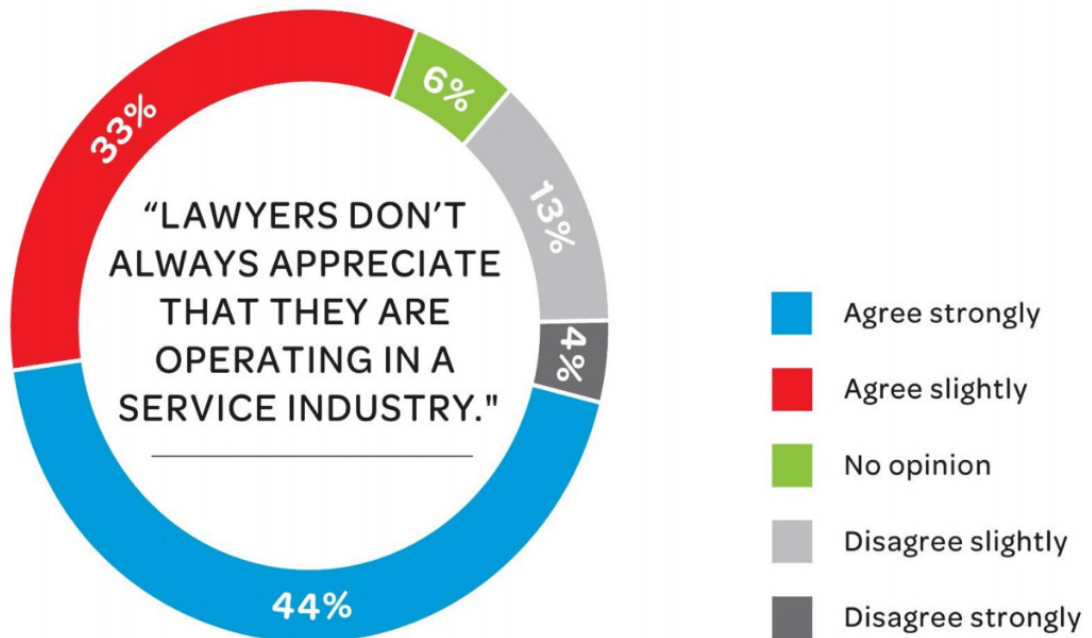
think they are delivering
above average service



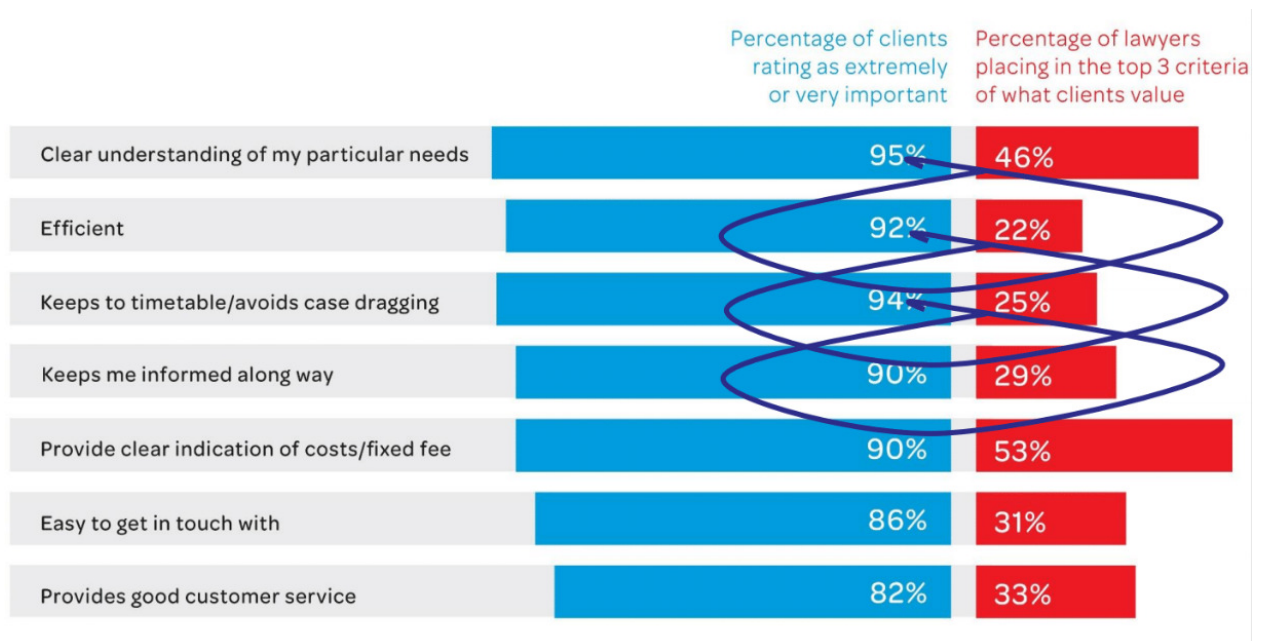
think they are receiving
above average service



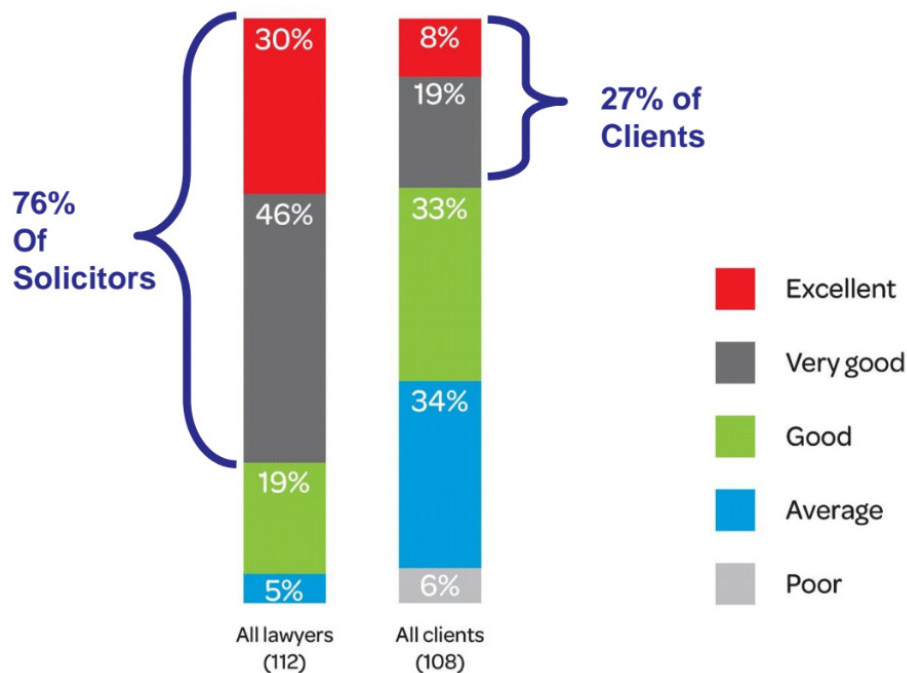
The Leeds Law Firm



Understanding what matters....



Do law firms provide value for money....?



80% of lawyers think they are delivering above average service with 76% believe that they are providing very good or excellent value for money.

40% of clients think that they are receiving above average service with only 27% believing that they are receiving very good or excellent value for money. Lawyers in general clearly do not understand what clients want. They don't understand what matters.

Clients want to be understood.

We aim to ensure that we *know our clients*. We need to understand their circumstances, understand what their concerns are, understand what they want to achieve.

Clients want an element of certainty.

We cannot deliver certainty of outcome or timing etc. We can however ensure that we explain and stick to timetables and case plans, agree fixed fees and costs estimates.

Clients expect accessibility.

We aim to be accessible for clients communicating with them face to face, by telephone, letter, e-mail, portal, or however else they wish. We shall use accessible language.

Clients expect great communication.

We want to be known as the firm that always returns client's calls and e-mails, great at managing a client's expectations, and always keeping their clients up to date.

Clients expect knowledge and experience.



The firm is committed to be market leaders as far as the quality of advice and service that it provides to clients.

Clients expect a quick service.

Speed of response matters. We shall promptly return calls and reply to correspondence.

Clients expect a value for money service.

Our charges shall be fair, transparent and competitive.

Clients expect courtesy and respect.

Everyone does.

Clients expect a consistency.

Reputations are built on consistency. The firm is committed to consistency in the quality of advice and service that it provides to clients irrespective of whom they deal with or which department or office is involved.

3. Size, breadth and geography matter

We shall remain a substantial regional legal services provider in terms of size by reference to turnover, numbers of clients and employees

We recognise that we benefit from the size that we are – big enough to operate efficiently and with adequate support, small enough to avoid a ‘big firm culture’ and maintain a relatively flat management structure.

We shall continue to offer the broadest range of legal services in the region

We shall remain committed to operating within the insurance, private, legal aid and commercial sectors

We shall look for opportunities to expand the breadth of legal services that we are able to provide.

We shall continue to look for ways to be increasingly accessible to local clients and deliver our service proximate to where they live and work.

We are committed to maintaining a central city centre office as well as potentially growing our network of branch offices.

Our brilliant branch network will be fully integrated delivering the services that people want in the place that they want it, by the right people, in the right way. Every time.

The strategy to deliver a brilliant branch network should impact every decision that the firm makes from how the telephone is answered, IT systems and training, to compliance, managing staff cover and marketing.



4. Our Customer Charter

1. We will ALWAYS get to know you. We need to understand your circumstances, your concerns, what you want to achieve.
2. We will ALWAYS meet you at an office local to you or at home if you prefer.
3. We will ALWAYS speak and write in plain English
4. We will ALWAYS agree a fee or provide a costs estimate before you instruct us.
5. We will NEVER incur costs on your behalf without your prior agreement and / or payment on account.
6. We will ALWAYS say if we don't know the answer or are unable to carry out your requests.
7. We will ALWAYS call you back or return your e-mails – that's the aim!
8. We will ALWAYS treat you with courtesy and respect.



We want you to be impressed and feel that you are getting value for money.

We want you to feel that we are your 'solicitors for life' and that you will be quick to recommend us to others.

5. Our attitude to Risk Management

We shall operate a modern, profitable and compliant legal services business

The firm shall be run profitably, commercially and in accordance with within proper financial risk management principles

The firm shall ensure that all decisions are made in the interests of the business as well as for clients. All decisions must be legally, morally and commercially sound.

Our clients, our employees and indeed our regulators benefit from our commitment to operate a well-managed business on commercial principles

6. Our attitude to our Colleagues

- The culture of the firm has been critical to the recent growth and success of the business.
- We will focus on teamwork and team integration.
- Recruit to maintain appropriate staffing ratios at team level so as to maintain and improve service.
- Retain and continue to train colleagues.
- Where possible promote from within.
- Further develop managers' skills.
- Retain open approach to information and management.
- Continue to develop case management systems and I.T. service and delivery.



7. Our attitude to financial performance

- We will continue to strive to increase turnover and profitability.
- We shall endeavour to increase turnover to £15million by 2022.
- We shall ensure salaries never exceed 50% of turnover.
- We shall operate without the need for external funding.
- We shall manage and reduce outstanding bills and debts.
- We shall maintain diversity of income streams.
- Financial reporting will be performed at branch level and on work type

8. Our attitude to our social and community responsibilities

- We shall support local charities and good cause ventures
- We shall support colleagues in the firm with their involvement with charities and good cause ventures.
- We shall support clients of the firm with their involvement with charities and good cause ventures.

9. Our attitude to management

We understand that for management to be most effective it is important that aspects are centralised whereas other aspects are localised

Centralised management

- Financial performance reviews
- On line marketing
- Monthly Senior Management Team meetings
- Quarterly Managers' forums
- Case management development
- IT connectivity
- Regulatory and compliance requirements
- Risk Management
- Risk register and Non-standard Undertakings register
- First stage induction procedure
- File Quality Reviews
- Debt management



Localised management

- Team meetings
- 1-2-1 appraisals
- Local marketing initiatives
- Social events
- Caseload Reviews

OUR VALUES

Our values reflect how we operate as a business. Each decision that we make is made in the interests of achieving the overall business objective of continued success and growth will be consistent with the following values:

1. **Great Communication**
2. **Honest Endeavour**
3. **Respect for Others**
4. **Accountability**
5. **Social and Community Responsibilities**

1. Great Communication

What do we mean by great communication?

For Colleagues it means

- We shall provide strong leadership – clearly defined aims and objectives.
- We shall ensure clear lines of management and communication are maintained.
- We adopt the principle of no secrets – regular manager's briefings and team meetings.
- We shall treat all colleagues with respect and courtesy.
- We shall support colleagues through coaching, mentoring and training.
- We undertake frequent appraisals – 1-2-1s.



- We shall convene monthly Senior Management Team meetings
- We shall convene regular manager's briefings.
- We shall listen and act on new ideas.
- We emphasise the importance of commitment to the team and developing policies to assist in team building and rewarding.

For Clients it means

- We prioritise them – we have a Customer Charter and we understand what is important to them.
- We will get to know our clients. We need to understand their circumstances, concerns, and what they want to achieve.
- We will meet clients at an office local to them or at their home if they prefer.
- We will speak and write in plain English
- We will agree our fees or provide a costs estimate before being instructed us and will confirm this in writing.
- We will not incur any costs on behalf of a client without their prior agreement and / or payment on account. We do not want clients exposed to liabilities that they are not comfortable with.
- We will say if we don't know the answer or are unable to carry out a client's requests.
- We will try to return calls and e-mails on the same day that they are received.
- We will treat clients with courtesy and respect.
- We will maintain a consistent level of service delivery.

To the Outside World it means

- We will demonstrate strong leadership and management style.
- We shall demonstrate clearly defined team aims and objectives – a clear strategy.



- We will develop a strong and consistent brand of the firm together with an associated reputation.
- We will maintain consistent growth in the firm's profile – both regionally and nationally.
- We will maintain a reputation for fair play, quality service and open culture.

2. Honest Endeavour

The continued success and growth of the practice is the firm's main business objective.

We believe that the further success and growth shall be achieved through enthusiasm, strategic planning but overall a culture of 'honest endeavour'.

Honest endeavour applies to all areas of the business.

Our Delivery of Services

Through honest endeavour we aspire to succeed in:

- Delivering high quality service to clients.
- Delivering high quality legal advice.
- Delivering high quality support and services to colleagues.

Our Marketing

Through honest endeavour we aspire to succeed in successfully:

- Reflecting the firm's values and qualities in the firm's brand
- Improving conversion rates from enquiry to instruction
- Increasing numbers of cross referred clients
- Increase the profile and visibility of the firm
- Increasing repeat business and recommendations.
- Increasing market share

Our Financial Management



Through honest endeavour we aspire to succeed in successfully:

- Focussing on key performance indicators at team and firm level.
- Agreeing, setting, communicating and monitoring team and firm targets.
- Improving risk analysis and reduce complaints and claims reporting.
- Focussing on performance issues at individual level via managers.

Our Personnel Policies

Through honest endeavour we aspire to succeed in successfully:

- Attracting high quality applicants for vacancies.
- Developing managers - their management tools and skills.
- Increasing staff retention.
- Continuing to improve effectiveness in consultation, setting, communicating and monitoring H.R. policies.
- Providing high quality training – externally and internally for legal training, and internally for case management and I.T. support.
- Promoting from within.

3. Respect for Others

We value our colleagues and the teams in which we work. We believe in mutual respect and celebrate the diversity of talents that we bring to work.

We celebrate equality and diversity of colleagues, clients, and service providers.

We believe that it is important to ensure that colleagues achieve an appropriate work-life balance. This benefits both colleagues and clients.

An appropriate work-life balance has a positive impact on the enthusiasm and motivation of colleagues to their work and their team.

Clients benefit from a positive attitude, heightened levels of service in both speed and quality, and client care in general. We believe that happy colleagues result in happy clients – an appropriate work-life balance clearly contributes to this.



We seek to ensure that a work-life balance is maintained by:

- Knowing our colleagues.
- Emphasis on approachable managers and regular communication.
- Regular 1-2-1s where workloads, stress levels and performance are monitored.
- Not encouraging work being taken home.
- Encouraging colleagues to take their full entitlement to annual leave.
- Flexibility of management by empowering managers to individually manage the members of their teams (working hours, making up time etc).
- Focus on rewards and recognition so as to be ahead of our competitors.

4. Accountability

Continuing to improve the quantity, quality and consistency of our work and service is the main thrust of our 5 year Business Plan. The quality and consistency of our methods of communication are the benchmarks on which our client's measure us.

In aiming to achieve our objectives we must recognise the importance of individual and corporate accountability. Accountability means that we should have high expectations of ourselves as well as our colleagues in working towards the firm's and our team's objectives. We need to show off and impress our clients and colleagues.

We should expect and welcome feedback and support measures to improve quality and service on an individual and corporate level.

As a firm we are accountable to the Solicitor's Regulatory Authority for breaches of professional conduct.

As a firm we are accountable to our clients for the quality of advice and service that they receive.

As a management board we are accountable to our colleagues, managers and teams for the decisions made that affect the firm.

As a team we are accountable to our clients, our colleagues and our line manager for the quality of advice and service that we deliver.



As an individual we are accountable to our clients, our colleagues, our team and our line manager for the quality of advice and service that we deliver and for our attitude and approach to the team in which we work.

Examples of how we value the principle of accountability include:

- Management board - annual anonymous staff surveys and reports.
- Teams – internal and external audits.
- Team leaders – monthly performance reviews, 1-2-1s involving input from team members.
- Team members – regular caseload reviews, file quality reviews, 1-2-1s involving input from other team members.
- Team leaders and members – client feedback questionnaires.
- Team leaders and members – complaints procedure.
- Team leaders and members – disciplinary procedure.
- Team members - grievance procedure

5. Social and Community Responsibilities

As a business we do not exist in isolation. We are committed to running our business responsibly.

The Environment

We believe in delivering the best service that we can to our clients / customers in a way that takes into account the effect on the environment.

Our Locality

We actively support local charitable projects.

Our focus is first and foremost in Yorkshire. Colleagues are encouraged to involve the firm in local charitable projects. We consider client requests to support charitable projects that require funding.

Pro bono work



We have for many years been involved in pro bono work for existing and new clients. We look to assist wherever possible and recognise this as being one of the firm's corporate responsibilities.

We always have regard to the importance of the work to the client, any potential greater public interest and the commerciality of committing to undertake the work.

C REVIEW INTERVALS

The 5 Year Business Plan shall be considered when preparing the annual team business plans

Full reviews will take place in 2020 and 2021.

D CONCLUSIONS

We want to provide a better high street service whilst delivering a stronger financial performance than any other law firm in the Country.

We want to be best of breed – the biggest multi-site law firm in Yorkshire.

We want to continue to offer more services than other firms, attract more clients than other firms and deliver a better service than anyone else.

What is more, we want to do so in a way that does not compromise our values of honest endeavour and always respecting others. The way that we communicate both internally and externally will define how successful we will be at achieving our ambitions goals and we must never take our clients or communities for granted. We live and work in Yorkshire and have an obligation to give back.

The next chapter for the firm will involve continually improving customer service and the way in which our different work areas and branches integrate. Our Brilliant Branch Network strategy will provide a clear focus to direct us to address those areas which need to improve.

We will clearly need to continue to live by our mantra which has served us so well: Always Changing – Always Improving.

We aspire to be the firm of choice for:

- Local clients who want excellent service and high quality advice;



- Employees who want career progression, to feel valued and treated with respect; and
- Business partners who want consistency of approach and delivery of service levels.

We believe that we shall see continued success and growth through our ability to anticipate and react positively to changing demands and markets.

The Legal Services Act has already seen many firms who have failed to embrace change are struggling. Ison Harrison will not be one of those firms.

Over the course of the next 5 years we shall strive to deliver higher and higher levels of service and advice in those areas where we specialise. By doing so we hope to evolve into a true regional market leader within each of the business sectors in which we operate.

Our commitment and enthusiasm to look continually for areas to improve our delivery of service will ensure that the firm is well placed to meet the opportunities and challenges facing the legal services sector in the years ahead.