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CONNECT



PRESIDENT'S UPDATE

I am now a few months into my position as President of the CNWLS, and it would appear there is now some light at the end of the tunnel after a tremendously difficult year for us all.

I am tentatively hopeful of a successful return to 'live' events that we have planned over the next few months.

I am pleased to see some very keen interest for the Golf Day at Prestatyn Golf Club on Friday 23 July. The Golf Day is a mainstay of the CNWLS calendar and I am delighted to see many members embracing this opportunity to catch up with colleagues and friends.

I am also thrilled that there has already been great support for the Summer Drinks Party at 1539 on Friday 13th August, which is being jointly hosted with the CNWJLD. It is one of my objectives for my year in office to create greater synergy between the CNWLS and CNWJLD, and I do feel that the relationship between the two societies is developing strongly.

On this note, I am absolutely delighted that the CNWJLD have voted to permit all undergraduate law students from the area to join their ranks as members.

It is important that Cheshire and North Wales retains the very talented pool of students from our local universities, and it is hoped that the earlier students become involved with the CNWJLD, the better opportunity we have to ensure the potential of students is retained for the benefit of our communities in future. The CNWLS' increased involvement with local universities and the CNWJLD will only strengthen this opportunity.

In other news, I have been invited to speak on behalf of the CNWLS at the virtual Presidents' and Secretaries' Conference on 16th July, on the basis that the CNWLS is considered by the Law Society as a great example of how much can be achieved for members locally, especially in the way that the CNWLS remained active in the past year. I am delighted to be able to represent the CNWLS at the Conference, although the attitude of the CNWLS to remain as active as possible in difficult times could not have been possible without the hard work of our Immediate Past-President Osian Roberts, and I shall be sure to mention this at the Conference!

On a similar note, our Vice-President Emily Littlehales recently attended a virtual meeting with presidents and office holders from local law societies, hosted by Law Society President, Stephanie Boyce. Emily was tasked with delivering an address at the meeting on behalf of the CNWLS, it being well reported that this was delivered with aplomb! I thank Emily for representing the CNWLS on this occasion and the CNWLS is very lucky to have Emily as its Vice-President.

I am also very fortunate in my role to have the support of a hard-working and engaged committee, a committee whose role continues to diversify for the benefit of CNWLS members.

I do hope all of our members are staying safe and well, and I wish you all a very happy summer.



FREDDIE STORRAR

HOW ARE YOU FINDING MY HMCTS?

The Cheshire and North Wales Law Society received an update from The Law Society (Chancery Lane) which we felt merited inclusion within our newsletter, it is likely to be of interest to our Private Client Practitioners.

Since the Law Society met with HM Courts and Tribunals Service (HMCTS) in April regarding the probate service, they received considerable feedback from members indicating that the data shared by HMCTS did not reflect what was happening in practice.

The Law Society collated this feedback and presented this to HMCTS in preparation for a meeting with them in May.

The common themes that emerged in the feedback related to:

- Estimated timescales and concerns about delays
- Accessing the online service
- Communication with HMCTS
- Collaboration between HMCTS and HM Revenues and Customs

HMCTS has expressed their gratitude for the feedback members are providing and are using this to make improvements.

A summary has been prepared by the Law Society which sets out what the issues are and what HMCTS are doing to address these: [HMCTS responds to issues with the probate service | The Law Society](#).

SMALL FIRM PRACTITIONERS - DID YOU KNOW ABOUT LAW SOCIETY CONNECT?

Law Society Connect is an online community for members who work in small firms to share their experience and offer support and guidance to their peers. Various topics have been covered so far, including SIF; setting up a new firm; remote witnessing of wills; guided hourly rates; certifying bank statements.

Small firm practitioners are encouraged to ask their own questions and create their own threads. The digital community is filled with support and advice from small firm members who are keen to help each other. The platform has had some great feedback and continues to grow – it's currently on 900 members.

If this would be of interest to you - more info can be found here:

<https://www.lawsociety.org.uk/topics/small-firms/discover-connections-on-law-society-connect>

GUEST FEATURE

RE-IMAGINING YOUR LAW FIRM: MODERN TECHNOLOGIES FOR LAW FIRMS

BY STEPHEN PRITCHARD
MATRIX 247

GUEST FEATURE

Necessity is the Mother of Invention... PLATO375 B.C.

Well, he actually said, “our need will be the real creator”but 400 years ago it was translated into the above.

The pandemic certainly created uncertainty in accurately planning and forecasting an existing law firm’s business strategy. It has become evidently clear however, after we have now had discussions at senior level with over 100 of our existing law firm clients, that necessity has indeed been the mother of creative inventions; with law firms looking now at how they are re-inventing their business strategy and the ICT Tech required to ensure the tools and software available to deliver successful infrastructures is available.

Change is the ONLY constant in Life... Heraclitus505 B.C.

But ‘Digital Transformation’ does NOT mean spending lots of money and starting again!



Law firms are realising, in the last 12 months more than ever before, the requirement to review the ICT landscape with a view to starting that ‘digital

transformation’. The legacy systems we found in most of our law firm clients when we reviewed before they joined Matrix247 were obviously designed and ‘built-for-purpose’ on the historic and previous law firm business strategy. Due to the necessity of change in law firm strategy moving forward, elements of what is in place will probably need to be updated, but in a strategic, logical and hopefully cost-neutral way!

It’s simply about aligning the revised business strategy with a revised Legal-Tech Strategy. But until you understand the art-of-the-possible, i.e. a supplier-partner that understands both the legal sector and the way you operate. A very good commercial brain that also understands all options on Legal-Tech available is needed, not just the products on their portfolio. This then enables choosing from an unlimited list. Then it can become a little ‘chicken & egg’, in how do you build an accurate business strategy without knowing all tools available, but how do you build your Legal Tech strategy without having a business strategy first!... this is where we can help.

Stop putting ‘plasters-on-plasters’!

On many deployments, we can leave in situ a lot of existing infrastructure and hardware enabling your law firm to ‘sweat-the-assets’ longer ...spending a lot less money basically. But always with the well thought-out pre-planned phased project over several years to do the right logical swap-outs at the right time. The key is ensuring the right foundation for home and remote working is ensuring the right foundation is in place.

WHY a Managed ICT Cloud environment is right for a Reimagined Law Firm.

Implementing your law firm in cloud-based, hosted desktop environment simply enables ANY device to work from ANY location at any time.

1. No capital investment needed, Flexible and Scalable

Pay as you go and spread across the term all set-up fees into monthly operating costs. Hosted desktop is a model that is completely scalable, to flex-up or flex-down as needed, which enables optimum financial planning and forecasting with fixed costs.

2. Optimise the management of risk

Security for COLPs. By building in business continuity/disaster recovery plans as standard, the levels of back-up already built into the remote data-centres that would be hosting your business critical applications across multiple locations, far outweigh the cost-justification of a re-imagined law firm doing this.



3. Outsourcing your ICT department

Reduce the ongoing expense in keeping IT staff skilled-up to the never-ending battle against threats and breaches, recruitment and training costs and the extra time needed in management time, stress and de-focus when managing a larger IT department inhouse. As IT staff gain more accreditations through your investments in them, expect and forecast for their salaries to continue to rise, unless you wish to run the risk of them moving to another organisation who wish to buy in those skills, after you have paid for their training!

4. Immediately build-in the optimum security wrap protecting client data

The investments needed to achieve the same levels that data centres provide you when they host your law firms critical applications cannot be matched.

5. Integration and collaboration between your law firms applications of Case Management / Practice Management software, Time-Recording for billing software, telecommunication platforms with call recordings embedded into case files, integration between these and Microsoft Teams and partners mobile devices is all becoming very common-place in law firms today who are reaping huge benefits in very slick automated working processes with the management information and tracking built in via KPI dashboards.

To do all the above in your law firm business premises will prove extremely costly and difficult if the vendors have done little integration before. By deploying your law firms application in a data-centre operated and managed by a supplier who specialises in the legal sector, you should find many instances where all the usual suspects are already integrating within the same data centre. Why re-invent the wheel and start paying higher fees to do this, when a large element is proven and ready to go?



6. Agile & Homeworking Solutions

In mid-July 2020, The Mail newspaper published an article by Stanton House citing:

* One in five professionals wished to continue working from home permanently

* 54% Wish to work no more than 1-2 days per week office based

* 72% Wished to work no more than 3 days per week.

Many mid-size and larger law firms have now decided to keep remote working models to varying extents, now the large number of benefits gained throughout the law firm and for the individuals on mental, life-style balance and increased productivity has been established.

This includes all the time and cost savings made by reducing office space, or renting out what is not needed and removing the need for business travel.

These changes also reduce the carbon emissions of your law firm and increase your sustainability credentials. It is proven that an agile and flexible management mindset is a major contributor in acquiring the very best talent and retaining them, with top fee-earners seeking out law firms that offer arrangements aligned to their personal circumstances.

7. Level the Playing Field against Competition

Above are just the headlines. Put simply, re-imagining your law firm and adopting a cloud-based hosted ICT strategy enables the levelling of the playing field against the largest of law firm competitors with hundreds of staff and partners in large city locations. It enables just a handful of staff with one or two partners to have access to ALL the same business tools and applications as a Top 100 law firm, but just investing at exactly the same cost per user per month.

To enable us to share with you more ideas of how we can help you design the right ICT foundation, or assist in a 'digital transformation' strategy for your law firm picking ideas from over 100 law firms we currently support, contact Stephen Pritchard at teamlegal@matrix247.com.



WILL AID 2021

Founded by solicitors in 1988 in response to Live Aid, Will Aid is a national will-writing campaign that takes place every November. It was created to reinforce the importance of having a professionally written will and has been raising vital donations for nine of the UK's best loved charities for more than 30 years.

Each year local solicitors volunteer their time to write wills for people and instead of charging a fee, ask clients to make a voluntary donation to Will Aid. The money raised supports the vital work of the Will Aid partner charities: Age UK, ActionAid, British Red Cross, Christian Aid, NSPCC, Save the Children, SCIAF, Sightsavers and Trocaire.

In the 2020 campaign, Will Aid raised over £650K, helping the nine partner charities continue their life-saving work after what has been an extremely challenging year.

Will Aid brings so many benefits to your business. By signing up you can welcome new clients through your door and expand your reach. You also have the chance to raise the profile of your firm with the support of Will Aid's amazing PR team.

Will Aid is widely promoted in the local and national press and is also supported by several well-known celebrities such as Dame Judi Dench, Graham Norton and Iain Glen.

The scheme is currently recruiting solicitors in Cheshire and North Wales who want to heighten the profile of their business, meet new clients and raise vital funds for charity.

Local firm Cribbin & Co Solicitors based in Lymm, Cheshire, was pleased to take part in Will Aid for the first time in 2020 and became one of the highest donating new firms raising over £4,000.

They are looking forward to being presented with their certificate by one of the campaigns charity representatives in the coming weeks and are thrilled to have been involved.

Company Director, Siobhan Cribbin said 'Will Aid is a fantastic programme. It has been extremely rewarding to be involved and to raise funds for the vital work of the charities.'

To raise the profile of your business, meet new clients and help charities bounce back from the impact of the pandemic, sign up to the 2021 campaign today!

You will also find some testimonials from solicitors who have taken part in Will Aid on their website.

<https://www.willaid.org.uk/solicitors>



**BY PETER DE VENA FRANKS
WILL AID**

SCOOBY-DOO AND THE RESISTANCE TO CHANGE MYSTERY

By MARTYN BEST
DOCUMENT DIRECT

Scooby-Doo is an all-time children's favourite cartoon, based around the premise of a group of four teenage sleuths plus their wonderful dog, Scooby-Doo, always finding themselves in situations of grave danger and supernatural situations.

Each story has the same plot line, which, following the initial introduction of a very strange incident, deep suspicion is followed by careful investigation and ultimate understanding and the culprit is usually unmasked as the janitor of the school or the administrator or curate lurking in the background.

The balance of the opening serenity is always quickly disturbed by uncertainty and insecurity, but there always emerged a happy ending to these situations – and a period of enlightenment and calm.

However, come the next episode all the same anxieties and concerns and dread about the new situation materialised, and the lessons learned from the previous episode when an innocent explanation was uncovered were all forgotten.

This reminds me so much of people's attitude towards any sort of change that they encounter.

These changes, and the legal sector is far from immune, include new services, new software, new case management systems, new technologies, remote ways of working – and in fact any change of any type which disturbs the comforting status quo.

Often there is the same feeling of dread that the Scooby-Doo crew encounter at the start of an episode; but then after a period of investigation, a period of uncovering and discovery, a period of training and a period of familiarity with the new circumstances there is always a happy outcome and off we go into the better, much improved new world.

But...when the next change comes along, do we remember all of that happy outcome? Or do we encounter those same feelings of dread and anxiety that often result in a reluctance to adopt and adapt to the new change?

So, can we learn anything from the Scooby-Doo team, and can Shaggy, Fred, Velma and Daphne teach us anything about how we can approach new changes, new services, new facilities, and new support?

Well, perhaps we can, and perhaps next time if we do reflect on that last occasion when the dreaded new approach was unveiled or when something challenging appears, let us just remember the last experience, and that there is nothing to worry about.

Do not be afraid - remember that at the end of every episode, the team triumphed and Scooby celebrated with his outsize Scooby snacks. So the next time that change comes knocking, be sure to channel your inner Scooby-Dooby-Dooooooo – and enjoy the Scooby snacks – whatever the new flavour may be!

Martyn Best is CEO of Document Direct, the UK's leading digital dictation, typing and transcription service, and he deals with the issues of change management on a daily basis.

Call him on 07798 700500 or email martyn.best@documentdirect.co.uk



IT'S NOT THE DRILL YOU WANT – IT'S NOT EVEN THE HOLE THAT YOU THOUGHT YOU BOUGHT THE DRILL FOR – IT'S ULTIMATELY ABOUT FREEDOM AND JOY.

By MARTYN BEST
LEGAL RSS

Theodore Levitt, was one of the 20th century's great economists, marketing observers and Harvard Professor.

He is particularly well-known for the great quote: "People don't want to buy a quarter-inch drill, they want a quarter-inch hole."

It's an entirely useful philosophy to have for anyone wishing to understand their customer and client needs, and if you're a lawyer, it's worth applying in a number of ways. A client doesn't ever want legal advice – they want a new house, they want to buy a business, they want a divorce ...

May I now offer a fresher perspective on this philosophy, inspired by Tim Ferris and Seth Godin.

Seth tells us that we don't actually even want that quarter-inch hole. We don't actually even want the rawplug to put into the hole to help put a screw into. We don't actually even want the shelf that you would place on top of the screw that you've just put into the rawplug that is in the hole in the wall for which you thought you needed a drill bit for.

And – we don't even want the shelf which you will use to place all of those books on that had previously been cluttering another corner of your room.

No – what you do need is the peace and harmony, and the joy and the love that comes from your spouse, or your internal critic, for creating that sense of tidiness and thoughtfulness.

Just like your own clients who will be wanting personal satisfaction, greater resources, freedom from an issue, and the ability to do more of what they want to do.

Whilst this new insight and perhaps new philosophy seems really straight forward once you have embraced it, it may not be easy to take the few steps backwards from the end result – but doing so will give great insights into why clients and customers want to use our services.

If you'd like to read the inspiration for this article: <https://tim.blog/2018/11/05/the-tim-ferriss-show-transcripts-seth-godin/>

Martyn Best is CEO of Legal RSS – the people who will put the news in
your NEWS BUTTON

Call him on 07798 700500 or email martyn.best@legalrss.co.uk



GUEST FEATURE

RECOVERY LOAN SCHEME: A VITAL FINANCE OPTION FOR FIRMS



BY CHRIS MCLOUGHLIN
BATHGATE BUSINESS FINANCE

GUEST FEATURE

“Over the last eighteen months it has, at times, felt like good news has been in short supply. For businesses affected by the pandemic, uncertainty has cast a shadow over many of the positives and even as we move closer to ‘normality’ this remains true.

When Bathgate Business Finance was approved as a Funding Circle CBILS Business Champion in May 2020, it allowed us to help many businesses - large and small - to access a financial lifeline.

Combining our strong relationships with professional introducers, traditional and alternative funders and SMEs, our team’s expertise across banking, invoice finance, asset finance and property finance, enabled us to quickly gain a deep understanding of the CBILS market and how it would interact with different types of finance solutions and also funders’ individual requirements.

By the time the scheme closed last month we had surpassed more than £30million in CBILS written, supporting 141 businesses in the North West and beyond. Many of the businesses we supported had previously been declined CBILS by banks and traditional lenders, had not been aware they were eligible, or did not fully understand the scope of solutions available.

Some of the more complex and significant deals brokered included a £430k CBILS funding for two agricultural clients, a challenge given some funders’ lack of understanding of farm finances; £450K asset finance for a client who initially did not feel they would qualify for CBILS and £370K asset finance and £250K loans for a client, having also negotiated a £1.8M non CBILS loan with a bank.

As we start to emerge economically from the pandemic, it is easy for businesses to feel like the financial rug is being pulled from beneath them, particularly with repayments on CBILS and BBLs being due and the end of the furlough scheme looming. However, this is not the case.

Bathgate is once again working with Funding Circle on the new Recovery Loan Scheme (RLS).

We see this as a vital finance option for businesses seeking finance, and key features of the scheme - such as no debenture and criteria regarding DG’s - make the loans more attractive and do not restrict the future finance requirements of SMEs.

The RLS scheme aims to help businesses affected by COVID-19 and can be used for any legitimate business purpose, including managing cash flow, investment and growth. Once again, we are seeing that people are unclear on the criteria, unsure if they are eligible or simply unsure where to start, especially if they have received prior government support.

In many/most cases, armed with the right knowledge and connections, there is a way to secure the funding. In the last week alone, we have submitted 10 loan applications, four asset finance applications and an invoice finance application, with a total requirement of more than £3.9 million.

The scheme is still coming into its own, but our team is repeating the approach we took with CBILS, proactively contacting funders to establish their terms. As we submit more RLS applications, we will learn more about the scheme’s criteria and requirements, therefore enabling us to better advise and support clients, and improve their chances of securing finance to meet their needs.

Just like we were able to step in to help new and existing clients weather the storm through the CBILS scheme, the same is true now through the RLS. We also have access to alternative finance solutions and own-book lending. The schemes may be changing and uncertainty may be casting its shadow again, but our commitment to providing the best service and delivering the best solutions remains.”

Bathgate Business Finance has three decades’ experience in providing finance support to law firms at all stages of their development. For further information about the Recovery Loan Scheme or other finance options, please contact Chris McLoughlin on 0151 625 7323 or email proposals@bathgatebf.co.uk

Free Webinars

We offer a number of free webinars which are designed to meet popular demand.

Throughout 2021 we are offering a series of online training events for legal practitioners.

In July 2021 we are hosting the following free webinars:

Criminal Law - Protest Rights: Common Offences, Common Defences And Injunctions

Thursday 1 July 2021 at 1pm

In this free 1 hour webinar, Richard Brigden and Mira Hammad of [Garden Court North Chambers](#) will summarise some of the common offences used to charge protestors and some common defences that can be employed in response. They will also summarise recent injunction cases involving protestors.

Registration

Immigration & Asylum - Begum And Beyond: What Is Next For Deprivation Appeals?

Monday 5 July 2021 at 1pm

In this free 1 hour webinar, Helen Foot of [Garden Court North Chambers](#) will consider the recent Supreme Court judgment in *Begum v Secretary of State for the Home Department* [2021] UKSC 7 and its implications for deprivation appeals in the First-tier Tribunal and SIAC. It will cover the *Begum* judgment itself, and consider common issues in deprivation appeals concerning both deception and national security issues.

Registration

Immigration & Asylum Support / Age Assessment - Turning 18 From An Immigration And Housing Law Perspective

Wednesday 14 July 2021 at 1pm

The transition to adulthood for young people and care leavers can be made difficult by the medley of services, legislative frameworks and the fact that many care leavers are expected to make that transition at the age of 18. For obvious reasons, the transition to adulthood is often particularly difficult for

unaccompanied asylum seeking children.

In this free 1 hour webinar Ciara Bartlam and Vijay Jagadesham of [Garden Court North Chambers](#) share their views on how to ensure a smooth transition to adulthood for young people and care leavers, especially those seeking asylum.

Ciara and Vijay will cover the inter-related issues of age assessment challenges, discretionary leave and leaving care.

Registration

Discrimination - Common Problems – Limitation

Wednesday 21 July 2021 at 1pm

In this free 1 hour webinar, Sonia Birdee of [Garden Court North Chambers](#) will provide a guide of what to do before limitation expires and what you can do afterwards.

Registration

Which Structure Should I Choose When I Set Up A New Firm

Thursday 22 July 2021 at 1pm

With so many structures available to choose from – sole practitioners, partnerships, LLP's, Limited companies, it's hard to know which one to choose when setting up a new firm. There are various considerations that should be made, including growth, entering and exiting partners and also the tax implications.

In this free 45 minute webinar, Paula Wheatley, an associate partner of [Charnwood Accountants and Business Advisors LLP](#) will discuss the options available to you.

Registration

Upcoming Free Webinars

Details of all of our upcoming free webinars can be viewed on our [website](#).

We hope that these events will be well received and help legal practitioners keep abreast of legal and professional developments.

Learn More



Recorded Webinars

Since March 2020 we have delivered a number of free webinars on various topics, including Anti-Money Laundering, Peer Reviews, Conflicts of Interest, etc. Recordings and slides of most of our previous webinars can be viewed on our [website](#).

Learn More

CONVEYANCING MARKET TRACKER

Q1 2021 EDITION

CONVEYANCING CRUNCH DEEPENS AS THE PROPERTY MARKET RECOVERS BY DOUBLE IN Q1

- Q1 2021 transactions were up 193% on Q2 2020 after the shutting down of the property market caused transactions to slide to 82,385.
- Strong trading conditions have led to a sustained recovery in the number of active conveyancing firms – active firms climbed 4% to 3,962 in Q1 2021, up from 3,808 in Q4 2020.
- Number of transactions completed by the average firm rose 21% over the last quarter to 61, underlining the scale of orders conveyancing firms are having to cope with.

01 June 2021 – The number of property transactions registered in England and Wales climbed 26% over the last quarter, rising to 241,916 in Q1 2021, up from 192,063 in Q4 2020, according to our latest edition of the **Conveyancing Market Tracker**.

This is the first time quarterly transactions have topped pre-pandemic levels since the onset of Covid-19.

Conveyancing volumes reached 241,916 in Q1 2021, up 2% from 236,641 in Q1 2020. Q1 2021 transaction volumes were almost double (up 193%) those recorded in Q2 2020 after the shutting down of the property market caused transactions to slide to just 82,385.

Surging property transactions since the first lockdown can be partly attributed to the Stamp Duty Land Tax (SDLT) holiday, introduced in July 2020. This triggered a wave of home purchases as buyers rush to capture the financial benefits on offer.

Our analysis shows January 2021 represented the busiest month of the quarter, with 86,130 transactions occurring, the highest monthly total since November 2019. There was a slight dip in February 2021 to 76,239 transactions, likely resulting from uncertainty over whether the SDLT holiday would be extended beyond March, as well as the impact of the return of lockdown conditions over Christmas and the New Year.

“CONVEYANCERS HAVE BEEN RUNNING HOT TO HELP GET CLIENTS’ TRANSACTIONS OVER THE LINE SINCE THE STAMP DUTY HOLIDAY WAS FIRST ANNOUNCED. OUR ANALYSIS SUGGESTS THAT THE COST OF PROTECTING THE PROPERTY MARKET HAS BEEN INTENSE PRESSURES ON REAL ESTATE LAWYERS. HIGHER AVERAGE TRANSACTION VOLUMES ILLUSTRATE THE GROWING WORKLOAD CONVEYANCERS ARE HAVING TO SHOULDER, WHICH HAS PUT A HUGE STRAIN ON THEIR WELLBEING AND PRODUCTIVITY.”

Andy Sommerville,
Director of Search Acumen

GRAPH 1: NUMBER OF QUARTERLY TRANSACTIONS SINCE Q1 2019



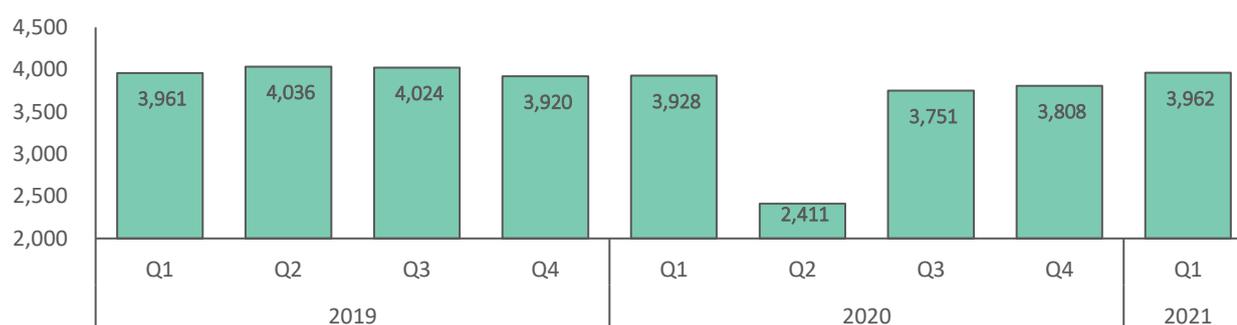
Number of Active conveyancing firms continues to climb from 2020 lows

High activity levels in the market have contributed to a sustained recovery in the number of active conveyancing firms. Active firms climbed 4% over the last quarter to 3,962 in Q1 2021, up from 3,808 in the previous quarter.

Stronger trading conditions have helped push the number of active conveyancing firms above pre-pandemic levels for the first time, with levels now exceeding the 3,928 firms that were in operation during Q1 2020. Comparisons to Q2 2020 illustrate the pace of the market’s recovery, where there were just 2,411 firms active. Q1 2021 figures represent a 64% increase from the heights of the pandemic.

The number of transactions completed by the average firm rose 21% over the last quarter to 61 per month, underlining the scale of orders conveyancing firms are having to process amid strong demand in the property market. This is a considerable jump from when the pandemic took hold in Q2 2020, which saw average caseloads drop to just 34 per month. Since then, average transactions have increased, with Q1 2021 representing the pinnacle of activity being handled by conveyancers since the pandemic began.

GRAPH 2: NUMBER OF ACTIVE CONVEYANCING FIRMS SINCE Q1 2019



MARKET COMMENTARY

Andy Sommerville, Director of Search Acumen, comments:

“This data indicates that the growth of the property market shows no signs of slowing down. Government stimulus measures, compounded by cheap mortgages and stronger demand for larger properties that provide more green space and opportunities to work from home more comfortably, are the key factors behind the bounce-back in transactions.

“Conveyancers have been running hot to help get clients’ transactions over the line since the Stamp Duty holiday was first announced. Our analysis suggests that the cost of protecting the property market has had intense pressures on real estate lawyers. Higher average transaction volumes illustrate the growing workload conveyancers are having to shoulder, which has put a huge strain on their wellbeing and productivity.

“The extension of the Stamp Duty holiday is likely to have a more muted impact on demand in the property market in the medium term. Since a large proportion of activity has been driven by buyers who have relatively higher amounts of housing equity and are now likely to have completed transactions, the pool of prospective buyers in the market has shrunk, which will result in a downward pressure on demand.”

“Despite this, lawyers have a huge task ahead of them to clear the backlog of transactions that have piled up and help homebuyers achieve their dreams before the window shuts. While many firms have embraced digital ways of working to manage during Covid-19 restrictions, we urge the sector to prioritise a digital-first approach as we look to the future. Through modest investment in digital solutions and training to upskill workers to improve their technological proficiency, firms can capture productivity gains and deliver a more efficient service to clients. These workflow improvements will make the transaction process far more seamless; help get people into homes quicker and make the sector more resilient to future shocks.”



Andy Sommerville is the Director at Search Acumen. His 35 years of experience in property searches spans both public and private sectors. He is committed to advancing government’s digitisation drive and to using technology to deliver products and services for the next generation of property law.

NOTES TO EDITORS

METHODOLOGY

The Conveyancing Market Tracker examines competition in conveyancing by analysing business activity among those firms holding Land Registry client accounts, as well as assessing commercial pressures and the outlook among conveyancers. The Tracker was designed by Instinctif Partners. While care is taken in its compilation, no representation or assurances are made as to its accuracy or completeness.

For more information or media enquiries, please contact Malini Parkash or Jack Barnett at Instinctif Partners on **0207 457 2020** or searchacumen@instinctif.com



www.linkedin.com/company/search-acumen



twitter.com/SearchAcumen

ABOUT US

Search Acumen is a property data insight and technology provider to conveyancers, solicitors and commercial property lawyers across the UK. Since taking its first order in October 2013, we have become the data supplier of choice for many leading residential and commercial firms.

Our business is dedicated to transforming the information processes to enhance and accelerate the practice of property law by delivering organised and prioritised property data. Our growth and success rests on working with data owners to understand, shape and deliver datasets that are essential and insightful for the next generation of property lawyers.

Our leadership team pioneered the original concept of property searches and built an entire industry in the process. Today we provide legal professionals with digital access to over 20 layers of essential property data on-demand, and work closely with HM Land Registry and other forward-thinking organisations to revolutionise the experience of buying and selling property. Our Managing Director Andrew Lloyd is a founding member and board director of the UK PropTech Association and featured prominently in LendInvest’s most recent Top 25 PropTech Influencers.

GUEST FEATURE

THE NEW RICS HOME SURVEY STANDARDS



BY CHRISTOPHER LEWIS
DEESURVEYS LTD

GUEST FEATURE

It is an exciting and busy time in the world of surveying with the stamp duty holiday still in effect and business for residential surveys booming as a result. On top of that this year the RICS has introduced their new RICS Home Standard Reports which began in March of this year with a transition period from the old to the new to end on August the 31st. They are intended to increase consistency, transparency and competence across the UK's residential surveying market which will help to grow understanding and confidence of the services provided by Britain's surveying industry.

The changes originate as a result of research by a group put together by the RICS in 2018 to look at the entire home survey guidance suite. Through their research they determined that the service and standards of home survey practitioners was not consistent and that there was no mandatory guidance on home surveys. This along with a general lack of knowledge or understanding of the types of surveys available by consumers needed addressing and this led to the new system.

The simplest and most obvious difference now is that the old titles to describe the various types of residential property survey that an RICS chartered surveyor might issue (the most recognisable being The Residential Building Survey, the RICS Homebuyer Report and the RICS condition report) have been replaced. Now there is a levelled system which will allow a client to better understand the depth to which a survey will go. There are three new levels with the extent of investigations and the depth of the report becoming greater as the level increases.

At level one (the former RICS Condition Report) the survey will provide a basic overview of the condition of a property. It is best used for modern properties built via conventional means.

The new level 2 surveys act as a replacement for the RICS Home Buyer Report. This level of survey is intended for use to determine the general condition of the property and where required its price (the new level 2 survey comes in two varieties, one with a valuation and one without).

Level 2 surveys cover a broader range of buildings and building types than the level 1 survey but they are unlikely to suit use on surveys for older (built before the 1850s) or unique buildings or those in a neglected condition.

Level 3 surveys are the most detailed assessments under the new system. They endeavour to provide assessment on all elements of a property and an assessment of defects including their scope, timescale for repair and cost. Where possible the advice is intended to be of such a level that further investigations should not be required, but if the Surveyor is not able to come to sufficient conclusions on a fault, then further investigations will still be advised. Unlike the level 2 survey, a level 3 survey would see most use on properties in a poor condition, of unique design or of a significant age (pre - 1850s).

The new levelled system for Home Surveys remedy many of the problems identified as a result of the 2018 research group's findings. The new reports demonstrate a growth in the Surveying sector that prioritises the customer and their understanding of the service provided by Surveyors. Through this new system the RICS has demonstrated commitment to high standards and a drive to improve the services of Surveyors everywhere going forward into the future.

For more information on these new surveys please follow the link below:

<https://www.rics.org/globalassets/rics-website/media/qualify/home-survey-standard-nov-2020.pdf>

HOW CAN I SPEAK TO MORE CLIENTS, WHEN I CAN'T WORK ANY HARDER?

By **MONEYPENNY**

There aren't enough hours in the day.

It's something we all complain of and for many, the pandemic has exacerbated the issue. The rise in 'e-presenteeism' that's come with remote working, the shift in consumer communications and the commercial pressure to 'bounce back' presents a triple threat and it's leaving many solicitors stressed and burnt out.

Mental Health Awareness Week magnified the issue and the need for long-term changes to promote and protect workplace wellbeing. But how can we ensure the client experience and bottom-line doesn't suffer in the process – particularly when demand for conveyancing and family law services is currently sky high?

Bernadette Bennett, Head of the Legal Sector at Money Penny, which provides telephone answering and live chat support to more than 1,000 legal firms across the UK, shares her advice.

1. Know when to be unavailable

This feels counterintuitive particularly when solicitors want to capitalise on demand, but you can't do it all. Sometimes you need to be unavailable in order to get work done. Review your diary and consider which times each day or week need to be set aside for focused work. Notify your in-house or outsourced switchboard teams that you're not to be disturbed so they can pick up all calls, take messages and if briefed properly, actively manage new enquiries while you're busy elsewhere. You can then return calls when you're free.

2. Don't be limited by the 9-5

In a 24/7 age, consumers do not feel the constraints of traditional 9-5 office hours and will reach-out to professionals at all times of day and night. Smart phones have put the research process into the palm of their hand and given them the means to contact solicitors at all hours, from anywhere.

Outsourcing call handling and live chat eliminates the worry of providing round-the-clock in-house resource and can offer a consistent 24/7 service using clients' preferred channels. It also means you can be speaking to new clients and potentially winning new work while you and your team sleep.

3. Use other tools to give you space AND win you work

Make your website a more valuable resource for clients and prospects so you don't have to call on your inhouse resources. A well-timed live chat pop-up can help to turn website visitors into potential new clients, answer FAQs and capture salient information so that when you do pick up the phone, it's a pre-qualified lead. It can also help to keep volume away from the phone – which means less noisy distractions. The instant nature of live chat has made it extremely popular with consumers and enquirers tend to offer more personal information through this medium than any other marketing channel. This presents an opportunity to build rapport, improve client understanding and drive service innovation.

It's no secret that when you feel in control of your workload you are more productive and therefore, typically, happier. Striking a balance between a culture of wellbeing, commercial success and loyal clients is the only way to future-proof business and protect your mental health in a post-pandemic world. There are only 24 hours in a day – use them wisely and you'll reap the rewards, financially and emotionally.

THE IMPACTS OF THE INSURANCE DISTRIBUTION DIRECTIVE ON CONVEYANCERS ARRANGING LEGAL INDEMNITY INSURANCE

By CHRIS DOWLING
DUAL ASSET

It is now well over two years since the Insurance Distribution Directive (IDD) came into force on 1 October 2018, bringing a number of fundamental changes for conveyancers who need to arrange insurance. Both the SRA and CLC introduced new rules for firms undertaking insurance activities, which can be reviewed here and here, respectively.

The IDD is designed to ensure a level playing field across all those providing, facilitating and arranging insurance products, and seeks to strengthen customer protection. The rules apply to all firms that sell, advise on or conclude insurance products, including legal indemnity policies, making them applicable to all firms undertaking conveyancing.

The new directive introduced:

- Enhanced and reconfirmed general principles for insurance distributors, intermediaries and cover holders to act fairly and in their customer's best interest
- Requirements to communicate in a manner that is clear, fair and not misleading and to ensure that remuneration does not conflict with the duty to act in the customer's best interest
- The Insurance Product Information Document (IPID) – a simple, industry wide standardised insurance document, which aims to provide consumers with clear information about the product they are purchasing enabling them to make more informed decisions.

The answer is that any firm that relies upon a single insurer to provide insurance for its clients is limiting their clients' options, which may potentially expose them to an allegation of breaching their obligations under IDD. The firm will need to demonstrate that it has reviewed the terms and products offered by a range of insurers, and are satisfied that one insurer is best suited to meet the demands and needs of its clients. That is a tall order given the large number of legal indemnity products now available, premium terms on offer and the product differences between insurers.

With a historically limited choice of providers in this area, it could be challenging and time consuming to obtain a sufficiently wide choice of comparison quotes/products but this is no longer the case. In recent years, the market has developed significantly with an ever-increasing number of insurers providing greater competition and a range of products relevant to the ever-changing needs of the marketplace.

Whilst insurance products must be 'fit for purpose' and acceptable to lenders, it would be unwise to think that price is not also a major consideration for clients, particularly if a similar insurance product is available elsewhere at terms that are more competitive.

From meetings and conversations with a wide range of conveyancers it would seem that, in spite of the introduction of IDD, there remains much uncertainty about how far firms have or should embrace the new regime. Whatever stance a firm adopts, it is clear that conveyancers are still under intense pressure to get transactions over the line, and arranging legal indemnity insurance need not be seen as an onerous and time-consuming part of the process.

However, IDD clearly has the interest of clients at its core, and as such, conveyancers are duty bound to consider this when choosing any necessary insurance policies.

DUAL Asset's online portal www.my-legal-indemnity-shop.com is one of the more recent innovations, making it very easy for property lawyers to obtain and compare a range of insurance products from competing A rated insurers. It gives them the ability to procure up to four quotes on a single portal, usually taking no more time than it takes to obtain a single quote elsewhere.

Conveyancers save much needed time and their clients are offered a choice, helping to meet the requirements of the current IDD regulations.

NET ZERO LEADERS



Here at Celtic Financial Planning, we're committed to conducting business in a more sustainable way.

We're passionate about supporting our local communities and the environment. That's why we have just been named Net Zero Leaders 2021 by the North Wales Mersey Dee Business Council as well as being crowned 'Business of the Year' by Mold Town Council.

We continue to provide our clients with our award-winning Advisory Service, our Model Portfolio Service and now, we are pleased to announce the addition of our all-new Ethical Portfolio Service.

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The increased uptake in investors looking to invest their savings in a more environmentally friendly and socially responsible manner has been one of the few bright points to emerge from the wake of the ongoing pandemic. As with all trends, people seize the opportunity to make a quick buck. We've seen the emergence of 'ESG' funds flood the market in response to this increased demand and we are quick to spot an investment that doesn't deliver on its' green promises.

That is why we are keen to vet any proposed investment solutions with our clients to ensure that they are investing in line with their tailored preferences.

If investing in an ethical solution sounds like something you would be interested in. Or if you simply want to review the suitability and efficacy of your existing pension provision, please do not hesitate to get in touch. We offer all new clients a free initial meeting, where we strive to give you the best transparent and honest financial advice.

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HMCTS UPDATE FROM THE LAW SOCIETY

Digital divorce service update – June 2021

Earlier this month our Justice team met with representatives from HM Courts and Tribunals Service to discuss progress with the development and take up of the online divorce service. Conversations focused on:

The represented respondent journey
Notices of change of solicitor
Refunds on consent orders
Contested financial remedy applications
Online divorce service mandated for solicitors from September 2021.

You can read the full summary, which includes links to relevant resources, here: <https://www.lawsociety.org.uk/campaigns/court-reform/news/update-on-digital-divorce-service-june-2021>

HMCTS launches 2021 communications and engagement survey

HMCTS is gathering feedback about how it communicates and engages with professionals who work in courts and tribunals.

We are asking professional court and tribunal users (such as legal professionals, the advice sector, contractors and the police) to complete a short survey about how we communicate and engage with them about the work of our organisation, including about reform, recovery and day-to-day operations.

From our use of social media and GOV.UK to blogs and e-bulletins, working groups, forums and webinars, we use lots of different ways to communicate with people who work in our courts and tribunals.

- are we using the right channels to reach the right people at the right time?
- are we providing the right level of detail about the things those working in the justice system want and need to know about the organisation?
- what could we do better?

The survey is open for a month and should take around 15 minutes to complete. Feedback will help us to improve what we do.

You can access the survey from here: [HMCTS Communications and Engagement Survey](#).

All responses will be treated anonymously and in the strictest confidence. We will not be able to identify participants from the information they provide.

CONNECTING SOLICITORS - LOCAL LAW SOCIETIES VIRTUAL MEETING

By EMILY LITTLEHALES
VICE PRESIDENT OF CHESHIRE AND NORTH WALES SOCIETY

Networking for me has been the fabric of my business at Celtic Law Ltd. It is how my client base started, and how it continues to grow.

However, what about networking with your connections in the legal profession? How can that help you develop?

I think it's fair to say that we can be quite a competitive profession. As I entered the profession (a few years ago now...!) the one thing I noticed was how little contact I had with other solicitors outside of the working environment. I sometimes feel that we don't always network and connect enough as a profession.

This is why I am so pleased to be part of the Cheshire and North Wales Law Society – we work very hard to facilitate those connections.

As a Sole Practitioner, I am enormously grateful to my friends and connections in the profession. To know I have trusted connections who understand or have been there, who I can pick the phone up and talk over a matter, a problem or otherwise is something I never take for granted. We are all in the same boat. It's a demanding profession and one which presents unique challenges.

On 27 May 2021 we were invited to attend the Local Law Societies virtual meeting. The Law Society and its engagement team have been fantastic, and this meeting was an opportunity to connect and learn from other local societies like us. The object of the meeting was for each local law society to present the 'most important issue for our members'.

For me, the really interesting thing was to hear other local law societies present their issue – and how we were all sharing concern about the same things:

1. The worry of the rising cost of Professional Indemnity Insurance and the difficulty in obtaining it
2. The closure of the Solicitors Indemnity Fund (noting there have been some developments since the meeting - the closure date has been extended for a year)
3. Access to Justice and the closure of local Courts
4. The availability of new/young solicitors qualifying into Criminal Law – particularly in certain areas of Wales
5. Respect – one society suggested that we ought to be campaigning for a Respect Mandate dealing with how clients and other third parties treat and speak to us as their lawyers
6. Concerns over the emergence of comparison websites

We decided at CNWLS that our key concern was dealing with the differences between the law in England and Wales and the fact our members are working very near to, or over, the borders.

This is unique to us operating in this part of the UK. The pandemic has really heightened the difficulties this presents, and there is a feeling that the devolution is not fully appreciated by the wider membership.

I came away from the meeting feeling comforted to know that what is worrying us (i.e. me!) is also worrying our peers. To me this validates why I think connecting with other members of our profession is so vital, whether you are a Sole Practitioner, Partner, Associate, trainee or anything in between. Sharing experiences is key.

I think I will end here by asking you all to look over the events that we have coming up, and encourage you to come along and connect – in person. Also, please make sure you are following us on Twitter and LinkedIn – we would love to hear from you.

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The founder of DEESURVEYS is a fellow of the Royal Institution of Chartered Surveyors and has over 34 years practical and management experience within the property surveying and property valuation field.



Data insight providers to conveyancers and commercial property lawyers, Search Acumen challenge industry convention by combining emerging technology and data. They are committed to re-engineering the property due diligence experience to help their clients work more effectively and efficiently to deliver better outcomes for their customers.



As a 'business to business' finance provider, our aim is to give our customers access to the best advice and funding we can. Whatever your business is, we would love to speak to you. We know the combination of business sector, finance requirement and reasons for funding are reassuringly diverse nowadays, and we'll always try and find business funding that's right for you.



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LegalRSS was founded in 1997 by Joe Reevy to provide consultancy services to professional services firms with a specific focus on techniques to improve profitability. Since then the business has developed and matured and now provides content to law firms throughout the UK.



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For more information about joining or renewing membership, contact:
Treasurer, Andrew Graves: andrew.graves@rowlinsons.co.uk