



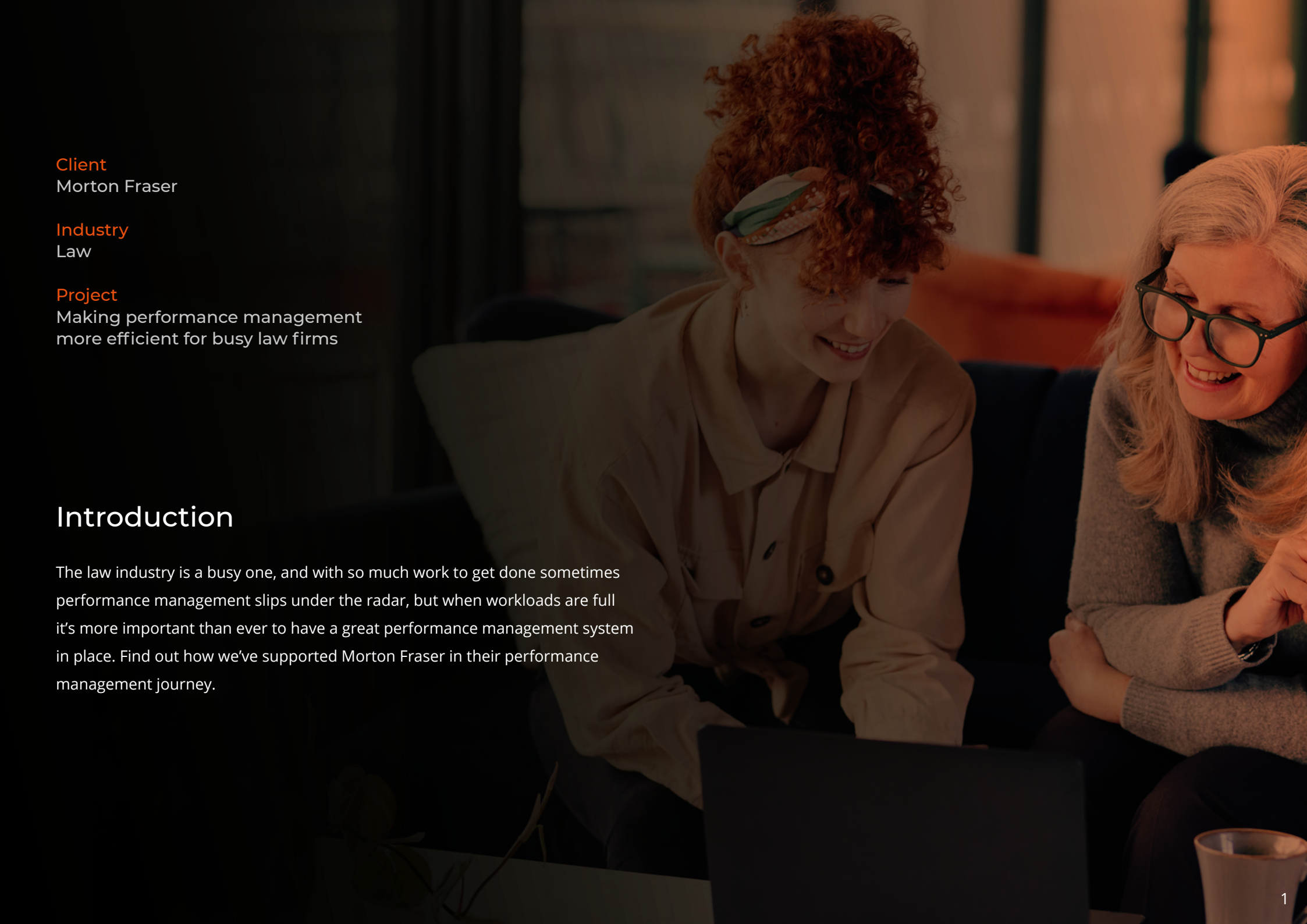
Law

Morton Fraser use performance management to focus on the things that matter



CASE STUDY





Client
Morton Fraser

Industry
Law

Project
Making performance management
more efficient for busy law firms

Introduction

The law industry is a busy one, and with so much work to get done sometimes performance management slips under the radar, but when workloads are full it's more important than ever to have a great performance management system in place. Find out how we've supported Morton Fraser in their performance management journey.

About Morton Fraser

[Morton Fraser](#) is one of Scotland's top law firms, and has been providing award-winning legal services to businesses, public sector, individuals, and families for many years. They are based in Edinburgh and Glasgow, have 215 employees plus 40 Partners, and were recently named one of the top 100 best companies to work for by the Sunday Times.

We spoke with Martin Glover, who has been the HR Director at Morton Fraser for 5 years. He spoke to us about the journey the firm took to improve performance management, and the benefits they have gained.

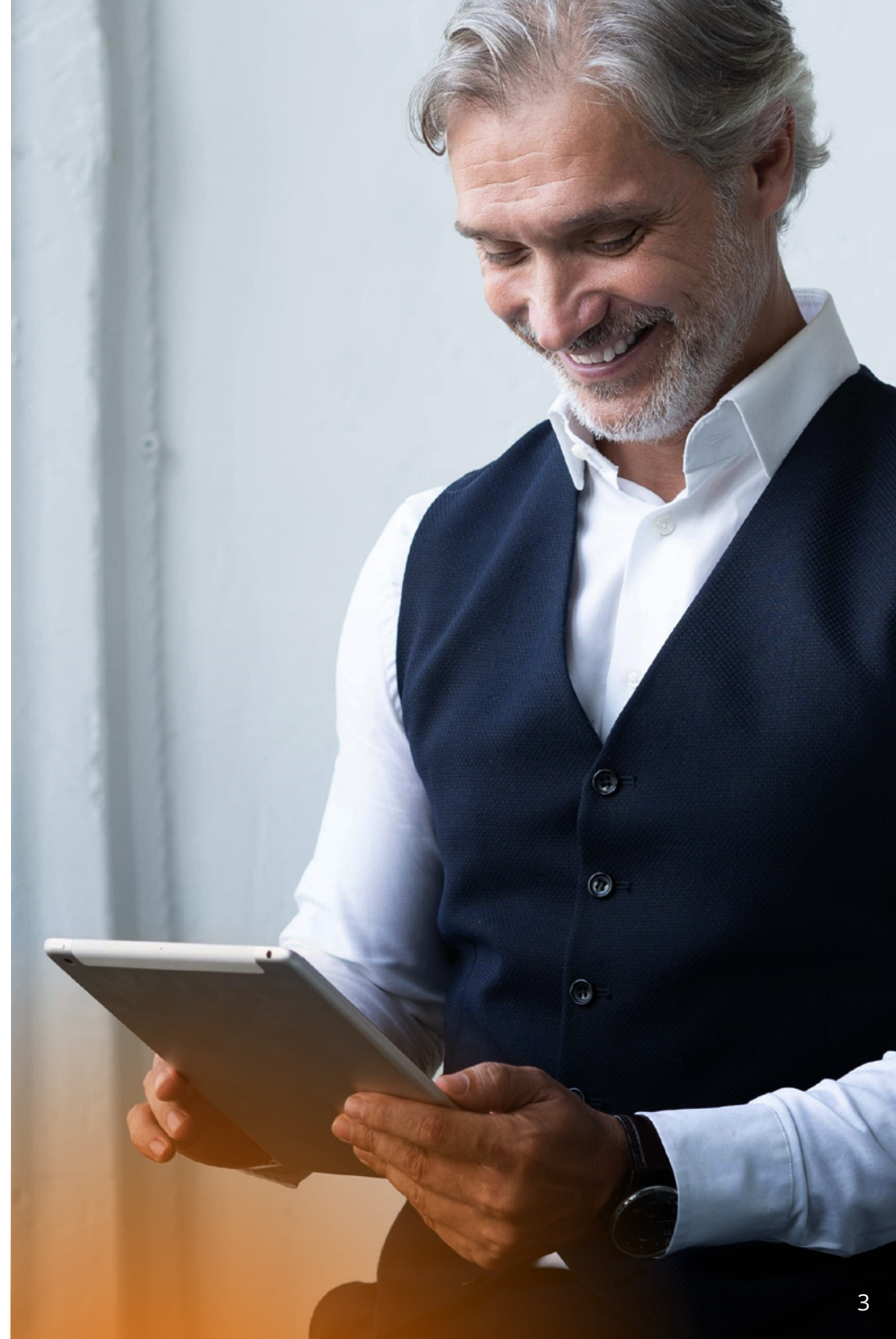


Redefining performance management

Martin remembers that when he first joined Morton Fraser, the firm had a very traditional approach to performance management. The process revolved around annual objectives and mid-term reviews and a final performance review that ended in the allocation of individual performance scores. These scores were hard wired to calculate the bonus each employee would receive. As a result, conversations were focused on bonus position needed to achieve a particular reward outcome rather than performance and development. Martin explained:

“The whole process reminded me of my time in the public sector in the 1990s. I felt that not much had changed here, it was as traditional as you could get. People who work in law firms love process, and they’d been doing performance management this way for a long time. I knew we could do better.”

That’s why Martin decided to make a change. He wanted to shift focus away from ratings and bonuses, and move on to supporting, and growing the potential of, people within the firm.





Why Advanced Clear Review?


Once the decision had been made to adopt a new system, Martin started to investigate Clear Review. He spoke about why he made that choice:

“I was already aware of the platform. I knew other organisations, like Virgin Money, who were using it and people spoke highly of it. These were professionals I respected from an HR perspective, and their success with the platform influenced me to consider Clear Review for our firm.”

Before purchasing, Martin wanted to trial the software. He found it easy to use, even though (in his words) he’s not the most tech savvy person. Because he found the platform so intuitive, he believed the firm’s users would have no issues adapting to the change.

Morton Fraser weren’t in a position to purchase Clear Review immediately, due to the line-up of the budgetary year. To fill the gap, Martin asked the sales team for some suggestions about implementing Clear Review type techniques into the business before the system was installed. Martin remembers the first steps they took:

“I trusted the product, and I liked the Clear Review team members we spoke to. They suggested beginning by implementing short term goals and monitoring performance and feedback, rather than just rating our employees. I took that advice.”

A photograph of two men in business attire, one with a beard and glasses, looking at a tablet together. The image is dimly lit with a blue tint. The text is overlaid in white.

“The first step was to set standard, but flexible, objectives for all of our fee earners. These could be revised if they did not line up with an individual’s workload and targets, so it was a positive way to get everyone started with using the system.”

Getting up and running

Due to the pre-installation changes already implemented, the Morton Fraser team were already familiar with a continuous performance approach when the time came to start navigating the software. Luckily, one of the most powerful aspects of Advanced Clear Review is ease-of-use. Martin recalled:

“We did live demos for our teams and sent an email around, but as it was so easy to use, there was very little requirement for training. The first step was to set standard, but flexible, objectives for all of our fee earners. These could be revised if they did not line up with an individual's workload and targets, so it was a positive way to get everyone started with using the system.”

These standard objectives incorporated elements like time recording, revenues billed, work in progress and client service delivery. They were pre-loaded into the Clear Review library, removing the pressure of deciding what goals to set by pre-defining the topics managers should be discussing with their team. These objectives weren't set in stone, they were simply used as a starting point for more meaningful performance conversations.

The next step for Morton Fraser is investigating the '9 soft skills' that make a great lawyer. These include skills like having a personal impact and managing difficult conversations successfully. They will soon be added to the system. These competencies are key to employee development. It's vital to look beyond day-to-day performance, and to start thinking about becoming more effective in the way we work.


What do the users have to say?

The partners and associates at Morton Fraser all have something different to say about the platform, but they believe it's been a successful transition. Everyone agrees it helps them to concentrate on the processes that have improved conversations and communication across the firm.

In a busy law firm it's easy to forget everything that has been accomplished and to just focus on the last few weeks. Users appreciate everything being recorded in the system because it has reduced recency bias during performance reviews. Now, managers can very clearly see the progress that's been made throughout the year. Martin said:

“We encourage everyone to use the system, but they don't need to use it in a manner we dictate. Instead, we encourage people to use Advanced Clear Review in a way that works best to help people improve their performance and focus on what really matters.”



A photograph of two women sitting at a table in an office or meeting room. The woman on the left, with dark hair, is speaking and gesturing with her hands. The woman on the right, with blonde hair, is listening attentively. The background is a plain wall with a window. The lighting is soft and warm.

“Having much better insight into the day-to-day performance of employees has been hugely beneficial. It helps us see who is doing really well, and those who are struggling and may need support.”

Managing pay and rewards with Clear Review

Moving away from bonus focused conversations has been beneficial for Morton Fraser, but they still needed a way to align pay and rewards with performance management. Clear Review has fully supported this process.

The firm now use the system to support talent reviews twice a year. The snapshots tool provides managers with 3 easy-to-answer questions that can be used to accurately measure employee performance. Combined with the information that has been gathered on Clear Review during goal setting, feedback, and check-in sessions, it is now much easier to fairly assess bonus payments.

The business case for talent reviews involves much more than just bonus allocation. Reviews can often highlight critical information such as the identification of those who may be ready for a promotion, or at risk of leaving the firm. Clear Review has been an outstanding success at Morton Fraser, and Martin believes it has improved the performance management process for everyone involved.

“Having much better insight into the day-to-day performance of employees has been hugely beneficial. It helps us see who is doing really well, and those who are struggling and may need support.

For the majority of staff, who turn up and do a good job every day, it lets us consider how we can help them develop and progress with us.

It’s great to really see the value that your workforce is contributing to your business.”



Overcoming time restraints

In the busy, often pressurised environment of a law firm, sometimes performance management can just feel like extra work. We asked Martin what his advice would be in terms of encouraging continuous performance management in other law firms. He replied:

“I have experienced push back from people, especially from busy managers and team leaders, who believe there isn’t enough time to engage with the platform. My answer to this is that leading, developing, and supporting people is your job as a leader - and this technology is going to help you do it better.

A system like Clear Review makes all of this so easy that you really don’t have the time not to be using it. The process motivates your employees, and this makes them better at their job.”



Advanced's software has successfully helped over 400 organisations switch from ineffective annual appraisals to continuous performance management - improving the wellbeing of their employees and revitalising their businesses.

Moving forward

Martin's next objective is to advance the firm's focus on learning and development. He thinks it's crucial that all staff understand performance isn't just about what they are doing now. Each individual needs to consider the career journey they want to follow, and to gain the skills and experience they need to achieve their aims. Having Clear Review, which supports actions around performance, development, and learning, will make employee progression much easier.

At Clear Review, we're excited to continue to support Morton Fraser as they progress on their performance management journey. We can't wait to see what they'll be doing a year from now.

If you'd like to find out how Clear Review could help with performance management in your organisation, [book a demo](#) with us today.





We would love to hear from you

We hope this was a useful insight into how the Morton Fraser Lawyers use Advanced Clear Review to streamline their operations, cut back on admin time and improve their performance management. If you would like to find out more about how Advanced Clear Review can help your business and ensure you are ready to meet the challenges of the future, book a demo or get in touch with us today.

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