



**SORAINEN**

A holistic  
data-based  
partner appraisal  
process

**WHY?**

Aku Sorainen  
TechTarget Oslo

15 January 2025

# About Personnel

(„From Good To Great“ by Jim Collins in 2001)

“Get the right people on the bus and the wrong people off and then figure where to drive the bus”

Do not waste energy to motivate people. Right people are self-motivated and the key is not to de-motivate them

What kind of  
a bus are we  
driving?

SORAINEN





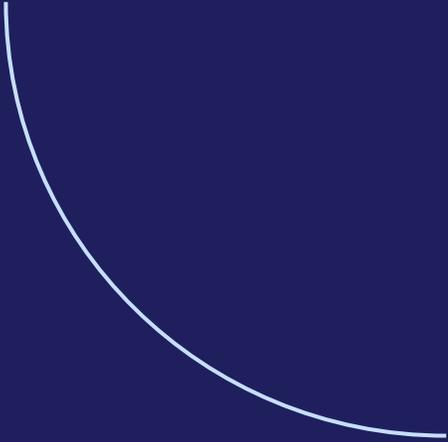


Regardless of the bus type EVERY partner has a steering wheel!



Does every partner drive to same direction  
at the desired way and speed?

„You get what you measure“



„How you measure partners’  
performance and reward them  
is the de facto strategy of your firm“  
(Inspired by Moray McLaren)

So what do we measure regarding partners' performance?

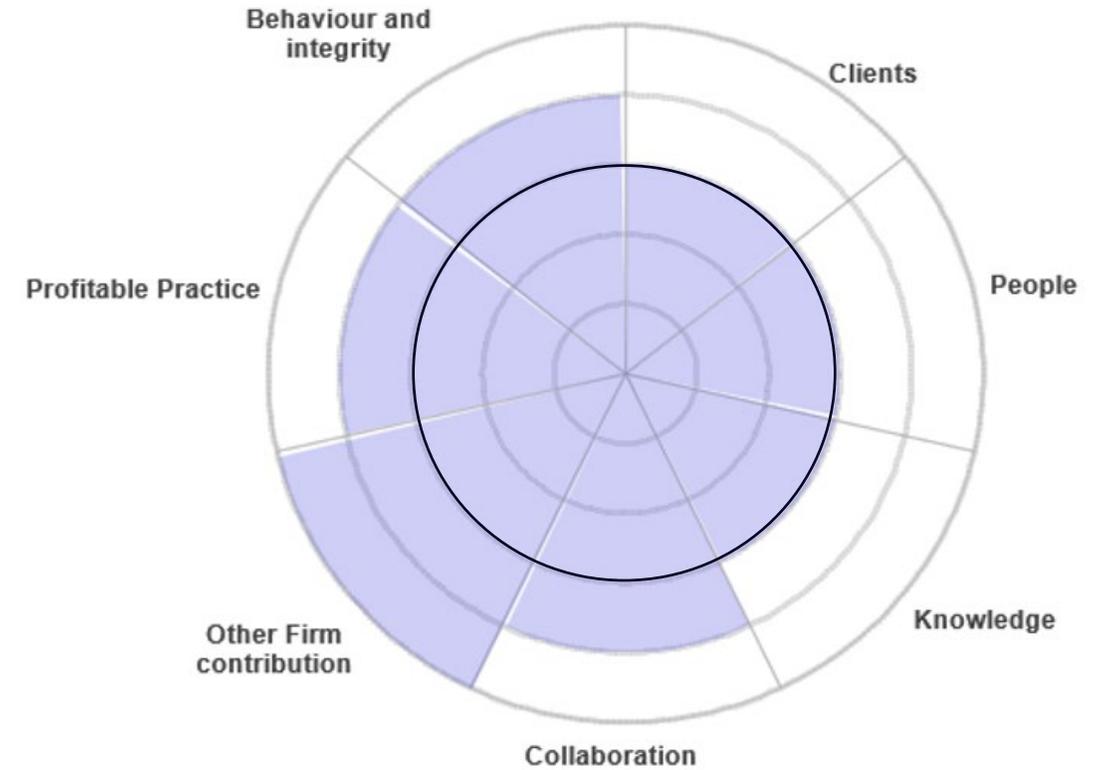
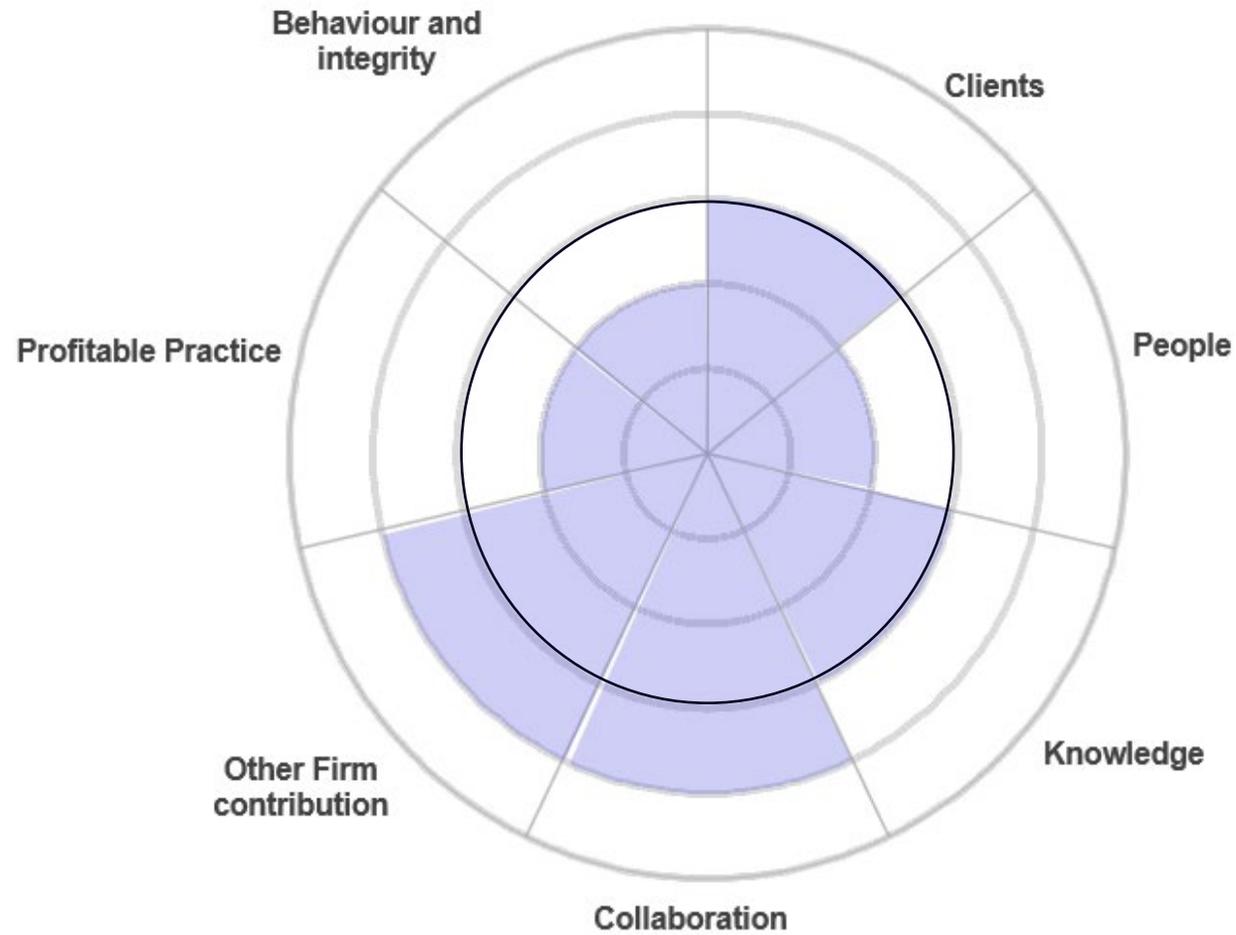
- Should we focus on a few „most important“ KPIs or try to have a holistic view of our partner's performance?



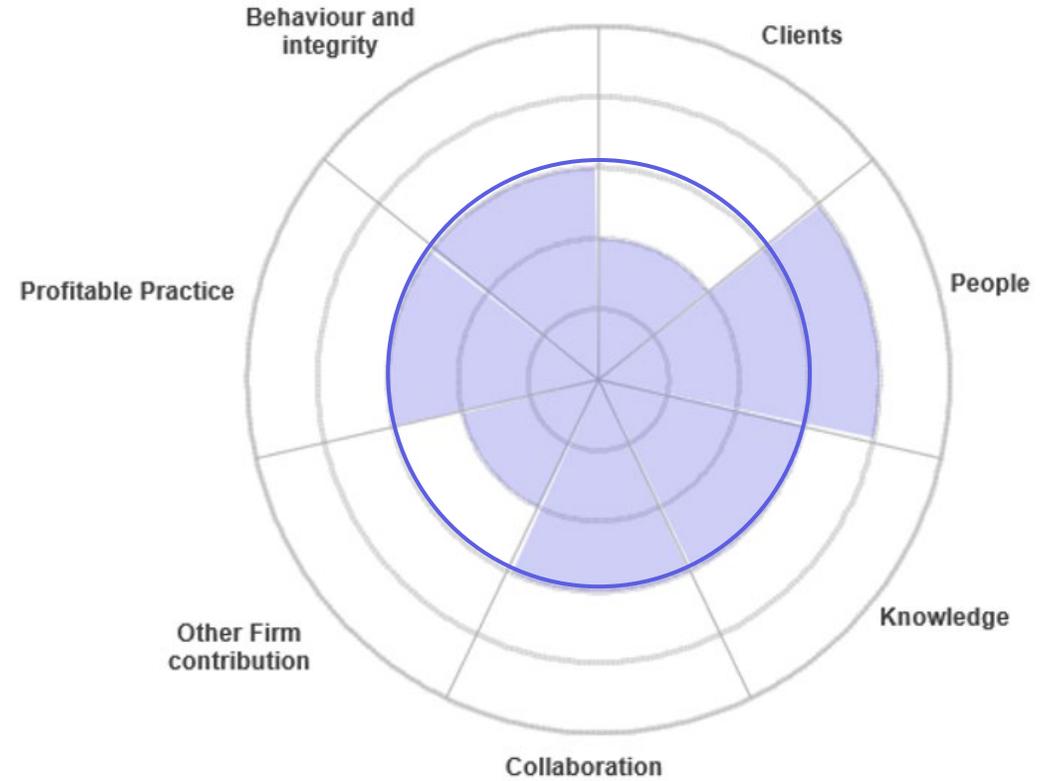
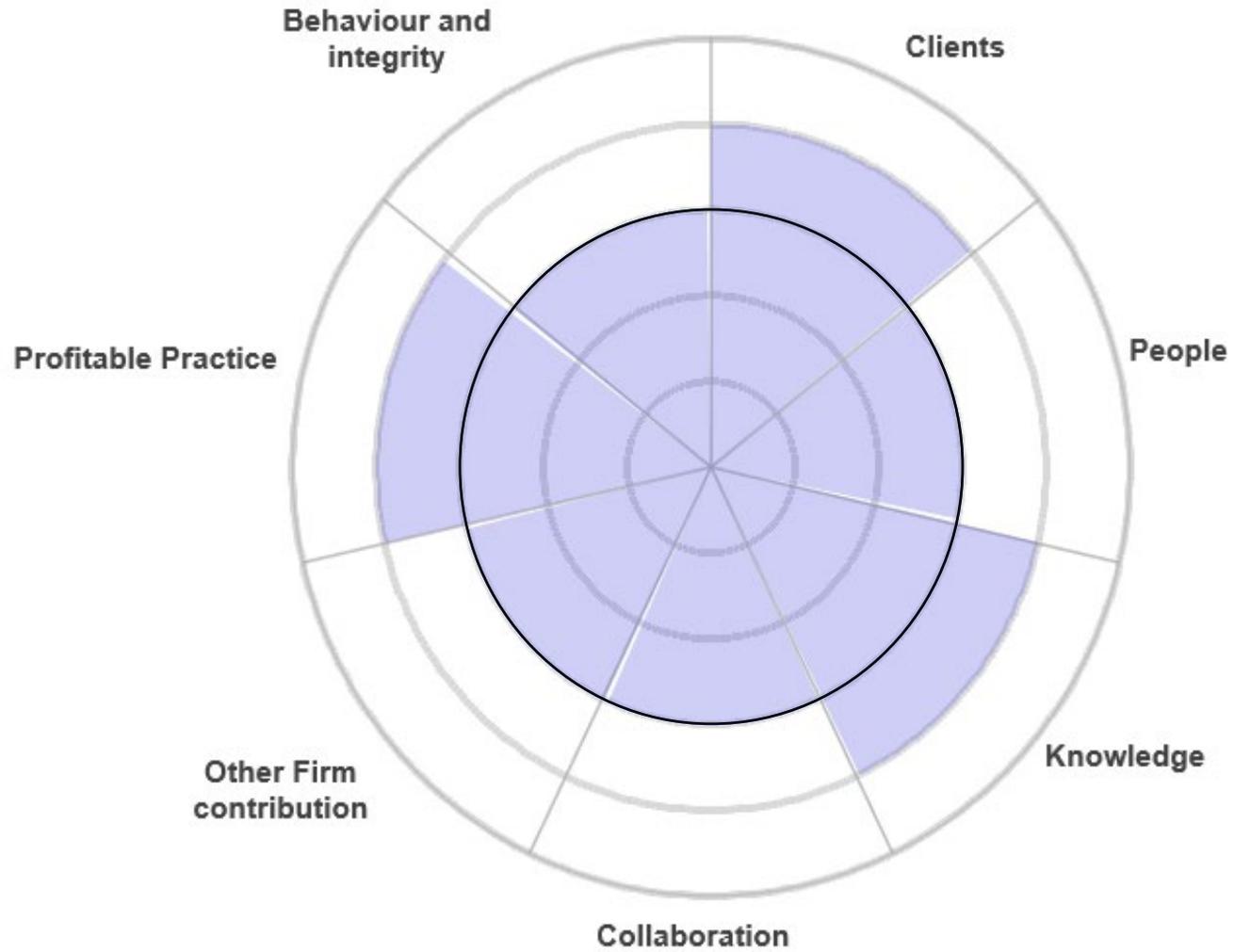
If the sensors provide the bus driver and the bus company with a „holistic view“ of the driver's performance, then

what is a holistic view of a partner's performance in a modern law firm?

# A real-life sample of a partner having some problems in 2022 vs. 2021



# A real-life example of a partner improving well in 2022 vs. 2021



# What are the data „sensors“ in a law firm?

## Hard Data (Quantitative)

## Soft Data (Qualitative)

### Legal Data samples

- Client matter outcomes
- Service penetration
- Partner's ranking in legal directories
- Use of KM „tools“

- Client Feedback
- High-quality BD meetings
- Debriefings registered
- Transaction Experience
- Outbound referrals
- Innovation

### Operative Data samples

- Utilization & realisation
- Partner's generated revenue
- Partner's generated profit
- Matter profitability
- Financial hygiene
- Collaboration: Cross-referred and supervised work

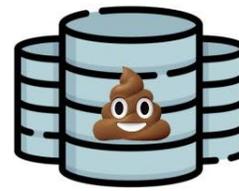
- Feedback on process inefficiencies.
- Personnel engagement
- Mentoring & Coaching
- Collaboration quality
- Firm Contribution
- Role modelling & Culture

# The Challenge:

Some hard data tends to get stored in the systems, but only few law firms have a culture of storing soft data, because **it's...**

- a. time-consuming
- b. boring
- c. about giving away your personal «business secrets»
- d. not being rewarded

**And the result is.....**(picture by Eduardo Ordax)

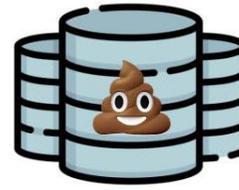


Data

+

Machine Learning

=

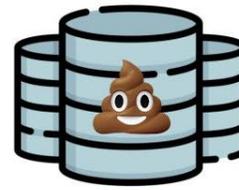


Data

+

Artificial Intelligence

=

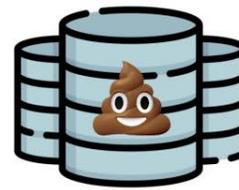


Data

+

Generative AI

=



Data

+

Agentic AI

=



When **MANAGING DATA** becomes one element of the **partner appraisal process**, it

provides an incentive to **ENTER DATA**, **MAINTAIN CLEAN DATA** and **SHARE INFORMATION**

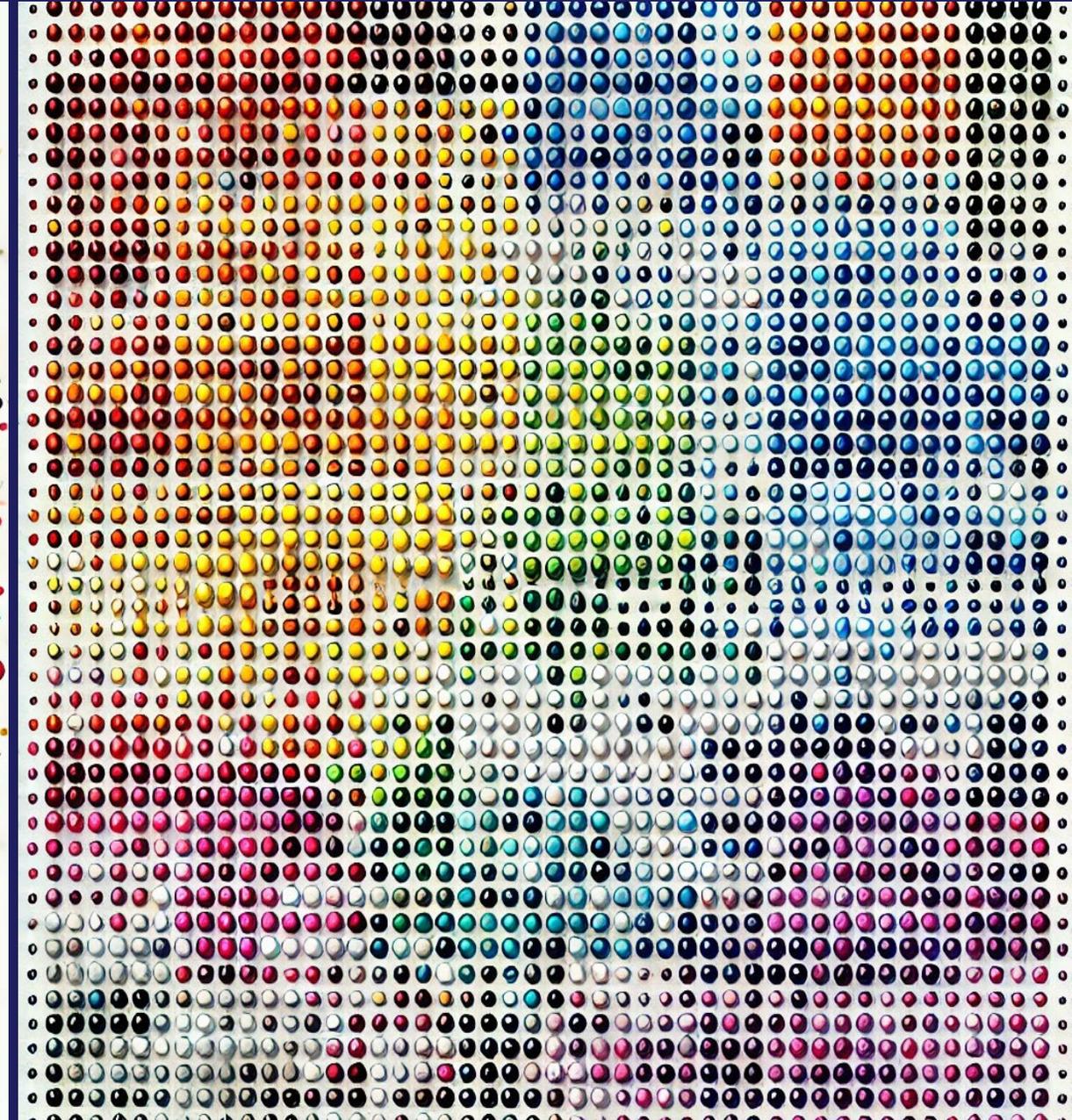
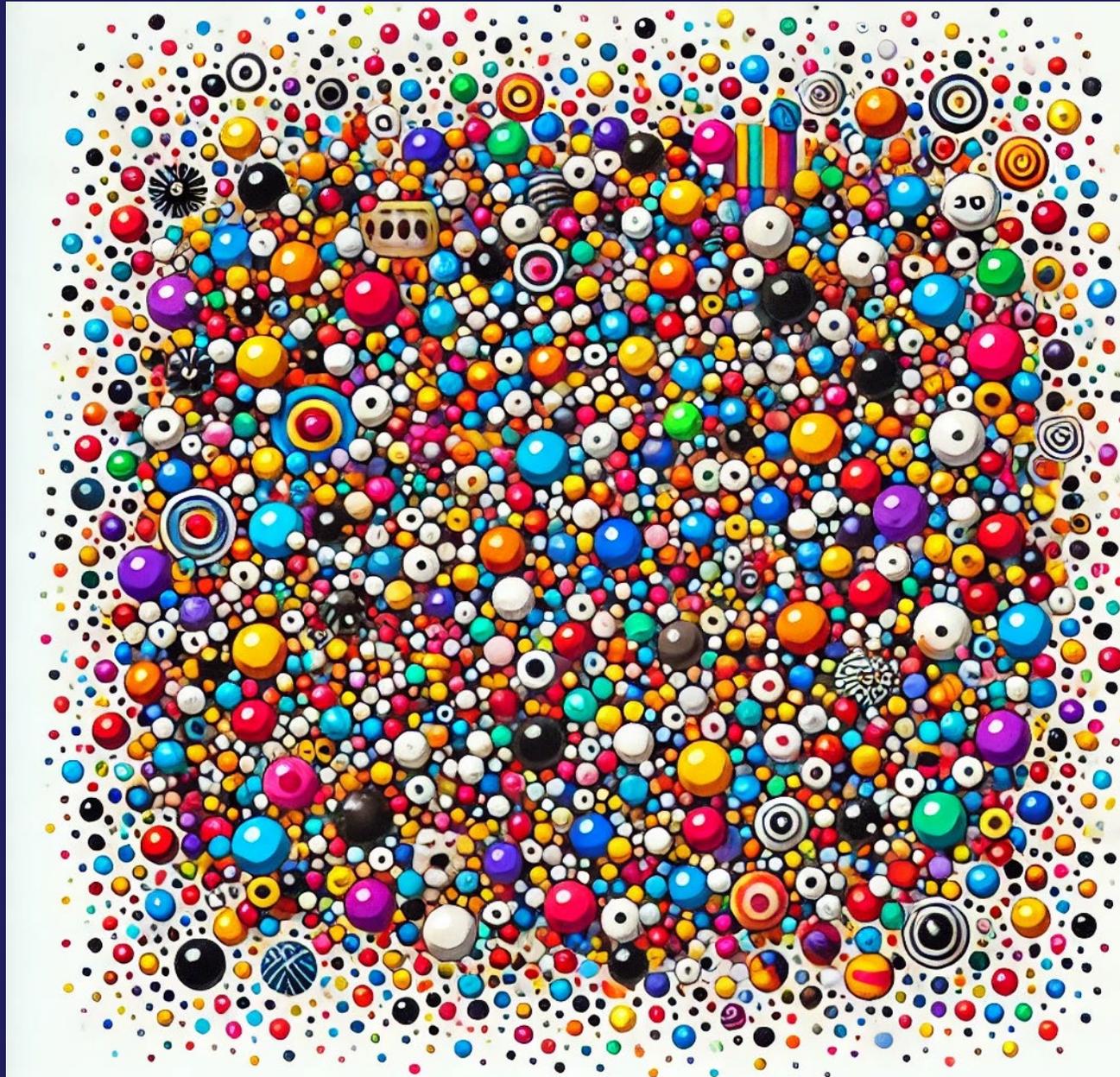


We know a successful law firm must have a  
**client-centric culture**



Focusing more on **THE QUANTITY AND QUALITY OF DATA** fosters a **data-centric culture**, and people will share more information and contribute meaningfully to maintaining **clean, structured data** beyond just the timecards

# Unstructured vs. Structured data



# Two platforms needed to unify data entry:

## DMS for legal documents

for storing, classifying and indexing legal documents and emails in a unified manner. (Consider global „Sali Association“ taxonomy)

## PMS for hard and soft data

e.g. **Crespect**, which provides a holistic platform for entering easily not only Clients & Cases but also

- CRM & BD efforts

- Market intelligence, leads & opportunities

- Case debriefings, lessons learned

- Transaction experience

- Special expertise of our colleagues, etc.

SORAINEN

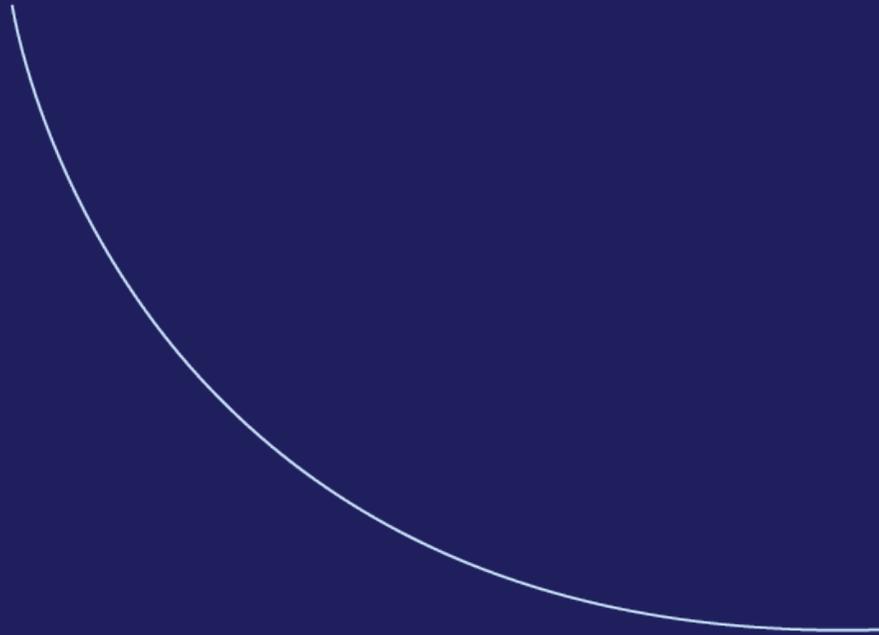


What if you get plenty of quality data in your system?



As a Bonus,  
you will be able to reap  
the benefits of machine  
learning and GenAI!

# One use case from Sorainen



During the past 24 years, an ISO 9001-certified Quality Management system was developed:

600 pages of guidelines, best practices and mandatory processes

Being structured data it was easy to build an AI Chatbot which enables chatting with the QMS.



To prepare for meeting a possible new client, you could consider the following steps:

1. Research the potential client and their business area or sector <sup>1</sup>.
2. Review any lists of issues that the potential client has given to Sorainen and follow up on specific issues <sup>1</sup>.
3. Involve relevant experts from other practice areas or offices, if needed <sup>1</sup>.
4. Consider targeting the potential client with specific business generation initiatives, such as inviting them to Sorainen events or building your public profile as an expert in a certain field <sup>2</sup>.
5. Communicate more often with the potential client through personal contact, such as in-person meetings or phone calls, rather than relying solely on email communication <sup>3</sup>.
6. Apply Sorainen's HCS methodology in your sales and business development activities, including performing HCS business development meetings with the potential client to understand their legal needs <sup>3</sup> <sup>4</sup> <sup>1</sup>.

Citations: [1. 2.5.1.crm-and-hcs.2019-04-25.eng.final.theboard-14.pdf](#)

[2. 3.4.3.attachment.new-business-generation-initiatives.2021-07-29.eng.mg-1.pdf](#)

[3. 2.5.1.guide.marketing-crm-and-sales.2017-05-22.eng.qmst-13.pdf](#)

What should I do if I think I might exceed the budget the client has approved?



If you think you might exceed the budget approved by the client, follow these steps:

1. Notify the client as soon as possible and explain the reasons for the budget increase <sup>1</sup>.
2. Discuss with the client the options to manage the situation, including reducing the scope of work or negotiating a higher budget <sup>2</sup>.
3. Obtain the client's approval for any changes to the budget or scope of work before proceeding with the work <sup>3</sup>.
4. Ensure that the client's expectations for excellent work and high-quality legal services are met or exceeded, while also striving to provide services in a profitable manner <sup>2</sup>.
5. Continually improve the efficiency of the Quality Management System to prevent similar situations from arising in the future <sup>3</sup>.

Citations: [1. 3.4.2-attachment.questionnaire-for-annual-client-review-meeting.2017-05-22.eng.qmst-7.pdf](#)

[2. 1.2.intro.quality-management-system.2016-07-04.eng.qmst-1.pdf](#)

[3. 1.2.intro.quality-management-system.2016-07-04.eng.qmst-0.pdf](#)

## Some use cases soon when we have a data-centric culture...

1. What should I know about the client I'm meeting today?
2. How should I budget and staff the next case (beyond the usual suspects)?
3. How can I utilise today the lessons my colleagues learned three years ago?
4. Which two clients should I call today?
5. Which clients in my portfolio most likely also need my colleagues' service?
6. To whom should I refer my client who wants to start a business in Timbuktu?
7. I need help quickly checking the invoice specification's case narrative!
8. What should I include in my next year's business plan?
9. Do all different personal, team and office business plans complement each other and contribute holistically to implementing the firm's strategy?
10. And what else could I chat about with **Crespect** while sitting in my self-driving car?



A holistic partner appraisal enables  
a data-centric culture and the  
efficient use of technology!

SORAINEN

# Culture

The right client- and data-centric culture enable

1. creation and maintaining structured data.
2. The key to managing and developing «institutional» knowledge and sharing know-how
3. Enables the use of GenAI more efficiently

**Enables the use of economies of scale!**

# People

Structured data enables:

1. Everyone to learn faster
2. A learning organisation rather than a group of smart individuals
3. Reducing boring, repetitive tasks
4. Partners get appraised holistically and get remunerated fairly

**Enables everyone to have more fun!**

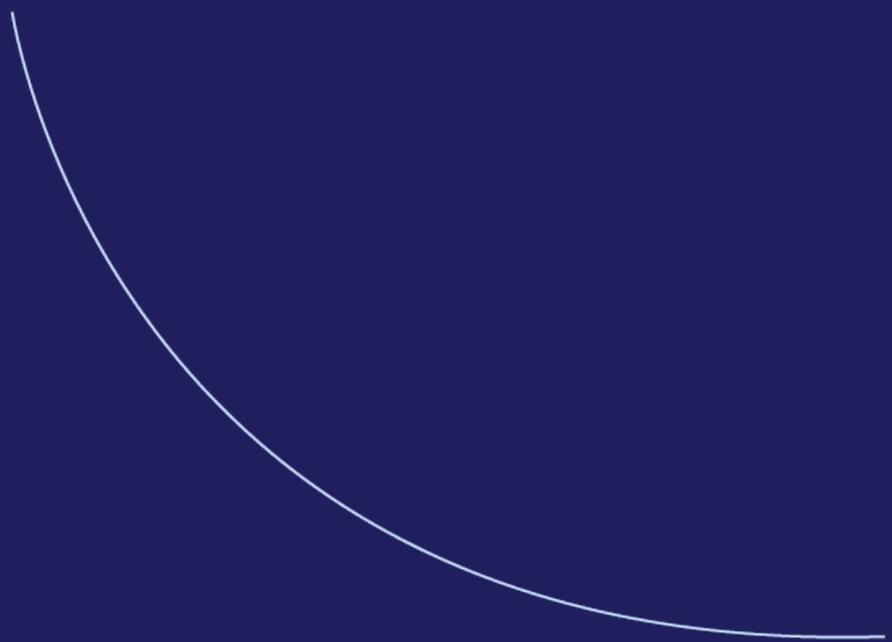
# Clients

Structured data enables:

1. Providing higher quality advice faster and in a more unified manner
2. Providing a better price/quality ratio

**Happier clients!**

Thank you for your attention!



For any questions, feel free to contact  
[aku.sorainen@sorainen.com](mailto:aku.sorainen@sorainen.com)

Check out [www.crespect.com](http://www.crespect.com)



Ann-Marie Ovin  
*CIO & Head of  
Knowledge,  
Process &  
Innovation,  
Vinge*



Jan Willamo  
*Chief Digital Officer,  
Roschier*



Casper  
Manniche  
*Head of IT,  
Moalem  
Weitemeyer*



'where lawyers  
meet modern IT  
solutions'

TechTorget Oslo 2025

Panel 2:

**Digitalisation  
& AI -  
different  
perspectives in  
the Nordics**



Per-Kaare  
Svendsen  
*Partner/Advokat,  
Kvale*



Martijn  
Lesterhuis  
*Partner Venturis  
Consulting, Co-  
founder Saga*



Aku Sorainen  
*Founder and  
Senior Partner,  
Sorainen*



Ann-Marie  
Ovin  
*CIO & Head of  
Knowledge,  
Process &  
Innovation,  
Vinge*

1. With adoption of Gen AI taking off, what is the status of adoption in the different Nordic and Baltic countries?



Per-Kaare  
Svendsen  
*Partner/Advokat,  
Kvale*

2. What are important considerations for your firm in adopting AI?



Martijn  
Lesterhuis  
*Partner Venturis  
Consulting, Co-  
founder Saga*

3. Initially, large international law firms have been leading in AI adoption. Is it a scale game, or will national and smaller firms pick up quickly, or even move faster? From a more strategic perspective, what is your opinion and what approach does your firm take?



Aku Sorainen  
*Founder and  
Senior Partner,  
Sorainen*



Jan Willamo  
*Chief Digital  
Officer,  
Roschier*



Casper  
Manniche  
*Head of IT,  
Moalem  
Weitemeyer*



Ann-Marie  
Ovin  
*CIO & Head of  
Knowledge,  
Process &  
Innovation,  
Vinge*

1. With adoption of Gen AI taking off, what is the status of adoption in the different Nordic and Baltic countries?



Per-Kaare  
Svendsen  
*Partner/Advokat,  
Kvale*

2. What are important considerations for your firm in adopting AI?



Martijn  
Lesterhuis  
*Partner Venturis  
Consulting, Co-  
founder Saga*

3. Initially, large international law firms have been leading in AI adoption. Is it a scale game, or will national and smaller firms pick up quickly, or even move faster? From a more strategic perspective, what is your opinion and what approach does your firm take?



Casper  
Manniche  
*Head of IT,  
Moalem  
Weitemeyer*



Aku Sorainen  
*Founder and  
Senior Partner,  
Sorainen*



Ann-Marie  
Ovin  
*CIO & Head of  
Knowledge,  
Process &  
Innovation,  
Vinge*

1. With adoption of Gen AI taking off, what is the status of adoption in the different Nordic and Baltic countries?



Per-Kaare  
Svendsen  
*Partner/Advokat,  
Kvale*

2. What are important considerations for your firm in adopting AI?



Martijn  
Lesterhuis  
*Partner Venturis  
Consulting, Co-  
founder Saga*

3. Initially, large international law firms have been leading in AI adoption. Is it a scale game, or will national and smaller firms pick up quickly, or even move faster? From a more strategic perspective, what is your opinion and what approach does your firm take?



Aku Sorainen  
*Founder and  
Senior Partner,  
Sorainen*



Jan Willamo  
*Chief Digital  
Officer,  
Roschier*



Casper  
Manniche  
*Head of IT,  
Moalem  
Weitemeyer*