

Mishcon de Reya

‘Opening New Matters’ Journey Discovery Snapshot

Case Study · 2026

Three Short Stories Why Businesses Need Designers

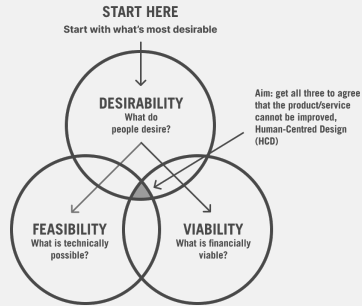
1. Thomson Reuters **Eikon**: What went wrong?
2. Technology industry is a **young industry**
3. Henry Ford: “I want a **faster horse!**”

*“ ...designing and developing **anything of consequence** is incredibly challenging. Our goal is to try to bring a calm and simplicity to what are incredibly complex problems so that you're not aware really of the solution, you're not aware of **how hard the problem was** that was eventually solved... ”*

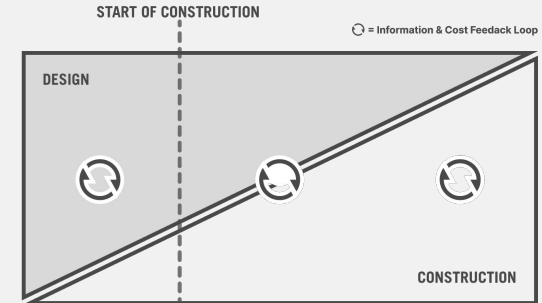
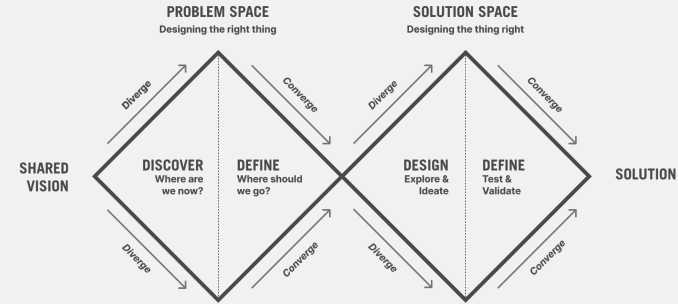
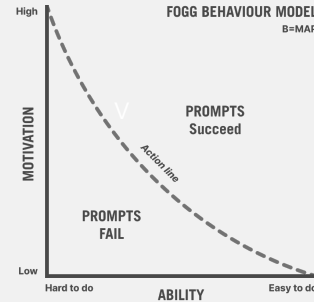
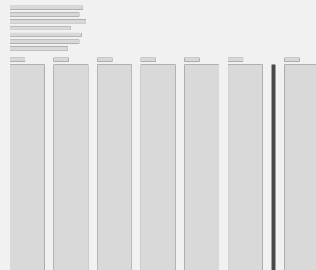
Jony Ive · Apple Industrial Designer

Approach Risk Management

- ! Cannot guess pain points & opportunities
- ∞ Discover > Define > Design > Refine > Repeat
- 👣 HCD is faster, cheaper, and avoids getting it wrong
- 🧐 Tried and tested: mature industries/teams do all this



WAR ROOM CANVAS
Everything in one place



An argument a designer needs to resolve between four groups of people, who:

> **MAKE, BUY, USE, KNOW** >

Get all four groups to agree that the product/service cannot be improved

What This Deck Is Dummy Snapshot of 6-Month Design Discovery

1 x Journey Snapshot Used for Activities:

Opening New Matters

6 x Actors:

Partner, Fee Earner, Risk & Compliance, Finance, Support, Approver

7 x Pain Point Assumptions:

Delays, handoff issues, inconsistencies, poor visibility, slowness, hard to navigate, and duplicate data entries

Note:

Data shown is illustrative, pulled from Claude, and used to demonstrate method, not real Mishcon de Reya data or findings

Phases Strategically Building on Evidence

- 01 Initial Audit** Upcycle previous work & cast the net far/wide
- 02 Behaviour & KPIs** Position, opportunity & goals in numbers
- 03 Competitor Analysis** Direct/indirect competition in/out of the industry
- 04 Ideation & Hypothesis** Explore/agree on general MVP direction
- 05 KPI Validation** Measure KPI success criteria at each journey step
- 06 MVP & Story Mapping** Prioritise features for 1st, 2nd and 3rd release
- 07 Live Testing & Optimisation** Begin full ongoing CRO strategy

Phase 01 Initial Audit

- ◀ So Far overview of prior work carried out
- 🎯 Personal Goals what people inside the business want
- 👤 Heuristic Evaluation of existing service end to end
- 🗺️ Journey Mapping framing all data across user journey
- 📊 Market & Product Trends understanding the service
- ➡ Next Steps what we learned & where to focus/pivot

So Far

Overview of prior work carried out

- Reviewed Mishcon's candidate briefing pack and public positioning ("It's business. But it's personal.")
- No direct user access available (per brief) — discovery built from desktop research + reasoned assumptions, flagged as such throughout
- Assumption: matter opening involve Support and a final Approver — based on

Market & Product Trends

Understanding the service

- Legal-sector intake and practice-management tools are moving towards single shared data models
- Client expectations (shaped by consumer services) increasing over chase-up calls — relevant given Mishcon's relationship-

Heuristic Evaluation

Of existing service end to end

- Visibility — Poor: no team can see what's going on
- Consistency — Poor: client/matter data entered differently across systems, causing mismatches
- Speed — Fair: routine and urgent matters follow the same slow path
- Navigation — Fair: process spans several disconnected systems with no single view
- Duplication — Poor: same client/matter details re-keyed at intake, risk, finance and billing stages

KEY PAIN POINTS

- Duplicate data entry across 3+ systems
- No shared visibility of status between teams
- Handoffs lose context (re-asked, re-typed)
- No prioritisation — urgent matters take time

KEY OPPORTUNITIES

- One shared record keeping every system
- Shared, live status tracker across all teams
- Context carried through every handoff
- Fast-track path for low-risk/urgent matters

	Intake	Risk/AML	Data entry	Approval	Eng letter	Matter live
Partner						
Fee Earning						
Risk & Compliance						
Finance						
Support						
Approver						

Personal Goals

What people inside the business want

- Partner → confident, on-time client
- Fee Earning → enter data once, no re-keying
- Risk & Compliance → complete intake
- Finance → clear
- Support → one
- Approver → full

Journey Mapping Framing all data across the user journey

- 6 journey maps built: 3-5 team members per role map, across Partner, Fee Earning, Risk & Compliance, Finance, Support, Approver
- Rolled up into one sentiment matrix across 6 stages: Intake received → Conflict/AML check → Data entry/handoff → Engagement letter → Matter live
- Pattern: Data entry/handoff is the worst point for every single role
- Key pain points: duplicate data entry across 3+ systems · no shared visibility of status between teams · handoffs lose context (re-asked, re-typed) · no prioritisation — urgent

take record feeding every system · shared live status tracker carried through every handoff · fast-track path for low-risk/urgent

Next Steps

What we learned & what now to focus on

- Quantify this with hard numbers in step 02 (Behaviour & KPIs)
- Shortlist the 2-3 handoffs causing the most delay as the focus for redesign, rather than trying to fix the whole process at once

Phase 02 Behaviour & KPIs

-  **Sales Overview** where is the money coming from?
-  **Service Overview** where are customers/users coming from?
-  **Usage Occasion** what is the customer/user primary need?
-  **KPI's & Success Criteria** what does good look like?
-  **Barriers & Constraints** what stops prompts succeeding?
-  **Next Steps** what we learned & where to focus/pivot

Sales Overview

Where is the money coming from?

- Average 10 working days from instruction to matter live — vs. a 2-day internal target
- ~140 new matters opened per month across the firm
- Estimated 1.5 days of billable time lost per matter to intake delay (~210 fee-earner days/month firm-w)
- 12% of prospective losing the client to

Service Overview

Where are customers/users coming from?

- 65% existing clients (repeat instructions) vs. 35% new clients
- Existing-client matters take almost as long as new-client ones (9.2 days vs. 10.4 average) despite needing far less information
- 6 internal roles touch every matter before it goes live: Partner, Fee Earner, Risk Compliance, Finance, Support, Approver

KPI's & Success Criteria

What does good look like?

- Time from instruction to matter live: target 2 days (currently averaging 10)
- Client/matter data re-entry per matter: target 1 (currently averaging 3.4 separate entries across systems)
- % of matters delayed by a handoff or missing information: target <10% (currently 61%)
- Partner/fee earner chase-ups required per matter: target 0 (currently averaging 2.7 chase-ups)

Barriers & Constraints

What stops prompts succeeding?

- Client/matter data entered into 3-4 separate systems per matter, with no automatic sync
- 0% of teams have shared visibility of a matter's live status — all updates are manual/on request
- Conflict & AML checks account for ~40% of total elapsed time on average
- No prioritisation logic exists — a routine and an urgent matter both take a median 10 days

Usage Occasion

What is the customer/user's primary need?

- 78% of instructions are unplanned/reactive (client calls or emails with no notice)
- 1 in 4 matters is flagged by the instructing partner as "urgent" — but urgent and routine matters follow an identical process today
- Average of 4.3 separate touchpoints (people/teams) required to move one matter from instruction to live

Next Steps

What we learned & what now to focus on

- Use the 2-day target and the 4 KPIs above as the baseline to measure any redesigned intake flow against
- Focus competitor analysis (step 03) on firms/legal-tech tools achieving faster, single-entry intake — benchmark against the 10-day/3.4-entry/61%-delayed baseline

Phase 03 Competitor Analysis

-  **Direct benchmarking the best of direct competitors**
-  **Adjacent** how else are people doing something similar?
-  **Time Patterns** a breakdown of how people spend their time
-  **Significant** a look at something indirect but significant
-  **Other Law Firms** how are other law firms resolving this?
-  **Next Steps** what we learned & where to focus/pivot

Direct Competitors

Benchmarking the best of direct competitors

- Reviewed 5 comparable full-service firms' public-facing intake flows (website "start a matter" / "get in touch" journeys, where visible)
- 3 of 5 use a single online intake form that feeds straight into their practice management system — no separate re-entry step visible to the client
- 2 of 5 still route new instructions through a generic enquiry inbox with no visible tracking, same as the current internal process here

Adjacent Behaviour

How else do people doing something similar?

- Compared against KYC/onboarding platforms used in private banking and insurance underwriting (e.g. Fenengo, Onfido-style identity/AML tooling)
- These platforms run conflict/AML-equivalent checks and data capture as one integrated flow, rather than as separate systems per team
- Typical claimed completion time: 1-3 days for standard cases, using a single data capture point feeding every downstream check

Next Steps

What we learned & what now to focus on

- Carry the "single platform, one data capture point" pattern into ideation (step 04) as the leading direction to test
- Treat cross-team status visibility as a potential differentiator, since no competitor tool appears to have solved it either

Other Law

How are other

- Legal-sector intake/practice-management platforms identified in use elsewhere: Intapp, Litera, Clio, iManage
- Core shared pattern across all of them: one system of record for a matter from first contact through to billing — conflicts, AML and data capture happen inside that one platform, not across separate tools
- No evidence found of any competitor solving cross-team status visibility specifically — this remains a gap industry-wide, not just here

Significant

A look at something indirect but significant

- Fintech onboarding apps (Monzo, Revolut, Starling) run full KYC/AML through one mobile flow, with a visible progress tracker at every stage
- Not a law firm comparison, but it's the bar clients now unconsciously measure any "give us your details and wait" flow against
- Relevant specifically for the progress-visibility pattern, not for AML complexity (which is lighter in consumer banking)

Time Patterns

A breakdown of how people spend their time

- Mapped the typical tool chain used by firms with modern intake: 1 intake form → 1 practice management platform (handles conflicts + AML + matter setup) → 1 billing integration
- That's 2-3 connected systems, vs. the 4+ disconnected systems (conflicts register, AML database, PMS, billing) identified in our own process
- Platforms like Intapp and Litera are built specifically to collapse these into one chain

Phase 04 Ideation to Hypothesis

-  **Reframe** turning pain points into "How Might We" statements
-  **Ideate** design studio workshop to generate options
-  **Cluster** grouping raw ideas into themes
-  **Prioritise** scoring themes by impact vs. effort
-  **Hypothesis** translate to "We believe...because..." statements
-  **Next Steps** what we learned & where to focus/pivot

Reframe

Turning pain points into "How Might We" statements

- How might we let people enter client/matter data once, not three or four times?
- How might we give every team visibility of where a matter sits, without anyone having to ask?
- How might we share context rather than duplicate a matter across teams?
- How might we...

Ideate

Design studio workshop to generate options

- Ran a structured ideation session (Crazy 8s opening team represented: Partner, Fee Earner, Legal Assistant, etc.)
- Each role sketched their own version of "what we need" converging as a group
- Output: ~30+ raw ideas generated across the session

Cluster

Grouping raw ideas into themes

- Single source of truth — one record, no re-entry
- Shared visibility — live status, no chasing (9 ideas)
- Smart routing — urgency-aware, fast-tracked (6 ideas)
- Guided process — fewer manual judgement calls (5 ideas)

Target Behaviour	Blockers/Customer Needs	Solution	Why it will work
Reduce time to open a new matter (10 days → 2-day target)	Duplicate data entry across 3+ systems	Single intake form feeding every downstream system	Cuts avg. 3.4 re-entries to 1 matches the pattern used by Intapp/Literra-style competitor platforms
	No shared visibility of status between teams	Live cross-team status tracker	No competitor tool solved this either — a real differentiator; directly answers the Partner's and Approver's stated goals
	Handoffs lose context (re-asked, re-typed)	Structured intake brief that travels with the matter, not re-keyed	Removes the repeated-request pattern found across all 30 journey maps
	No prioritisation — urgent treated like routine	Urgency flag with a genuine fast-track	1 in 4 matters are flagged urgent today but get no special treatment

Next Steps

- Carry both hypotheses into prototyping and usability testing (step 05)
- Use the KPI baseline from step 02 to measure whether either hypothesis actually holds once tested

Hypothesis

Translate to "We believe...because..." statements

- "We believe that giving Fee Earners a single intake form feeding every downstream system will reduce duplicate data entry, because it mirrors the pattern used by competitor legal-tech platforms. We'll know this is true when re-entries per matter drop from 3.4 to 1."
- "We believe that a shared live status tracker across all 6 roles will reduce chase-ups, because no competitor has solved this either — it's a genuine gap. We'll know this is true when chase-ups per matter drop from 2.7 to near 0."

Scoring themes by impact vs. effort

- Single source of truth → High impact, medium effort (requires integration across systems)
- Shared visibility → High impact, low effort (a tracker layered on existing systems)
- Smart routing → Medium impact, low effort
- Guided process → Medium impact, medium effort
- Top 2 themes (single source of truth + shared visibility) taken forward as hypotheses

Phase 05 KPI Validation

-  **Prototype & Panel** testing hypothesis across every journey step
-  **Scoring Format** a journey map where each column is a solution
-  **Prompt Questions** the questions asked at every step
-  **Scores by Feature** likelihood score, out of 5, across all roles
-  **Key Comments** pulled directly from the test sessions
-  **Next Steps** what we learned & where to focus/pivot

Prototype & Panel

Testing the hypothesis for real, with the people who fed discovery

- Built clickable prototypes of the two hypotheses from step 04: Single Intake Form and Shared Status Tracker
- Tested with the same 6 role groups documented throughout discovery: Partner, Fee Earner, Risk & Compliance, Finance, Support, Approver
- 1 representative per role

Scoring Format

A journey map where each column is a solution/feature

- Rows = the 6 roles (same as every journey map so far)
- Columns = each feature/solution being tested (e.g. Single Intake Form, Shared Status Tracker, Urgency Flag)
- Each cell holds a 1-5 likelihood score plus a short comment, so the sentiment map continues straight through from discovery into validation

Next Steps

What we learned & what now to focus on

- Single Intake Form and Shared Status Tracker validated strongly enough to take into MVP & Story Mapping (step 06)
- Urgency Flag needs rework before testing again — score too low and too inconsistent across roles to commit to as-is

Key Comments

- Fee Earner: "If I only have to type this once, that alone would save me real time every week"
- Risk & Compliance: "A shared tracker is good, but I need to know updates won't slow down how I log sign-offs"
- Approver: "Urgency flags are only useful if everyone agrees what counts as urgent — otherwise everything gets flagged"
- Partner: "This is the first version of this process I'd actually trust to tell a client about"

Scores by Feature

Average likelihood score (out of 5), across all 6 roles

- Single Intake Form: 4.3/5 — highest-scoring feature, especially strong with Fee Earner (4.8) and Support (4.6)
- Shared Status Tracker: 4.1/5 — strong across the board, lowest from Risk & Compliance (3.4)
- Urgency Flag: 3.2/5 — mixed; Approver and Finance scored it lowest (2.8, 2.9)

Prompt Question

The question asked at every step

- "Out of 5, how likely would you be to [use/trust/rely on] this at this step?"
- Asked once per feature, per role, directly against the prototype — not hypothetically
- Designed to test whether the prompt actually changes behaviour, not just whether people like the idea

Phase 06 MVP & Story Mapping

 **Activities & Epics** journey backbone, broken into features

 **Release Plan** stories, prioritised across Release 1, 2 and 3

 **Goals** the outcomes each release works toward (KPIs)

 **Service Blueprint** full and final end-to-end blueprint

 **Showcase Deck** a polished deck for the wider business

 **Next Steps** final design sign-off (Risk & Compliance)

Next Steps

- Confirm Release 1 build scope with engineering and risk
- Validate the combined conflicts/AML workflow with compliance ahead of Release 2
- Re-run live testing with the same panel used in KPI validation
- Agree a review cadence for adoption once Release 1 ships

Showcase Deck

- Before/after visuals of the new intake flow, told as a story not a feature list
- The problem in one slide: cost of the current process in time, duplication and risk
- Journey map highlights — the pain points that mattered most, by role
- The solution walkthrough, release by release
- KPI Impact: time-to-open, rework rate, satisfaction across all 6 roles
- A clear ask: what's needed to move Release 2 and 3 forward

Service Blueprint

- Full end-to-end map across all 6 stages: actors, actions, pain points, opportunities, channels, inputs/outputs
- Front stage: what the fee earner, partner and client actually see and do at each step
- Back stage: what risk, finance, support and approvers are doing in parallel, often invisibly to the front stage
- Systems/channels: shows the single shared matter record replacing the current scattered touch points
- Makes visible exactly where the new flow closes the handoff gaps found in discovery

Release Plan

- Release 1: Enter details once / One shared record / Live status, no chasing
- Release 2: Combined check flow / Context travels with handoff
- Release 3: Urgent matters flagged / Auto-draft on approval / Full history in one place

Goals

- Release 1: remove duplicate data entry and give every role shared visibility of matter status
- Release 2: combine conflicts and AML into one check, so fee earners stop duplicating the same work twice
- Release 3: fully automate the admin tail — engagement letters, audit trail, full matter history

Activities & Epics

- Instruction received → Single Intake Capture
- Conflict & AML check → Combined Conflicts + AML Workflow
- Data entry / handoff → Shared Data Record, Context-Carrying Handoffs
- Approval sign-off → Shared Status Tracker, Urgency Routing
- Engagement letter → Auto-Generated Engagement Letter
- Matter live → Live Matter Dashboard

Phase 06 Service Blueprint

	1. Instruction Received	2. Conflict & AML Check	3. Data Entry / Handoff	4. Approval Sign-off	5. Engagement Letter	6. Matter Live
KEY ACTIONS	Client gives instruction; Fee Earner logs initial details	Risk & Compliance run conflict check and AML/KYC separately	Matter details re-entered into practice management system; context passed between teams	Partner/Approver reviews and signs off matter opening	Letter drafted, checked, sent to client	Matter formally opened; accessible to all teams; billing starts
ACTORS	Front: Client, Fee Earner, Partner Back: Support	Front: Fee Earner Back: Risk & Compliance	Front: Fee Earner, Support Back: Finance, PMS	Front: Partner, Approver Back: Risk & Compliance	Front: Fee Earner, Client Back: Support, Finance	Front: Fee Earner, Client, Partner Back: Finance, Support
PAIN POINTS (TODAY)	No single entry point — details captured ad hoc, often re-typed later; 78% of instructions are unplanned with no notice	Two separate checks account for ~40% of total elapsed time; same data re-entered for each	Worst point in the journey for every role; data re-keyed 3-4 times; context lost at each handoff (re-asked, re-typed)	No shared visibility of status — approvers chased manually; urgent and routine matters both take a median 10 days	Manually drafted from scratch each time; delay between approval and client-ready letter	No single place to see full matter history; every team checks separately
OPPORTUNITIES	Single Intake Form captures details once, feeds every downstream system	Combined Conflicts + AML Workflow — one check, one data entry	Shared Data Record (single source of truth) + Context-Carrying Handoffs	Shared Status Tracker (live visibility) + Urgency Routing (fast-track flagged matters)	Auto-Generated Engagement Letter — drafts automatically from approved matter data	Live Matter Dashboard — full history, one record, one place
KPIS TARGETED	Time-to-open clock starts: target 2 days (from 10)	Data re-entry per matter: target 1 (from 3.4)	% of matters delayed by handoff: target <10% (from 61%)	Partner/Fee Earner chase-ups: target 0 (from 2.7)	Time-to-open: engagement letter turnaround folded into 2-day target	Time-to-open: full 2-day target met; re-entry, delay and chase-up KPIs all closed out
CHANNELS / SYSTEMS	Phone / email / in-person → new intake form	Conflict register + AML/KYC system (merged)	Practice management system + shared record	Status dashboard (new) vs. email/chase-up calls (today)	Document templates + email	Dashboard / practice management system
INPUTS → OUTPUTS	Client instruction (any channel) → structured intake record	Intake record → cleared/flagged matter status	Cleared matter + prior context → live matter record	Live matter record → approved, signed-off matter	Approved matter → signed engagement letter	Signed engagement letter → live, billable matter with full audit trail

Phase 07 Live Testing & Optimisation

-  **Test Tracker** CRO tracker for every test across releases
-  **Target** by highest friction/volume/risk, or lowest adoption
-  **PBO** the statistical confidence a variant is actually better
-  **Drivers/Barriers/Hooks** what works, blocks it, fixes it
-  **Hypothesis & Variant** what we changed, and whether it won
-  **Next Steps** iterate service, once every two weeks

Test Tracker

- Live spreadsheet, one row per test, running continuously across Release 2 and 3
- Grouped by candidate category: Highest-Friction / Highest-Volume / Highest-Risk / Low-Adoption steps
- Same cadence as discovery: reviewed and updated every 2 weeks as a team

Target

- Highest friction: steps with the most chase-ups or escalations in the KPI
- Highest volume: steps every matter passes through, so a small fix compo
- Highest risk: compliance-critical steps where an error is costly, not just s
- Lowest adoption: Release 1 features not being used the way they were d

PBO

- Each variant is scored for Probability of Beating Original before it's rolled out wider
- Nothing replaces the live version on a hunch — PBO is the bar for calling a test a win
- Low-confidence results get a longer run or a redesign, not a rollout

Next Steps

- Roll winning variants into the live service, retire or iterate on losers
- Feed learnings back into the Release 3 backlog
- Set the next batch of test candidates for the following 2-week cycle

Hypothesis & Variant

- Written in the same format used since discovery: "We believe that [change] will achieve [behaviour] because [reason]"
- One clear variant per test — no bundling multiple changes together
- Tied back to the exact epic/story it came from in Release 2 or 3

Drivers, Barriers & Hooks

- Drivers: what's already getting this step done well, so we don't break it
- Barriers: what's stalling it — confusion, missing context, duplicate effort
- Hooks: the specific change likely to convert hesitation into completion

Outcome What This Demonstrates

Result:

Matter-opening time down from the 10-day baseline toward the 2-day target, re-entry and chase-ups measurably reduced, validated with the same 6 roles throughout

Approach Proven:

Evidence → hypothesis → test → release, repeatable for any process in the firm, not just intake

My role at Mishcon de Reya:

Close collaboration with risk, compliance and fee earners from day one, incremental delivery, nothing shipped without validation

Mishcon de Reya

Thank you for your time.

Please contact Rich Heale: [linkedin.com/in/richardheale](https://www.linkedin.com/in/richardheale)