A YEARS

ALTIOR

THE STORY OF ALTIOR...AS TOLD BY JOHN LOOSEMORE

One day, I went to a lecture in Bristol with my business partner, Rob Parsons, about the management of a law firm and we came away saying, "We could do this better ourselves". And that's the beginning of Altior - or Lawyers Planning Services, which it initially was in 1979. We started lecturing (primarily) partners in law firms throughout the UK on how to manage your law firm. Back then, lawyers had little to no training on management and leadership, limited training on financial skills and no training in people skills - so we decided that this was a great opportunity, particularly as it coincided with the Law Society introducing a scheme of compulsory further training for qualified solicitors.

We carried on running the law firm but very quickly, Lawyers Planning Services began to take over our working lives. We ran seminars in prime locations (London Hilton Park Lane, for example) and regularly, 300 law firms' partners would come from all over the UK to hear us speak. The first course was called 'How to Expand your Practice', the second was called 'What They Didn't Teach you in Law School' and we initially we ran these courses all over England and Wales. We were then invited to other major cities like Belfast, Dublin, Edinburgh because wherever we went, people wanted answers about expanding their law firm and managing it efficiently. Ultimately, we were able to motivate partners in law firms to go-forit! As a result of what we did in the UK, we got invited all over the world, lecturing in Australia for six years, South Africa and North America too.

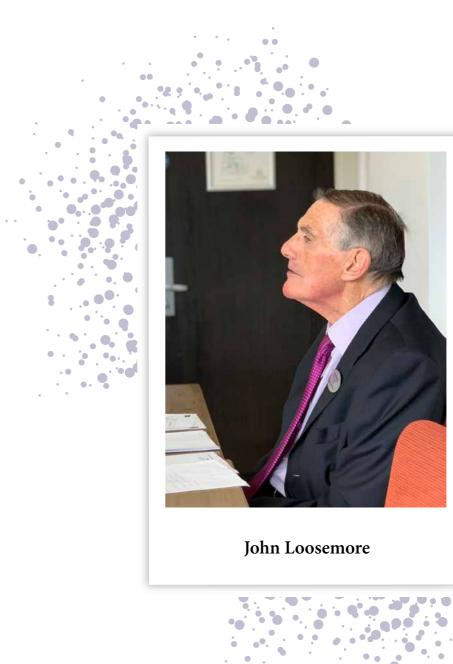
We also developed a consultancy practice because law firms were continually asking for personal support which saw us working with law firms all across the world to help achieve their goals. I had an amazing session with a firm in Dubai - an incredible multicultural organisation - and we then realised we had to broaden what we did with Rob Parsons developing a training course on stress management in particular. He was well ahead of the market now everyone is talking about mental health, and rightly so, and Rob's sessions for partners in law firms were ahead of the curve and really well received.

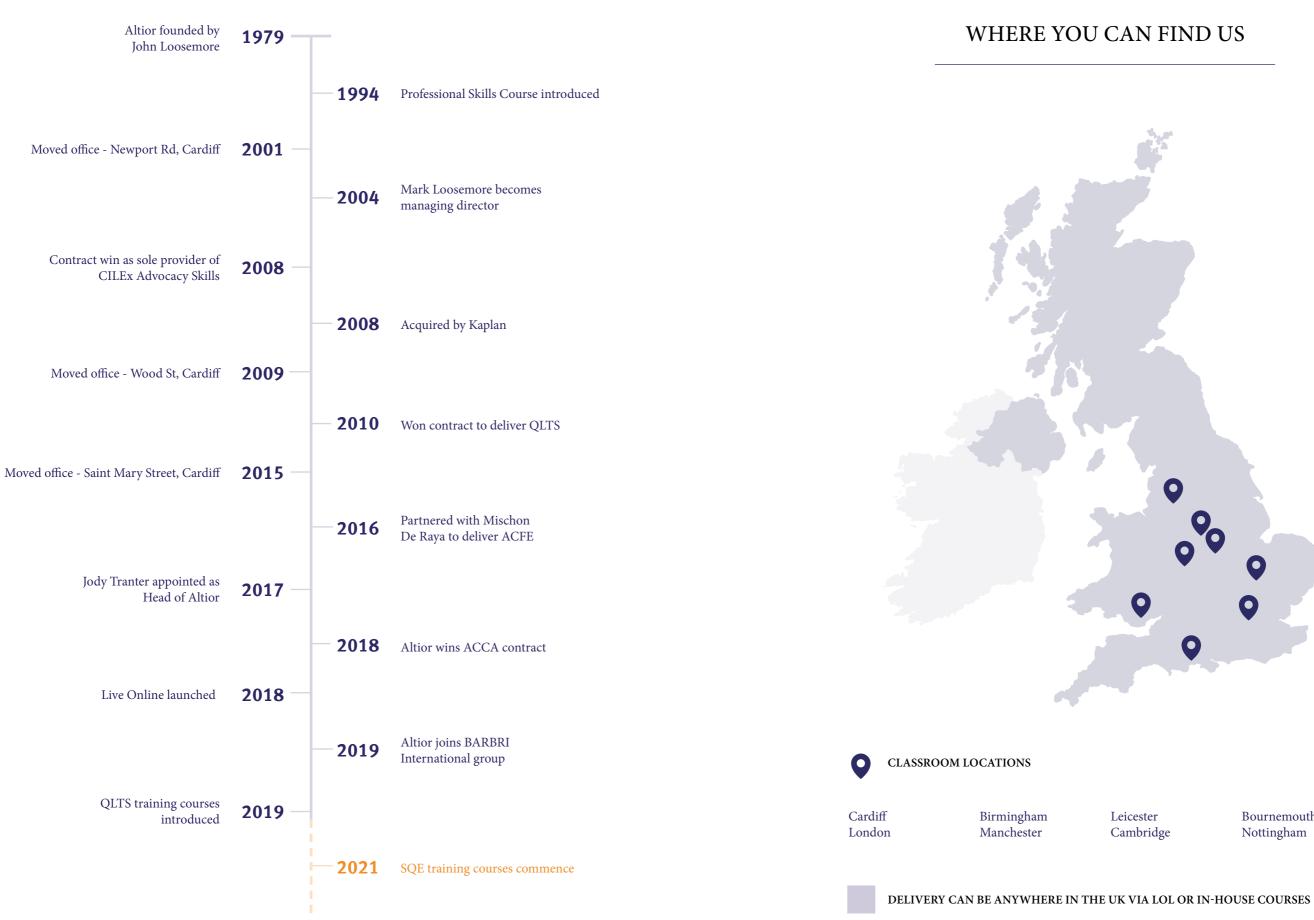
Early in the 1990s, the Law Society introduced the Professional Skills Course (PSC), compulsory for trainee solicitors. This was a huge opportunity for us as the syllabus covered much of the skills training we had pioneered for qualified solicitors - client care, professional standards and financial and business skills - and added advocacy training for which we devised several mock civil and criminal trials. We were one of the first providers to be authorised by the Law Society to run PSC.

We believe you learn more if you have some fun during training and our advocacy training is a great example of this. Although the prospect of 3 days of mock trials is pretty daunting for trainees, they quickly enter into the spirit of things playing a variety of advocacy roles before their tutor who acts as Judge, as well as assessing and feeding back positively on each trainee's performance. Frequently, during feedback, the group collapses into laughter as, inevitably the occasional mistake is made!

When Rob retired in the 1990s, I was running the show as the chief executive. And when Rob left, we changed our name to 'Altior' to symbolise taking people higher in their achievements as we think the biggest asset law firms have is their people. We actually put this into practice - it's become a cliché but putting people first and listening to them was our main driving force.

Then, my eldest son, Mark Loosemore who had experience in a big firm in London decided to come back to Cardiff and I handed over the reins to him and he became chief executive of Altior. He developed the business further, realising that there was a larger market in London which he then developed further afield, looking to Manchester and Birmingham too. In 2008, Mark was approached by Kaplan. The business was developing a law school in London as the first stage of training for people post law degree and they wanted to partner with Altior. So, they bought us out and continued to build on our foundations. We still have a good working relationship and for that I'm so grateful, especially as the business enters its new phase as BARBRI Altior.







Leicester Cambridge Bournemouth Nottingham

PEOPLE, PARTNERSHIPS AND **INNOVATION: 40 YEARS OF ALTIOR**

In case you haven't heard, we're incredibly proud to say that Altior celebrated its 40th year of operations in 2019. Over the last four decades, we've established ourselves as a trustworthy, longstanding legal training provider, working with countless firms and individuals to help futureproof careers in the legal sector, and we've received such positive feedback in doing so. However, we have no intention of slowing down and we are continuing to innovate under our new ownership as part of the BARBRI group. We'll be adding to our service offering to meet the growing demands of the legal sector, further confirming our position as industry leaders and ensuring our ongoing relevance, particularly as the SQE is introduced in 2021 and the evolution of law continues.

As you may already know, at Altior, we take the time to fully understand learning and development requirements for the firms and individuals that we work with, which over time has seen us expand our course offering. Originally, we started with the Professional Skills Course and consultancy services, and although these are services that we still offer, we now have much more to bring to the table. From Management and Leadership, Continuing Professional Development, HRA, CILEx Advocacy skills, Compliance, QLTS, US Bar Review and more, we help the firms that we work with to grow their knowledge bank and nurture talent, which is what has seen us truly cement our place in the legal training industry over the last 40 years.

However, as well as our wide course offering, I believe that our success stems from our people, priding ourselves on our expert trainers who continue to practice and our team who work tirelessly to ensure the development needs of all those we encounter are met. They understand what our clients need and know the industry inside out which has played a pivotal role in helping us to introduce a blended approach to learning with our virtual classroom, Live Online, which officially launched in 2018. We know that everyone's learning preferences, capabilities and schedules differ, which is why we've added this new approach that is both efficient and engaging. We have seen over 400 delegates undertake their learning through our virtual classroom over the past two years and we expect to see this trend continue to grow as more of our courses and modules become available online.

Ultimately, reaching 40 years was an incredible achievement for Altior and it's something which we are all very proud of. We have worked hard to ensure that as an organisation, we do not rest on our laurels and are always innovating in line with industry standards and requirements based on insights such as the Solicitors Regulation Authority's Risk Outlook, for example. As a team and organisation, we're passionate about providing exceptional service, which I believe is conveyed in all that we do, and we are all very excited for our next chapter.

So, as we enter a new era in the legal industry and and we prepare to start delivering our innovative and newly designed SQE programme, I wanted to end this short note with another big thank you from all of us at Altior. We really appreciate your input into our journey over the past 40 years and we look forward to continuing our work with you in this new decade.



Jody Tranter - Head of Altior



Jody Tranter Head of Altior



Jude Welsh Delegate Services Manager



Mercedes Benjamin Client Services Manager



Leeann Guerin Programme Administrator



Andrea Spears Head of Legal Professtional Development



Natalie Bushell Resources Manager



Sales and Marketing Executive Toni Cooper

Delegate Services Advisor

Alisa Gray Director of Business Development



Content Manager



Gemma Evans Programme Leader



Delegate Services Advisor

OUR TEAM

The strengths of the business are determined by the experience and dedication of our team, with numerous members of Altior working within the company for over a decade. From trainers to our in-house team at our headquarters in Cardiff, Altior employs a diverse, dedicated, passionate team who can provide knowledgeable consultancy and advice to firms and delegates alike.

The team are excited to be adding SQE training to our portfolio of courses and they're working hard to ensure that when our SQE courses are launched officially in 2021, our clients and delegates will continue to receive the same level of exceptional service they've come to know and expect.



MEET THE DELEGATE SERVICES TEAM

It's time to get to know our Delegate Services team. At Altior, you'll always get a personalised, 1-2-1 experience from our team. So here is your chance to get to know the Delegate Services team, your first point of contact with Altior a little better. Let's get started...

Tell us a bit about who you are and what you do?

Jude: I'm Jude, I'm the Delegate Services Manager and what don't I do *laughs*. I oversee the customer services, sales and marketing teams here and get involved in data management. I am also the Disability Support Officer, Health & Safety Manager and the General Office Manager.

Christina: I'm Christina and my role is Business Development, so I call clients that have either booked with us in the past or who currently have delegates with us and see if they'd like to book with us again and whether they have any requirements for other training courses that we can help with.

Toni: I'm Toni and I'm the Delegate Services Advisor. On a day to day basis, I deal with incoming email and telephone enquiries, along with sales and bookings. I also tend to work fairly closely with a few of the other wider Altior teams.

Why did you decide to join Altior?

T: Joining Altior was actually my first real job. Fresh out of university, it took me three years to find a job and after consistently job hunting, alongside having volunteer jobs/ work placements, Altior was the first company to finally take a chance on me. I started off as the Business Development Assistant and from there to Business Development Executive to now Delegate Services Advisor. I really liked the atmosphere in the place when I joined - everyone was so nice and working in a small team is something that I preferred and still do.

C: Because they're a reputable company and I thought the training aspect was very interesting

J: I moved to Wales in 2005 (I married a Welshman), leaving behind a great job in the Alumni Office at the UEA. I took a job in a company that sold fixings, fasteners and ironmongery doing sales, procurement and office management. It was a male dominated environment and although I really enjoyed my time there, it was tough to make new friends and I was drawn back to an office culture where I could not only nurture friendships, but also keep boosting my skills in a challenging but rewarding environment.

How do you think the needs of delegates have evolved?

C: I haven't been here for a long time but since I have, we have introduced Live Online, so I think the need for convenient learning has increased.

J: I think it's a more competitive market out there for trainee lawyers with not as many training contracts available as there once were and I get the impression that they are taking on more and more responsibility from an earlier point. I think most of us are now quite time poor with hectic social and working lives and trying to fit everything in means they need to be able, to find convenient study methods that fit in with their workloads. They also want greater accessibility to materials and information on their phones so things can be viewed on the move. Our LMS and the Live Online course delivery were definitely borne out of this need.

T: I agree there's more work that's asked of them these days and so they don't have a chance to get their courses done as early as they'd like. It's often the case where delegates have a limited amount of time to get everything completed, so we just try and help them as much as we can so it's possible for them to get their course done within the time they have. It also helps that as we now have Live Online, they have the option of taking some modules at home/in the office, where they don't need to travel as much but it still allows them to be very interactive.









SUPPORTING OUR LOCAL COMMUNITY

We recognise the importance of giving back to the community and our team is proud to regularly get involved in charity initiatives with fundraising activity as well as hands-on efforts. We're proud to say we've done a lot over the years, and that's largely down to the enthusiasm of our team.

This has seen us support schemes such as the Business in the Community's 'Give and Gain' volunteering scheme for over five years where we helped with painting projects at schools, gardening at homeless shelters and much more; as well as selecting a chosen charity annually supporting a range of charities including Ty Hafan, Jeans for Genes and many others. In more recent times, we've donated to charities chosen by individual team members specifically, such as the fantastic Autism Puzzles Cymru, a charity which is held dear by one of our longstanding team members and we will continue to support with coffee mornings and other fundraising activity across the years to come. We've also offered our support on a seasonal basis donating Easter Eggs to local charities; packing boxes for the Samaritan's Purse Shoebox appeal ready for delivery across the world; and hosted collections for food banks, and we'll continue to do this for as long as we can.

Giving back is such an important part of our culture and our team are even offered two days leave per year for volunteering activities. That's why we couldn't imagine creating this yearbook without including our charity partners that we hold so close to our hearts.



ALTIOR NAMED TRAINING TEAM OF THE YEAR

Cardiff-based legal training provider, Altior, has recently been crowned the 'Training Team of the Year' at the inaugural Wales Legal Awards.

Altior was up against tough competition for the award including Helen Iles Ltd and Morgan La Roche Solicitors, but came out on top to win the Training Team of the Year award sponsored by Swansea University Law School.

With a core team of 15 and 60+ active trainers operating across the UK, Altior maintains a peoplefocused approach to all elements of its training, striving to meet the evolving needs of those operating within the legal industry.

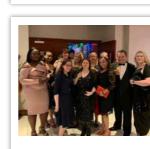
Speaking of the award, head of Altior, Jody Tranter said: "We are absolutely thrilled to be crowned the Training Team of the Year at the very first Wales Legal Awards. It's a fantastic achievement to be recognised for the work that we do, and it's even more satisfying that we've won this award in the year of our 40th birthday. I'm incredibly proud of our team and all that we have achieved so far this year - we certainly couldn't do this without each and every member.

"The legal industry is continuously evolving and I firmly believe that what makes us stand apart as an organisation is that we work closely with firms and individuals to fully understand their training needs, creating a development plan that has a mixture of face-to-face and online learning and one that is best suited to them. We will continue to strive to deliver blended learning in this way, particularly as we look to launch additional courses in the coming months."

Altior is a leading legal and professional services training provider. Based in Cardiff with courses delivered across the UK as well as online through its Live Online platform, it supports delegates and firms across all stages of development.













LIVE ONLINE

We understand that time is money and the time your team have available to spend away from their desk is limited. However, we also know that compromising on personal and professional development is not an option, especially in the context of a thriving legal practice.

For these reasons, we launched our innovative virtual classroom, Live Online, in 2018, blending online and live trainer delivery to shape an enhanced training experience. As the first provider to develop and deliver PSC modules online, this is an engaging learning tool that helps trainees understand and actively develop through the same level of interaction that they'd enjoy in a classroom environment with content specifically designed for online delivery. Delivered by our passionate, expert trainers who are available to support learners every step of the way, the platform's course offering has expanded tremendously to include PSC Electives, Compliance, ACCA, Management and Leadership as well as additional online formats for the US Bar Review and QLTS.

Live Online has been welcomed by the SRA and has proved highly effective for those undertaking training thanks to its convenience, efficiency and forward-thinking approach to future-proofing careers in the legal sector. At Altior, we'll continue to prioritise a flexible approach to development, allowing our delegates to continue their development wherever and whenever.



PROGRAMME ACCREDITATION

The creation of our virtual classroom did not come without its research. When we were creating our Live Online platform, we wanted to ensure that it maintained the engaging element that we had worked hard to create for our face-to-face delivery over the last few decades.

Alongside the SRA, we looked to develop a programme that would be innovative, flexible and would above all, maintain the quality status of training associated with the Altior brand, delivering learning in a dynamic way. We initially scoped out modules and topics within the PSC framework that would be well-suited to virtual classroom delivery in short 2-3-hour sessions, and we presented this proposal to the SRA. We outlined that the sessions would be delivered at various time of the day and on different days of the week to ensure we could cater to busy professional schedules and followed the same materials and contact hours as PSC classroom-based courses.

Thanks to our research and the hard work of our trainers and team, Live Online has been welcomed by the SRA and has proved highly effective for those undertaking training thanks to its convenience, efficiency and forward-thinking approach to future-proofing careers in the legal sector. At Altior, we'll continue to prioritise a flexible approach to development and will continue to work alongside the SRA and other course regulators to meet the required, high standards of delivery, allowing our delegates to continue their development wherever and whenever.



ACCA





CHARTERED INSTITUTE OF LEGAL EXECUTIVES





Andrew Shanahan

Chris Sweetman

Helen Huxford



David Bittiner

Janine Collins

John Loosemore

Nick Howard



OUR TRAINERS

Our expert trainers are on hand to support our clients every step of the way with engaging, thought-provoking content both online and offline. With many being lawyers themselves, our trainers have the insight and experience to deliver relatable training with impact. Always working to develop and improve our course materials for continued relevancy, they're now busy working away in the background to develop the best possible content for our SQE courses ahead of 2021.

Neeta Halai

Roy Morgan

Richard Stone

Simone Pearlman



MEET THE TRAINERS: ROY MORGAN

Our trainers play a crucial role to all that we do at Altior. So we thought that it's time you know a little bit more about them. Let's get started, Roy...

Can you tell us a little bit about what you do at Altior?

There's probably not enough space in just one blog but here's a taste.....I am Altior's lead Advocacy trainer and I provide training and assessment on several Advocacy courses such as Higher Rights of Audience, the PSC and CILEx Advocacy rights. As part of this, I also manage a team of Advocacy trainers to assist with Altior training requirements.

As well as my Advocacy focus, I deliver various CPC /CPD courses, to help our delegates at all stages of their development, and work with their organisations on business management courses. I also deliver wider professional training including our global ACFE course as a Certified Fraud Examiner.

Outside of my everyday training delivery, I troubleshoot issues with delegates, clients and the Altior team whilst also contributing blogs and articles (as you can already tell, I'm sure!).

What skills do you bring to Altior?

My main focus is on Advocacy and communication skills as I have 30 years of experience as an advocate running my own legal practice (which developed into one of the largest in the country) alongside 25 years as a trainer in the legal sector. I believe one of my key strengths is that I have a loyalty to professional quality whilst appreciating business and financial demands.

However, delegates often report on the inspiration and emotion that I bring to training, together with an ability to engage delegates and lighten anxieties when they are outside their comfort zone - feedback which is always nice to hear.

Please provide examples of how you have used your expertise to enhance Altior's training.

I would like to think that my passionate approach to training has inspired many a young, and often many a mature, advocate. Being able to call upon a wealth of real-life experiences to bring aspects of training to life has whetted the appetite of delegates for more. I frequently receive messages from delegates years later with thanks for lessons learnt that have enhanced their professional performance and enriched their career path. Recent feedback suggested the manner and style of training "far exceeded expectations" and "made a daunting task fun."

I also know that qualifications or training obtained from Altior has enabled delegates to secure positions of employment, climb the promotional ladder or simply perform better for the benefit of their clients.

Why should lawyers choose Altior for their legal training?

At Altior, we not only train our delegates to gain qualifications to meet compliance requirements, but also, we train them to use new skills through engaging learning techniques and put them into practice to enhance abilities. This is why we impart skills by using experienced, skilled professionals not academics. But above all, we refuse to rest on our laurels - we listen to delegates and continually re-evaluate their needs based on industry and cultural changes.

Tell us an interesting fact about yourself

I'll do better and give you two...

In private practice, my firm was the subject of a fivepart TV series on BBC Wales. In one episode I was recorded seeing four generations of a family, from great grand-mother to great grandchild, as separate clients in one day! I was awarded a trophy for the first woman to cross the line in the Radyr 10k race!! (It needs explanation....it's a dining-out story!)







Capital Law



OUR CLIENTS

Through providing skills training and assessment to the legal sector for over 40 years, we have been fortunate to work with many of the UK's Top law firms. We pride ourselves on offering tailored, flexible training plans that are accessible to legal professionals at all levels of seniority, tackling key industry issues including diversity, compliance and more.

FARRER&Co Geldards GOODMAN DERRICK LLP

Cooley

Kennedys Keoghs 🔅 LEWIS SILKIN Mishcon de Reya



SHCOSMITHS







HUGH JAMES

K&L GATES

O'Melveny



We know that those operating within the accountancy sector want to create a well-rounded service for their clients. This is where an ACCA Probate and Estate Administration course can prove most beneficial, allowing accountants to apply to practice probate for the first time, helping them to offer an additional, valued consultancy service. We recently caught up with one of our ACCA delegates, Nigel Reynolds of Reynolds and Co, to learn more about his experience of the course and why this was so important to his professional progression.

What is your name?

Nigel Reynolds

What job role do you currently hold and at what company?

Director

What is/ was your overall development goal?

To develop my skills so that we can provide the range of services that clients are looking for. The traditional services that accountants and tax advisers provide will over time be eroded by increasing use of technology. It is important therefore to always be looking for business areas which can be developed.

Have you faced any challenges in reaching this goal? If so, what were they?

The main challenge has been from finding a way that I could train without losing too much time from the business.

Why did you choose to undertake your ACCA training with Altior?

I have been on Altior courses previously and have found them to be well structured with the right technical level as well.

What did you think of Altior's online training structure 'Live Online'? -

The online training was easy to use and saved the inconvenience of having to travel to a training room.

This saved on both the cost of travelling as well as the time and stress (if held up in traffic) of travelling. Using the online training was far more relaxing and I learnt more from it. The question feature allowed myself and other delegates to ask questions of the presenter plus being able to view a copy of the presentation afterwards allowed me to re-listen to what was actually said without simply relying on notes.

What were the highlights of the course for you?

The ease of use of the online presentation as well as being able to replay the presentation to refresh my memory of what was said. This meant that rather than taking detailed notes, I could focus on listening and learning.

Did you find the learning resources helpful? And if so, in what way?

The learning resources were helpful as I could read through these prior to the presentation. This gave me an understanding of the subject which meant that what the lecturer covered was easier to understand. Plus, when the lecturer added things which were not in the notes (practical aspects, for example) that added even more value to the presentation.

Would you recommend Altior to a colleague and why?

Yes, because of the ease of use and available resources.

How do you feel the course benefitted your overall goals?

It has allowed me to build on a new service and also given me the confidence to use this service from Kaplan/ Altior in connection with any other training that I want to undertake.

What are your next steps in your career?

Initially to build on this qualification but probably to add to my tax knowledge and qualifications

Where do you see yourself in five years?

A difficult question, but hopefully having completed a couple of books I am working on....



[I'd recommend Altior] because of the great support I received from the administration team with all of my queries. Furthermore, the engaging and practical teaching from the tutors and trainers.

"Loved the course and all those who instructed and organized. "

MARTIN BARYE, MARS INC

"From start to finish, the staff and trainers at Altior make the whole training epperience eptremely professional, very flepible and are always keen to provide the best service possible."

BEN AMOAH, ASSOCIATE, FARRER & CO

WHAT NEXT? THE FUTURE OF LAWTECH: SHOULD IT BE ON YOUR FIRM'S AGENDA?

As technology evolves and is embraced by professionals across the globe (as it has been over the last several weeks), it's predicted that the growth of LawTech will gather considerable pace across the UK. With increased awareness and a preference amongst younger lawyers discovering LawTech in their professional development, it's becoming a key consideration for firms who want to future-proof operations. From online professional development to AI litigation and smart contracts, LawTech covers a range of time and money saving applications, so even for the most sceptical, it is worth considering.

Key drivers for sector growth

Valued at \$15.9 billion globally, the LawTech sector is aimed at supporting, supplementing and replacing traditional methods of delivering professional legal services. As more firms embrace technology to improve their productivity and profitability, this valuation is likely to skyrocket. According to the Law Society Gazette, in the UK alone, there are 269 private companies in the legal industry backed by £430m in capital investment, with the most established LawTech products seen in the fields of eDiscovery and legal research. This is set to grow further, with Tech Nation recently receiving £2million of UK government funding to help support the digital transformation of the legal sector over the next three years.

Speeding up efficiencies

Keoghs Solicitors recently developed AI technology that enables Road Traffic Accident (RTA) personal injury cases to either be litigated electronically or identify the need for barrister involvement – all without human intervention. With proven results and room for further developments, this technology is set to free up time for the more complex tasks, adding additional value to clients and the firm. Examples like this are why the legal tech industry has grown a staggering 713% according to Forbes, reaching an investment high in 2018.

Switching up development

Technology also presents the opportunity to continue professional development remotely, reducing time spent away from desks. As professionals ascend the career ladder and time becomes sparser, it's critical that they look to enhance their skills for continuous improvement. Our virtual classroom Live Online has proven particularly crucial for those who cannot afford to be out of the office for long periods of time. We also predict that as LawTech evolves, more training programmes will be developed around this very topic to help firms make the most of advances in technology.

Cyber security considerations

With increased developments comes the counter-risk of cybersecurity threats, making organisations cautious of cloud-based and/or automated operations, as well as the ethical issues that the use of technology can raise. As a result, we're seeing some resistance to change, with the perception that digital processes are less safe than traditional alternatives - especially as the Solicitors Regulation Authority (SRA) highlighted that £11 million was lost to cybercrime in 2018. However, we predict that the growth of LawTech will bring refreshed regulations, particularly where money or data is involved, to mitigate the potential risks for both the firm and the clients they work to protect.

Despite its growth, we're seeing a divide in attitudes to LawTech. Young lawyers are learning about the opportunities during their training but are unsure of how to implement new ways of working; whilst more established legal professionals are grappling with how to train up their teams and embed technology into their practices in a way that will be effective and efficient for all. Yet, it's critical to note that this trend isn't going away, which is why LawTech needs to be on everyone's agenda. ALTIOR AL

ALTIOR ALT So that's the last 40 years in a nutshell, but what about the future? The UK's legal industry is continuously evolving, and we predict that we'll see big changes as the SQE is introduced in 2021. Not only will this see Altior further expand our service offering but will likely change the way you approach training and we're here to help you every step of the way as you readjust your priorities and set new development objectives for your firm and your team. Whether you wish to undertake this wide variety of training online, face-to-face or a combination of both, our team will find the solution for you.

But for now, we look forward to working together over the next 40 years (and beyond) and continuing our relationship.

Thank you,

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Jody Tranter Head of Altior

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