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Law's Boundaries: Connections in Contemporary Legal Professionalism

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Law's Boundaries: Connections in Contemporary Legal Professionalism

ABSTRACT

Legal services markets and their professions are transforming, through market liberalisation, regulatory disruption and a broader set of societal shifts. This paper argues that the nature and scale of these changes requires a re-evaluation of the role that rigid jurisdictional boundaries play within the system of the legal professions.

Legal Professionalism developed on the basis of strong control over its professional boundaries. Recent discussion of the contemporary legal services market has focused on the competitive threat that new entrants bring to these established boundaries. This paper argues that such a focus underplays the nature of the disruption across boundaries of expert knowledge.

It focuses on legal services as an exemplar site of regulatory disruption to professional boundaries and draws on the analysis of two key sites (ABS and Wealth Management) to ask what is the nature of connected claims of expertise and what drivers for connectivity do they indicate?

Through this analysis of connected professional claims within legal services, this paper focusses attention on a new approach to professional work that is becoming more important. In doing so, it advances the research agenda on professions and organisations, not just within legal services in England and Wales, but for other professional sectors and other jurisdictions.

KEYWORDS: Lawyers, Organisations, Legal Services, Connectivity, ABS, Wealth Management

INTRODUCTION

Changes to legal services in England and Wales challenge the way boundaries of law are claimed and maintained at organisational and profession-wide level. Central to this is the Legal Services Act 2007 (LSA), which permits new professions in the marketplace. Changes in how professions organise their boundaries are hugely significant. They matter for organisations – in how divisions of expert work are structured, how careers progress and how compliance is addressed. They matter for regulators – should the focus should be on occupational title, organisation or function (Mayson 2019)? They also matter for the sector's productivity; thus enhanced productivity is identified within organisations with higher proportions of externally generated ideas (Love et al 2010). This article's focus is on the growing importance of connections across professional boundaries.

Multi-disciplinarity in professions and their organisations is, of course, not new (Jameson 1956). However, the *scale* of change in legal services is critically important (Flood and Muzio 2012; Law Society 2016: 4). These challenges impact core dimensions of professionalism; knowledge and its boundaries (Kritzer 1999; Abbott 1988). Given the scale of change, the legal sector in England and Wales provides an important litmus test of transformations for other professions and jurisdictions. Crucially, regulatory challenge to claims based on occupational title frames the context within which claims of connected expertise are seen.

Boundaries between one profession's expertise and another, enable professions to 'clearly differentiate their identity' (Larson 1977: 14). Thus, professions claim their expert knowledge is most appropriate to resolve a task and seek exclusive rights over that work (Abbott 1988: 59). Legal professionalism similarly exerted strong boundary control (Sugarman 1996). Much of the post-LSA discussion has, therefore, focused on the disruptive *competition* that new entrants bring. However, as Muzio, Brock and Suddaby argue,

existing theories have not yet been able to fully grapple with the ... transformation of practices as professional jurisdictions are reshaped (2013: 701; Švarc 2015: 405).

We need to re-think how professional boundary work in Law is claimed. This paper's central focus is, therefore, on two key questions; what is the nature of claims of expertise within connected professional fields and what can this indicate about the drivers for connectivity?

To address these questions, the paper sets out a field-level picture of legal services, before analysing the claims of connection made in two key sites – Alternative Business Structures (ABS) and Wealth Management. It does not attempt a detailed analysis of the day to day workplace practices behind the claims. However, claims highlight the issues that organisations wish to foreground in response to the market, and thus may be indicative of drivers towards particular models of practice. Moreover, claims are the primary means by which traditional boundary work was directed to key audiences (Gieryn 1983: 791). It is therefore instructive to examine how claims are presented within a context that encourages connections. ABS and Wealth Management are chosen, not because connections can *only* be seen in these sites and in contrast to other sectors. Rather these sites are exemplars – in their claims and structured supports for connections.

The analysis of the claims builds on existing debates (Seabrooke 2014), through its focus on connections between established disciplines, and not only in transnational spheres (Faulconbridge and Muzio 2012; Blok et al 2018). In contrast to existing work, the focus on claims foregrounds the ongoing importance of established professions and highlights the specificity of the context to which the connections respond. It develops Abbott's 'linked

ecologies' concept (2005), and synthesises it with Noordegraaf's work on connectivity (2013), to assert that 'linkages' can develop between professions, in their work and practices, and not simply between different ecologies (such as professions, the state, clients and so on).

Law, perhaps above other professions, emphasises exceptionalism (Packel 2018) in its claims of exclusivity - an independent profession commanding the boundaries of a 'reified' normative system (Davies 2017: 28). In highlighting the growing importance of connectivity, as a model of professional work on Law's Boundaries, this paper argues for an increased recognition of connectivity in regulatory, educational and theoretical work on professions and organisations more widely. It thus proposes a preliminary model through which to understand the drivers for connective professionalism and the claims for distinction made within it.

LEGAL SERVICES, BOUNDARY UNCERTAINTY AND THE LIMITS OF EXCLUSIVITY

This section presents a field-level analysis and, in particular, highlights the boundary uncertainty which is both a product, and a driver, of the field-level disruptions within legal services. It suggests an emerging pattern of connected work across professions within the sector, not readily captured by traditional accounts of boundary work.

The UK legal services sector is a large, important and growing professional services field. It has a turnover of approximately £32 billion, generating around £4 billion in net exports (LSB Health). There are nearly three times as many solicitors as 30 years ago, although the rate of growth is slowing. There are currently 143,167 solicitors and 9452 private practice firms, which has been relatively stable since 2015. Most firms are relatively, small, but there is a concentration of large law firms in the City of London (Law Society 2019a).

The sector has experienced significant disruption over the last ten years. The LSA established a new regulatory framework, and crucially, a new discourse – one of competition and de-regulation. The current regulatory settlement contains contradictory elements (Mayson 2019). On one hand are the 'reserved legal activities' (s.12 LSA), which relate to traditional claims of exclusive legal expertise (Sugarman 1996). However, the counter-balance to this is the promotion of the consumer interest (s.1(1)(d) LSA) which has seen the primacy of competition (LSB 2016a: 3), embraced by the oversight regulator (the Legal Services Board (LSB)) and the Solicitors Regulation Authority (SRA) (www.sra.org.uk/sra/consultations/consultation-responses/cma-report.page). Alongside this is, of course, the key innovation of non-lawyer ownership and management of entities providing legal services through ABS (LSA Part 5) which disrupts the profession's traditional control of its boundaries (Law Society 2016a: 48-53).

Legal services were founded on exclusivity. Under this model, the profession's work jurisdiction is tied to the expert knowledge it claims as its own. The goal is full jurisdiction or exclusivity, policed by a professional association (Abbott 1988: 106; Noordegraaf 2011a: 468). Professionals asserted differences between themselves and 'the other' (Gieryn 1983), including the expert and non-expert (Bucher et al. 2016), and turf wars between lawyers and accountants characterised their history (Sugarman 1996; Walker 2004). Fundamentally, while there has been movement around professional boundaries (Gieryn 1983: 792), the principal driver has been competition to secure exclusive control (Abbott 2005: 246).

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3 Claims founded on exclusivity, of course, continue within the legal field. Boussard, for
4 example, highlights the work in transnational Mergers and Acquisitions (M&A) to secure
5 normative rather than legal boundaries (2018). Corporate law firms generally assert *legal*
6 expertise as providers of professional tax services as a response (Bucher et al 2016), to the
7 competitive threat posed by accountancy firms (Rose 2018). At an occupational level, the Law
8 Society asserts the importance of *legal* expertise in contrast to unqualified advice (Law Society
9 2018). Boundary work in this classical sense continues (Muzio, Brock and Suddaby 2013: 707).
10 However, this paper argues that within legal services we can see the emergence of alliances
11 between professions, not countenanced by traditional exclusivity accounts.
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15 Challenges to the legal profession's claim of expertise (Moorhead 2014: 453-60), alongside
16 specialisation (Moorhead 2010), is concurrent with the growing complexity of client problems
17 (Gardner 2007: 4). Hence, whether in a large corporate deal, wealth planning, criminal defence
18 or divorce, connecting the expertise of lawyers, accountants, tax specialists, mediators, and
19 social workers might be required (Cohen 2015). In global legal and professional services,
20 connections arise to manage the uncertainty of work with multinational clients (Etherington
21 and Lee 2007), develop strategies to manage local cultures (Faulconbridge and Muzio 2015)
22 and instigate organisational practices that transcend original discipline (Greenwood and
23 Suddaby 2006). Technology both facilitates and requires connections to support these
24 developments (Susskind and Susskind 2015; Eversheds), impacting 'on the skills mix within
25 law firms [requiring] data analytics, process management and business transformation
26 expertise' (Law Society 2019b: 57; EY 2018). Within social welfare, complex client needs and
27 uncertain funding drive innovative networks which connect professions (Kenrick and Palmer
28 2016: 229) and legislation requires lawyer/mediators' hybridised expertise (Maclean and
29 Eeklaar 2016: 126). Connections exist in other sectors too, including in health care and policy
30 work (Noordegraaf 2011b: 1361-2). All this is a response to the re-configuration of
31 professional work, fragmentation of professional segments and shifting boundaries of expertise
32 (Noordegraaf 2013: 801).
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37 Multi-disciplinary working has existed within large accounting practices (Greenwood and
38 Suddaby 2006). However, within legal services in England and Wales what appears striking is
39 that, in ABS, there is a new organisational structure that facilitates increasingly visible claims
40 of connection. Secondly, and in contrast to Seabrooke's view of national jurisdictions'
41 inhibition of movement around knowledge pools (2014: 54), the regulatory context de-
42 emphasises professional exclusivity. The LSB's response to the Competition and Market
43 Authority's Interim Report draws attention to 'shared cultural norms' among solicitors which
44 'mute competition between providers' (2016a: 5), and highlights problems for competition
45 generated by occupational titles (2016a: 8). The narrative is 'disruption and connections –
46 good; claims of expertise on the basis of occupational title - bad.' Fundamentally, the context
47 of legal services in England and Wales means that there are now new opportunities for
48 organisational support of professional connections, and new regulatory and market imperatives
49 which recognise the value of such connections. What emerges are claims of connected
50 professional working.
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55 There has been significant disruption at the boundaries of law, within an uncertain legal
56 services market. I have argued that key elements of this disruption are examples of different
57 forms of connection. Discursive claims were central to professions' defence and expansion of
58 their exclusive professional jurisdiction (Gieryn 1983). Therefore to compare exclusive and
59 connected strategies, I explore the claims to distinction, the way these claims are supported and
60 the audiences to whom they are directed (Abbott 2005: 246). Claims are additionally important

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3 as a site of disruption as they are delivered through marketing (Jervis 2017) - the most common
4 form of practice innovation in legal services (LSB 2016b: 59). Of course, connected claims
5 may not fully reflect organisational reality. However, they must nonetheless have a 'semblance
6 of reality,' like other professional claims (Larson 1977: 51). Therefore, the paper addresses
7 these central questions; what is the nature of claims of connected expertise and what does this
8 indicate in terms of the drivers for connectivity. The next section explains the relationship of
9 the two exemplar sites - Alternative Business Structures and Wealth Management – to the
10 wider field, before explaining the methods underpinning the data collection in these sites.
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13 **EXPLORING PROFESSIONAL CONNECTIONS IN LAW – ALTERNATIVE** 14 **BUSINESS STRUCTURES AND WEALTH MANAGEMENT**

15 *1. ABS and Wealth Management: Structured Connections and Disruptive Claims*

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ABS and Wealth-Management exemplify the professional connections identifiable throughout
legal services (Gardner 2017). They also demonstrate drivers for connectivity identified in
other sectors, such as healthcare and policy work; namely, the complexity of client problems,
the multi-problem nature of professional tasks and perceptions of risk requiring multi-
professional responses (Noordegraaf 2011b: 1358; Gardner 2017: 4). Thus, law, accountancy,
and taxation advice in wealth management, or legal and insurance responses in personal injury.
The complexity of client problems takes the task beyond a claim of narrow professional
expertise.

Innovative practice models and transformations in organisational structure are taking place
within these exemplar sectors to a greater degree than legal services as a whole. Thus, there
has, in general, been less disruption than anticipated post-LSA (Roper et al: 2015: 72). These
sectors are outriders for an emergent connectivity. Thus only around '16% of [all] providers
had introduced changes to their organisational structure' (LSB 2018: 20), but ABS are 'twice
as likely as other legal service providers to implement management innovation' (LSB 2018:
25). There is also a strong correlation between innovation and investment in connections
driving change in firms, ensuring 'there are statistically significant links between higher levels
of non-lawyer ownership and the likelihood of having made an investment (LSB 2017: 4).

In contrast to the wider legal services market, both the ABS and wealth management sectors
were less likely to see new organisational / business structures as having a negative impact on
their services delivery (LSB 2016b: 62). This is unsurprising – both sectors are already, and in
contrast to the field as a whole, deploying these new organisational structures. ABS were
significantly more likely to have made changes to their organisational structure, and this was
more prevalent in the Personal Injury (PI) sector (LSB 2018: 20).

There are currently 1306 licensed ABS (LSB – ABS). ABS represent around 11 % of the total
legal services sector, generating annual turnover of £2.29billion. Levels of entry have slowed
in recent years (LSB 2018: 18). Most early ABS were law firm conversions generating limited
market disruption (Aulakh and Kirkpatrick 2016: 289; 297). The small number of ABS that
secured external investment have done so from a parent firm, although exceptions include the
investment into Knights by private equity firm Hamilton Bradshaw. ABS have higher levels of
service development, deploy greater use of corporate structures, have evidence of more
organisational and management innovation and generally are making better use of technology
(LSB 2018: 73-74).

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3 The second site is Wealth Management, encompassing tax, trusts and estate management,
4 wealth planning, law and accountancy. It is not only a site of organisational connectivity but
5 through, the professional body STEP, there is institutional support for what appears a more
6 cognitively coherent field. STEP is a global professional association, representing
7 approximately 20,000 members working in trusts, estates and wealth management. It is
8 disciplinarily and nationally diverse and advocates to governments on issues relevant to its
9 members (Harrington 2012).

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12 To support its claims to ‘professional standing’, STEP’s qualification framework requires a
13 Diploma, two years’ experience at senior level and ethics training. Wealth Management is
14 characterised by major differences in disciplinary and jurisdictional focus. Thus, for example,
15 most law and accountancy firms are focused on the on-shore market, whereas most trust
16 management firms are off-shore (STEP 2016).

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19 The drivers for STEP’s formation predate the LSA. They include the marginalisation of private
20 client lawyers and accountants within their commercially dominated professions, and the
21 growing opportunities for Wealth Management in on and off-shore jurisdictions (Tasker 2010).
22 The contemporary regulatory and economic environment has facilitated further organisational
23 and institutional connection. There are a wide range of firms with different disciplinary
24 backgrounds presenting as expert within the boundary-spanning field of Wealth Management.

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27 Within both sectors, it is not simply organisational form that operates as a point of difference
28 to the wider field, it is the balance of professional expertise within these organisations. Thus,
29 while organisations within legal services in general saw 76% identify it being ‘very / fairly
30 important to recruit from a law background’, this fell to 54% among those providers operating
31 within the trusts sphere (LSB 2018: 40). Again the relationship of non-legal expertise to change
32 and innovation is more pronounced in these sectors than the field as a whole, with ‘those who
33 believe recruiting people with a non-legal background is important... are 2.1 times more likely
34 to implement organisational innovation’ (LSB 2018: 40). ABS and Wealth Management thus,
35 represent exemplar sites within which the claims of, and support for, the connectivity that is
36 emerging elsewhere in legal services are particularly advanced.

37 38 39 40 2. *Data Collection Methods*

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42 The key sources for the ABS are official databases¹ and organisations’ websites.² This data is
43 from twenty seven ABS.³ Joint venture ABS were selected as they were most likely to contain
44 multi-professional connected expertise. The firms predominately originated from the insurance
45 sector (17/27) and mainly focused on personal injury - connecting insurance, claims-
46 management, medical and legal expertise, as consistent with the wider ABS sector (LSB 2016b:
47 18). There were also media (accountancy, fundraising, consultancy and lawyers) and tax
48 practices (lawyers, accountants, tax advisors and financial planners). Firms were generally
49 small, with single figure partnership/management structures and did not have large numbers of
50 staff – the largest had just 33.

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53 The organisations were coded for factual characteristics (size, sector and so on) and the
54 presentation of their structure, connections and claims. Key ‘claims-making’ pages on websites

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57 ¹ SRA Register of ABS and Law Society Register of Solicitors on the Roll.

58 ² The supplementary file contains referenced firms’ URL, size and disciplinary connections.

59 ³ *A database of alternative business structures and interviews* doi.org/10.5255/UKDA-SN-852260 (ESRC) and
60 a recent example.

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3 ('about us', 'our services' and so on), were identified and subjected to thematic analysis (Braun
4 and Clarke 2006), before coding recurrent statements. Finally themes were re-categorised to
5 narrow the principal discourses.
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8 The Wealth Management discussion draws on two key datasets. The first has an organisational
9 focus and comprises a detailed analysis of twelve wealth management firms (2017-8). The
10 analysis of this sector is complicated, as there is no register of firms regulated by STEP (in
11 contrast to the SRA's ABS register). STEP membership operates on an individual, rather than
12 firm-level basis. The sample was, therefore, identified through cross-referencing a general
13 search with the membership data. This produced six firms with law backgrounds, four
14 accountancy, and two presenting as consulting professional services, ranging from sole traders
15 to global partnerships of 900, which is consistent with the disciplinary spread within STEP.
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18 The second dataset has an institutional focus and explores the connected expertise within and
19 facilitated by STEP. This analyses STEP's recently revised qualification framework,
20 consultation responses and governance framework (2016-18). This is augmented by data from
21 a study conducted at a crucial point in STEP's history. This earlier study comprises 774
22 questionnaire responses (a rate of 5.56 per cent, but with strong congruence with STEP's
23 membership statistics relating to gender, ethnicity, discipline and on/off-shore location). In
24 addition, eleven interviews with STEP's professional and salaried leadership were undertaken
25 to reflect institutional role, discipline, gender, international location and so on. Changes have,
26 of course, occurred since this data collection in 2009-10; for example, leadership turnover,
27 ABS, scrutiny of off-shore wealth-management and a rebranding of STEP (STEP 2016).
28 However, there are strong continuities; in particular around the specialised, but connected
29 disciplinary expertise and divergence in off-shore and on-shore concerns (STEP 2016).
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33 The same process of analysis of the organisations' claims was followed, with similar thematic
34 analysis applied to the interviews. Statistical analysis of the membership data was supported
35 by SPSS. In most cases, the data captures straightforward information such as the % of lawyers
36 based off-shore. However, special attention was given to those instances when cross-tabular
37 analysis demonstrated statistically significant associations between variables (Miller et al.
38 2002: 133). Information is also provided about the organisations in these two case-studies to
39 provide context and to shape future research (Supplementary file).
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43 The following section analyses the claims of connected expertise. This analysis enables a
44 preliminary model of connected claims, and the ways in which these claims may reveal drivers
45 of connectivity. Within this, the primacy of the consumer as driver and key audience for
46 connected claims, the compatibility of connected claims with originating disciplines, the
47 narratives of disruption and the importance of the field in determining the conditions for
48 connectivity appear central. The claims also draw attention to the organisation as evidence of,
49 and in support for, these claims.
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51 **ALTERNATIVE BUSINESS STRUCTURES: CLAIMING ORGANISATIONAL** 52 **HYBRIDISATION IN LAW** 53

54 *1. Claims of Distinction: Integrated Service* 55

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57 The most common way in which firms assert distinctive expertise is a claim to 'integrated
58 service.' This is in direct contrast to the exclusive claims of legal exceptionalism, discussed
59 above, which highlight distinctly *legal* services and foreground the role of the lawyer, for
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3 example in a corporate deal (Allen & Overy 2013) or ‘top quality legal advice’ (Slaughter and
4 May).

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6 Critically, it is the service to the client upon which the claim of integration is made and not the
7 body of knowledge which provides the basis of that claim. This indicates something other than
8 a straightforward emergence of a new profession (cf. Abbott 1995: 860), and, moreover, is not
9 a claim that is compatible with exclusivity. It depends on connection.
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12 ABS are an organisational framework for claims of integrated service to the client. In the realm
13 of vehicle accidents, FMG Legal draws on incident managers and lawyers to offer ‘combined
14 expertise for greater results.’ Maitland promises ‘expertise without boundaries’ in taxation, and
15 in media, CounterCulture boasts ‘progressive multi-disciplinary practice, offering clients a
16 one-stop-shop approach to gaining expert advice across a range of professional services,’
17 celebrating its connection of ‘consultants, accountants, solicitors, project managers...
18 fundraisers ([and] musicians, artists, historians, writers).’
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21 Client specificity, rather than exclusive knowledge, is central to the connected claims of
22 distinction (Gardner 2017: 5). The ABS are well-positioned, willing and able to frame their
23 claims to distinctiveness in the provision of a tailored, bespoke service on the basis of their
24 multi-disciplinary expertise. Noordegraaf is clear that the contingency of cases drives
25 connected professional responses (2011b: 1360-1) because exclusivity is not credible when
26 clients demand a nuanced and personalised response. I argue, further, that the need to respond
27 to the specificity of a client’s problem is intensified when those problems arise in the
28 marketised, consumer-driven context of legal services (CMA 2017). The ability to claim
29 integrated service to a specific client is therefore a ‘hinge,’ providing reward to each connected
30 profession (Abbott 2005: 255).
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33 Thus, ‘client care’ dominates as a core value among the ABS claims, with eighty per cent of
34 firms stressing this. Moreover, the key issue is not simply that client care is highlighted, it is
35 the *way* in which the client care is delivered which is notable. Thus, for example, FMG herald
36 a service ‘tailored to *your* individual needs’ and ALP Law stress that ‘*each* client is provided
37 with a bespoke service tailored to their *individual* needs’. Similar language is deployed by other
38 firms including Aspire who highlight their ‘*bespoke, tailored* service’.
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42 While ABS were heralded as an opportunity to drive down costs (DCA 2005: 40), the ABS
43 firms did not make strong claims in this regard. Rather than ‘costs’, it is ‘quality’ of service to
44 the client that is emphasised. This is presented in terms of efficiency and effectiveness. Thus,
45 1st Central Law articulate strengths in ‘handling cases in a modern and efficient way’. Dixcart
46 will handle cases ‘efficiently’, and M & R Legal Services will give ‘friendly, jargon free advice
47 in a quick, seamless manner’. OC Law’s ‘core focus is on delivering legal services that matter
48 to our clients, in a timely, efficient and cost-effective manner.’ RSA Law ‘provid[e] high
49 service standards, clear simple advice, timely and efficient service with regular updates.’
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52 Traditional legal values such as justice, or rights do not feature prominently. A small number
53 of ABS firms (primarily PI) make reference to affordable access to justice, but not in great
54 numbers. Professionalism is referenced, however, this is framed as a descriptor as to the type
55 of service provided - ‘professional help’, professional advice’ and so on, or in terms of a quality
56 mark, ‘professionalism, integrity and flexibility’. There is no reference to traditionally
57 articulated values of professionalism such as trust, ethicality or wider public interest (Larson
58 1977: 51). Distinction is derived from professionalism’s symbolic power (Kirkpatrick and
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Noordegraaf 2015: 100), while its traditional values are downplayed in favour of the new institutional logics.

2. *How are the claims supported?*

Fundamentally, the claims of service, efficiency, and bespoke, effective services for the consumer in the examples identified are supported by the connected organisational form. Exclusive claims draw on occupational title (Abbott 1988), even at organisational level (Evetts 2013). In contrast, ABS structures provide the framework through which the claims may be delivered, but are also evidence for the substance of the claims. Thus, an integrated, efficient service can be provided through organisational connections such as referral vehicles or in-house expertise (LSB 2018: para.5.32). Yet, crucially, the fact that the organisation making the claim *is* an ABS also provides *evidence* of the multi-disciplinary connectedness. Thus, for FMG Legal, its ABS status is explicitly linked to its claim that the ‘combin[ation of] the UK’s largest vehicle Incident Prevention and Accident Management services provider with a wider Legal Services team ... delivers excellent results.’ Large accountancy firms draw on their vast infrastructure to support claims of ‘seamlessly combining market-leading tax and legal expertise with the latest technology’ (KPMG Legal).

Law and insurance firms use ABS as vehicles for referrals - for example, IMe Law and Linkfield Claims Services Ltd - which provide a more robust framework than looser, informal networks (Painter 2015). These hybridised organisations are relatively small, with similar numbers of lawyers and non-lawyers. However the continuing importance of disciplinary origin appears significant (Kirkpatrick and Noordegraaf 2015: 103). Thus, new professions of Creative Consultants are not emerging (c.f. Abbott 1995), but new organisations providing structured support of connected claims are, such as CounterCulture.

Middle-status professions, or those seeking to challenge traditional boundary settlements, rely on evidence-based framing for their claims (Bucher et al 2016: 516). ABS (as new entrants) present claims which rest on rational, rather than normative, justifications. Thus, evidence for the claims to efficiency and effectiveness is not exclusive occupational designation (LSB 2016a: 8), but the client’s ability to monitor. In the context of the Personal Injury ABS, ‘online tracking systems’ with chat functionality are highlighted, to measure the claims of efficient and tailored service. By contrast, Wealth management firms were least likely to use client evaluation as quality assurance tools (LSB 2016b: 60). This indicates a complex picture in some aspects of professional autonomy alongside the more disruptive elements of connectivity.

The constraint upon professional autonomy (Noordegraaf 2013: 798), (through client monitoring) is built into the claims of distinctiveness. While few firms pushed transparency of *costs* as a distinction, transparency of *service* was a consistent theme (Dolin 2017). The organisations invoke this self-disciplining discourse (Fournier 1999: 294) in their market positioning and draw on connections (for example with claims management) to enable this monitoring. While a service focus could, of course, be viewed from the basis of exclusive professionalism (Hanlon 1999), connectivity appears well-placed as part of a narrative of disruption to established patterns of professional practice (EY 2018). Thus, the discourse is that exclusivity is *anti-consumer*. Connection therefore *benefits* the consumer. The primary focus of the connected claims is, in turn, on the consumers as the purchasers of legal services. Although the regulator is not the primary audience of the claims, it nevertheless shapes the field.

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3 In this sector the claims are organisationally framed. There is little evidence of new professions
4 emerging or institutional support, such as in Wealth Management. The organisational form
5 provides the structure through which professional connectivity is supported, which, in turn,
6 facilitates claims of integrated service to be made to the consumer. Of course, organisational
7 form was important within exclusive boundary work. Until the reforms of the LSA, exclusive
8 claims of expertise were linked to organisational title through the prohibition of non-lawyer
9 ownership of solicitors' practices. The arrival of ABS generates uncertainty for the established
10 legal profession (Law Society 2016: 50). However, they also provide a vehicle through which
11 organisational shelter is provided on a connected basis to lawyers (and others).
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14 **WEALTH MANAGEMENT: DISCIPLINARY CONNECTIONS** 15 **IN A DISPARATE FIELD** 16

17 *1. Claims of Distinction: Connected Expertise* 18 19

20 As with ABS, the distinction claimed within Wealth Management does not rest upon assertions
21 of exclusive knowledge, but of *connected* expertise and *integrated* service. The claim of
22 specialised expertise within the originating profession is crucial. This specialist expertise is,
23 however, connected in terms of the other knowledge with which it engages and the other
24 professions with which practitioners work (Harrington 2012).
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27 Within organisations, it is the connection of traditional expertise that permits the claims of
28 integrated service. Thus, Oury Clark (structured as two legally separate entities) emphasises
29 expertise across law, accountancy, tax specialisms to offer a 'uniquely integrated service.'
30 Turcan Cornell claims that it is the 'joined up interdisciplinary approach of combining legal
31 and tax expertise [that] really set us apart.' The Big Four accountancy firms, each stress
32 'integrated service' alongside multidisciplinary strength. Prydis Legal asserts that '[o]ur team
33 of lawyers deliver legal solutions that are integrated with the financial and accountancy
34 advice given by Prydis Wealth and Prydis Accounts.'
35
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37 There are differences between these organisational claims with those of individual practitioners
38 and supported by STEP. The emphasis here is on specialised expertise within the originating
39 profession, but enhanced by connections with other professions (Harrington 2012: 835). Thus,
40 the claim differs from a traditional, exclusive claim, in rejecting the façade of equal competence
41 (Johnson 1972: 55) and emphasises its connectedness with, rather than its differences from,
42 other professions in its claims to best address wealth management matters.
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45 STEP describes its history beginning 'as a niche society for UK-based accountants and lawyers
46 working with trusts' (<https://www.step.org/our-brand>). It now emphasises wealth management
47 for families (Harrington 2012). The Wealth Management emphasis is demonstrated through its
48 new Postgraduate Diploma in Private Wealth Advising, designed to appeal across the
49 disciplinary divide to attract International Tax Advisors, Wealth Managers and Senior Lawyers
50 (<https://www.step.org/ppgd>).
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53 Notwithstanding this shift, in presenting its expertise during Government Consultations, it
54 remains the connections between its constituent professions that are foregrounded, rather than
55 an assertion of the expertise of a new profession of Wealth Professionals – 'a range of
56 professions, including lawyers, accountants and other specialists' (STEP 2018). The majority
57 of the Consultation Responses (collated worldwide) are directed towards UK based tax and
58 regulatory concerns and the UK technical committee is dominated by professionals describing
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3 themselves as lawyers or accountants, rather than a new hybrid role (<https://www.step.org/uk-technical-committee>). Even the worldwide policy committee has only a handful of members
4 who do not reference their traditional discipline ([https://www.step.org/public-policy-](https://www.step.org/public-policy-committee)
5 committee).
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9 The emphasis on connected *existing* specialist expertise, rather than *new* expertise, is reinforced
10 by the recently revised STEP qualification framework, designed to accommodate national
11 jurisdiction and disciplinary background (<https://www.step.org/qualifications/diplomas>). This
12 contemporary picture is consistent with the membership study. Thus, Lawyers primarily do
13 law, Independent Financial Advisors (IFAs) do financial planning and trusts administrators
14 administer trusts and so on - 'it's the Law - that's the framework within which I work'
15 (Interview 2, Branch). Particularly for lawyers and accountants, the connection with expert
16 knowledge beyond the host discipline is in knowing when to refer; in terms of understanding
17 the broader body of expert knowledge, but also knowing other professionals (Harrington 2012).
18 While mere referral may miss smart collaboration opportunities (Gardner 2017: 2), it brings
19 business advantage; 'an outstanding way of raising my profile in the local community... I think
20 [referral] is a great way of networking' (Interview 5, Branch).
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23
24 The membership was clear that their claim to expertise was as an accredited Trusts and Estates
25 practitioner, albeit within their host discipline. Thus, with no disciplinary (or other) differences,
26 the fact that STEP offered a 'Qualification that Defined the Specialism' was a reason for joining
27 for 63 per cent of respondents - and 31 per cent identified this as the primary reason. The new
28 cross-disciplinary postgraduate qualification asserts its benefits to prospective applicants as
29 'demonstrating mastery of the knowledge and skills, required for Senior Advisors in the Private
30 Client field... increase your professional connections [and] set yourself apart'
31 (<https://www.step.org/ppgd>). The developer of the new Postgraduate Diploma, similarly
32 advocates that the primary benefits of STEP are 'excellent professional training and
33 qualifications for practitioners involved in private wealth' (Hodson 2018).
34
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36
37 The firms make claims on the basis of the integrated services to clients through connected
38 expertise. Rather than claiming that legal, or indeed accountancy, expertise is best suited to
39 resolve a particular wealth management problem, the claim is that connected, accredited
40 expertise is most appropriate. Both 'cinderella' private client professions derive benefit from
41 this claim (Abbott 2005: 255). They are stronger on a connected basis. A reliance on traditional
42 exclusive claims would leave each ill-placed in terms of the internal stratification of the
43 originating professions (Abbott 1988: 82). Knowledge to refer, rather than new knowledge
44 (Harrington 2012), signals that STEP's institutional support for connected expertise exists
45 alongside traditional disciplinary claims.
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48 2. *How are claims supported?*

49 Claims are supported in two broad ways - organisational structures and the STEP qualification.
50 Within wealth management, there are a number of alliances between firms with a tax and
51 financial planning focus with those of law firms - for example, Pinsent Masons Pension
52 Services and Womble Bond Dickinson Wealth. These connections are stronger than referral –
53 in many cases, presented as the same organisation; effectively providing organisational support
54 for (and evidence of) connection. This is indicative of much more structured linkages, than
55 traditional clubbable collaboration (Jameson 1956).
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58 Wealth management delivers an 'under one roof' approach through multi-disciplinary
59 organisations; the largest accountancy firms employ significant numbers of lawyers or, in some
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3 cases, operate a separate legal form. Thus, for Prydis Legal, it is the organisational structure
4 which means that ‘*as a result* [emphasis added] we can deliver comprehensive advice quickly
5 and can prevent issues falling between the gaps.’ One E Group, frames their claim in terms of
6 adding value to accountancy through a ‘nationwide network of specialist services *under one*
7 *roof*...one of the largest independent tax advice, tax planning and tax dispute resolution firms
8 in the UK.’ Deloitte emphasises the ‘multi-disciplinary’ expertise of its private and family
9 wealth office.
10
11

12 Oury Clark’s claim of connected expertise rests on ‘a new approach to professional services’,
13 seeking to differentiate itself, not from the non-expert, but from the non-connected. Technology
14 is also emphasised heavily. It showcases modernity in brand identity which foregrounds (and
15 is supported by) professional connections. Thus, particularly among accountancy firms,
16 ‘investments in innovation and technology [to] enable our teams to provide creative solutions’
17 for clients are highlighted (KPMG).
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19

20 A key dimension of these connected claim of expertise is the credibility of the established
21 professions (law and accountancy) who are connected within the organisation. This normative
22 deployment of authoritative expertise (Bucher et al 2016: 514-5), enables firms to focus
23 attention on ‘combining legal expertise and tax expertise’ (Turcan Cornell), and their
24 ‘accountants, IFAs and solicitors’ (One E group) and of the discursive power of references to
25 a ‘dynamic *professional* firm (Oury Clark).
26
27

28 As noted above, the STEP qualification provides a key support for individuals’ claims of
29 expertise. Just as ABS provides a vehicle for, and evidence of, connectedness, so too the TEP
30 qualification signals specialisation in a connected field (Harrington 2012: 832). In an uncertain
31 market, STEP practitioners are keen to assert that their specialised connected knowledge best
32 positions them to claim the role of trusted advisor (STEP 2010a: 10). However, they lack the
33 status within their originating professions (Greenwood, Suddaby and Hinings 2002: 64), to
34 engage in the ‘ontological theorisation’ of the marketplace, deployed by large professional
35 services firms, asserting *a priori* categories, rather than empirical evidence (Suddaby and
36 Greenwood 2005: 52; Boussard 2018: 287-9). The STEP claim is therefore strengthened by
37 possession of a robust qualification – the ‘gold standard’ in the field (STEP 2010a). This is
38 reinforced by the invocation of the ‘foil’ of the non-expert generalist doing damage to the
39 public (Gieryn 1983: 791; STEP 2010b).
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43 Different actors have different audiences for their connected claims (Abbott 2005). For STEP
44 members, the key audience is their employer. Thus, the most common ‘Strategic Priority’ (44
45 per cent of respondents) was to ‘promote the qualification to employers’ and a further 17.8 per
46 cent of respondents identified it as *the most important* ‘Strategic Priority.’ STEP supports its
47 members to establish the STEP qualification as the industry standard,⁴ but also engages with
48 governments to reinforce its credibility and protect members/clients’ interests
49 (<https://www.step.org/consultation-tracker/1>). Firms, however, direct their claims at individual
50 clients; connected responses to the contingency of case treatment (Noordegraaf 2011b: 1360-
51 1) - ‘all the professional advice... *an individual might need* during their lifetime (Turcan
52 Cornell); ‘right people, right expertise to solve *your* business *needs* (PWC).
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56 The focus in the analysis above is on claims rather than organisational reality. However, in
57 setting out the discourse that claims invoke and the evidence that is drawn upon, I argue that
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⁴ For example, STEP’s Employer Partnership Programme - <https://www.step.org/epp>

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3 this can be developed to form the basis of a preliminary framework to explore drivers for
4 connective legal professionalism. The discussion of this framework and the research questions
5 it raises are set out below.
6

7 8 **TOWARDS A CONNECTIVE ACCOUNT OF LEGAL PROFESSIONALISM** 9

10 The following section synthesises the findings from the exemplar sites, with the field review
11 above, and draws on existing literature (in particular, Noordegraaf 2011a and Abbott 2005) to
12 propose a preliminary framework to consider the claims of, and the drivers for, connective legal
13 professionalism. The key elements prominent in the claims are the importance of client, strong
14 narratives of disruption and the enduring bonds with the originating discipline. In
15 understanding why these claims emphasise the themes that they do, I suggest that it is critically
16 important to consider the field context to which they respond.
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19 The consumer as a driver for making, and the key audience of, these connected claims is
20 critical; the ABS and Wealth Management sectors both illustrate this. As noted above,
21 competition is the dominant discourse framing the contemporary legal services landscape of
22 England and Wales. The regulatory discourse is that traditional professional practices are anti-
23 competitive and contrary to the consumer interest. In this context, connections between
24 professions can demonstrate added value to the client. Moreover, this added value is expressed
25 in terms of service and efficiency to the client. Of course, these conditions also require
26 exclusive claims to be similarly framed. However, connected claims represent a more
27 “legitimate” or “permissible” professional response’ (Nelson and Trubek 1992: 22) and,
28 therefore, are more compelling in the market context. Context matters, and the context within
29 legal services is anti-exclusivity. The claims of professional connections highlighted in the two
30 sites (and, indeed, those within the wider legal field) respond to this context.
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34 The second point concerns the narratives of disruption. In contrast to traditional claims of
35 continuity and stability, the claims of connected expertise in the two sectors identified their
36 differences to the norm and disruptions to established narratives. Thus, they downplay
37 traditional boundaries, highlight new models of control and doing things differently. There is
38 also evidence that organisational innovation and disruption has occurred in these sectors (LSB
39 2018). Thus, the claims of ‘new forms of practice’ through one-stop shops for example, align
40 with the narrative of the new organisational forms as disruptive challenge to established
41 professional work.
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44 The final point is that the claims appear to indicate that connectivity does not necessarily lead
45 to a new profession (cf. Abbott 1995; Boussard 2018). The connected claims are, in fact,
46 closely associated with their originating disciplines. These roots are integral to the story of
47 connection. This is seen in the two sites explored in depth, but can be identified elsewhere, for
48 example the role of lawyers in family mediation (Maclean and Eekelaar 2016). The enduring
49 importance of discipline (Davies 2017), particularly for traditional professions such as law and
50 accountancy, anchors the connected claim and draws on the authoritative expertise of the
51 originating discipline. Moreover, the *added value* of connection as a claim, and as resilience
52 against field uncertainty, is lost if the alliances simply lead to amalgamation and a new
53 profession. Within the connected claims, there were strong continuities in the prominence of
54 key disciplinary terms such as ‘the law’, ‘your rights’, and the ongoing importance of ‘law and
55 legal services’ in both sites considered in this paper. Similarly, the traditional designations of
56 lawyer or accountant dominate the self-penned biographies of the STEP UK technical
57 committee (https://www.step.org/uk-technical-committee). In the membership survey, lawyers
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3 were more likely than any other profession to state that ‘I am a lawyer (or accountant, IFA and
4 so on) first, and a trusts and estates specialist second.’ Crucially, the claim to expertise does
5 not end with the occupational title, but is strengthened through connection.
6

7
8 The claims of connectivity studied in this paper signal that organisations value making
9 connected claims. This suggests that the field requires it. Thus, looking closely at the claims
10 and the evidence cited in support, enables a preliminary framework for understanding the
11 drivers toward connectivity within legal services. There is, of course, a difference between
12 drivers to claim connectivity and drivers to undertake organisational transformations to
13 connect. Nonetheless, the claims are likely to require a level of credibility to be successful.
14

15
16 The claims analysed and field level data point to elements of the organisational realities and
17 why connections might be required. Abbott’s concept of ‘linked ecologies’ emphasises the
18 importance of overlapping alliances between different ecologies, such as the professions or the
19 state (2005: 248). Abbott’s aim is to develop a more complex notion of the audience to which
20 professions make their claims (2005: 246), through his focus on ‘hinges’; ‘those issues [which]
21 provide dual rewards within both ecologies’ (2005: 255). Although, Abbott’s ecology of the
22 professions remains a system of competition for exclusive jurisdiction (2005: 264), the
23 alliances and the concept of ‘hinges’ does, however, capture something of the connections
24 within legal services generally and in the case-studies discussed. Thus, both claims
25 management and law aim to derive the benefit of demonstrating that they satisfy the field’s
26 demand of integrated service to clients.
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30 As the legal services case reveals, the conditions of particular professional fields may shape
31 the emergence of ‘hinges’ and drive connections. In this sense, a drive to connect might exist
32 because of the complexity of client problems (Noordegraaf 2011b: 1360-1). ABS, for example,
33 identified drivers as enabling the provision of services tailored to individual client needs (LSB
34 2018: 45). Proximate knowledge work may be required in particular fields; law and
35 accountancy in tax; law and insurance in personal injury work and so on, leading to
36 collaborative working in particular workplaces (Leicht and Fennel 1997). Such practices may
37 require greater technological, institutional and organisational support for the connections of
38 professional work (Kirkpatrick and Noordegraaf 2015). Alternatively, fields may limit
39 connectivity. For example, in large consultancy businesses, resources may not be comparably
40 available to different professional actors (Spence and Carter 2014). They may therefore
41 struggle to build connections across established boundaries (Fineman 2008: 10), rendering the
42 division of expert labour more akin to Abbott’s sub-exclusive settlements.
43
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46 Field conditions may include disruption through competition or specific changes in the rules
47 governing the market. For example, changes to referral fees rules in 2013 were attributed to
48 the early entry of insurance/law firm connections in the personal injury market (LSB 2016b:
49 26). The relationship between local and global may also be relevant to how alliances operate
50 (Blok et al 2018), as may the extent to which national regimes enable or constrain connection
51 (Seabrooke 2014). These connections may be professions’ attempts to address the vulnerability
52 now visible because markets and society are no longer receptive to their claims of expertise
53 and status (Fineman 2008: 12; Leicht 2006).
54
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56
57 For connectivity to be properly understood as a form of professionalism, then a clear distinction
58 needs to be drawn between connection and collaboration. Noordegraaf employs connectivity
59 in a broad sense (analogous to collaboration or multi-professional work (Noordegraaf 2011b:
60 1361-2; Gardner 2017: 218)). In order to support future research (including in other sectors), I

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3 suggest that connections should refer to a series of structured ties or linkages to support ‘dual
4 reward’ between two or more professions of different disciplinary origin, in ways that resemble
5 ‘hinge’ issues (Abbott 2005: 255). Thus, within the ABS sector, we can identify the claims of
6 connected expertise evidenced (and ideally facilitated) by the particular organisational form,
7 with its license approved by a mainstream regulator. Similarly, STEP through its infrastructure
8 of a global professional association facilitates durable linkages that amount to much more than
9 an ad-hoc relationship. Connections are, therefore, likely to have organisational or institutional
10 support (Abbott 1988: 106), rather than be premised on personal relationship (Jameson 1956;
11 Seabrooke 2014). Collaboration may be ‘imperative’ (Gardner 2017: 4), but is more ad-hoc
12 and, I suggest, less centrally associated with structured linkages to support dual reward than
13 connective professionalism.
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17 This paper has argued that connections should be seen in the context of uncertainty
18 (Noordegraaf 2011a: 468). Thus, they should not be conceptualised as offensive / defensive
19 strategies to secure exclusive boundaries or, indeed, the emergence of new professions. Instead,
20 they are better understood as professions’ attempts, through connections around key issues
21 (Abbott 2005), to strengthen resilience against the vulnerabilities exposed by a turbulent
22 marketplace and a challenging regulatory environment.
23
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25 Under exclusive professionalism the occupational group defines itself and its knowledge claims
26 against other providers of services (Abbott 1988; Gieryn 1983: 781). Late nineteenth and early
27 twentieth centuries required this form of professionalism (Larson 1977: xiv). This is less
28 relevant when the profession’s ability to act is constrained, practitioners’ identities are more
29 ephemeral and the treatment of cases more contingent upon clients (Noordegraaf 2011b: 1358).
30 Thus, lawyers’ autonomy is becoming constrained (Brown and Lewis 2011; Moorhead 2004),
31 identity more fluid (Mangen and Brivot 2015; Law Society 2015: 8) and, as the two exemplar
32 sites have shown, cases are more contingent on client. Moreover, I have argued that the legal
33 services’ context provides another driver towards connection with its focus on the primacy of
34 the consumer and disruptions to occupational title (Passmore 2019).
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38 FIG. 1 contrasts the drivers, claims and evidence under exclusive and connective legal
39 professionalism, highlighting those identified by Noordegraaf and the drivers, associated
40 claims and evidence highlighted by this paper. This provides a basis for future research to
41 investigate these preliminary assumptions about this emergent area of professional work.
42
43

44 CONCLUSION

45
46 This paper argues that shifting the analysis of boundary work to emphasise connections
47 foregrounds an important and overlooked aspect of professional and organisational change.
48 Crucially, connection across previously rigid jurisdictions is not simply a negative description
49 of lost professional control (Abel 2003) or the emergence of a new profession (Boussard 2018).
50 Rather, it enables analysis of how a more flexible professional project might take shape. Thus,
51 elements of exclusive boundary work still exist within the legal field, but crucially so too do
52 connected claims of expertise.
53
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55 Emphasising the importance of connective legal professionalism, therefore, does not simply
56 layer on another way in which legal professionalism has been lost, is weakened or is threatened,
57 but rather, sets out the basis upon which we may better understand its re-configuration
58 (Noordegraaf 2013: 803). The key elements of connective legal professionalism are likely to
59 involve the primacy of the consumer, the compatibility of connected claims with originating
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3 disciplines, narratives of disruption and the importance of the field in determining the
4 conditions for connectivity.
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7 This paper's focus is on the connected *claims* of expertise, rather than the reality of the
8 *organisation* of expert work within these firms (Leicht and Fennel 1997: 225). Future research
9 should test the claims of connected expertise and investigate how connections are
10 operationalised. What are the systems and processes that shape service delivery, and how do
11 they differ from those within firms that claim exclusive expertise? What organisational
12 structures are in place, and how does this impact on productivity, innovation and compliance
13 concerns? Are connected teams embedded within firms to respond to clients from outset or
14 additional expertise brought in only when required? If, as I suggest, the context of the field is
15 so important, how will organisational connections vary across fields, and will disciplinary
16 origin matter? Thus, for example, will the connections within a multi-disciplinary practice of
17 legal heritage be organised on a fundamentally different basis to an ABS established by a Big
18 4 accountancy firm with a long-standing record of multi-disciplinary work (Greenwood and
19 Suddaby 2006)?
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23 Individual experiences of connectivity must also drive research which should ask how legal
24 professionals work in connected environments (McGivern et al 2015; Adler et al 2008). How
25 does connectivity impact on their identity, knowledge, ethicality and legitimacy (Sanders and
26 Harrison 2008)? The connectivity experienced by women lawyers in corporate law firms
27 required to bridge the boundaries of their disciplinary expertise in services for clients
28 (Sommerlad 2016: 69-70), is very different to Seabrooke's 'epistemic arbiters' (2014: 50).
29 What will be the new models of professional practice and how will that affect the professionals
30 within them? Beyond the individual and organisation, a focus on connectivity provides a
31 response for a professional association managing fragmentation (Law Society 2016: 13). We
32 should ask whether and how multiple priorities of professions and organisations might be
33 pursued and whether public or social trusteeship survives (Kirkpatrick and Noordegraaf 2015:
34 106)?
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38 Thus, at a macro-level, future research should examine the relationship between education,
39 training and professions. Connectivity as a feature of legal professionalism is already shaping
40 the attributes that recruiters desire - for example, 'the ability to form lasting relationships'
41 (Womble Bond Dickinson Wealth). The need to work with professional actors from different
42 disciplinary backgrounds,⁵ bodies of knowledge, prior socialisation, cultural and ethical norms
43 may also require relational attributes to be developed by those seeking work in these sectors
44 (Noordegraaf 2011b: 1361; Edwards et al 2009).
45
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47
48 Examining Law's Boundaries from the basis of Connective Legal Professionalism supports a
49 research agenda that takes account of the way in which lawyers, at an individual, organisational
50 and occupational level may manage the uncertainty of the contemporary landscape. This paper
51 provides a preliminary framework to analyse these different professional claims and new ways
52 of working (Boussard 2018; Gardner 2017). Indeed, this flexibility, this ability to cross and/or
53 re-imagine boundaries may characterise successful professional projects in an uncertain world
54 (Noordegraaf 2013: 799). Fluidity, flexibility and connectivity may now provide long-term
55 safety for professions, a means, therefore, by which lawyers go with the grain of the field.
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⁵ 'Prydis offer a unique proposition helping our team to grow their skills amongst professionals from different disciplines' <<https://prydis.com/process/>>

Complexity is the new professional norm, and this paper has argued that connectivity should be a central lens through which future analysis explores this uncertain professional world.

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Organisational Details of Firms Referenced in Paper

1st Central Law <<https://www.1stcentrallaw.com/>>

Size: (2 partners, 10 people, one office)

Cross-Professional Connectivity: Insurance, Claims Management, Law

ALP Law <<https://www.alplaw.co.uk/>>

Size: (5 lawyers, 6 staff, 1 office)

Cross-Professional Connectivity: Insurance, Claims Management, Law

Aspire <<https://www.aspirelaw.co.uk/>>

Size: (4 partners, 5 people, one solicitor, one office).

Cross-Professional Connectivity: Claims Management, Medical Support Charity, Law

CounterCulture LLP <<https://www.counterculturellp.com/>>

Size: (2 offices, 13 partners, 14 people, but just 3 solicitors)

Cross-Professional Connectivity: 'We are consultants, accountants, solicitors, project managers and fundraisers (we're also musicians, artists, historians, writers)'

Deloitte – Details about Wealth Management operation here:

<https://www2.deloitte.com/uk/en/pages/financial-advisory/solutions/private-wealth-and-family-offices.html>. NB: Deloitte has now also established an ABS (2018) – Deloitte LLP <https://www2.deloitte.com/uk/en/pages/legal/solutions/about-deloitte-legal.html> (98 people in this organisation, 79 solicitors in this organisation, 22 SRA approved managers, 27 offices)

Dixcart <<https://dixcart.com/>>

Size: (2 partners, 7 people, one office)

Cross-Professional Connectivity: Legal primarily, but operating within broader commercial services group

FMG Legal <<https://www.fmg-legal.co.uk/>>

Size: (1 office, 3 partners, 5 people)

Cross-Professional Connectivity: Claims Management, Law

KPMG – Details about Wealth Management operation here:

<https://home.kpmg/xx/en/home/industries/financial-services/asset-management/wealth-management.html>>. KPMG also operates an ABS (2014) KPMG LLP <https://home.kpmg/uk/en/home/services/tax/legal-services.html> (104 people in this organisation, 91 solicitors in this organisation, 21 SRA-approved managers in this organisation, 28 offices)

IMe Law <<https://claim.ime-law.co.uk/WhatIsMotor.aspx>> (Part of Irwin Mitchell, large personal injury law firm).

Size: (5 people, including 4 solicitors).

Cross-Professional Connectivity: Insurance, Claims Management, Law

Linkfield Claims <<https://www.linkfieldclaimsservice.co.uk/>>

Size: (2 partners, 3 staff;

Cross-Professional Connectivity: Joint venture between - Brian Johnston & Co (Insurance Brokers) Limited and Proddow Mackay Legal Limited)

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4 M & R Legal Services <<https://www.mandrlegalservices.co.uk/>>

5 Size: (3 people, all partners)

6 Cross-Professional Connectivity: Marketing, Claims Management, Law

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9 Maitland Advisory <<https://www.maitlandadvisory.com/>>

10 Size: (1 office, 6 partners, 15 people)

11 Cross-Professional Connectivity: Taxation, legal, location within wider consultancy
12 group

13
14
15 OC Law <<https://oclaw.co.uk/>>

16 Size: (8 staff, 3 partners, 1 solicitor, one office) (last accessed June 2018; No longer
17 appears to be trading)

18 Cross-Professional Connectivity: Insurance, Claims Management, Law

19
20
21 One E Group < <https://oneegroup.com/>>

22 Size: (12 Directors)

23 Cross-Professional Connectivity: ‘one of the largest independent tax advice, tax
24 planning and tax dispute resolution firms in the UK’).

25
26
27 Oury Clark <<http://www.ouryclark.com/>>

28 Size: (28 people, 5 partners. 2 offices)

29 Cross-Professional Connectivity: Chartered Accountants, Lawyers, Solicitors,
30 Consultants, Recruitment and Financial Advisors

31
32 Pinsent Mason Pensions Services < <https://pmps.pinsentmasons.com/>>

33 Size: (7 people, 4 Directors including two from Pinsent Masons).

34 Cross-Professional Connectivity: Pensions, Taxation, Financial Advice, Law

35
36
37 Prydis Legal <<http://prydis.com/prydis-legal/>>

38 Size: (2 partners, 9 solicitors, 1 office).

39 Cross-professional Connectivity: Chartered accountants, Tax auditors, Financial
40 Planners, Law

41
42
43 PWC Legal <<https://www.pwc.co.uk/services/legal-services.html>>

44 ‘We’re the largest legal services network by geography. We have over 3,500 lawyers in 90
45 countries and immigration law services in 116 countries’ (183 people, 166 solicitors, 34
46 SRA-approved managers, 29 offices)

47
48
49 RSA Law < <http://rsalaw.co.uk/contact.html>>

50 Size: (4 staff, 1 solicitor, 4 managers, one office)

51 Cross-Professional Connectivity: Insurance, Claims Management Law

52
53
54 Turcan Connell < <https://www.turcanconnell.com/>>

55 Size: (approx.230 staff, 23 partners)

56 Cross-Professional Connectivity: Tax, Law

57
58
59 Womble Bond Dickinson Wealth - <<https://www.womblebonddickinsonwealth.com/>>



60 Size: boasts ‘over 80 professionals’.

Cross-Professional Connectivity: Financial Planning, Tax, Law

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3 Recruitment page - <<https://www.trainingcontract.com/about-you/>>
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5 Unless otherwise stated, firm websites last accessed on 6 June 2019.
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For Review Only

Model of Professionalism	Exclusive Professionalism	Connective Professionalism
Drivers	<ul style="list-style-type: none"> • Primacy of scientific knowledge, • heterogeneous clients, • emergence of free markets, that were susceptible to monopolisation, and • an affinity with the dominant ideology • Fundamentally, collective mobility project towards market control and status gain. • (Larson 1977: xiv, Abel 2003) 	<ul style="list-style-type: none"> • Constrained Autonomy • Ephemeral Identity • Contingency of Client Problems (Noordegraaf 2011b: 1358). • And additionally.... <hr/> <ul style="list-style-type: none"> • Opportunity for ‘dual reward’; e.g. improved productivity or status – availability of ‘hinge’ issues. • Importance of Field Context, for example <ul style="list-style-type: none"> ○ Regulatory challenge to occupational title ○ Proximate Knowledge Work ○ Primacy of Consumer ○ Market Disruption ○ Field position
Claims	<ul style="list-style-type: none"> • Exclusive knowledge, claims made against other professions and laity • Professional Autonomy • Public Service • Altruistic Ideal • Elite Status • Stability and continuity 	<ul style="list-style-type: none"> • Connected Expertise • Integrated Service • Strong Consumer/Client Focus • Disruptions/New-ness • Enduring Connection to Originating Discipline • Reference to ‘professionalism’ as quality mark, but not to traditional claims ‘public service, justice, etc. •
  Evidence/Support	<ul style="list-style-type: none"> • Rational, scientific body of knowledge • Education and Training • Accreditation • Codes of Ethics • Strong Professional Association • Regulation of Occupation title 	<ul style="list-style-type: none"> • Institutional / Organisational Supports • Durable linkages around ‘hinge’ issues • Accreditation of Integrated Expertise • Ability to draw on claims of authoritative expertise of originating profession • Monitoring ‘quality’ systems for clients.