



OUR VIVID VISION **OTB LEGAL**



Back To Work

It's January 2025. Our team return to work fresh, relaxed, and full of mince pies with promises of health kicks which start tomorrow. We continue to maintain the tradition of closing down the office between Christmas Eve and New Year without staff having to use their valuable annual leave to recharge their batteries. Everyone is back ready for the challenges of a new year and an ever-changing landscape of immigration laws.

Whatever they have been up to, everyone seems happy and have enjoyed their break which is great as work culture is hugely important to us.

We have continued with our aim to deliver "Immigration Advice Made Simple" without distractions of "new" "shiny" areas of law. We have fought hard for our position as a market-leader in immigration law and we don't intend to give that up lightly.



In an industry which seemingly prides itself on squeezing every last drop of time and commitment from its staff...

We like to think we are different.

1

We pride ourselves on putting the needs of our team first and limit measurement of their success to important outcomes rather than managing inputs of time through demoralising management systems.

2

We have continued to promote family friendly working practices as well as flexible working policies which allow staff to choose the hours and places which suit them best, all supported by great IT systems which set them up for success however they choose to work.

3

Communication is key and we ensure that we keep in touch with each other regularly to swap ideas for innovation, provide emotional support to each other and appreciate the strengths we all have.

4

Culture is driven by Directors who all have a shared vision of what we want our company to represent which includes; a commitment to genuine quality work, high ethical standards and an openness to addressing new ideas. We want all staff to be the best they can be and enjoy the time they spend at work.

Director of Operations

- Marcus Worthington

“This can’t be achieved though without an outstandingly talented team who share our values and are just nice people to be around”



Our People

We have maintained our aim of having a small operations function to provide high level support across IT, HR, compliance, marketing, and risk management with further specialist external support being bought in as and when required.

The Legal teams have successfully implemented a "pod" approach to working where small defined groups of 4-5 legal staff work in self-supporting teams, led by an experienced supervisor (at associate level), with 2-3 further lawyers providing excellent client care and case outcomes, whilst being supported by 1 paralegal who provides all quasi legal and admin support for the team. This pod approach to team-working allows people to develop professionally and have a clear path for career progression.

All teams are encouraged to work in a way which works for them and their colleagues and this can be a mixture of home working, at our Head Office in Nottingham or at any of the three work centres we have across the UK which have enabled us to recruit talented staff from across the UK, rather than just locally. This enables staff to maintain one-to-one contact with others when they need it to get the real team-working feel and emotional support that can sometimes be lost through purely working from home.



We have been fortunate that our recruitment policy has enabled us to bring in highly skilled professionals who can slot directly into our teams but our main area for growth has been our approach to developing home-grown talent.

We have successfully highlighted the brightest and best individuals who share our corporate vision as well as meeting our essential "decent person" test, often from outside the legal sector and allowed them to be trained and supported within pods to be future immigration law leaders.

This combination of experience and future potential has allowed us to grow organically and in the process build diverse teams who have a modern, open way of looking at the world, open to suggestions about how things can improve and actively contributing their own ideas into the melting pot.

We have an outstanding training policy in place which supports all staff across technical knowledge (in their chosen specialisms), softer skills such as client care, and also compliance to provide a holistic package of development tools.

We have also supported and funded staff in obtaining professional qualifications to further support their development. We believe this has played an important part in our staff turnover being virtually zero since we started in 2019.



Our people understand that the focus of our management team is on successful outcomes rather than arbitrary inputs. We actively promote billing success, positive case results, great client feedback, community engagement and low staff turnover as good outcomes. This supports our business and our corporate aims rather than "presenteeism" which more traditional law firms still seem to cherish which focuses on generating chargeable hours at the expense of everything else.

Our people remain our strongest asset as a company. They are all, without exception, bright, talented and working towards being market-leaders in their chosen areas of expertise.

Over the past 3 years we have worked hard on our recruitment policy to ensure that we attract the right calibre of person to apply to work with us. Our website and social media output demonstrates what we stand for as a company so that everyone instantly knows our corporate identity and what it means to share those goals. There have been times when it has been tempting to take on staff we had doubts about to ease the short-term pressure of work, but holding firm in our beliefs in recruiting only the right people is paying dividends now.

We now have a team of 21 staff, spread across three teams (Business Immigration, Personal Immigration and Operations), each headed by one of three Directors.

Leadership

All of our leadership team, which includes managers at all levels, have received high quality training on how to coach the best out of their staff. We feel that this style of leadership supports a great culture and allow us to focus on delivering successful outcomes.

We have found this approach leads to better working relationships, better ideas, better communication and a more committed team. Staff tell us that they feel positive about working within, and contributing to, their individual teams but also that they feel part of an organisation-wide ethos with shared values and strategy.

Our managers all have access to market-leading management information about their individual areas of the business and the people they supervise to allow them the freedom to approach things in new and interesting ways and to see the impact of their decisions in the outcomes which we track. This encourages all members of staff to be open to doing things in a different way as well as allowing them to recognise when their successes have a material impact on the wider business.



1

We have established and maintained strong links with other law firms who do not offer immigration law advice as a service and have good cross referral systems in place which generate high quality clients from across the UK.

Sales and Marketing

2

Through having a small but dedicated marketing team who truly understand what our potential clients are looking for and producing bespoke emails, social media and in-bound web materials we have doubled our enquiries year-on-year since launch.

By focusing on having clear, transparent pricing structures which, although not the cheapest, do represent outstanding value for money, we know that we can convert a significant proportion of these clients to be paying customers. Reviewing our calls to action for clients, refining our follow-up emails and working hard to establish rapport and trust in our initial meetings have allowed us to increase our conversion rate to 25% of enquiries taking on our paid services.

The introduction of an "account-based" structure to our Business Immigration Team allows us to foster exceptional long-term working relationships with our corporate clients so that they feel we are a trusted advisor to their HR teams and continue to work with us for longer than a one-off transaction.



OTB LEGAL

3

Overall, this combined approach to continually improving our marketing and sales has meant that we have assisted many more people to have good quality affordable advice. As a consequence we have comfortably broken through the £1.3 million fee income barrier for the last year with ambitious plans in place for doubling this in the next 18 months.



>> OTB LEGAL <<
>>>>>>BUS1NESS<<<
>>>>IMM1GRAT10N>>>
>>>>>>TEAM<<<<<<<<<<

Compliance and Accreditations

We are now three years into our Lexcel accreditation which provides us with a rigorous annual audit around our quality management systems to keep us on track with our work processes and to demonstrate to the outside world that what we say, we actually do in practice.

In addition to Lexcel we have passed reaccreditation for Cyber Essentials Plus, the highest level of cyber security accreditation for our industry. As a company who enjoys using technology to offer modern, seamless services to clients, it is important that we take our custodianship of highly sensitive data seriously and Cyber Essentials Plus is our commitment to delivering on that.

Our annual Solicitors Accounts Rules audit continue to show that we have a good handle on accounting systems and continue to look after client account money in the correct way.

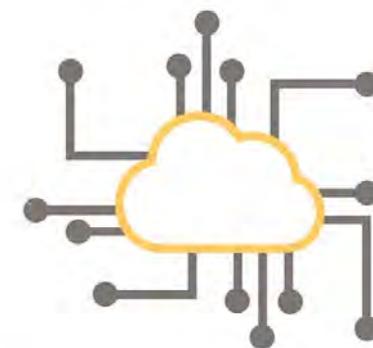
We have a strong operational team who give analysis and direction on maintaining our systems and processes to be compliant at all times.

All of our Personal Immigration Team lawyers have been, or are working towards, IAAS accreditation at the senior level.



POSITIVE RELATIONSHIPS

- > Positive working environment
- > Valuing every relationship
- > Family oriented



INNOVATION

- > Finding a better way
- > Remaining original
- > Using technology to improve

Our Core Values



MAKING A DIFFERENCE

- > Via results
- > Through balance and honesty
- > Promoting universal justice



INTEGRITY

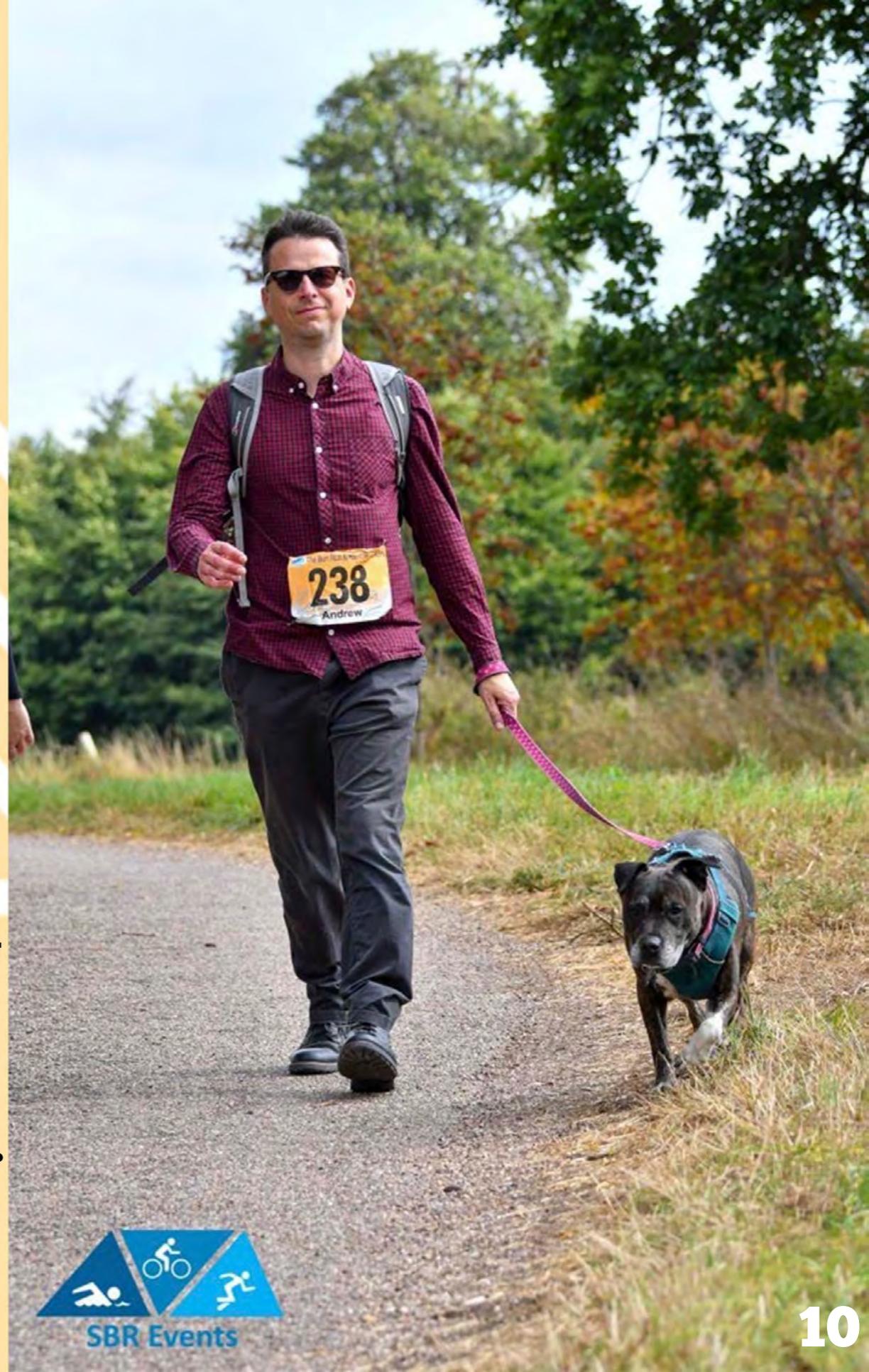
- > Transparency
- > Sustainability
- > Sticking to our values

Community and Environmental Impact

We have continued to take our community and environmental commitments seriously. This has included ensuring that, where possible, contracts for services are offered to independent local business.

We are proud to have continued to support one new local charity per year through fundraising, work experience programmes, and profile raising via social media platforms. Staff have been encouraged to engage in this project by recommending local charities and events to be supported each year.

2025 represents our 5th year of being a carbon neutral business through our carbon offset programme which has seen us plant 8,352 trees to date.



Financials

Our fee income has risen by 80% year-on-year on average since launch in 2019 on the back of the expansion of our legal teams, targeted marketing plans and increasingly streamlined work processes giving rise to a healthy balance sheet which has enabled us to share 20% of what we bill in excess of our targets with our team members.

We make a point of paying all invoices due well before their due date to ensure that the suppliers we work with benefit from the success we have which they have made a contribution towards.

We continue to put our VAT and corporation tax liability into a separate account on a monthly basis as well as 3 months of overheads to ensure that we have a significant cash buffer in place should an unexpected issue arise in the future.

We have a range of financial KPIs in place which we monitor on an ongoing basis to ensure that we continue to make 20% net profit, have strong budget and cash-flow projections and understand the financial stability of our company.

We are proud to be a Real Living Wage employer and have been for over 4 years now. This gives us the assurance that all staff we employ are not just getting by on minimum wage salaries.

As part of our focus on delivering exceptional case outcomes and being seen as market leaders we are grateful for the recognition we have received for the work we do.

We are now listed in the highest bandings in the Legal 500 and Chambers and Partners Guides for our legal work, with all legal directors and legal supervisors listed as leading lawyers within these categories. This company-wide and individual recognition continues to give the law firms who refer work to us the assurance that we will provide their clients with a top quality service.

“Client feedback is also immensely important to us and we are enormously proud to be listed as the number 1 ranked immigration law firm nationally on Review Solicitors, the leading solicitor client feedback network.”



Recognition

Efficiency

Traditional law firms have been slow to embrace technology and the competitive advantage it can bring.

OTB Legal has continued to invest in both forward-thinking IT systems and training for all staff to be able to deliver this to clients effectively.

From our case management system, to our online booking systems, remote working, payment acceptance, video conference and website engagement tools, all of our systems work together in harmony to promote what we offer as a business in as efficient a manner as possible.

Our client base is international and increasingly tech-savvy and it is important that our business systems reflect this and give clients a great service whenever, and wherever, they are in the world. Our investment in these systems has paid real dividends with new client enquiries, bookings and payments being made 24 hours per day, 7 days per week, 365 days per year with no direct input required from any staff at the point of engagement.





The Future

This ability to scan the future horizon and embrace what is coming our way in an adaptable way with a fantastic team who have a shared goal and commitment to growth is what will ensure that our growth path continues in the same trajectory for the next three years.