



Balancing Productivity & Integration

Effective Technology Adoption for the Legal Profession



Overcoming Territorial Culture & the Fear of Change...

Surviving the digital revolution is likely to be a sticky business. Adopting technology can be unnerving and intimidating. And let's face it, we're now living in a world where technology has proliferated to such an extent that human beings no longer have exclusive rights over specific industry knowledge and experience. And technology ubiquitously presents itself as an 'essential' rather than a 'nice to have' option.

Add to this, the fact that on average, 30% of major digital system integration projects fail¹, and it's no wonder most law partners feel overwhelmed - both by the constant threat of project failure and an ever-increasing number of technology options.

The issue of course lies in the conflict between the rapid pace of change within the tech industry as a whole and the change resistant nature of human beings - especially those in long-established, conservative industries.

Challenges & Opportunities...

And it would be remiss to discuss technology within the context of the legal profession without mentioning the legislative challenges and opportunities emerging as a result of this digital proliferation.

¹ Salesforce. The 360 blog. Available at <https://www.salesforce.com/blog/>

It's a constant game of cat and mouse, with legislation, and its traditionally slow-paced human consensus processes, trying to keep up with intractable technologies, empowered by a well-funded market place, unreservedly advancing at lightning speed.

The extent of rapidly expanding knowledge within an array of rapidly expanding technologies (see p.6) means that law firms need to establish highly adaptive and flexible new service departments if they are to remain relevant.

Sharing Data Effectively in a Highly Compartmentalised Business...

Law firms generally offer a number of diverse services which are as different as they are complex in the way they manage clients. Conveyancing is about as unlike personal injury as its possible to get, and employment law is just as dissimilar again.

The natural outcome of this diversification is for the established law firm to operate as a number of separate silo organisations - often with little contact or asset sharing between differing departments.

This means well thought out technology adoption and development projects will demand a more in-depth requirements gathering process when compared to organisations with less diverse service portfolios. This is because we have to record the specialist needs of each individual service department alongside developing a clear understanding of how the practice would like to share and use information as a whole.

But it is worth the effort. Because well managed, universally accessible information can be a big benefit when it comes to client retention, repeat business and just generally unifying disparate employees. If undertaken well, technology adoption projects can increase revenue by up to 29%².

And speaking as someone who has accessed the services of the legal profession to no greater or lesser degree than anyone else, I can say with confidence that the more well managed your clients are, the more confident they will feel in your abilities.

'Law partners feel overwhelmed - both by the constant threat of project failure and an ever-increasing number of technology options'

² CIO. What to do when your crm project fails. Available at <https://www.cio.com/article/2381909/what-to-do-when-your-crm-project-fails.html>

'Law firms need to establish highly adaptive and flexible new service departments if they are to remain relevant'



Ab Initio - Start Where You Are...

When it comes to initiating a digital change project, avoid the temptation to start from scratch. Current services, processes, programmes, projects and people can all be used to create a future state which delivers value.

Because a lack of user engagement is the biggest reason for system integration failure - resistance management should be part of the picture from day one. Project buy-in from solicitors, clients and back office staff can only be achieved if they have a clear understanding of the expected business benefits; what's in it for them; and the anticipated risks and limitations.

It's a good idea to have a demonstrable communication management strategy in place to keep stakeholders up to date with progress and how progress milestones will affect their day-to-day operations.

Requirements Gathering and Integration Planning...

The key to considering software and technology options is to recognise that there will be some overlap between technology platforms - so you should have a prioritised list of requirements from each platform which can be cross referenced with other applications. For example, practice management software will often include a CRM module, and this may remove the need for a separate CRM system altogether, however, because this in-built CRM module may be fairly rudimentary, it may not meet your key functionality requirements for a CRM system (email synchronisation, bulk email marketing, social media management etc.).

It's also important to form an understanding of what each platform will and won't be used for so as to avoid duplicated data entry and unnecessary work. Integrating and automating your digital systems is a complex subject in itself with a number of products and methodologies available. Depending on project complexity this may require a separate integration plan (which outlines event triggers and dataflows); specialist development and/or implementation, and ongoing technical support.

Focus on Value - Business Objectives...

Notwithstanding everything detailed in this paper, it's important to remember that technology must remain a tool for the people and organisations using it, and we must avoid allowing this notion to get flipped on its head because of the size and power of the tech industry and its constant demand for our attention (and cash!).

Business objectives and benefits must be understood from the outset and referred to throughout to ensure they are the driving force behind adoption and do not slip down our list of priorities.



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Work Holistically and Transparently - The Big Picture...

Having an overview of data management systems and integrations across your organisation in an ‘as is’ baseline and ‘ideal world’ future state will help to maintain focus and inform future development projects, as well as providing the means for holistic communication.

And this can level the playing field in terms of understanding digital business management systems and the business reasons for their inclusion.

Without universally understood architecture - integrated software and technology systems can remain an intractable mystery to all stakeholders - including those with a high level of IT proficiency!

Progress Iteratively...

Technology adoption projects should be scaled and staged so as to cause minimum disruption to Business-As-Usual, and to realise prioritised benefits in clearly defined manageable steps.

Every change should be considered in terms of how it will affect systems and stakeholders across the whole of the organisation - and beyond it.

Avoid Process Creep – Change Management...

Having a defined change management process is important, especially in larger organisations, as even seemingly minor changes to an integrated system can have broad reaching consequences for user processes and reporting functions.

It’s a good idea to baseline your system on an annual or biennial basis via a systems audit – this should be maintained alongside a change log in order to provide a clear picture of the current state of your digital data management system.

³ Centre for Policy Studies. The Price of Law



‘The automated retrieval and analysis of the information and data held within your organisation’s data management systems will become normal practice’

Machine Learning Implications

A recent report from the Centre for Policy Studies shows us that hourly rates at law firms in the UK have risen by a factor of almost ten over the last two decades³. If software can be taught to read contracts and identify discrepancies at a better rate of accuracy than trained solicitors, and blockchain technology can verify contract compliance and trigger payments without human involvement, then legal clients are unlikely to pay human rates for better quality machine outcomes.

I believe this is relevant because it demonstrates that over the coming years, the automated retrieval and analysis of the information and data held within your organisation’s data management systems will become normal practice. Letting go of the territorial culture so often deeply entrenched within law firms will be an absolute must for those that wish to survive.

Embracing an inclusive approach towards automated digital system management will provide lawyers with the opportunity to perform their roles free from the excessive burden of long hours of peripheral research, heavy paper records, constant cross-referencing, low-level client management, pen and paper document signing, time recording and submission and much, much more!

Project Stage Overview

System Baseline

An initial audit of the full system to provide a clear picture of the current state along with a documented list of issues.

Requirements Gathering and Benefits Planning

The process of gaining a documented understanding of business needs in terms of business process requirements, expected benefits and future objectives.

Marketplace Research

Researching and comparing systems which can perform the required business processes including details of any limitations.

Marketplace Report

Clear representation, often in the form of multiple tables, of the information gathered during marketplace research.

Request for Information (RFI)

Formal request from prospective suppliers for information to confirm, challenge or complete the findings of the marketplace research. Alongside details and pricing for any specialist requirements and/or bespoke technical work required as part of the implementation.

Trials and Demos

Systematically assessing any prospective systems against pre-determined business processes.

Product Selection

Final selection of approved systems.

Integration Planning

Separate plan detailing why and how individual systems will be integrated, including recommended technologies; data mapping, maintenance requirements; and whether any workarounds are required.

Implementation

Managed system implementation including any specialist technical requirements; user testing and training.

Change Management Planning

Instructions detailing how the system is to be controlled when planned or remedial changes are required.



Future Development Planning

Maintaining an overview of how you expect your system to develop over the next 2-3 years provides a great reference and starting point for all future customisation and development projects.

Annual or Biennial Auditing

System auditing designed to ensure that, along with a system change log, there is a documented 'present state' of the entire data management and software suite.

Technologies...

I believe it would be useful here to provide a list of relevant software and technology types, along with a brief explanation as to the purpose and applicable processes for each one.

Technology Platform	Description	Applicable Processes
Law Practice Management Software	Whole 'Practice' applications which seek to integrate and automate front and back office activities – will generally include an option to provide clients with a self-service portal to access shared docs etc.	Case management, calendar management, appointment setting, document management, time management, billing, accounting, marketing, lead management, conflict checking, messaging and more.
Legal Case/Matter Management Software	Specific applications designed to manage the life cycle of a case or matter with maximum efficiency.	Case and matter management, time and billing management, data mining and modelling, reporting, data storage and archiving, document creation and management, and more.
CRM Software	Client relationship management software is designed to unify marketing, sales and customer service processes.	Lead management, client management, service management, sales pipeline management, marketing management, business process management and more.
Document Management Software	Software designed to automate the process of creating, storing and distributing documents. Providing a means to efficiently manage document assets across departments and organisations.	Document creation and editing, template management, document storage, document distribution.
Legal Library Websites/Legal Research Software	Web based libraries of case law, legislative records, case records & judgements.	Manual and automated discovery and analysis of information indirectly relating to an ongoing case.
Blockchain	A distributed digital ledger which records transactions in a verifiable and permanent way.	Any processes where secure, modification resistant records are required – EG: When modifying and distributing contract revisions between multiple organisations.
Time Tracking & Legal Billing Software	Automates time tracking, invoicing, diarising, and accounting to facilitate legal-style hourly invoicing and recording of case related expenses.	Invoicing, accounting, payroll, time management, workflow management and m Our legal integration team has worked on a diverse range of technical adoption projects for a number of law firms; including, ; Veale Wasborough Vizards LLP; Ward Hadaway LLP, and Simpson Millar Solicitors. ore.
Digital Signature Software	Allows for secure signature capture through an encrypted process which allows users to attach a signature image to a document.	Document signing, document distribution.
System and Data Integration Software	Integration software allows separate applications to communicate and share data.	Configuring data management systems to provide a complete business solution with (potentially) a single point of access. Integrated reporting.

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