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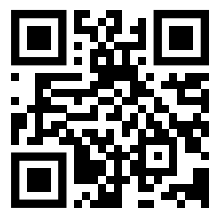JAN - 2022

LOOKING AHEAD AND BEYOND

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IT REFRESH? HERE ARE SOME CONSIDERATIONS

BY JON WAINWRIGHT

It's not surprising that most firms are now actively pursuing an all-out, cloud-first IT strategy. Whilst firms had already had a taste of cloud technology, pre-pandemic – Office 365 is one example – the benefits the technology has offered to businesses over the last two years are irrefutable.

In fact, the firms that were in the cloud when the pandemic hit, made the transition to remote working very easily and thrived. Firms that operated primarily through on-premises IT and paper-based processes, found the shift more problematic. Some of those who weren't on the cloud for business-critical applications, took the decision right in the middle of the pandemic to adopt the technology as quickly as they could.

Firms now acknowledge how easy it is or would be (if they were in the cloud) to manage and support a cloud environment – no massive hardware refreshes and server back-ups; business continuity, disaster recovery, dealing with the next major security vulnerability or unexpected software patches are the responsibility of the cloud service provider, and the list goes on. Furthermore, IT teams have complete visibility of costs, and even more crucially, they are defined and predictable.

Interestingly, Gartner estimates that by 2025, 85 percent of organisations will embrace the cloud-first principle – and anything non-cloud will be considered legacy!

Against this backdrop, and with the pandemic-driven uncertainty showing no signs of fading, anecdotal evidence suggests that in 2022 firms are planning

to take a long hard look at their IT capability – not just to "tide over" the pandemic, but to adopt technology and adapt to the next normal in a meaningful way.

Here are some practical considerations for firms as they ponder their IT strategy and refreshes:

Have your firm's business aspirations changed?
Prior to the IT refresh, appraise your IT estate within the context of the business aspirations of the firm and how technology could support their achievement. With this understanding, then review what is working, where the bottlenecks are, what processes are costing the firm time and money, what are customers expecting, and such.

Additionally, if plans are afoot for growth through events such as mergers and acquisitions, under tight non-disclosure agreements, bring in trusted technology vendors and partners into the conversations. They will be able to provide tips and suggestions so that the technology delivers against business requirements. For example, if there's a need for merging data from two different practice management systems, what would be the best approach for data migration? What kind of expertise and experience should the technology partner have?, and so on.

By 2025, 85 percent of organisations will embrace the cloud-first principle

Swiss army knife or best-of-breed?
In a remote and dispersed workforce environment, in addition to enabling staff to work from anywhere and anytime, applications must offer functionality, data management capability and security, among other things. Think about adopting a system that will cost-effectively serve the firm in the long run. So, weigh up "Swiss army knife" type

solutions and best-of-breed systems. The former do lots of things in very limited capacity, which may be sufficient and cost-effective at the time of deployment, but as the firm grows they will likely fall short of requirements. And later, to transition to a best-of-breed solution will possibly be more costly and disruptive.

Do your firm's applications need to be re-configured to meet new user requirements?
Determine the needs of staff and clients equally to understand where the gaps in technology exist. For instance, is it proving really difficult to find information in a hybrid setting? It may be because users are using their email inboxes as their filing systems, so the firm needs to then understand why that may be so – especially if a document management system or equivalent centralised repository for storage is available to them. If employees are struggling to

efficiently collaborate with each other and clients, it could well be that security protocols are becoming hindrances?

Are applications integrated to meet business need?
Often, firms have numerous technology applications deployed, but they aren't integrated into the core system where lawyers and other employees live and breathe during their work day – which is typically the document management system (DMS). For example, based on a firm's way of working and nature of business activity, it may be that for a particular kind of organisation, integrating the DMS with the practice management system is critical to business operation, whilst for another firm, integrating the DMS with document bundling and template management applications is more important. Likewise, a firm may find that approvals – everything from holiday forms to

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expenses – in a remote environment are very time intensive, which is a clear sign that there's a need to adopt digital signatures.

Similarly, many firms will recognise that frequently they have systems deployed that aren't really fit for purpose. For example, a firm may have deployed a case management system in the conveyancing department initially, then rolled it out to other departments, even though it isn't best suited to other practice areas within commercial law. To correct the situation and provide the functionality that the commercial law practice areas require, an option could be to integrate the case management system with the document management system. By doing so, the workflows will be better suited to the commercial law practice areas.

Don't re-invent the wheel
Today, there is no dearth of legal technology applications – and some are better than others. In fact, once again, firms have come to realise that the best-of-breed approach is safest and as close

> *Think about adopting a system that will cost-effectively serve the firm in the long run*

as any technology adoption can be to being risk free.

This said, don't go by only what vendors say. It's a good idea to learn from other firms' experience – what's worked, what's not, how they have overcome integration issues, what kind of applications best suited for a particular type of firm, and so on. Fortunately, in the legal technology sector, there's a great willingness for information and experience sharing and collaboration amongst peer groups, so it's well worth benefitting from it.

The pandemic has served as a wake-up call. With remote and hybrid working the norm in at least the near future, this is a good time for firms to revisit their

IT environment and plan for near and medium term business requirements.

The good news is that with the cloud, the cost of technology has come down significantly, and firms no longer need large IT teams internally to support technology deployment. Yes, there's a certain amount of administration, but nowhere near the same amount of effort is required as was previously with only on-premises solutions. Crucially, the best available technology is equally viable for all firms regardless of size.

Jon Wainwright is Sales Director at Ascertus Limited. With over 25 years' experience in the industry, he has helped many legal and accounting firms as well as large corporate and government departments implement strategic, end-to-end document life cycle management and automation solutions. Prior to Ascertus, he was Sales Director with responsibility for driving sales and growing the business at Solicitec, a case management solution provider to professional services organisations.

LATE ADOPTERS MAY BE LEFT IN THE WAKE AS THEIR PEERS EMBRACE THE CLOUD

BY PAUL WALKER

Whatever the size of your firm, your CIO and GC, among others, are likely preoccupied with the topic of migrating to the cloud – unless you have already made the transition. Someone in your organization who recognizes that virtually any area of business can now be conducted with greater efficiency, easier collaboration, and more advanced protection, in the cloud, is actively promoting the move. They fear that a "wait and see" approach may already be perceived by clients and prospective recruits as a stubborn refusal to read the writing on the wall.

"Firms can't afford resistance to the adoption of technologies that promise to optimise the functioning of the hybrid workplace. The more that legal organisations can ensure that management sees the clear business impact of adopting new technologies, the more successful they will be in driving adoption among their professionals and reaping the associated performance benefits," says Brian Jones, Senior Director of Customer Adoption at iManage, in Lawyer Monthly.[1]

Coming around to the cloud
While conservative decision-makers in

Acceptance of the cloud has gained significant ground since COVID-19 entered our everyday vernacular

traditional industries are often reluctant to embrace new methods, new rules, and new tools, many progressive firms have jumped in with both feet, going cloud first.

Dan Surowiec, Chief Information Officer, Baker McKenzie, said that "To support our lawyers in delivering the best possible legal services to our clients, we needed a secure, world-class, cloud-based system that our attorneys can access on any device, anytime, anywhere around the world – and iManage fit the bill perfectly."[2]

This serves to embolden those on the fence, who – while initially less enthusiastic — are gradually coming around to the cloud way of thinking. We are speaking primarily of legal professionals and law firms, of course – but in this category of cautious adopters we also frequently count corporate financial, accounting, insurance, and the business end of the healthcare industry.

These "laggards" are frequently chastised for being slow to adopt new technology.

Mobility and access are key
In their defense, these industries are all well-versed in risk management. Having much to lose, they have likely weighed the potential cost of an ill-advised gamble against potential gain many times over. And, by tradition, they bear a solemn responsibility to weight the probability of failure more heavily than the possibility of success.

The CIOs of older, more prestigious firms may find it particularly challenging

to win adherents to the cause of migrating to the cloud. But — internal struggles notwithstanding — according to Microsoft, 80% of organisations that use on-premises servers still use the cloud for at least a portion of their data protection strategy.[3]

Acceptance of the cloud has gained significant ground since COVID-19 entered our everyday vernacular. Beyond security and governance, mobility and access are key — now more than ever. Business agility, cost predictability, and competitive positioning should further induce latecomers to rethink their strategy.

Vanquish entrenched ideas of the past
In A Leader's Framework for Decision Making, HBR authors David J. Snowden and Mary E. Boone suggest that leaders are susceptible to "a conditioned response that occurs when people are blinded to new ways of thinking by the perspectives they acquired through past experience, training, and success." And when things seem to be going well, they add, leaders often become complacent.[4]

But with legitimate arguments in favor of migration to the cloud being well-documented, and the worldwide pandemic response being non-negotiable, haven't even the staunchest advocates of on-premises technology been shaken out of their complacency?

We must embrace change or prepare to finish last. Neither complacency nor clinging to entrenched ideas rooted in the past are an option for any business determined to thrive in the knowledge economy.

Unlock the value in knowledge
Knowledge is the central activity of value creation in the legal sector. Organisations of every size and shape seek to unlock knowledge and deliver better service for their clients. Knowledge is at the core of all your firm does, and all it aspires to do.

Moving your data to the cloud is the first step to building an effective knowledge management strategy:
- Knowledge must be captured and conveyed to demonstrate your firm's skill and expertise as well as your ability to deliver the desired outcomes.
- Knowledge must be made accessible to ensure that data is quickly gathered and easily refined to meet each need.
- Knowledge must be managed, protected, and secured to enhance the degree of trust clients can place in your firm.
- Knowledge must be safely shared to facilitate frictionless collaboration and enable workflows that help solve complex business challenges.

Harvest the insights in your data
Regardless of the size of your firm, you have an abundance of valuable information already in your possession. Customer knowledge. Professional knowledge. Organisational knowledge. Regulatory knowledge. Historical knowledge.

Harness that knowledge and you can make your processes more efficient, your staff more productive, and your business more competitive. By using the knowledge, you have to its best advantage — and harvesting the insights your data contains — you'll create a more fulfilling work experience for your staff and bring greater satisfaction to your clients.

Establishing a robust and comprehensive "information architecture" is a core component of a data analytics and visualisation strategy, which should empower people to solve problems using data, according to Alex Smith, Global Product Management Lead for iManage.[5] And the ability to solve problems enables a business to shape a strong reputation that wins new clients and keeps existing clients coming back.

Recover precious time and resources
But maintaining complex on-premises systems and security in a growing

[1] https://www.lawyer-monthly.com/2021/08/firms-cant-afford-resistance-to-technology-adoption-in-a-hybrid-workplace/
[2] https://imanage.com/news-pr/baker-mckenzie-selects-imanage-cloud-as-its-new-global-work-product-management-platform/
[3] https://www.microsoft.com/en-us/microsoft-365/business-insights-ideas/resources/cloud-storage-vs-on-premises-servers
[4] https://hbr.org/2007/11/a-leaders-framework-for-decision-making
[5] https://www.silicon.co.uk/data-storage/business-intelligence/visualizing-data-how-data-insights-could-be-about-to-change-347574

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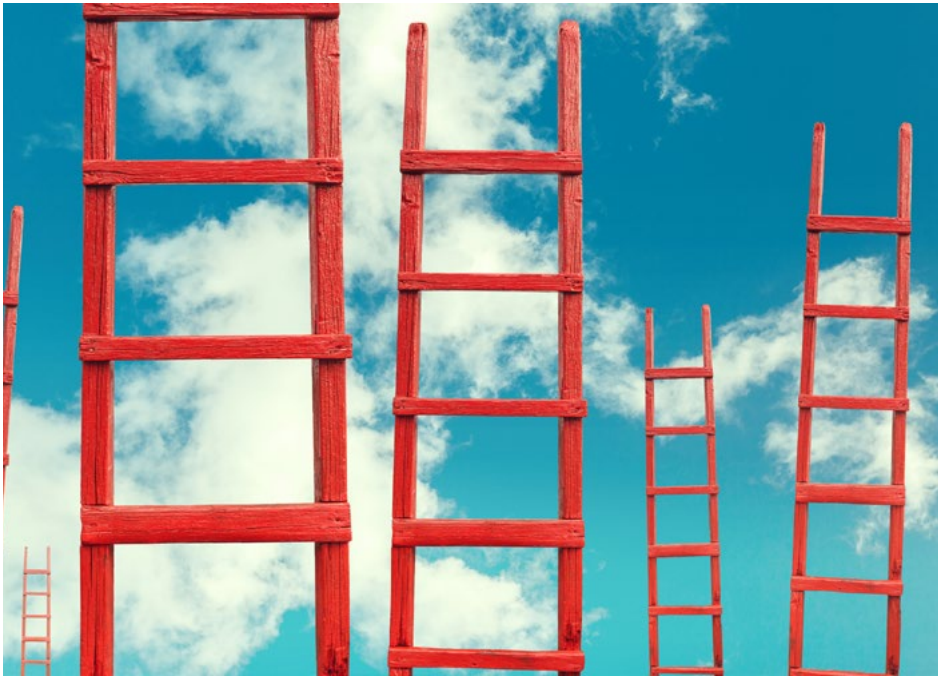**Draft Documents**

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We must embrace change or prepare to finish last

From an IT perspective, the cloud excels. Mobility and collaboration are vastly superior in the cloud, improving both the user experience and client satisfaction. And if that is not enough to vanquish entrenched ideas of the past, cloud security has never been better. Gartner estimates that public cloud service workloads will suffer at least 60% fewer security incidents than those in traditional data centers.[8]

Meanwhile, predictable costs and outsourced support enable the organisation to recover precious IT time and resources, freeing them to pursue higher value activities like solving business problems and delivering better business outcomes.

But arguably the most important factor in the decision to move to the cloud is choosing a cloud platform that employs systems designed to support knowledge workers. This is the key to unlocking knowledge and creating value that will endure and keep your organisation moving forward, whatever the future holds.

Paul Walker has over 20 years' experience within the Legal and Accounting Technology sectors. Having previously worked for PwC, Slaughter and May, Autonomy Inc and Hewlett Packard. Paul has worked with the majority of the top 200 law firms in Europe, all the Magic Circle, the Big 4 Accounting firms and dozens of large corporates including (BP, Barclays, Shell, BBC, Rolls Royce etc.). Paul has extensive development and technical skills, but has for the last 8 years moved into a delivery and subject matter expert roles, advising clients on a number of topics across Document Management, Knowledge Management, E-Disclosure and broader Information Governance. Paul is currently EMEA Technical Director for iManage.

business consumes precious time and resources, making the wealth of accumulated knowledge difficult to manage, and still more challenging to draw insights from. One of the most frequently sought, and appreciated, benefits of migrating to the cloud is the ability to relinquish the administrative burden of managing on-premises systems without making any concessions in the user experience.

With typical IT organisations spending over 30% of their budget on infrastructure, shifting some or all of this work to the cloud can save organisations anywhere from 10-20% of their annual IT budget."[6]

This saving, and the ability to more accurately predict — and budget for — annual IT costs, enables organisations to focus their IT resources on solving business problems and producing better business outcomes.

Find new ways to collaborate and exchange information
One business problem that has been a bane to firms across the globe for nearly two years is the need to identify safer, more innovative ways to collaborate and exchange information. As information-intensive businesses in a knowledge economy, with a vested interest in

secure communications, this should concern us all.

A knowledge management strategy rich with tactics that support, foster, and promote collaboration helps everyone deliver against the shared business objectives of growth, profitability, and end-user benefits.

"Moving to iManage Cloud isn't just about freeing ourselves up from managing IT infrastructure — it's about enabling future ways of working," said Karen O'Connor, Chief Information Officer, Lander & Rogers. "The rollout of smart devices across our firm has given our lawyers more flexibility and mobility. iManage Cloud will allow our staff to access their documents, files or communications whether they're in the office or on the go."[7]

Choose a cloud platform designed to support knowledge workers
Latecomers to the cloud may find themselves scrambling to compete with their peers as the business case for the cloud becomes steadily more obvious and easier to build, forcing their justifications for holding back into obscurity. But whether your firm is a "laggard" or simply on the fence, there's still time to catch up.

[6] https://assets.kpmg/content/dam/kpmg/pdf/2015/11/cloud-economics.pdf
[7] https://imanage.com/news-pr/enhanced-security-and-mobility-draw-lander-rogers-to-imanage-cloud/
[8] https://www.microsoft.com/en-us/microsoft-365/business-insights-ideas/resources/are-your-files-secure-in-the-cloud

LOOKING AHEAD TO 2022 AND BEYOND

What can we expect of the near future? It's a question that keeps many of us busy as we try to plan for the months and years ahead. The current pandemic makes it more difficult to predict where we are going. That's why we asked many, many industry experts about their opinion: what to expect this year and beyond? We grouped the answers per topic, eight in total!

THE YEAR(S) AHEAD FOR PRACTICE MANAGEMENT

ERIC SUGDEN
THOMSON REUTERS ELITE

Microsoft CEO Satya Nadella recently posited in a speech that we are likely to see "more digitization over the next 10 years than the last 40." Think about that for a second: four decades representing the emergence of mobile phones, social media, video telephony – all delivered in a quarter of the time.

I think the same prediction arguably could be made when it comes to practice management in the legal sector. The industry has been reliant on on-premises solutions for a long time, sticking to age-old arguments that law firms must retain all access and control over their data and just can't trust it in the cloud. This is, of course, despite the fact that the majority of major companies around the world – ie their own clients – have now moved at least part of their tech infrastructure to the cloud. So I think it's very likely that 2022 may be the year that the slow, and often reluctant, march to the cloud for the legal sector finally accelerates.

Thinking about this in terms of the standard cycle of change and tech adoption, it seems to me that we are about to enter the 'late majority' phase, and law firms are starting to wake up to this. Those who don't start to at least think about making this shift will not benefit from where all the innovation is taking place, so the risk of being truly left behind is increasing.

Hand-in-hand with this is finally starting to realise the true power of things like AI and machine learning. Everyone's talked about this for a long time, but often ignore the fact that what's required to make it really work is lots of data and lots of computing power – both of which, in reality, require use of the cloud.

More widely, the next few years are also likely to see a distinct move toward more automation for routine practice management functions, tasks and workflows – both driven by AI and otherwise. One of the reasons that this is really possible now is because of the increasingly open architecture of practice management solutions, including our own 3E, which offer many APIs to connect disparate systems in ways never before possible.

The potential applications here – whether it's billing, time keeping, analytics or matter or client intake – are really exciting. In particular, there are some very interesting innovations happening in areas like using data and AI for predictive time entry in a truly 'smart' way. Looking further ahead, it's entirely possible that we could see the end of the manual timesheet in the legal sector by 2025 – the prospect of which would likely delight many lawyers around the world.

Eric Sugden is chief technology officer for Thomson Reuters Elite, the world's leading provider of innovative business management solutions for the legal industry.

REMOVE EXISTING ROADBLOCKS AND MAKE PRACTICE MANAGEMENT IN THE CLOUD A REALITY

CHRIS CARTRETT
ADERANT

Law firms are facing increasingly steep challenges in practice management today, which will continue – and perhaps increase – in 2022. Historically, the front office of lawyers, paralegals, etc. handled the client-facing work while the back office managed the business side with billing, financial tracking and administration. However, this once clear division of labor is beginning to blur as law firms become more aligned and unified, realizing that overarching firm alignment is essential to satisfying clients while maintaining profitability.

Law firms are being overwhelmed with the volume of outside counsel guidelines that today's clients are requiring. In addition, clients are expecting greater accountability and performance transparency from their firms. This makes stellar metrics, efficiency and process absolutely essential.

The best strategy for law firms to meet growing client needs is to effectively align

their practice using integrated technology solutions and insisting on clear communication to bridge any outstanding gaps. Practice management technology creates the bedrock for building these bridges and irons out disconnects in the firm's workflow. Harvesting performance data with analytics tools puts the firm in a more advantageous position to please clients and optimize service delivery.

The entire firm must work as a single unit to serve the client effectively. For example, ensuring that lawyers in the front office are adhering to clients' guidelines and addressing errors at the point of time entry allows the back office team to process billing and collections in a smoother, shorter process. The technology overlap between both 'sides' of the office creates a more effective, efficient, and, ultimately, profitable firm.

We are also seeing firms work towards implementing better document and data management practices and adopting policies to improve communication and access to information. By implementing robust document and knowledge management platforms, staff is more aptly equipped to utilize a wealth of firm knowledge. Streamlining and subsequently surfacing data and information within the applications lawyers work in most will propel firm efficiency even further.

Finally, we expect that adoption of cloud-based practice management will skyrocket in 2022. Many firms have been cloud-first for some time, but others have been reluctant to take on such a seemingly ambitious project. The stakes are high since practice management comprises the foundation of the firm's tech stack and integrates with so many of its other systems. However, now that it's clear that the hybrid workplace has become the status quo, firms will need to find a way to remove existing roadblocks and make practice management in the cloud a reality. In turn, practice management technology providers will continue to engage with clients to further develop and fine-tune their cloud offerings as part of a fully integrated system.

Chris Cartrett is CEO at Aderant, a position he was promoted to in January 2022. He previously held the role of President and had held other top executive strategy and growth positions since joining Aderant in 2014. A 20+ year veteran of the legal software industry, Cartrett is a prolific writer and frequent speaker at marketing and technology events around the globe. He has presented at many continuing legal education seminars, bar associations, and legal marketing organizations about emerging trends and best practices in law firm marketing and technology. Cartrett holds a Bachelor of Science degree in Marketing and Management from Jacksonville State University.

2022 – THE YEAR OF THE "LET'S WAIT AND SEE"

DAVID BASKERVILLE
BASKERVILLE DRUMMOND CONSULTING LIMITED

When I was asked to pen a few words on the future of Practice Management Systems in 2022 and beyond I thought it would be an easy piece to write. It was only when I opened Word that it dawned on me the risk of ridicule that making bold sweeping statements can have when they don't come true.

I will therefore caveat everything that follows by saying if they don't happen it's because, like a butterfly flapping its wings, my thoughts altered the future. (That's my excuse and I'm sticking to it !)

So, stepping forward with the confidence of Steve Balmer, CEO of Microsoft, who in 2007 predicted "There is no chance of the iPhone ever gaining significant market share" let's turn our crystal ball towards the world of PMS.

2022 – The Year of the 'Let's wait and see'
The last few years has seen unprecedented change of ownership of leading mid-market PMS systems (used by firms of c. £8m to £30 Million) with nine of the leading PMS solutions now in the hands of just three large IT companies. We have also seen Peppermint, once seen as the great disrupter, largely retreat from the provision of fully featured PMS solution to a tactical focus on CRM/CMS strategy. This has led to market confusion, frustrated clients, lack of viable options and trepidation as to what the future brings.

In 2022 I predict that PMS will continue to be a hot topic as I do not ever recall a time where there are so many conversations with firms about their options. However, conversely, I expect it to be a year of discussion and definition rather than one of action.

Therefore despite market demand and law firm frustrations, the number of firms changing traditional mid-market, single solution PMS set-ups will slow down due to market uncertainty. Unless a firm is operating on an 'end-of-life' platform and has to change, this could be the year of 'wait and see' as firms watch suppliers' strategy fall into place.

Firms should use this period to influence vendors' clarity of direction and development roadmap as well as assessing what it really would be like to work with the proposing vendors.

Convergence
I believe that 2022 will be the year the PMS 'consolidators' start planning on how

to get returns on their investments.

It is simply not viable for suppliers to own more than one PMS solution and do a good job of it. Equally, there is no point purchasing a competitive solution if you are just going to continue to run it as a standalone competitive entity.

I would expect to see merging of development teams, combining of features and a general convergence between the PMS solutions now owned by the same company so they have one 'go-forward' solution.

I also do not believe the market disruptions are complete and I would expect other suppliers to change ownership during 2022. There could even be breakaways from previous take-overs where the expected returns have not materialised.

Subscriptions
Software-as-a-Service became a reality in 2021 for many firms; typically the preserve of web-based solutions we have now seen this become the norm for one of the larger suppliers.

It represents a significant price increase for firms used to the traditional 'purchase and maintain' style of software licencing and has sent shockwaves through the userbase.

It is here to stay, and I would fully expect all other vendors to move towards a similar model.

Relationship Balance
The 'big three' will continue to clarify their short, mid and long-term strategy and seek to deliver this by losing as few clients as possible. But make no mistake, these companies know that the fragility of the market and the limited options available puts them in a position of strength. We have already seen some sweeping decisions 'dictated' to the userbase and this will continue.

As I mentioned earlier there are more conversations about PMS than ever before. I am seeing, and indeed facilitating, conversations between law firms about the situation. To counteract the supplier power I'd like to think there'll be a resurgence of user groups as firms work together to find answers to the challenges they face.

Make Do and Mend
Given the challenges, more law firms on a supported system will opt for the expedient of a 'make do and mend' strategy in the short term:
- Investing in customisations
- Training staff
- Investing in tactical solutions (e.g., strategic case management systems) rather than expecting the PMS to do all functions
- Spending longer talking to potential vendors

Subhead: The New Entries
It would be inaccurate to say that TRE & Aderant do not have clients in this space but normally you would associate both providers with 'top 200' firms or at least 50 – 75 fee earners rather than competing head-to-head with the likes of P4W, SOS, Linetime, DPS or Eclipse.

However, given the state of the mid-market traditional suppliers we are already seeing them operating more seriously in the sub 200 staff market and I would expect this to continue as both vendors work to expand their 'best of breed' finance systems into fully featured PMSs, providing the type of functionality you would expect to see from the traditional 'single supplier' solutions.

Equally 'smaller firm' or new entrant solutions such as Action Step, LEAP, Clio, Osprey could well start to push up market. However, as we have seen with the struggles of Peppermint, creating a new fully featured PMS is no mean feat - so given the functionality gap, and in some cases high monthly costs, this upward climb will not be as immediate or straightforward as the descent of Aderant and TRE, who will be able to come 'down market' by reducing functionality or providing packaged installations.

The Long View
The crystal ball is really misting up as we look into 2025 but I expect to see:
1. One 'go forward' PMS solution from each of the 'consolidator' vendors (Note: there may be two flavours – one "onsite" and one hosted)
2. All vendors basing new business, and potentially historical client renewals on a "subscription" Software-as-a-Service
3. Aderant and TRE as serious contenders in the mid-market PMS space offering a fully featured solution which is

affordable to sub 200 staff firms.
4. One or two of the 'smaller firm' solutions to have made inroads into the mid-market
5. Most law firms taking a more tactical application approach, breaking with the tradition of using the PMS for all aspects of their business.

David started his career in Legal Technology in 2002 when he joined Thompsons Solicitors as Software Applications manager. David then moved on to Tollers Solicitors to become the Head of IT and then Director of Operations and IT. In 2011 David founded Baskerville Drummond and has grown the consultancy to be one of the leading providers of independent strategic advice to UK Law Firms. He has assisted many firms undertaking strategic reviews, system selection and implementation, and is a retained trusted advisor (or Virtual IT Director) for several well-known firms.

David is particularly known for his work on complex projects, such as the MAB demerger and for turning-around failing practice management systems (PMS's) or other challenging technology situations such as assisting firms address or move away from poorly performing outsourced hosting or support arrangements. David is MBA qualified and is a member of the British Computer Society (BCS) with Chartered IT Professional status.

WHAT TO EXPECT FROM DOCUMENT MANAGEMENT IN 2022 AND BEYOND

NEIL ARAUJO
iMANAGE

Document management has long been foundational to the daily workflows of legal professionals, and that will continue in 2022 in new and exciting ways.

There has been an attitudinal shift on the part of the users.

The COVID-19 pandemic of the last 18 months forced legal professionals to embrace new ways of working, and now that they've experienced that change, users are hungry for more.

The fact that they were able to successfully adapt to remote working and hybrid working models – by leveraging investments in cloud to provide access to critical documents and emails and enable easy and secure collaboration with colleagues across the organization, regardless of where those professionals were physically located – has given legal organizations a boost of confidence that they are capable of tackling big change projects and transforming themselves.

Professionals have discovered a new quality of life from working remotely, while demonstrating that they can be effective and productive while working from home. Meanwhile, firms now have a broader pool of talent to pull from, precisely because professionals can work from anywhere and be productive.

For firms now, the question is: how do we really continue transforming ourselves into a firm that is ready for the future of work?

Document management has a big role to play here in delivering more functionality to their end users around digital ways of working and collaborating. It will play a foundational role in tackling challenges around automating workflows, unlocking the knowledge within documents, and securing, protecting, and governing documents.

Expect to see even more integrations between document management systems and the collaboration tools that have become indispensable over the past 18 months, like Microsoft Teams; the emphasis will be on ensuring that these products work together seamlessly and that communications created in Teams can be governed similar to email communications.

Looking out to 2025, we expect to see an accelerated migration of workloads to the cloud as organizations get more comfortable with cloud technologies and we expect clients to focus not only on moving their documents to the cloud but also on doing more with their documents in the cloud. Examples of doing more include enhancing the ability to derive insights locked in the documents and automating workflows for specific practice groups.

Ultimately, it's the end users who must change to embrace technology as an enabler to better productivity nd security. They have a whole new attitude, and they are eager to tackle the goals that they have set out for themselves as they stand on the precipice of an era of unprecedented change for the legal industry.

Neil Araujo is co-founder and CEO of iManage where he plays a prominent role in leading product direction and overall business strategy for iManage's Knowledge Work Platform. Neil's oversight has helped position iManage as the gold standard for document and email management, AI-based Knowledge Management, and advanced security and governance within the legal and professional services industries.

LAW FIRMS WILL CONTINUE TO LOOK FOR CLOUD SOLUTIONS TO MANAGE CONTENT AND ENHANCE WORK

JOSH BAXTER
NETDOCUMENTS

With work-from-home and the hybrid-workplace becoming the new reality, the industry's philosophy towards cloud solutions has rapidly evolved. In 2022, we will see law firms and legal professionals continuing to invest in cloud solutions to manage content and enhance their work. ILTA's 2021 Technology Survey shows almost half (49%) of firms say their Document Management or Enterprise Content Management solutions are in the cloud, or they are planning a cloud migration within the next 12 months. With nearly a quarter of firms stating they are "mostly in the cloud" this trend shows no sign of slowing down as increasing numbers rely on the cloud to support hybrid working environments and allow for greater flexibility and collaboration.

Law firms will invest in technology to retain talent amid the 'Great Resignation'
The 'Great Resignation' is upon us. According to research from Microsoft more than 40% of workers around the world are considering quitting their job or changing their profession. This could be positive for the legal sector as it could be an opportunity for fresh blood to enter the industry. However, it could also be detrimental to talent retention if firms don't play their cards right.

The global pandemic has given lawyers a taste of hybrid working and a better work/life balance. Now the genie is out the bottle, law firms will need to ensure that they can continue to offer the same level of flexible working. To do this, they need to invest in the right collaboration tools. Cloud technology will play a vital role in ensuring that lawyers can work productively and with ease, from any location. If they don't equip lawyers with the right tools, they will soon watch talent walking out the door.

Platformization will become a reality in 2025
In the next few years, the legal sector will be investing in platforms rather than individual solutions. This means utilizing the capabilities of core technology platforms more deeply, building apps and integrations that extend the platform further, and creating a seamless experience for users to do work.

Take a mission-critical technology such as document or enterprise content management: the hub for all content, documents, emails and everything that is managed by the firm, internally and externally with extranet collaboration. This will be the only place and the only authoritative repository of what the truth is pertaining to all documents, folders, emails etc. Platformization ensures that all solutions –– such as document and email management; collaboration, task and discussion management, and set builders –– share common storage with a common search engine. Such an approach, helps guarantee a single version of the truth, enabling legal staff to work collaboratively, securely, and productively.

NetDocuments CEO Josh Baxter brings a broad background in global technology leadership including 20 years working in engineering, customer success, operations, and sales. Since his arrival in 2017, Josh has led NetDocuments to unprecedented growth and global expansion of its 3,400+ customer community.

FOR 2022 AND THE YEARS BEYOND, THE CLOUD DMS ARMS RACE WILL CONTINUE

BRIAN PODOLSKY
KRAFT & KENNEDY, INC.

Everyone knows the world changed in 2020. Everything changed. How we live, how we work, how we shop, how we eat. That shift to working outside the office resulted in many companies investing further in remote access capabilities. Gone were the days of nearly all staff working within the four walls of a single office building. As law firms looked to make it easier for attorneys to do their work from anywhere, some firms invested

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Ascertus takes a best practice-led approach to customer success. We offer an end-to-end change management program, starting from pre-sales engagement through to post-implementation support. This approach helps minimise and mitigate change-related challenges in firms, right from project inception.

Ascertus – Best in Class Support

Ascertus is recognised for its superior iManage support services. Year on year, the company scores top ratings for client satisfaction in iManage's independently conducted customer survey.

"Ascertus displayed great eagerness to understand our requirements and suggest approaches that would solve our problems"

Jurian Hermeler, ICT Director at NautaDutilh N.V

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Change can be for the good. For an iManage partner who better meets your requirements get in touch now.

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in Citrix, VPNs, DirectAccess and other remote access capabilities. But the real long-term thinkers started investing in Software-as-a-Service and moving their core technologies to the cloud. At the forefront of that shift was Document Management.

As we are now accepting the new normal heading into 2022, we are seeing firms of increasing size embrace the cloud with both iManage Cloud and NetDocuments. Providing secure access to matter content, while allowing secure collaboration and mobile access, has become a necessity. As we look at plans for 2022, firms with on-prem DMS platforms will have to decide if their investments should go towards highly redundant access to on-premises infrastructure, or a subscription to a cloud-based DMS. It will be a year of transitions. Firms with iManage who have used FileSite and DeskSite for years will need to plan their transitions to the Work 10 Desktop Client, to avoid running close to the End of Support period beginning in mid-2023. Likewise, any of those

firms with the iManage IDOL Indexer will need to learn and transition to the RAVN Indexer or migrate to the cloud. Firms leveraging Single-Sign-On (SSO) to iManage Cloud will need to transition from the Identity Provider to the Service Provider option, as the legacy Identity Provider option will not be supported by the end of 2022.

For 2022 and the years beyond, the Cloud DMS arms race will continue, with industry leaders iManage and NetDocuments developing and acquiring new modules to help attorneys perform as much of their work within the realm the DMS platform as possible. Whether its functional modules like automated closing binders and workflow tasks, or technical modules like Customer Managed Encryption Keys (CMEK), vendors will look to deliver more capabilities to their most security-conscious customers. Another necessity as we look at the road ahead will be deeper integration and connectivity to Microsoft Teams and the Microsoft 365 ecosystem. It is inevitable that most firms will be living in the

Microsoft Cloud by 2025. What remains to be seen is whether vendors like Epona can gain more traction in North America and manage that content living in Microsoft, or vendors like iManage and NetDocuments can more seamlessly interact with the Microsoft 365 platform and their own DMS content. In the end, we hope to see a secure collaborative world where firms can access, manage, and control all their important content in the cloud.

Brian Podolsky leads the Enterprise Content Management (ECM) Practice Group at Kraft Kennedy. He has extensive experience implementing and supporting Microsoft Office, NetDocuments, iManage, OpenText eDOCS, and Worldox document management systems, as well as third-party integrated add-ons. He also drives research on the latest ECM technologies including email management, enterprise collaboration and search, and provides guidance and best practice standards to clients implementing ECM solutions.

EXPLORE OUR CYBER PRODUCTS

90% of law firms are extremely or somewhat concerned about the impact of cyber threats*

*PWC, Oct 2021

NIKEC SOLUTIONS

LEGAL TECHNOLOGY EVENTS IN 2022 AND BEYOND: LIVE? VIRTUAL? HYBRID?

GEORGE KATRIVESIS
CHILLI IQ

O r all of the above..
It has been an interesting couple of years since Covid-19 came knocking on our door and shook the foundation out of our live events and life in general as we knew it. As a business Chilli IQ decided not to go down the virtual events path when our live events were halted, as there seemed to be an influx of these events with mixed reactions from both attendees and event partners. We were lucky enough to hold a few smaller live legal tech events in 2021 in between lockdowns and found that Hybrid seemed to be a necessity between those who could attend the live portion and those who couldn't.

However, our larger 2-day summits such as our annual Lawtech Summit has not yet been able to be held and has been in a holding pattern since September 2020.

It is these larger 2+ day legal technology events I believe will return in 2022 and beyond. With the covid vaccination rates quite high in Australia, both interstate and international travel re-opening there is appetite amongst our legal tech community to re-connect face to face.

Will we get back to the scale of large overnight summits in 'away from office' resort locations? Eventually, I believe we will - as it's the informal discussions & networking outside of the sessions between delegates and vendors where the 'event magic' happens – this is something that can't be replicated in virtual only events.

There is a place for legal tech events in 2022 and beyond however they will look different to what we've known, Covid is a factor of daily life which we all have to live with and navigate to ensure the safety of all the attendees. The new agile workforce has emerged and has had to 'unlearn' old strategies and adapt to a savvier new version. As a conference organisation we also need to be able to adapt and change our model as the industry depicts.

The hybrid model will be key for legal tech events in the immediate future giving all our community the opportunity to be involved in the discussions and learnings, this model also allows a far greater reach than what we have been used to. "Zooming' in keynote speakers from overseas locations will be more acceptable as this has been part of our daily life.

Virtual legal tech events will remain as they will also have their place for smaller short sharp information sessions and learning platforms. The technology in running virtual events has also seen huge advancements allowing greater interaction between presenters and attendees with great success.
Live Legal Tech events have most certainly been disrupted, however judging by the recent live events we've held it is fantastic to see the buzz of people connecting face to face.

George Katyrivesis is Marketing Director at Chilli IQ and has over 27 years of sales, marketing & management experience and a degree in Business Marketing. George founded Chilli Marketing Solutions in September 2002, originally the business was a marketing consultancy assisting SME's with their outsourced marketing needs. It was also the platform for the conference arm of the business which was to follow in late 2003.

Since then the business has grown into Chilli IQ Law Events which creates and develops innovative conferences, in Australia, NZ and Asia. Well known events such the Lawtech Summit and the Managing Partners Forum are part of Chilli IQ's annual events, attracting leading law firm Managing Partners, CIO's and senior decision makers.

WE ALL PLAN TO MIX AND MINGLE AGAIN, SAFELY, IN 2022

JOY HEATH RUSH & BETH ANNE STUEBE
ILTA

L et's start with what we expect for ILTA: It has been a challenging last 18+ months. We've had to adapt our ILTA events to make them accessible, safely, to the largest amount of people. We were proud to deliver an excellent hybrid event a ILTACON 2021 in August; this required creativity and agility.

In addition, we have had to develop programmes and networking opportunities in real time to address issues that we had no idea our members and business partners would need to solve in 2020 and 2021.

With an eye to gathering safely and effectively, we expect, over the next year, to begin to meet again in smaller groups earlier in the year, working toward larger gatherings, when safety possible. This has been our goal for the last 6-9 months: to begin to gather safely.

This is also true of others in the legal ecosystem, including law departments, law firms, and legaltech providers. We will continue to look for the right mix of digital offerings and services and in-person opportunities, focusing on reserving for in-person those activities that can be done best or only in person.

We all plan to mix and mingle again, safely, in 2022.

The real question here is whether, by 2025, we will be "back to normal." We would contend that there is no going back. It is possible that 2025 will look more like 2019 than 2020 or 2021 did or have. That, however, is setting the bar quite low.

By 2025, we will have identified those components of the digital and work-from-home experiences to create a blend in in-of office and remote work that maximizes the productivity gains achieved during the pandemic and ensures that the learning and collaboration of being together occurs.

As for ILTA, With that said, we're going "full-tilt ahead" as we check our calendar for 2022 and beyond. Our ILTA events team plans for all possibilities, focusing on in-person engagement.

Our Service Delivery team will be onsite in National Harbor, in February 2022, conducting a typical site visit, prior to our August events. There, we will engage the conference venue staff to find creative and educational ways to bring our attendees together, safely, but distinctly in person.

We know that ILTAns learn best together, and our role in February is to plan ahead, look for ways to continue our peer-powered learning, and bring the greater constituency back together. 2025 will be here before we know it. We can be confident we are heading for a bright future, as ILTA and as a legal ecosystems, because of the brilliant, passionate, and committed people that make this Community extraordinary.

Joy Heath Rush is the CEO of The International Legal Technology Association (ILTA). She leads and mentors the professional staff, while serving members, business partners and key constituents. She has spent her entire career supporting lawyers and technologists in the practice of law, and has deep familiarity with the complexities ILTA member firms and organizations face. Her prior role was with Litera as VP of Client Development for four year after spending 28 years in a variety of IT and management roles at the prestigious international law firm Sidley Austin LLP. With more than 30 years of experience supporting lawyers, Joy is passionate about applying technology to the business problems of law firms. In addition to her law firm and vendor roles, Joy has a long history of volunteering in the legal technology community, having served as board member and president of three different legal technology peer groups, including ILTA.

Beth Anne Stuebe is the Director of Publications and Press for ILTA. At ILTA, she directs and manages press communications, implements strategic press and media plans for events, publications, and surveys and oversees all ILTA publications and surveys. Previously, Beth Anne was the Managing Editor for The Electrochemical Society. There, she implemented the Society's Open Access program and Open Science publishing imperatives, along with managing the conference and quarterly publications. Beth Anne has a long history of volunteerism within scholarly publishing, DEI, and animal advocacy.

PEOPLE PEOPLE PEOPLE

STEVE PARROTT
ALTERNATIVE EVENTS

For too long we have been glamorized by the leadership views of the Managing Partner and the role of the CIO to dive digital transformation , while of course these roles are still hugely relevant they are not in 2022 as relevant as the firms HR and L+D leaders.

Professional service firms have been saying for years "we are a people business" but only now is this actually the top agenda item at the Partner meeting.

So for 2022 a firms people strategy , including training , skills development and clearly defined career pathways the priority.

So if you have not promoted your HR/L+D leaders onto the board/partnership meetings now is the time.

Steve Parrott is Co-Founder of The Professional Alternative and Alternative Events Company.

FIRMS ARE SEEKING TO ADOPT NEW DOCUMENT-BASED KNOWLEDGE SYSTEMS

DAVE WILSON
TIGER EYE CONSULTING LTD

Whilst there is much talk of automation as a key trend in the industry at the moment, I have found this to be a bit of a buzzword. Largely we have found the uptake in such technologies to be slow, as firms explore automation in theory, rather than in practice.

At Tiger Eye we are finding that in reality many firms are going 'back to basics' to make sure that the documents at the heart of their practice are managed effectively. For some, a reliance on virtual knowledge retrieval has highlighted issues with their database set up, taxonomies, and document tagging, with users becoming frustrated that their knowledge searches are bringing back irrelevant or inaccurate information. For others, hybrid working has shed a light on inefficiencies within knowledge review processes, with limited systems restricting the knowledge team's ability to make sure know-how is in date, approved and ready for use. In both cases, firms are being spurred on to revisit their curation efforts, as the legal industry recognises the need to manage their ever-mounting data stores and bring order to their knowledge banks.

As firms begin to review their document-based knowledge systems, many are finding that those implemented many years ago have begun to show their age, particularly from a user design perspective. With this, a number of firms are already beginning to look at alternatives to their core knowledge systems, and this trend is set to continue into 2022. Both larger and smaller firms are seeking to adopt new document-based knowledge systems to act as a springboard for future innovations such as those related to machine learning, with knowledge leaders recognizing that before A.I. can be brought into the mix, curation must be perfected, so that A.I. can work in partnership with – and make sense of - the firm's existing human intelligence. Moving into 2025, it is likely that the hype around A.I. and document analysis will increase, but only firms who do necessary preparations for such innovations will be able to make the most of these technologies.

Dave Wilson is the Managing Director and Founder of Tiger Eye, the leading iManage Partner for Knowledge and Technical Expertise. Tiger Eye support law firms across the globe to manage their documents, emails and knowledge effectively. Offering 'expertise, from the team that listens' Tiger Eye provide iManage implementations, custom development services, technical support, and a broad range of in-house developed solutions including Blueprint – the Knowledge Management system for iManage.

FIRMS WILL INVEST IN ENHANCING THE SEARCH CAPABILITY IN THEIR SYSTEM

JAVIER MAGAÑA GARCÍA
LEXSOFT SYSTEMS

The value of knowledge management (KM) has been proven in the legal sector in the last two years. In 2022, firms that have consolidated KM systems in place will look to both fine-tune their processes and take the function up a level.

Lawyers routinely search for "knowledge" that is generated internally in the firm in the form of documents, best practice, advice and so on. Additionally, they also look to external resources for similar information, despite the fact that, they have some of the most reputable legal authors and experts in-house. Why? Because the level of information-sharing and collaboration isn't embedded in the firm, making finding this data difficult. To address this issue, many firms have dabbled with AI tools (at some cost) with limited or no success. So next year, firms will once again revert to adopting more realistic, affordable and practical measures such as focussing on honing their processes for timely knowledge identification, publishing and classification. This will ensure that content is captured and automatically classified so that it can be easily surfaced.

Furthermore, firms will invest in enhancing the search capability in their system. They will integrate and unify internal and external third-party content repositories, in an attempt to create a single, centralised search portal so that lawyers can search for everything from documents, laws, matter precedents thought to named legal experts in different fields. This kind of holistic search across repositories and resources will be important and of great value, especially in the foreseeable hybrid work environment.

With such strong KM fundamentals, as we get closer to 2025 (and beyond), efforts to reduce human involvement with the use of technologies such as AI and big data, may become a more realistic expectation. For example, AI will start to be applied, in some measure, to crawl information repositories, identify information that will be valuable to lawyers, extract knowledge from different types of documents and appropriately classify for end-user consumption. And no, this does not mean that an algorithm will entirely replace human oversight. Professional Support Lawyers will always be needed in KM departments to ensure that the content published is relevant and of high quality.

By then, one can also expect technology to have advanced enough to enable simultaneous searches across multiple repositories with the search results automatically merging in a meaningful way for end-user consumption. In fact, technology is already under development to facilitate this kind of search, but work is still needed to make it truly deployable.

KM is an exciting area to be in, not only for technology vendors, but professionals too. Firms are pushing for increased value from the KM function, in response vendors are encouraged to innovate in the space.

Javier Magaña García – CTO at Lexsoft Systems - is responsible for the successful completion of all customer projects, overseeing everything from project design and troubleshooting through to delivery of ongoing support and services. He is reputed in the wider technology community for his experience in delivering technically complex projects to some of the largest and most demanding global businesses.

THE NEXT PHASE OF KM CENTERS AROUND STANDARDS

JACK SHEPHERD
iMANAGE

Knowledge management has always played a crucial role in any well-run legal organisation, helping teams to make use of their most valuable asset: knowledge.

This noble goal is somewhat hampered, however, when there is a lack of standardisation around how knowledge is categorised, labelled, and otherwise managed.

The result is that people use different words for the same concept. For example, one branch of a law firm might refer to a client as "Internal Widget Corporation", whereas another branch calls it "Int'l Widget". Other examples include the term "precedent", which means a templated starting point to one person, and an executed example of a contract to another person. A lack of standardisation in terminology makes it challenging to tie relevant concepts together when people are looking for knowledge.

These kinds of things are known as "data hygiene" issues. They have a direct impact on the client experience a professional services firm is able to offer. While firms are the custodians of the contracts and other assets they create on behalf of a client, those files are the property of the client – and clients want to be able to access the information they contain. Any inconsistent terminology used in these materials (or their supporting metadata) are visited upon clients when it is passed to them.

For example, what if one law firm that the client works with tags certain contracts as "real estate leases" and another firm tags them as "property leases"? In this example, a member of the legal team of that client would only get half the documents available if they searched for "real estate leases".

A solution to this is to drive data standards between different organisations, so that at the very least, any difference in wording is tied to a common concept.

2022 is seeing real progress on this front. Initiatives such as the Standards Advancement for the Legal Industry (SALI) Alliance and noslegal are working hard to engage with everyone in the legal ecosystem – law firms, clients, vendors, and partners. Their aim is to drive language, concept and data standards.

From a technical perspective, this will allow for much more tightly knit and effective integrations than have existed in the past. This will enable more robust KM capabilities that can effectively integrate and draw from multiple systems. It will mean less work is required to map the data standards of one system to another – if both adopt the same standard, this work is already complete.

This is a hot topic, as more and more organisations are moving to the cloud. Over time, the ability to exchange data between different systems is going to become even more important.

These initial efforts around data standards and data hygiene in 2022 can be considered a foundational effort that "lays the groundwork" for the real payback a few years down the line. In three to five years' time, those standards should be embedded in the way that knowledge professionals conduct their

processes and collect data, allowing them to generate powerful insights that, for instance, succeed in enabling a more data-centric approach to pricing or give them a comparative view on deals.

While the seeds are being planted now, the true promise of KM will come to full fruition in the coming years, helping to drive powerful advantages and better business outcomes across the legal ecosystem.

Jack is a legal practice lead at iManage. He combines his knowledge of legal technology with his experience working as a restructuring lawyer at an international law firm. He has a focus on the processes lawyers do in their day-to-day working lives, and how technologies and processes can feed into these and actually become adopted on the ground. He has particular expertise in transaction management, e-signatures and knowledge management.

WE HAVE ONLY SCRATCHED THE SURFACE OF WHAT IS POSSIBLE

MICHAEL GRUPP
BRYTER

Wow – what a wave No Code has become this year! Companies need digital solutions, in every team, on every level. IT is overstrained and cannot help – and with a global shortage of IT talent, becoming digitally ready becomes a real issue. For legal and compliance, the hurdles are even higher: While most teams have now seen the advantages of digital solutions, they are struggling to procure the budgets for IT development. In hindsight, No Code is an obvious solution that has now become an indispensable one for many legal departments and law firms: it enables domain experts to go digital themselves faster, easier, and cheaper.

I remember how often we had to explain the term No Code in 2019 and 2020, but in 2021 it was all the rage and the industry has really picked up the concept. So, what do I expect to see in 2022? More! We have only scratched the surface of what is possible. Many of our customers have developed several apps, but we know how many more concepts, decisions and applications are waiting to be developed. And there is another factor that will further boost development: Most applications that have been developed in the last two years are only now starting to bring value. So 2022 will demonstrate numerous success stories and bring to light more projects that have been in the making, proving everyone right who bet on No Code early on.

In terms of hype, Gate's law is still very true: "We overestimate the impact of technology in the short-term and underestimate the effect in the long run." Effects of technology compound exponentially. This is even more true for a concept like No Code that further accelerates the move to digital. In three to four years, we will really see the impact digital applications have on the business, and companies and law firms that invested early will be in the driver's seat of that push. One of our clients said it nicely: "We have developed an intake tool that saves us over 90% manual efforts – and do you know what we are currently doing with the time we saved? We're already building another solution!"

I am curious to see how deep the impact of No Code will be. It will certainly not replace IT or lawyers, but by 2025 we will see most repetitive workflows and decisioning digitized. And, of course, a prediction by a Tech Analyst at Gartner will be right: "By 2025, 70% of new applications developed by organizations will use low-code or no-code technologies."

Michael Grupp is CEO and co-founder of BRYTER, the no-code service automation platform that enables legal and regulatory professionals to build and run digital applications, without any programming. BRYTER is one of the fastest growing SaaS companies with customers across the globe from corporates like McDonalds and ING through to law firms like Paul Hastings and Simmons and Simmons. Michael began his career as an international litigation and arbitration lawyer before finding his passion in building companies. He publishes and speaks on topics of legal technology and innovation and speaks as a guest lecturer at the University of Frankfurt and Bucerius Law School. He's a big fan of seafood and fast talking people.

THE LEGAL INDUSTRY IN 2022 - A CITIZEN DEVELOPMENT FUTURE

CHRIS OBDAM
BETTY BLOCKS

Universally, companies in the legal industry are increasing their technology budgets. There is a need for automation and digitization, to remain flexible, progressive, and competitive. Legal companies experience specific pains, such as:

- Business is not self-reliant
- IT systems are outdated and inflexible
- App delivery and maintenance is slow and expensive
- Customers expect innovative services

However, investment into technology is not a perfect, straightforward solution. Legal industries' tech investments frequently risk only capturing a small portion of the potential contracted life cycle management investment benefits. This is a result of insufficient knowledge regarding end users' needs as well as business requirements.

The solution? For tech investments to go into the knowledge holders at the forefront of the legal industry. Speeding up application development by adding business users to the process: citizen development.

Citizen development enabled by fusion teams allows a law firm to digitize and modernize internally, as well as win over (new and existing) clientele through emerging customer facing applications.

2022: Legal professionals at the head of fusion teams and development

Nobody understands the frustrations of an organization better than the person without a well-suited tool to support themselves or their clients. Citizen development allows those with the most knowledgeable insight on the needs of the industry and clients to generate technological solutions. It allows legal professionals to steer solutions and take charge of innovation.

Citizen development starts with fusion teams - multi-disciplinary or cross-functional teams which bring together people with diverse professional backgrounds who use data and technology to achieve shared business outcomes.

With the technical barriers of developments being removed from a low-code / no-code (LCNC) such as Betty Blocks, there are no restrictions or boundaries to innovation. LCNC platforms allow legal professionals to guide, be engaged with, and enact citizen development.

A strengthened focus - Customer facing applications

Within legal industry citizen development, there has previously been a focus on internal applications which automate and optimize work and workflow management for legal professionals.

In 2022, leaders in the sector will continue using digital transformations to turn internal and external problematic business processes into effective and automized solutions. According to Betty Blocks, 2022 ushers in a strengthened focus amongst the technological developments in the legal industry: the development of customer facing applications.

Here, too, the legal professional is vital in the app development cycle, playing a role suited solely to those with the most intimate knowledge of the industry. By building customer facing applications

catered specifically to the pain points of legal firms' customers, legal professionals optimize their business proposition.

A look into the future

As citizen development and fusion teams are established in the legal sector, legal professionals' unique skills are put to use in the conceptualisation and ideation of application.

Customer facing apps contribute to a higher customer satisfaction by bringing innovation directly to a client. This can also be employed for marketing goals and lead generation, benefiting not only existing but potential customers. Through implementing citizen development, by 2025 the legal sector is investing in and generating technological solutions with a perfect product market fit.

Chris Obdam is founder and CEO of no-code platform Betty Blocks. He's a born programmer turned internet entrepreneur with a passion for people and a lust for life. Through Chris' vision, Betty Blocks has become the number one citizen development platform for enterprise organizations.

Corporate legal teams will become more sophisticated in their use of technology and demand greater innovation in legal service delivery from their law firms. Against this backdrop, it will become more important for legal teams in both camps to understand how to develop their ideas for tech solutions in a structured manner so that their organisations can effectively deliver on their overall innovation strategy. As the market matures, we're likely to see design thinking principles at the heart of these strategies where the user is central to every product, process and service.

Rebecca Tear, Global Head of Marketing at Neota Logic Inc

THAT THREATS FROM BOTH CHINA AND RUSSIA WILL INCREASE

ANDY MILES
QUANTUM RESILIENCE

Exponential advances in technology combined with decreasing costs have made the world more connected than ever before, driving extraordinary opportunity, innovation and progress. The coronavirus (COVID-19) pandemic has accelerated this trend, but we are likely still in the early stages of a long-term structural shift.

2022 will see the continued rapid expansion of data and digital connectivity to almost every aspect of our lives. Huge global growth in Internet access and usage, underpinned by data and the infrastructure upon which data use relies, is creating new markets and increasing convenience, choice and efficiency. But, it also makes organisations much more dependent on interconnected digital systems, providing more opportunities for malicious activity and significant 'real-world' impact. As critical and non-critical technologies continue to converge across sectors, these risks are spreading to new areas of our economy, and the movement of data and services into the cloud – and often out of the EU/UK – is further increasing our exposure.

We anticipate that threats from both China and Russia will increase, how China evolves will be the single biggest driver when addressing information security.

Cyber-attacks on hospitals and oil pipelines, schools and organisations, some will continue to be brought to a standstill by ransomware, and commercial spyware used to target activists, journalists and politicians will continue.

Nation states (and latterly criminals) will continue to exploit vulnerabilities and supply chains.

Looking forward to 2025, it is highly likely that the regulatory authorities will have introduced standards for operational resilience, in particular with regard to biometric privacy – building on the foundation laid by the GDPR.

Furthermore, it is anticipated that over 50% of large organisations will use privacy-enhancing traditional compute, enhanced by artificial intelligence platforms to process data using multiparty analytics across a data mesh.

A mesh will have three pillars, Data, Software, Hardware, the data layer for example will include differential privacy, synthetic data and homomorphic encryption. The federation of software will be ubiquitous and within this layer, secure multipart computation and zero-knowledge proofs will be key.

Gartner have predicted that by the end of 2023, 75% of the world's population will have its personal data covered under modern privacy regulations, an increase of 25% from the end of 2021. Furthermore, privacy related lawsuits, (brought both against organisations and their clients), related to biometric information will drive over €7 BN in settlements.

By the end of 2025, many Internet of Behaviours (IoB) systems will increase the risk of unintended outcomes.

Coming back to 2021, many organisations still lack the basic controls and operating models with regard to information risk management, they are still sleep walking into the abyss – although surprisingly the key challenge sits outside, I maintain that the key reasons for this are:

1. The technology industry (Cyber Security) is at fault – it uses language and jargon that the Board does not understand.
2. An organisation will, generally, only invest if it can show that the investment:
   i. Helps it make money,
   ii. Save money, or,
   iii. Create value for the organisation or their clients.
3. There is an absence of an operating model that focuses on operational resilience and risk management, (this not just a 'Cyber' problem).

To conclude, in the face of multiple fire hoses, organisations will continue to digitally transform through to 2025 and now is the time to place trust above regulatory compliance. Invest in risk management and use this as an enabler for competitive advantage, establish, maintain and evolve by either enhancing or introducing this new operating model. Ultimately, both consumers and organisations will be influenced by social, digital and regulatory channels and look for trust characteristics – and, this starts with the organisations leadership.

Andy Miles is seasoned Chief Information Security Officer, advising senior executives and is noted for his straight talking and practical business centric counsel. He will be launching his new risk management advisory practice, Quantum Resilience in 2022, joined by a some of the most respected experts in counter-terrorism and law. His most venture, was the Founder and CEO of a global cyber-security-as-a-service, (sold to Investors, Dec. 2019).

Andy was awarded the UK's National Cyber Security Centre, (NCSC), SME Industry Champion 2018. He is a commercial and use application adviser to research academia, agnostic adviser & expert witness and has led operational and financial transformation programs, up to £0.5BN.

Andy's interviews and commentary are published by the BBC, ITV, regional and global publications.

THE LEGAL COMMUNITY IS GOING THROUGH AN ACCELERATED METAMORPHOSIS

NANDINI JOLLY
CRYPTOMILL CYBERSECURITY SOLUTIONS

The last two years have been pivotal in our personal and work lives, as we have witnessed a paradigm shift to remote work due to COVID-19. While most of us were in lockdown, enormous change was surging through the global infrastructure we were relying on.

Forced by the unimaginable change due to the pandemic, most industries jumped years forward in business digital adoption, in a matter of weeks. The legal community is also going through an accelerated metamorphosis, catalyzed by and focused on customers and data.

When it comes to cyber, this pandemic has also greatly changed our thinking around data protection and policies. With the proliferation of mobile devices needing access to the corporate network, use of personal devices and new security risks, IT Security teams can no longer impose the standard rules and mandates for enforcing new updates. In addition, enterprises are hosting data on a variety of platforms and services that reside both on premises and off, employees / partners are accessing applications through a range of devices in multiple geographical locations.

A Zero Trust architecture, operating on the assumption that no user, internal or external to the network, can be trusted by default has quickly become a necessity. The use of encryption technology is gathering momentum and going forward will become a critical part of data protection policies. Encrypted data is useless to criminals and encryption is practical and could solve many of the issues surrounding data privacy. This is especially true as more companies must grapple with regulations such as GDPR, which specifically requires organizations to incorporate encryption to protect consumer data and to mitigate the risks associated with data transfer and sharing.

With data being the new parameter, a Data Centric Security (DCS) approach is important to enable a Zero Trust architecture, key against the onslaught of cyber-attacks and crucial in helping safeguard a distributed corporate network that now lacks a true perimeter. A data centric security model is where protection is bound to the data itself, the default state is that data always stays encrypted and access is dynamic on a need- to- know basis. This in turn allows data to exist anywhere inside or outside the corporate perimeter.

Such a DCS approach addresses protection of data at rest, in use and when sharedinternally and externally. Assets stay protected on endpoints, mobile devices, and in the cloud. With always-on encryption, organisations can then easily extend their security policies to external parties, while maintaining control over data, ensuring sensitive data shared with the supply chain and partners remain protected. The ability to revoke access, visibility and control of shared data and use of evolving AI & Machine Learning capabilities to identify unauthorised access further lead to a powerful approach in addressing today's escalated cyber threats and a complete holistic data security solution.

A reboot of legal culture is necessary to unlock the industry's potential to better serve clients, as an agile business unit - proactive, data-driven, integrated and risk mitigating. Increased technology spend, automation and a data centric mindset will be the focus in a post Coronavirus world for the legal community.

Nandini Jolly is the Founder, President, and CEO of CryptoMill Cybersecurity Solutions, a proudly Canadian company that provides data-centric encryption to protect sensitive information from external hacks and internal leaks. Receiving her Masters in International Finance and a Bachelor's Degree in Economics from the London Business School, England; Nandini is a passionate advocate for security and privacy in the digital age.

Prior to founding CryptoMill, Nandini served as the Senior Vice-President of Global Treasury Services and Financial Risk Management for the Bank of America. global publications.

After years of high-volume breaches combined with employees sharing excessively via social media, the trove of person information and intelligence available to attackers is extraordinary and beyond disturbing. This will enable adversaries to craft even more convincing attacks. They will exploit the human layer aggressively, resulting in significant business disruptions and a corrosion of trust. Email and cloud communication systems continue to provide attackers the ideal venue for to target their victims.

Peter Bauer is the CEO, Co-founder and Board Member at Mimecast, which he launched in 2003 with fellow Board Member and Co-founder, Neil Murray.

THE YEAR(S) AHEAD FOR COLLABORATION

ANDY NEILL
THOMSON REUTERS

When it comes to collaboration in the legal sector, the last 18 months have seen a step-change in capabilities. Whereas the first client extranets were little more than glorified document repositories, today they are more powerful and more flexible than ever, and one of the many ways that firms drive productivity, deepen client relationships, and improve productivity and profitability by doing more with less. With these powerful tools, the industry is riding a new wave of collaboration between clients and law firms.

This trend will only accelerate in the years ahead, with nearly every point of partnership between firm and client now digitised and shared – from contract review to due diligence. Document, project, and transaction management information are all viewed in real time, including financial data such as WIP and billing, and virtual data rooms and knowledge sharing centres can easily be created.

We see collaboration tools moving beyond that, to a future of smart, open and connected services offering seamless user experiences that exceed what is expected of enterprise systems. Indeed, they will soon be able to be viewed alongside the best of consumer applications. These next-generation collaboration tools will deliver more insightful, value-added services. Some firms are already starting to use online portals to deliver tailored content where their knowledge and insight can be digitised and turned into online 'products' that can either be given away to high-value clients or sold on subscription, providing additional revenue streams. We will certainly see more of this next year and beyond.

We also believe that APIs will prove critical in enabling a revolution in technology innovation, as applications and organizations learn to work across boundaries and silos to truly connect and collaborate.

Hand-in-hand with this will be the continued cultural evolution of the legal sector, which in many ways has traditionally been closed, confidential and sparse with sharing the detail. The long, slow march toward more transparency and more information-sharing has accelerated during the COVID period, and we expect this to continue. This is due to both the impact of the sudden shift to a largely virtual operating environment, but also relentlessly growing pressure from clients.

Finally, it's worth noting that we are approaching the point – if we aren't there already – where so-called 'digital natives' are starting to occupy positions of real influence and leadership in the industry, joining the partnerships of law firms around the globe or playing key operational or business transformation roles. With that will come the natural shift toward technology-fuelled collaboration being the starting point, not just some radical experiment. Rather than saying "why would you work more closely with your clients?", the key question for the next era of collaboration will be "why wouldn't you?"

Andy Neill is Director, Product with Thomson Reuters, overseeing the development of its market-leading collaboration solution HighQ.

CLIENTS WANT INFORMATION TO HELP THEM MAKE AN INFORMED DECISION

DAMIAN JEAL
NIKEC SOLUTIONS

In the last 12 months, we have seen a steep rise in law firms asking us for help enhancing their client collaboration online and there is no doubt that this is a direct result of our new hybrid way of working.

For many law firms', online collaboration simply starts with document sharing, but it certainly is not limited to this. In our recent legal collaboration roundtable that we held in London in November, the general consensus is firms have many ways of collaborating with their clients and said chosen way depends on the use case, be that Client Portals, MS Teams, DMS file sharing, email or even WhatsApp! Law firms are now trying to share more information than ever before, as a result of new demands and expectations driven from their clients. Such information can be anything from financials to matter status and many firms now want to save valuable billable hours and get their clients to instead self-serve. However, the standout question still remains – what do your client really want?

In 2022 we hope to see more law firms delivering legal advice in a way which suits their client first and the law firm second. To do this they need to think about the client experience and less about the steps the lawyer needs to go through. Clients want information to help them make an informed decision and we expect this client first approach to increase.

We are also expecting many more firms will follow the trend and move away from their make-do systems and start using collaborative platforms that are way beyond just branded document sharing. Many firms however still need to get this right before they push beyond that. Getting those legal integrations to your key platforms is critical (DMS, PMS, eSignature), as this ensures as much as possible is automated, especially with document sharing. We have all seen the huge rise in Teams and Zoom, and many will try and shoehorn legal use cases into these platforms, but in 2022 expect to see more legal specific platforms that have more functionality than what these offer. Lastly, we in 2022 hope to see more people' un-zoomed' and in person.

If we look out further past 2022, I think with online collaboration we will see a lot more automation, a lot more integration, a lot more data sharing and more self-service by clients. We will see more law firms offering clients access to their legal platforms to use through these online collaboration platforms. Some of the big firms do this already, but I think in the coming years online collaboration tools will allow most firms to deliver some of these kind of services for their clients, which will greatly enhance the client experience. The one area I see changing the most in the next 5 years is the use of email. It won't go away, but it will be used less and less for client communication and collaboration.

Damian Jeal is CEO at Nikec Solutions and Co-founder of Collaboration platform, Hubshare - now owned by M-Files.

KEEP UP THE PACE AND CAPITALIZE ON TECHNOLOGY ADVANCEMENTS

MARJAN HERMKES
L-IME / LEGALTEAMS

"Change or die" is an often-heard battle cry used by a lot of self-proclaimed experts in the legal industry. A shout out to all partners and legal professionals alike trying to convince them to embrace legal technology. In fact, for the legal sector to continue its flourishing existence, firms must keep up the pace of change and capitalize on technology advancements much faster. Is that the same old same old cock-a-doodle-do or is the global pandemic finally changing things?

COVID-19 surely caused a global shift to remote and hybrid working. Law firms not excluded rapidly needing to change how they operate and collaboration tools becoming a 'must have' within an extremely short period of time. And although it wasn't a deliberate choice it proves that law firms too are capable of change and even with little to no preparation. Needs must and all that. But will it stick? I don't expect that the default will be working from home, but remote work is undoubtedly here to stay, and collaboration tools are therefore essential. According to Gartner the pandemic bent the long-term curve of the social software and collaboration market upward, with double-digit growth projected through 2022.

The question is what kind of collaboration tools are most likely to find a permanent way into our standard day-to-day workspace. Using Microsoft Teams can be really cumbersome whilst Zoom has a reputation for being easy to use. Slack or Chanty might be too distracting and are prone to a decreased intensity in use as then again adoption rates are climbing for feature-rich collaboration platforms such as HighQ and Hubshare. Now that the end of the pandemic seems to be in sight, a lot of law firms are unsure how to best move forward. They take a moment to reflect. 'Portal as a Service' solutions like XS2Files can remedy this situation: a pay per use, simple and secure online collaboration platform that answers to a firm's basic needs without any hassle and significant investments. This allows organizations to further develop their collaboration strategy without being tied down upfront. A key takeaway from the pandemic is that flexibility definitely makes all the difference.

In the very near future, I expect to see more intelligence build into collaboration tools and more integration of social software in other applications and platforms. As technology is evolving so does the use of collaboration software. It is already not attached anymore to our desktop computers, it's basically - just like email - in our hands all the time, fully integrated in our day-to-day work process. Gartner predicts that by 2025, nearly 65% of enterprise application software providers will have included some form of social software and collaboration functionality in their software product portfolios. So, we will see a continued increase of partnerships between software providers and surely some interesting acquisitions.

Marjan is the co-founder of L-IME. L-IME is an independent legal tech consultancy company that is focused on advising, guiding and assisting law firms to thrive in an ever-changing playing field driven by the digital transformation of our society.

Marjan is also the co-founder of LegalTeams. LegalTeams is a legal project management company steering legal projects in an effective manner based on the award-winning worldwide IILPM community principles and practices to enhance the delivery of legal services.

TRAINING WILL BECOME MUCH MORE USER FOCUSED

ROBERTA GELB
CHELSEA OFFICE SYSTEMS INC.

When the pandemic began, some firms were able to quickly pivot to working remotely; others fumbled dramatically. Law firms' eyes were opened to the gaping holes in the legal tech education they had been providing. How many times have we said the words "you have to unmute" while people looked for the mute button? Without immediate access to a support person, some users were completely lost. It became obvious that complicated software was even more difficult to support remotely.

We need to learn from this and change course going forward. What will firms and their software vendors do to address these issues in 2022 and beyond?

Firms that resisted the cloud were left in an unenviable position. The cloud is here to stay. New development will be in the cloud without any on-premises option.

Remote training will be used much more frequently than before, making a direct cut into travel expenses. Firms will start evaluating when in-person training is appropriate. In some situations, in-person training and support will continue. This may be limited to major upgrades and the introduction of new software. Providing skill enhancements to users might work very well for some in a remote environment.

Vendors will have to review their software from a user experience point of view. They will want to focus on the user's experience and ask for feedback from users and partners. They will need to understand user needs and communicate them to developers. Such interaction will result in changes to the technology, making it more consistent and easier to learn.

When modifying their software, vendors will have to make meaningful and logical changes. It is understandable when new features are introduced the software has to change, but moving a frequently used feature to a new location can be disconcerting to even experienced users. For example, the Do Not Disturb feature on the iPhone had been on the first page of Settings and now it has been moved to Settings>Focus. Sometimes not even Google can keep up with a feature that has moved to another location.

Training will become much more user focused and will have to be designed to address the specific workflow the users require to perform their own tasks. This will require pre-training analysis which may include learning about the specific requirements. This may be more appropriate on a wish list: our current remote software will have

to improve dramatically and become more instructor- and user-friendly. For example, the mute button should take up a large portion of the screen and be bright red so that it is very easy to find. I'm only half joking.

Roberta Gelb, President of Chelsea Office Systems, Inc., is a well-known professional, having established authority on productivity, software and office systems solutions for law firms and businesses for the last 37 years. She has substantial expertise in systems design, implementation, training and the "human factors" associated with effective use of technology. In 1984, Roberta founded Chelsea Office Systems, a unique software consulting and training company that provides custom productivity recommendation, application programming, document management implementation and development, education, and on-site support to law firms and corporations.

PROPEL LEGAL EDUCATION IN THE FOURTH INDUSTRIAL REVOLUTION

CAT MOON
VANDERBILT LAW SCHOOL

" **I** learned long ago never to predict. All you can do is influence what you can and endure the rest."

JR Ward (The Jackal), best-selling author and lawyer

Living JR Ward's advice, rather than predictions, I offer a prime opportunity

for legal tech and innovation educators. As we (hopefully) emerge from the COVID pandemic in 2022, we have a tremendous opportunity to influence legal education by leveraging what we learned over the past 20+ months and use this to propel legal education in the Fourth Industrial Revolution.

Legal educators who avail themselves of simple tools like retrospectives (an

example of one I co-facilitated is here) to capitalize on the roses, buds, and thorns of this liminal period we are all experiencing? Will be poised to make the most of the buds (growing opportunities) and learn from the thorns (those things not going well, which the pandemic exposed or made possible to continue to ignore). And elevate and celebrate the roses (successes, even the small ones)!

While all legal educators have this opportunity, those in the legal tech and innovation space should be LEADING on this front. Continuous improvement and learning from experiments and failure (what doesn't work) are integral to technology development and the innovation process. If we're not modeling this for our students, we are not walking the walk.

In an effort to influence and innovate legal education in 2022, I issue a challenge to my colleagues: Do your

retrospectives. Learn from the experience. And act on what you've learned.

We must. Because innovation and technology are integral to thriving in the 21st century paradigm and remain undervalued and underemphasized in legal education—a system developed in the Second Industrial Revolution that is breaking under the strain of Fourth Industrial Revolution demands. Until and unless those currently doing this work figure out how to leverage and wield our influence, the pace of change will remain unacceptably slow. Who will accept the challenge?

Looking ahead
If we've accepted the challenge to learn from our collective COVID experience and act on these learnings, then our opportunities to influence the future of legal education are nearly endless. Meaning that how and what we teach in 2025 could look very different

than it does today. Again, who will accept the challenge?

Caitlin "Cat" Moon teaches in the Program on Law and Innovation (PoLI) at Vanderbilt Law School, where she also serves as the Director of Innovation Design and directs the PoLI Institute (innovatethelaw.com), Vanderbilt Law's innovation-focused executive education platform. Cat co-founded PoLI's Summit on Law and Innovation (SoLI), which brings together experts across legal, technology, and other disciplines in collaborative legal innovation projects. She regularly speaks, facilitates workshops, and coaches individuals globally on the application of human-centered design methods and processes to lead innovation in the legal profession and lawyer professional formation. Before joining her alma mater Vanderbilt Law's faculty, she practiced law for 20 years and still maintains an active law license.

CLIENT DEMANDS WILL DICTATE HOW IMPORTANT THE USE OF TECHNOLOGY HAS BECOME

BONNIE BEUTH
LTC4

The past two years of disruption identified skills gaps, particularly among attorneys. The majority of those involved in delivering legal technology education found themselves busier than ever. Attorneys' reluctance to attend in-person training events in the past became an urgent need to attend virtual training sessions once they recognised that they couldn't call on that helpful colleague at the next desk to resolve their challenges!

LTC4 has built a strong network of IT training professionals who share their thoughts and ideas regularly. At roundtable meetings over the past 12 months the current and future role of the trainer has been discussed and the strong message from all is that it has now changed irrevocably. Delivering effective skills improvement virtually has been a challenge which the community has dealt with successfully.

But what of the future? There will always be a need to learn new skills and to understand how various technology tools actually work. There are considerable change management issues to be faced when new technologies are introduced, particularly their impact on the attorney workflow. Attorneys need to learn how to deal with the changes which occur, whether it is new hardware or new software in a way that does not disrupt their work. Client demands will inevitably increase and they will dictate how important the effective, efficient use of technology has become.

Training for new hires and major system roll-outs or upgrades, and business-as-usual skills improvement will still be needed and how it is delivered will need to be flexible. A key word that comes out of all our recent discussions is flexibility. Delivering training virtually has shown to work if it is kept short, totally relevant to the individual's workflow, and offers a tangible benefit in terms of time saved and frustration averted. However if we reintroduce in-person training again then the "hybrid" approach becomes apparent. Training professionals have long talked about the benefits of a blended approach to skills improvement, this becomes even more relevant in a hybrid world. Is it possible to deliver effective training both virtually and in-person simultaneously or do we have to keep the two methods separate? Can we develop bite-sized e-learning videos that are easy to access and that will quickly resolve a skills gap at the point of need? There are systems available now to address this and these must be part of the way forward.

LTC4 came about just over 10 years ago because a group of technology professionals recognised there was a need to provide people with the skills they need using real-world workflows. LTC4 has now established a globally recognised Certification too – a reassurance to clients they can rely on their legal advisers to be tech competent. The initial 9 Learning Plans have been regularly reviewed and in 2021 two new Plans were introduced to directly address current, and future, working practises. "Hybrid Working" and "Video Conferencing" were launched in November 2021. All LTC4 Learning Plans provide a structure for training delivery which can be easily tailored to specific firm requirements and systems. Flexible enough to accommodate different methods of both delivery and assessment they can be used to develop a roadmap for the future which will allow for whatever situation we find ourselves in.

Now we need law firms themselves to recognise the vital importance of technology competence at the highest level and the role it plays in performance and profitability. By seeking LTC4 Certification they can prove to their clients and to themselves, a level of proficiency which today's attorneys must have.

Bonnie L. Beuth is one of the founding members of LTC4, and has served as the Chair of the Board of Directors since the company's inception. Her contributions to LTC4 include the original design of the LTC4 concept, multiple presentations, articles and interviews promoting LTC4, and developing and acquiring new business partnerships. Bonnie spearheaded the acquisition of the LTC4 Affiliates and the eDiscovery/eDisclosure certification through KoWorks, and is leading an effort to pursue other major partnerships. Her primary responsibilities as Chair have included setting the agenda of the organization and being the primary liaison with the organization's legal team. Her future goals are to develop our Affiliates membership, promote eDiscovery certification in the US and elsewhere, and work with industry leaders to develop an "elevator speech" for attorneys to have with their clients so their clients understand the true value of LTC4 certification in each core competency. Bonnie is also the Information Systems Trainer for FordHarrison LLP.

INTO ACTION

TIM NIGHTINGALE
NISUS CONSULTING

Back in the good old days of 2019, when people who wore masks were either surgeons or tourists from the Far East and conferences were things we travelled to, not dialled into, I was invited to speak at Lexpo in Amsterdam. I stayed for the whole two days and very good it was too, a meeting of minds between Business Development (BD) and IT.

The two areas have to co-exist and increasingly so as technology plays an ever-increasing role in project management, marketing different services and managing relationships. On the second day, a BD Director from a big firm was on stage. In the middle of the presentation, they stopped, looked at the audience and asked, "Does anyone here work for a firm where their CRM system is not full of rubbish?" I guess there were at least a couple of hundred people in the audience and everyone looked at each other. Everyone shook their heads; nobody put their hand up. This was a seminal moment. It was no great surprise, but somehow you thought at least a few people would raise a hand. Clearly not all the data in these systems is rubbish, but equally nobody was confident enough to say they didn't have plenty of rubbish in there as well.

I have come across some shocking statistics in different firms - about all of the partners being put through training on a new CRM system, but only half of them actually using it subsequently. Then there are nightmares of firms that merge with another firm and have two mutually exclusive systems that refuse to talk to one another and so on. I am less concerned with the technology side and much more focused on the utility and return on investment. If any firm is going to be fit for purpose and be equipped with the requisite management information systems, CRM needs to be in there, ideally talking to all the other systems.

I take the view that the CRM system (whichever brand you select), is the means to the end, not the end in itself. I can't comment on whether one has better functionality over another or links in with the practice management system (if it is not already part of it). The promise land for me is a system that partners and associates have been brought up to use and who have an interest in keeping it up to date for their own benefit as well as for the benefit of the firm.

This is about the training lawyers are given (or not given) and the time they are not always given to build, sustain and manage relationships. Presumably we are at a point where everybody uses Outlook and keeps their addresses there. The CRM system should be no different. Firms tell me their data is clean and up to date but when push comes to shove, this rarely proves to be the case.

Perhaps firms need to look at the business model, look at the training they provide, look at whether their prevailing culture is entirely about legal training and hitting billable hour targets. Until firms get to look at the world through some different eyes, it is unlikely their CRM systems will ever work properly or be used to best effect.

No doubt in coming years, CRM systems will get ever more complex, and start to draw on Artificial Intelligence (AI) and machine learning. That's all well and good but if partners are only at the Outlook stage and steadfastly refusing to engage with Interaction/Hive/Dynamics/Sales Force or whatever, then we're back to RIRO – 'rubbish in, rubbish out'.

So, here's the take out. Being a good and successful lawyer is not just about expertise in the law. Legal expertise is a given, but so is the ability to build personal chemistry with clients to earn trust and for clients to select you before anyone else. It also demands the ability to manage a team in most instances, sometimes across offices and borders; to think strategically and commercially; to be responsive etc. This is just scratching the surface but keeping tabs of different people and relationships is going to be essential for one's own practice as well as the firm and that means accepting and working with technology, not against it.

Tim Nightingale founded Nisus Consulting in the mid-90s and had been helping law firms and other professionals to become more client focused ever since. He is co-author of the award winning 'Strategic Tendering for Professional Services – Win more, lose less', with a second edition due for publication in March 2022.

CRM DATA WILL BECOME AN IMPORTANT PART OF DECISION MAKING BY LAWYERS

JENNIFER WHITTIER
COLE VALLEY SOFTWARE

Adaptation to the ever-changing environment will be the theme of 2022. Law firms will continue to evaluate technology purchases based on ease of use and adoption. As lawyers become more actively involved in selecting new applications, they will look to select CRM solutions that can solve multiple business needs in one product. After long absences from the office, along with an increase in working from home permanently for many lawyers – CRM must provide up-to-date comprehensive information about clients. We can expect to see users requesting greater access to data that enhances the complete picture of a client relationship. CRM data will become an important part of decision making by lawyers as they manage their practice each day.

For example, integrating financial system data with CRM contact information will allow lawyers to obtain a complete picture of the client relationship with the firm. Enhancing this financial data with fully integrated marketing automation tools will highlight the level of engagement the contact has with the firm. Combining both touch points, financial and marketing, allows management to measure the level of investment to obtain a new client – leading us well down the path towards establishing ROI.

Client Relationship Management (CRM) tools are often under-utilized by lawyers when firm management chooses a solution without a clear understanding of the problem the firm needs to solve. We can expect to see business partners focus on the adoption and services required to successfully implement innovative technology. The burden of success is shifting to the vendor as firms have fewer resources to successfully implement new technology remotely. A technology partner with a strong understanding of how law firms work will have an advantage in helping lawyers adopt CRM. We can expect to see expertise and service become a key factor in defining CRM success in 2022.

Coming off another strong year of firm growth, we can expect to see a renewed focus on client retention and understanding the strength of relationship. Combining CRM technologies with ERM (Enterprise Relationship Management) solutions provides the marketing and business development teams insight into the level of client engagement. ERM analytic data provides a firm insight in to emerging trends, both clients that are more actively engaging with the firm and offer cross-selling opportunities to clients that have become less engaged or overlooked during the pandemic.

We can expect to see comprehensive CRM solutions providing financial data, marketing automation tools and ERM relationship analytics which will allow a firm to truly meet the business needs of all – firm management, lawyers, and marketing teams.

Jennifer Whittier is President of Cole Valley Software, maker of ContactEase CRM. She is a frequent speaker on best practices of CRM implementation, including the integration of technology and marketing. Before joining the company in 2009, Jennifer was a ContactEase client for over five years.

As the former Director of Marketing for a New England law firm, Jen's background makes her an excellent resource for clients as well as those just considering a CRM solution. She can be relied on for sound advice, extensive CRM knowledge and most of all, her ability to facilitate those difficult decisions sometimes necessary to guarantee success.

HOW TO INCREASE TECHNOLOGY ADOPTION BY ATTORNEYS

BY PATRICK DIDOMENICO

In the world of law firm innovation and technology, user adoption is arguably the most important focus and the thing that often receives the least attention. Those who fail to prioritize efforts to assure user adoption are bound to fail in deploying potentially useful tools. Here are a few pointers for increasing the adoption of technology tools in your law firm or legal department.

Stop Using the Word "Technology"
Ironically, the first impediment to technology adoption is technology itself (or at least what people believe to be technology). A large portion of the population is intimidated by technology. They don't understand it. They think it's too complicated.

But many of these technophobes conflate and confuse technology with tools. They may actually fear or misunderstand "real" technology, but few lawyers or other legal professionals actually use--or even encounter--real technology. In reality, they use software tools to do their jobs. I contend that software tools are not

technology and should not be labeled as such. The best software tools are designed to be easy to use, but lawyers have been traumatized by hard-to-use "technology" for so long that many just shut down when confronted with the request to adopt a new "technology". Compounding the problem, most legal IT professionals don't differentiate between technology and software tools and do little to alleviate fears.

Technology is defined as "the application of scientific knowledge for practical purposes." The introduction of the ballpoint pen was considered a technology when everyone was using quills and ink. Quills were considered

technology when reed pens and pigment were the norm. We have been using word processing software for more than three decades. It's time to stop calling common business tools technology.
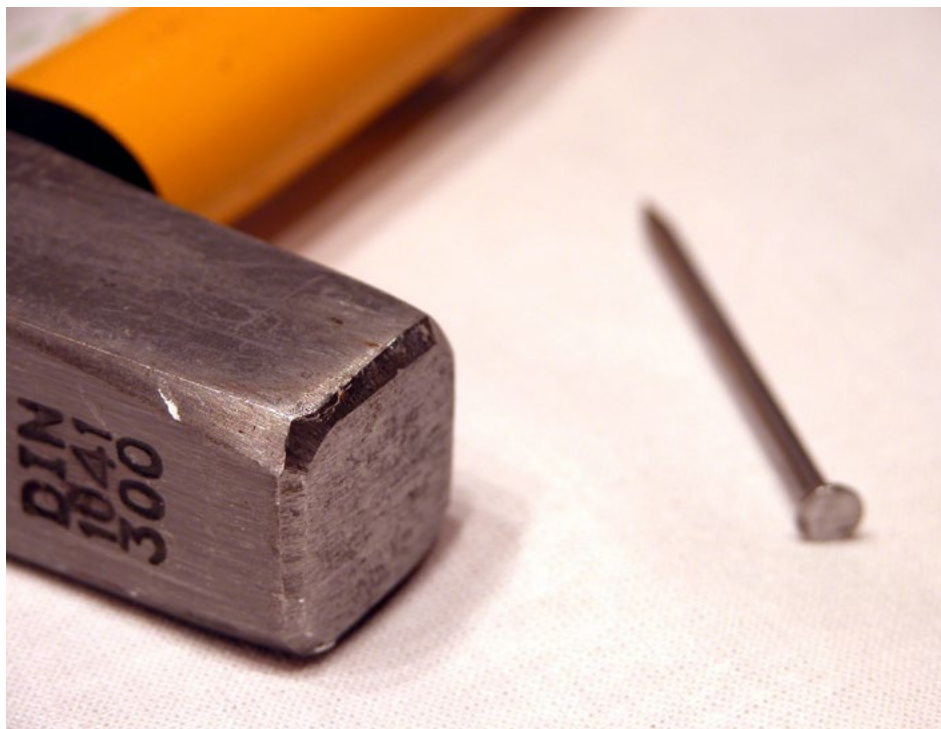
So, as a baby step to "technology" adoption, stop using the "T-Word." Instead, use terms like "efficiency tool," "productivity tool," or even "application" or "app". The latter has become a familiar, unintimidating term thanks to the ubiquity and ease of use of smartphones.

Focus on User Experience Design, Not Technology

Many legal IT professionals suffer from Maslow's Hammer Syndrome, a cognitive bias that is best summarized in the familiar phrase "if the only tool you have is a hammer, you tend to see every problem as a nail." The most ambitious (or oblivious) IT offenders try to convince vulnerable technophobes that anything involving a computer (or even electricity for that matter) should fall under the domain of the IT department. Throw in some confusing techie jargon and the threat of a cybersecurity breach, and soon all of the other administrative departments will be reporting to you because everyone uses software. But be careful what you wish for. The Dunning-Kruger effect is real.

Unfortunately for IT leaders, lawyers don't have technology problems. They have business problems and client-service problems, and those problems are rarely solved with technology. More often, they are solved with business process improvements, improved access to information, and thoughtfully-designed tools. Solving these problems requires an understanding of the nature of the legal industry and how lawyers work. Most law firm IT professionals lack this understanding and it impedes their ability to deliver effective solutions. The best and most effective solutions will come not focusing on technology, but from great design with a focus on user experience (UX).

Even technology companies know how to prioritize UX design over technology. Steve Jobs, co-founder of Apple Inc., one of the most successful technology companies in the world, was well aware of this. Upon his return to the company in 1997 (after being ousted 12 years earlier),

Jobs was harshly questioned by someone who was critical of Jobs' decision to replace Apple's OpenDoc programming language with Java. Jobs declared, "You've got to start with the customer experience and work backwards to the technology. You can't start with the technology and try to figure out where you're gonna try to sell it." Jobs went on to elaborate how the goal of the company was not to use a particular technology, the goal was to create amazing products that could be sold, at scale, to billions of people. This does not start with software engineers (technologists) who write code, but rather with designers who understand the industry and the customers.

> ## Unfortunately for IT leaders, lawyers don't have technology problems

Law firms should heed the warning of Steve Jobs. IT professionals should defer to those with legal experience and have expertise in designing solutions for lawyers and clients. More often than not, such professionals are found in Innovation and Knowledge Management (IKM) departments; not in IT departments. And to be clear, those IKM professionals

should ensure that they understand the strategy, vision, and goals of their firms and adjust their priorities accordingly. Law firms that do otherwise will run the risk of IT professionals to "starting with the technology" and allowing the technology tail to wag the law firm dog.

Focus on the Problem

Prioritizing UX design starts with focusing on the problem to be solved. Albert Einstein is purported to have said, "If I had an hour to solve a problem I'd spend 55 minutes thinking about the problem and five minutes thinking about solutions." Apocryphal or authentic, it's good advice. The point is that to provide the best solution, a solid understanding of the problem (i.e., what someone really needs) is critical. This usually requires a detailed conversation about what is being requested. Often, the way someone describes what they think they want is not exactly what they really need.

I once received an email from a lawyer requesting a tool to help him manage his appointments. He had heard that there were "various technologies out there that could help." Managing appointments is a pretty vague concept, so I sought to better understand the problem--what he really needed. A quick conversation revealed that he needed to schedule meetings with his colleagues, but it was difficult to find mutually-convenient

times without sending and receiving multiple emails. The lawyer was under the impression that we needed a new technology to help. In reality, an existing tool, Microsoft Outlook Scheduling Assistant, which displays his colleagues' open calendar times and allows him to select the time that works best for everyone, was all he needed. While this is a simple example, it demonstrates how taking the time to understand the real problem can lead to an effective solution.

Focus on Change Management

When a new solution is needed, convincing lawyers to change their behavior and adopt the solution requires a focus on change management. There is no universal definition of change management but a good one from the Project Management Institute is: "a systematic approach to dealing with change, both from the perspective of an organization and on the individual level." Change management is important because adopting anything new is all about convincing people to change their behavior. While a full exploration into the field of change management is beyond the scope of this article, here's a primer that focuses on the ADKAR change management model. ADKAR stands for Awareness, Desire, Knowledge, Ability, and Reinforcement:

- Awareness of the need for change involves communicating why a change is necessary. Usually, the lawyer requesting a solution to a problem has a good awareness of the need for the change, but ensuring that other members of the firm appreciate the reason for the change is critical for mass adoption.

> *To provide the best solution, a solid understanding of the problem is critical*

- Desire of lawyers to support and participate in the change is also critical. Identifying key proponents of the change and incentivizing the desire to change can be helpful. Articulating "what's in it for me," or how lawyers can personally benefit from the change, can also help.
- Knowledge of how to change and perform effectively under the new approach is also important. Training, education, mentoring, and access to information about how to make the change are required.
- Ability to implement the new skills and behaviors required for the change comes when we provide lawyers the time to practice using new tools, help coach them in this practice, and give them access to the right resources and appropriate feedback to ensure success.
- Reinforcement to sustain the change is important because people have a tendency to revert to past behaviors. Reinforcing the use of new tools requires rewarding and recognizing adoption, correcting regressive behavior, measuring performance, and holding both lawyers and those championing the changes accountable.

Notice that none of these change management principles and approaches involve technological expertise.
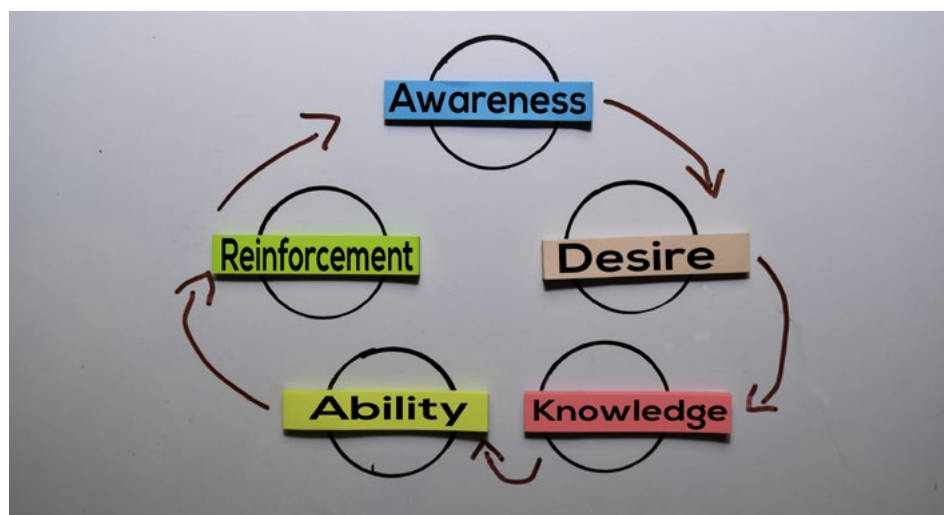
Use Some Psychology

Persuasion tactics can be helpful to encourage adoption of new tools. Psychology professor Robert Cialdini coined the term "social proof" in his book, Influence. It's defined as a "phenomenon wherein people copy the actions of others in an attempt to undertake behavior in a given situation." Two effective social proof tactics are the use of testimonials and endorsements.

For example, if you deploy a new tool to a small group of lawyers who find it useful, ask them to share the news of their great experience with their peers. This type of testimonial coming from a peer often carries more weight, and is more persuasive, than a similar message coming from someone in an administrative role. That's why you see customer testimonials on infomercials. The product spokesperson is convincing, but the actual customers who "can't live without it" really sell the product. If you're deploying a new tool to a large group, consider asking the firm's managing partner to send an announcement about it. Lawyers are more likely to read an announcement from the managing partner than from an administrative staff member.

A similar tactic is to promote the new tool at a practice group meeting and then ask one of the lawyers in the practice group to say a few words about their experience and how it helped them in their practice. Selecting the right attorney for your endorsement is important. It's best to select an attorney who is well-respected among his or her peers and subordinates. A final persuasion tactic is what I like to call the "secret beta test group." This tactic employs the psychological principle of scarcity (a.k.a., the "scarcity heuristic"), which holds that rare things are more highly valued than common things and can lead to greater demand to obtain something or take part in an activity.

In one firm at which I deployed a new productivity tool, I sent an email via blind copy to an undisclosed recipient

list. I wrote, "We're in the final stages of development and we need people to test out a tool to make sure it's working properly. I'd like to invite you to become a member of the Secret Beta Testers Group and give you early access so that you can try it out before anyone else." I asked the invitees to not share the invitation or discuss the project with others.

The implication was that this group was limited and exclusive—they were getting VIP access. In reality, I sent the email to all attorneys. And my plea to keep the project a secret was also a tactic. In fact, I wanted people to discuss it. As you may have experienced, the best way to get the word out about something is to ask people to keep it to themselves.

The secret beta test group tactic serves several purposes. It exposes many lawyers to the new tool and incentivizes them to try it out. Since the "exclusive group members" feel special and appreciate being included, they have a greater tendency to give valuable feedback about the tool. This leverages another psychological tactic called the reciprocity principle, which creates an incentive to return a favor or reciprocate a kind gesture.

> *Lawyers are more likely to read an announcement from the managing partner than from an administrative staff member*

Even for those who do not actually use the new tool, it serves as a way to make them familiar with it for when the tool is promoted in the future as a part of change management efforts. The more times someone hears about something, the more likely they are to remember it when they need it.

Conclusion

Creating or deploying effective software solutions or applications is difficult and expensive. To ensure the greatest value and return on your investment, adoption is critical. If the right people apply the right tactics and approaches, as outlined above, you'll have a greater chance of success.

Author of the book Knowledge Management for Lawyers, published by the American Bar Association, Patrick DiDomenico has been in the legal innovation and knowledge management industry since 2005. He is the recipient of the 2013 International Legal Technology Association (ILTA) Knowledge Management Professional of the Year Award. Before his innovation and knowledge management career, Patrick was a practicing litigation attorney for more than eight years.
Patrick is a freelance consultant to law firms and legal departments and has served as Chief Innovation Officer for Jackson Lewis, P.C., Chief Knowledge Officer for Ogletree Deakins, P.C. and Gibbons, P.C., and KM Manager for Debevoise & Plimpton, LLP.

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