LEGAL OPERATORS

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TONKEAN - REVOLUTIONIZING WORKFLOW AUTOMATION

FOSTERING INTERGENERATIONAL COLLABORATION

THE SUCCESS OF E-DISCOVERY PROJECTS

POWER OF HUMAN SKILLS | INTRODUCING COLONEL ROZELLE

THE FUTURE OF LEGAL OPERATIONS

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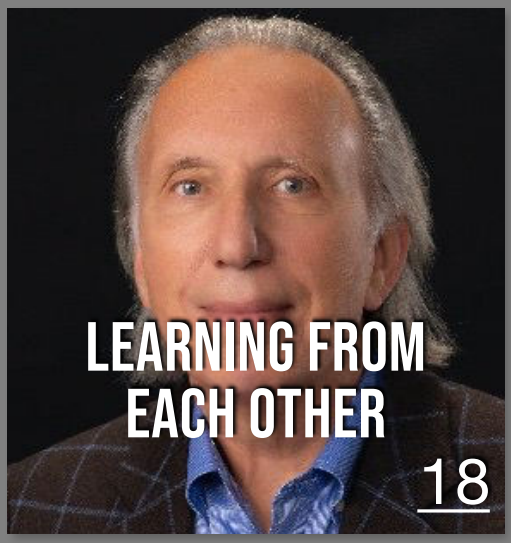

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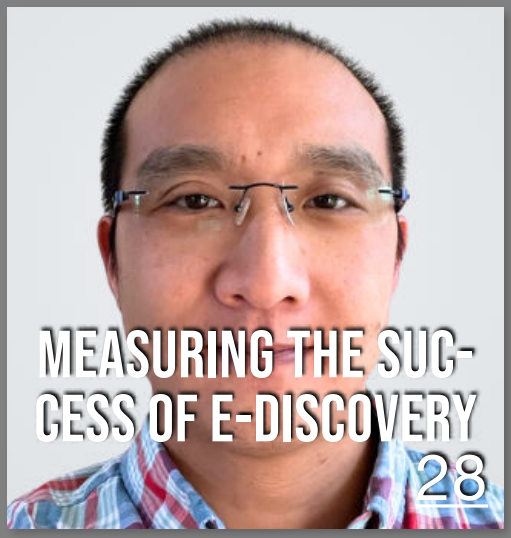

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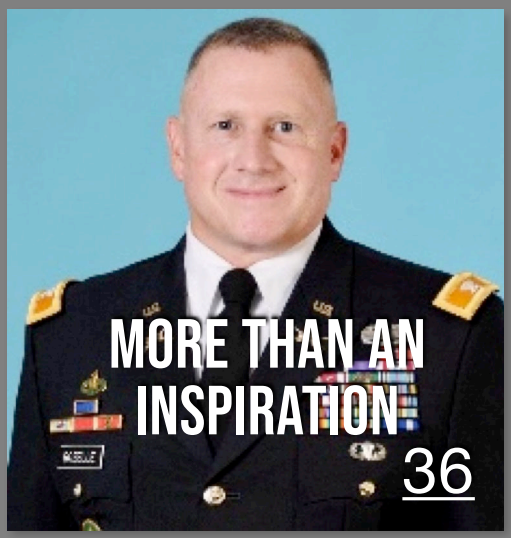

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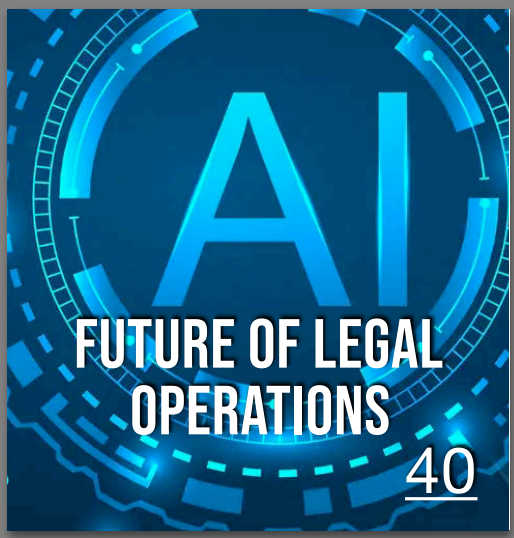

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A special thanks goes out to Sagi Eliyahu, Dawn-Marie Vaughan, Mark A. Cohen, Ari Kaplan, Vincent Lui, Eve Vlemincx, David M. Rozelle, and our own CEO Colin McCarthy.

EDITORIAL

Welcome to the new issue of Legal Operators.
In this magazine we share insights, information and knowledge from experts, thought leaders and connoisseurs from around the world.

This issue

In this issue, Legal Operators' Dawn-Marie Vaughan speaks with Sagi Eliyahu, serial entrepreneur and founder of Tonkean about the evolution of no-code workflow automation technology and how it applies to the legal sector. Thought Leader Mark Cohen talks about learning from each other and Fostering Intergenerational Collaboration, and Legal Analyst Ari Kaplan interviews Vincent Liu of Level Legal about measuring the success of an e-Discovery project. Eve Vlemincx, Strategic Advisor, Advisory Council Member for Harvard Business Review and is a Course Facilitator at Stanford Graduate School of Business writes about The power of human skills, and we've asked our Legal Ops Chat GPT bot to tell us more about the Future of Legal Operations. And last but not least we present Colonel David M. Rozelle, Keynote Speaker at our upcoming Summit by the Sea and a truly inspirational icon if I might say so.

Become a household name in the industry

With its backbone in the Legal Operators Community, the magazine is a perfect medium to share your expertise, claim leadership, and increase your brand awareness throughout the industry. Make yourself heard, increase engagement and

Management
Legal Operators
Mr. Colin McCarthy

Editorial/Publisher
Chief Publishing J.Peters
Editorial Dept.

let us help you to share your message thru eZines, eBooks Whitepapers, Webinars, and events.

The Community

If you're interested to learn more about Legal Operations I'd like to invite you to join the **Legal Operators community**. In this community you can connect with your peers across the legal industry, discover innovative solutions, learn about upcoming events, etc.

Furthermore your feedback, suggestions, and ideas are warmly welcomed as we build specials and future editions of the magazine that are tailored to the topics and people you want to read about. Please send me a message at **colin@legaloperators.com** to let me know what you think.

I hope you enjoy this third edition!

In community spirit,
Kind Regards,
Colin McCarthy, CEO

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TONKEAN - REVOLUTIONIZING WORKFLOW AUTOMATION

An Interview with CEO & Co-Founder of Tonkean Sagi Eliyahu

Today we had the opportunity to chat with Sagi Eliyahu, CEO & Co-Founder of Tonkean, touted to be "trusted by the world's most innovative teams". We wanted to speak to him about the evolution of no-code workflow automation technology and how it applies to the legal sector specifically. We wanted to ask him, what is no-code exactly? And will AI take over the world? Because the humans don't seem to actually like all the rules and constraints around using software applications! How do you solve for a problem like that?

Sagi Eliyahu is Co-Founder and CEO at Tonkean. An entrepreneur, innovator, and

tech guy, Sagi is passionate about building products that solve real problems. His ability to look at the big picture while zooming into a product's most minor technical and design details has made solving "unsolvable" problems what Sagi does best.

Introduction: In today's fast-paced and technologically advanced world, businesses are constantly seeking ways to streamline their operations and maximize efficiency. Workflow automation has emerged as a powerful solution, allowing companies to automate repetitive tasks and optimize processes. Tonkean, a leading workflow orchestration platform with a no-code approach, has been at the forefront of this automation revolution. In this article, we dive into the world of Tonkean and gain insights from its CEO, Sagi Eliyahu.

Tonkean - A Brief Overview: Tonkean is a cutting-edge no-code process orchestration platform that empowers organizations to automate complex business workflows without the need for extensive coding or IT involvement, by applying the no-code methodology. Tonkean's Process Experience Platform seamlessly wraps around existing policies and systems, allowing internal service teams to do more with what they already have as well as build process experiences that are personalized for each requester. Unlike traditional workflow automation tools, Tonkean leverages artificial intelligence and machine learning to create a human-centric approach to automation. The platform seamlessly integrates with various systems and tools, empowering teams to work more intelligently and collaboratively, by connecting people, processes, and tools across functions. Founded in 2015, Tonkean is headquartered in Palo Alto with R&D in Tel Aviv.

Legal Operators: **What was the initial inspiration behind starting your company?**

"The essence of why I started Tonkean was my previous experiences that enterprises are not leveraging software correctly. Business processes are about people, but software is about data," Sagi said. Sagi realized that ROI should not only be measured for

the company but also for the individuals using the tools. The technology needed to be a leverage point for humans, not a detractor.

Legal Operators: **Explain that a little more, what exactly is the challenge here?**

Sagi provided a little history, dating back when SaaS was at its peak in 2015, and the proliferation of software tools, integrations, and access to data was transforming the business landscape. There was a disconnect, though. Business processes are not solely about data but are fundamentally centered around people. Enterprise software was designed with a focus on data and efficiency, neglecting the importance of personalization for individual users.

One of the significant challenges faced by software lies in the lack of user adoption. Compliance requires high adoption; adoption requires a great experience. Sagi explains, "people don't like the process; they were never involved in the decision making on user experience or how their workflows best suit their needs. There wasn't collaboration, and the time to implement, train, support and deploy were time consuming and expensive. "And guess what, no one is using it."

The solution, he argues, lies in providing a user experience that aligns with consumer technology principles, where simplicity and personalization drive adoption.

"The sad truth about this all, they also don't use it because they just don't care." 67% of employees routinely skip legal procedures.

Sagi continues, "What I mean is, why would a salesperson care about learning a new tool now when all they want is to get a resolution."

Sagi further explains if there's pressure that the deal "has to happen, or if it's a massive risk, they may consider going around it." Unfortunately, the reality is, people will circumvent the process.

Sagi suggests it should be a priority for companies to improve the end user experience. This will result in higher process adoption, which is critical, because "without the adoption, you're not going to get compliance, and you're definitely not going to get efficiency."

Legal Operators: **So how do we get people to "care" about using software and following required processes?**

"Personalization is key to increasing adoption," Sagi said. "Firstly, we need to be proactive in our approach and offer tools and processes at the right time. Secondly, we should leverage existing context and data to simplify the user experience. Lastly, change management plays a crucial role. Instead of forcing people to change their behavior, we should focus on providing a

good reason for them to adopt new tools and processes."

"The user experience should be designed to eliminate unnecessary complexity and align with consumer technology principles. We automate processes by leveraging existing data and context, reducing the need for manual form filling and data entry. Additionally, we focus on change management by providing a user-friendly interface and avoiding the need for users to switch between multiple tools."

Tonkean acts as an orchestration layer that sits on top of existing systems, streamlining workflows, and providing a cohesive user experience.

Sagi's realization led to developing a platform that prioritizes personal ROI – the value of technology to individuals using it – alongside the company's ROI. By facilitating human-centric processes and understanding the specific needs of users, Tonkean seeks to bridge the gap between technology and people, ensuring technology acts as a leverage to enhance human productivity and experiences. People often resist adopting new tools or processes because they find them complicated, time-consuming, or not aligned with their preferred way of doing things.

This is especially true in legal. Legal workflows often involve very specific steps and requirements, which can be perceived as rigid and not aligned with the natural workflow of individuals within the organization. This misalignment between processes, tools, and individual preferences can hinder user adoption and result in circumvention of established procedures, leading to inefficiencies and compliance issues.

Tonkean's approach to personalization and orchestration addresses these challenges. The platform empowers users by integrating with existing tools and systems, allowing individuals to work within their preferred environments while ensuring streamlined processes and collaboration. By utilizing automation and intelligence to provide contextualized information and by eliminating unnecessary complexity, Tonkean enhances the user experience and encourages adoption.

Tonkean also utilizes AI and machine learning to understand and learn from user behavior. The platform is equipped with intelligent features that enable it to adapt to changing circumstances and make informed decisions. Tonkean can analyze data, detect patterns, and proactively suggest improvements to workflows. By continuously learning from user interactions, Tonkean becomes smarter over time, allowing businesses to optimize their processes and make data- driven decisions.

Legal Operators: **From a legal ops' executive perspective, it sounds like Tonkean offers a powerful solution for addressing**

some of the organization's pain points without disrupting the entire workflow. The ability to start small and iterate gradually is appealing. However, I'm also curious about AI applications in the legal tech space. How does Tonkean leverage AI, and what extraordinary applications can it bring to legal operations complex processes?

Sagi predicts: "AI is indeed a game-changer in the legal tech space, and Tonkean has recognized the immense potential it offers. With the advancements in AI technology in the past six months alone, we can expect even more remarkable developments in the future. Contrary to the misconception that AI will replace lawyers and legal teams, its impact will be more transformative and complementary."

Tonkean's AI Front Door is a prime example of how AI can enhance legal operations. By combining GPT and Large Language Models (LLM) with Tonkean's powerful process automation capabilities, you can bring a seamless and intuitive experience to legal operations. It revolves around the concept of intent rather than just self-service.

Sagi described a new AI front door feature, "it looks like a Google search bar, which is very familiar and user friendly." This feature enables users to ask questions or send emails to legal departments through various platforms like Slack, Microsoft Teams, or email. Instead of having to navigate a legal portal or search through policies, users can simply inquire about their needs, and then it will reply to you based on the policies in place. AI Front Door understands intent and can guide users to the appropriate workflows or forms based on their queries.

This approach also allows legal departments to be involved earlier in the process, ensuring that important matters are addressed proactively and preventing last-minute fire drills. It simplifies the interactions between legal teams and other departments, making it more efficient and effective for both parties.

In summary, Tonkean's AI Front Door offers a significant advancement in how legal teams can interact with the rest of the organization, making the process smoother, faster, and more accurate.

Legal Operators: **What types of workflows can Tonkean automate for legal sector use cases?**

Sagi: "Tonkean's LegalWorks platform, launched in May 2023, is capable of automating a wide range of workflows across different industries. From intake and matter lifecycle management, categorizing and resolving requests, to operations and customer support, Tonkean can handle complex workflows involving multiple systems, data sources, and stakeholders.

Our platform also integrates with popular business applications, such as Salesforce, Slack, and Jira, enabling seamless collaboration and data synchronization."

Legal Operators: **How does Tonkean differentiate itself from traditional legal sector software solutions?**

Sagi: "We're not in the business of innovating new legal operations software solutions. Tonkean takes a different approach by integrating with tools rather than replacing them."

The Tonkean team recognized that businesses have different needs and preferences, creating a platform that sits on top of existing systems, over 1,000 components, orchestrating processes and ensuring frictionless collaboration. Tonkean aims to provide an intelligent and adaptive solution that maximizes efficiency while giving users the flexibility to choose the tools that work best for them.

Legal Operators: **What experience have you had with the legal ops professionals and how would you rate their technical prowess?**

Sagi commends legal operations teams for their strong understanding of operations, people, and processes. However, he also notes a common mental blockage among these teams, where they tend to expect poor software and may not realize the potential for improvement and better user experiences.

One aspect Sagi highlights is the need for legal teams to recognize their impact on the organization beyond just cost-saving metrics. He encourages in-house legal leaders and GCs to measure their impact based on metrics related to revenue generation and risk reduction. By thinking of themselves as a central business unit and understanding their influence on other areas of the organization that rely on legal support, which is very significant, they can leverage technology and efficiency to create a positive ripple effect throughout the company.

Sagi emphasizes the importance of looking beyond the immediate cost-saving implications of improving legal efficiency. Instead, he urges legal teams to consider the broader impact on business processes and operations. By resolving legal matters faster and more efficiently, other departments can benefit and make more informed decisions promptly, resulting in significant improvements in overall business outcomes.

Moreover, he points out that other departments in the organization have already recognized the value of attaching data to a bigger narrative, showcasing the wider implications of their work. Sagi suggests that "Legal operators should adopt a similar mindset and connect their efforts to the

organization's strategic goals and long-term success. It's an entire team effort from the entire organization and the legal department touches them all in some way or another."

Overall, Sagi is optimistic about the positive trends he has observed in the legal tech and legal operations space over the past few years. The growing focus on leveraging technology to drive efficiency is paving the way for transformative changes in the legal industry.

When asked what recommendations he would offer to Legal Ops teams, Sagi provides valuable advice from a technology perspective.

- Embrace the Role of Product People: Sagi believes "legal operations teams are essentially product people, even if they may not realize it yet." They should focus on understanding their stakeholders and customers, which, in this case, are the various departments and individuals within their organization. By understanding their needs and behaviors, legal ops can tailor their processes and solutions to be more effective and efficient.

- Adopt an Iterative Approach: Sagi takes the perspective that, "Like product development, legal operations should embrace an iterative process. Building a solution is not a one-and-done task. It requires continuous evaluation, validation, and improvement." Sagi recommends that it is crucial to regularly talk to stakeholders and build relationships and trust, gathering feedback to ensure that the processes and technologies in place are meeting the organization's evolving needs.

- Foster Innovation: Sagi encourages legal operations teams to be innovative in their approach. "Rather than merely being efficient with existing tools, they should be proactive in seeking out new technologies and solutions. By staying curious and exploring the latest advancements in legal tech, teams can identify opportunities for improvement and drive positive change within the organization."

In summary, Sagi sees legal operations teams as pivotal players in shaping the efficiency and effectiveness of legal processes within an organization. By approaching their role with a product mindset, knowing "their customer", embracing iterative practices, and fostering innovation, legal ops teams can make a significant impact on the organization's overall success.

Sagi Eliyahu's insights regarding Tonkean's approach to orchestration can provide valuable context for addressing the challenges related to enterprise platform customization, integration, and deployments in legal operations:
The interviewer raises the concern that enterprise platforms like Salesforce require

extensive customization, support teams, and consultants to keep up with updates and integrations with other enterprise software. This complexity can be a major pain point for legal operations.

Sagi responds by acknowledging the overuse of the term "no-code" and warns against tools that claim to simplify complexity by just visualizing code without fundamentally addressing the underlying issues.

He highlights the importance of true integration and the challenges that come with connecting systems with different underlying structures and data formats.

Tonkean's approach to integration is more than just connecting APIs; it involves a process called ETL (Extract, Transform, and Load) to properly transform and load data. But the key difference lies in Tonkean's focus on understanding the use cases and treating them as business functions, rather than merely wiring together APIs.

Tonkean has built enterprise components that recognize common concepts in different systems, such as ticketing, projects, and statuses, and wraps them in workflows to provide a seamless user experience. This orchestration approach enables workflow actions and needs to drive the workflow, instead of just forcing components together. In essence, Tonkean acts as an assembly line in a factory. Sagi likens it to how "humans and machines are integrated into the workflow, and a manufacturing engineer reviews the process to identify areas for manual handling and adjustments for greater efficiency."

This approach allows legal operations to leverage technology effectively, stay compliant, reduce risk, and ensure smooth collaboration between different systems, all while enhancing user experience and overall success.

By understanding Tonkean's orchestration philosophy, legal operations can expect a more streamlined and efficient integration process, with a focus on business needs and actions, from removing time-consuming manual tasks to ultimately improving the adoption and effectiveness of technology in their workflows

Legal Operators: **Now, turning our attention to a Senior Legal Operations Manager's role specifically, how would you define their responsibilities and what key skills do you believe are essential for someone in this position?**

Sagi: "Legal Ops Managers play critical roles in legal departments, and in my view, one thing to be more successful is if they apply the perspective of a product owner of their tech stack." Sagi suggests, there are three main responsibilities:

I. Understanding and Serving the Customer: As a legal operations manager,

to understand the needs and behavior of their stakeholders and customers within the organization. This understanding allows them to adapt and develop processes as "products", driving behavior by catering to the personas and needs of their customers and developing solutions that align with their requirements and the policies that are in place.

II. Embrace Iterative Process: They need to internalize the concept of continuous iteration and improvement. Building and deploying solutions is not a one-time task; it requires constant validation, reevaluation, and user testing. The true impact and success come from actively engaging with customers and making improvements based on their feedback.

III. Cultivate Innovation: Legal operations managers should be innovative and open to exploring new possibilities. They need to ask questions, identify challenges, and stay curious about the latest technologies available in the legal tech space. Being technically efficient with existing tools and understanding the unique situation of their organization enables them to come up with creative and effective solutions.

In addition to these responsibilities, the key skills essential for someone in this position include:

- Agile Methodology: Familiarity with Agile project management principles, which emphasize iterative development and continuous improvement.
- Technical Proficiency: Being knowledgeable about the existing legal tech tools and technologies to efficiently work with them and integrate new solutions.
- Innovation and Curiosity: Having a proactive attitude towards exploring new technologies and finding innovative ways to improve legal operations.

By adopting these responsibilities and honing the necessary skills, legal operations managers can excel in their roles and make a significant impact on the efficiency and effectiveness of legal operations within the organization.

Legal Operators: **How important is change management adoption within the legal industry, in-house or firms? Is there a lag compared to other industries?**

Sagi feels, "There has been a shift in the past few years, as the pandemic forced a lot of change because of remote working, and it definitely had a significant effect on everything to do with legal departments. However, historically, law firms had systems in place they were happy with and didn't feel the need to change. And to me that was the biggest barrier of innovation, the actual change.

And so, if you want to embrace innovation, you need to understand how to reduce the change, so it's a manageable thing." the biggest barrier of innovation, the actual change. And so, if you want to embrace innovation,

you need to understand how to reduce the change, so it's a manageable thing."

Legal operations leaders often measure their impact based on metrics related to revenue or risk reduction. However, Sagi points out that legal efficiency is not just about saving billable hours; it's about creating leverage across the organization and understanding the broader impact of improved legal processes on other areas dependent on legal.

Shifting Leadership Narrative: There has been a positive trend in the legal tech and legal operations space, with a changing narrative of leadership. Legal operations teams are now seen as more central business units, and there's a growing recognition of their significant impact on the organization's business and operations.

Sagi acknowledges that the legal industry has faced resistance to change, especially from lawyers and law firms. Lawyers often prefer traditional tools like Outlook and Microsoft Word and may be reluctant to embrace new technologies. This resistance poses a challenge in change management.

Sagi sees Tonkean as a solution to help overcome the resistance to change. Tonkean allows organizations to retain familiar tools and processes while still achieving massive improvements in efficiency and workflow. This approach allows legal professionals who prefer to stick to their existing ways to do so, while still benefiting from the enhancements brought by Tonkean's automation and integration capabilities.

Legal operations leaders are calling for an Innovation approach, where different tools and technologies can be integrated in a way that fits the organization's specific needs. This approach promotes flexibility and adaptability, reducing the barriers to innovation and change.

Sagi underscores that the biggest barrier to innovation is change itself. To foster innovation, organizations need to find ways to reduce resistance to change and make it more manageable. This involves shifting from the perception of change as insurmountable to seeing it as something that can be effectively managed with the right tools and strategies.

By understanding the impact of efficiency improvements, adopting flexible and user-friendly tools, and managing change effectively, legal technology operations can make significant strides in enhancing workflows and overall performance. "Additionally, we focus specifically on change management by providing a user-friendly interface and avoiding the need for users to switch between multiple tools. Tonkean acts as an orchestration layer that sits on top of existing systems, streamlining workflows, and providing a cohesive user experience."

Legal Operators: **What sets Tonkean apart from other workflow automation platforms?**

Sagi Eliyahu: "Tonkean's uniqueness lies in its ability to bridge the gap between human and machine. We firmly believe that automation should not replace humans but rather augment their abilities. Our platform is designed to be intuitive and user-friendly, allowing non-technical users to easily create and manage complex workflows. Tonkean understands that not all tasks can be fully automated, and that's why we emphasize the importance of human decision-making and intervention when necessary."

Legal Operators: **What does the future hold for Tonkean?**

Sagi envisions "a future where Tonkean becomes an integral part of every organization's workflow automation strategy."

Their focus is on continuous innovation and enhancing the platform's capabilities to meet the evolving needs of businesses and expansion into the legal sector.

"We are investing in research and development to further harness the power of AI and machine learning, enabling even more intelligent and adaptive automation."

Tonkean plans to further personalize and optimize legal workflows using AI and machine learning. By empowering organizations to leverage technology in a human-centric way, it will provide an effortless automation to drive compliance, efficiency, and positive user experiences.

Ultimately, Tonkean wants to empower organizations to focus on high-value work while the platform handles the rest.

In conclusion, Sagi Eliyahu's insights shed light on the critical need for a human-centric approach to enterprise software development. By prioritizing personal ROI, focusing on personalization and change management, and providing a seamless user experience, Tonkean strives to optimize efficiency, compliance, and user satisfaction in an increasingly digital and interconnected world.

Tonkean's commitment to bridging the gap between humans and automation sets it apart in the realm of workflow orchestration platforms. By harnessing the power of AI and machine learning, Tonkean empowers organizations to automate complex workflows intelligently while emphasizing the importance of human decision-making.

As businesses continue to seek ways to optimize their operations, Tonkean stands at the forefront, revolutionizing the way we approach workflow automation…

… Effortless and frictionless!

About the Author

This Interview was conducted by Dawn-Marie Vaughan (dmv), Founder of Springboard Ventures a PortCo and start-up consulting practice. She's also a Board Member of Legal Operators and an early investor.

Dawn-Marie is an experienced executive who's developed an extensive skill set over 20 years as a practitioner and leader. Motivated by complexity and applying critical thinking to challenges, she has successfully retained clients for years and illustrates industry knowledge across a diverse range; including cybersecurity, Federal Government (DoD), financial services, venture capital/ private equity, healthcare, telecommunications, e-Discovery, entertainment, retail, technology, supply chain and transportation. Furthermore she conducted due diligence analysis and investigations on behalf of financial institutions, venture capital and private equity firms, and organizations considering businesses to acquire. Evaluations included financials, human capital, asset validation, business operations, customer support & success, and leadership qualifications/capabilities. Led/participated in successful acquisitions of over $4Billion in investments.

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WHAT ATTENDEES ARE SAYING ABOUT SUMMIT BY THE SEA 2022

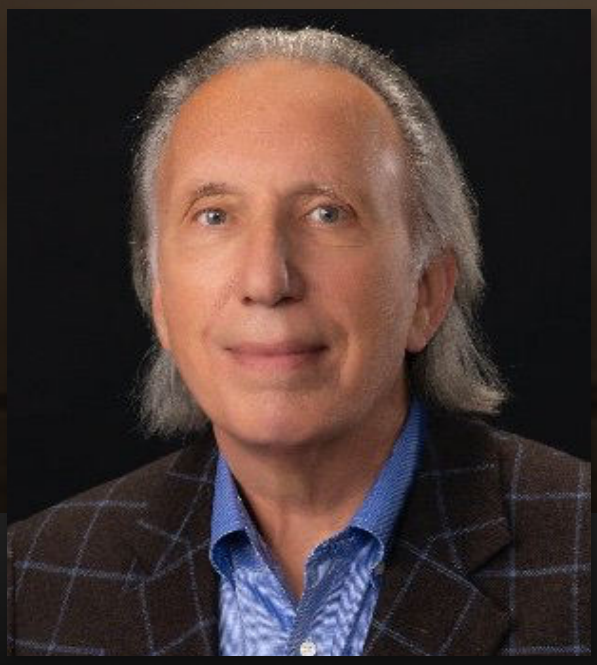
"Summit By The Sea is where industry leaders come together and push one another to innovate. It's an incredible forum for sharing ideas within Legal Operations. There's little doubt that you will walk away challenged and encouraged that Legal Operations is an asset that can and will power your business forward.""

Aaron Boersma

Strategic Projects Lead, Global Affairs Finance (Legal) I Google

LEARNING FROM EACH OTHER: Fostering Intergenerational Collaboration

By Mark A. Cohen



People try to put us d-down (talkin' 'bout my generation). Just because we get around (talkin' 'bout my generation). Things they do look awful c-c-cold (talkin' 'bout my generation). I hope I die before I get old (talkin' 'bout my generation) This is my generation. This is my generation, baby - The Who, "My Generation"

Generational divides are common intra-familiarly as well as in the workplace. That is nothing new, but never in modern history has the workforce comprised five generations as it does now. Longer life expectancies, the high

cost of living, and technological advances that have morphed offices into laptops and smartphones have extended the work lives of many seniors. "Retirement" is more than Barcaloungers and bingo; the Boomer and silent generations are still well represented in the workforce. The convergence of changing demographics, declining birthrates, The Pandemic, The Great Resignation (a/k/a Great Reshuffling), talent wars, digital transformation, geopolitical instability, climate change, mass migration, and other socio-economic forces have changed workforce dynamics. The rapid, widespread shift to remote work in response to COVID-19 and the sociological, psychological, and ideological changes it has produced are profound. Paradoxically, the workforce is perpetually connected even as many feel more detached and isolated because of the shift from the physical to virtual workplace.

Technology has elevated-not minimized- the importance of humanizing the workplace, human contact, and empathy.

For millions, "jobs" have become "gigs," "side hustles," and a fluid view of where, when, how, and why they work. "Careers"

are no longer linear paths to retirement. Most in the workforce—legal professionals included—can expect to have multiple jobs/gigs and, perhaps, transition to another sector. These and other dynamics have altered the meaning of work and how it is balanced with other facets of life.

Millennials, middle-management, and those in the midstream of their work lives are particularly struggling. They had anticipated a smooth glide path to advancement, then retirement. That is no longer the norm. Instead, they are caught in the shorthairs of automation, generative AI, data platforms, blockchain, quantum computing, and other technological advances that threaten to marginalize or make them redundant. Most lack the context to see the opportunity that these changes can provide—the creation of new jobs for those "skating to where the puck will be." They are too stressed to look beyond the day-to-day grind to up-skill, and open their minds to new ways to do things that better serve the end-users of their services. They tend to resist change even as their recalcitrance casts the redundancy die.

The challenges of managing a five generation workforce are legion but so too are the opportunities. Spoiler alert: culture, human behavior, and adaptation—even more than technology, data, and process— are the keys to intergenerational collaboration, cross-functionality, and enterprise-wide resources and tools necessary to solve complex challenges as well as to seize opportunities. An organizational culture that respects individuality while aligning a holistically diverse workforce has created a solid foundation for a successful, sustainable digital enterprise.

Digital transformation is about people and their ability to embrace a common purpose, collaborate to advance it, and utilize new tools in a fit-for-purpose way that benefits the enterprise, customers, and society. Intergenerational collaboration is an important element of this process.

A Spectrum Of Generational Talent But Scant Collaboration

Multigenerational workforces may be commonplace, but collaboration among them is scarcer. A 2020 Study by The World Economic Forum found that employing multigenerational workforces can create a significant competitive advantage by generating a stronger pipeline of talent, improving workforce continuity and stability, and assisting the retention of knowledge. It also found that mining the potential of a multigenerational workforce is a challenging process that few enterprises have mastered.

A Deloitte study on Global Human Capital Trends found that corporate leadership ascribed a high level of importance to multigenerational workforces but only 6% of companies are equipped to lead them effectively. The Living, Learning, and Earning Longer Collaborative Initiative survey found more than 80% of corporate leaders said

multigenerational workforces are key to growth, yet 53% did not include age diversity in their DEI initiatives.

"Multigenerational" and "intergenerational" are not synonymous; the distinction goes well beyond semantics. A multigenerational workforce is one that spans different generations. (i.e., Gen Z, millennials, Gen X, baby boomers and the silent generation). Multigenerational refers to generational characteristics that too often become stereotypes (e.g., "Gen Z'ers are 'difficult.').

Generational differences are forged by social, technological, geopolitical, climatic, and other changes confronting those coming of age and entering the workforce. Stereotyping individuals of a particular generation is a societal and workplace challenge. The individual's character, ability to collaborate, curiosity, empathy, and ability to earn and extend trust are core qualities whose importance far eclipses generational categorizations.

"Intergenerational" describes the impact of the interaction between/among different generations. Intergenerational collaboration, like other forms of diversity, has intrinsic and extrinsic value. It promotes an agile, cross-functional, team-oriented approach to problem solving. It is conducive to forging important human connections that promote physical and emotional well-being. This is especially important in remote workforces that are geographically dispersed, culturally diverse, segmented by business line and/or function, and rarely convene in-person.

Intergenerational workforces are fostered by organizational cultures that value humanity, promote common purpose and teamwork, invest in the health, well-being, up-skilling, and career progression of its workforce. Senior leadership are, ideally, the talismans of enterprise culture. Good leaders insure that they are not the sole champions of organizational culture. They recognize multiple leaders within the organization and task them with ensuring its values are well understood, practiced, and reinforced across the enterprise. Trust, respect, shared purpose, customer-centricity and social responsibility are among those core values.

Not only is this an ideal environment for intergenerational collaboration, but it is also one that attracts, advances, and retains holistically diverse talent. It is also good for business. A Gartner study revealed that a highly inclusive environment can improve team performance by up to 30%. Another by McKinsey & Company suggested that companies with the most diversity outperform those with the least by 36% in profitability.

Creating an intergenerational workforce is neither a simple nor quick process. Its success is grounded in humanity, collectivity, and agility that enables adaptation. Agility applies not only internally, but also with

customers as well as society. This is a fluid, ongoing process, one designed to adapt to change in real time. It benefits from the collective skills, expertise, cultural awareness, and mutual trust of a diverse workforce.

Organizations that create a culture built on diversity and collaboration across functions, generations, supply chains, and other facets of business have laid a solid digital foundation. That includes employees of different ages, backgrounds, skillsets, and mindsets learning from each other (a/k/a "reverse mentoring". The organization cannot mandate this; teamwork must be a core element of its culture—in hiring, indoctrination, evaluation, and advancement. Organizations must hone their ability to identify the skills and strengths of each individual in the workforce and identify how best to engage with them as well as identify strengths that can be leveraged to advance team goals.

The Challenges Of Legal Culture

Law is an analog function in a digital world. Its culture is the principal cause.

Legal culture derives from the myth of legal exceptionalism manifest in its worldview of "lawyers and 'non-lawyers.'" The industry operates on the premise that "lawyers know best." It is self-regulated, self-selective, (read: homogeneous), and self-contained. Its legacy stakeholders—law schools, legal providers, regulators, and the judiciary—continue to operate as a guild. They cling to stasis in a world where change has become one of its few constants.

Law's hierarchical structure impedes collaboration in a variety of ways. The workforce is segmented by rank—usually conferred by seniority. Expertise is, likewise, often associated with years of practice, not aptitude, experience, results, professional judgment, or leadership skills. Performance, especially in law firms, is measured by input, not output. The larger the law firm, the farther removed most attorneys and legal professionals—especially younger ones— tend to be from the client. This affords them little context for what the overriding strategy is, how their work fits into it, and what the client's objectives are and the process of meeting them. This piecemeal approach to tasks virtually eliminates the opportunity to collaborate with those that fashion the strategy or to learn by observing them. Conversely, seniors tend to pursue approaches that may have worked in the past but may not be so effective now. They can learn from younger generations that are often in the vanguard of change.

Remote working, high turnover (especially among firm associates), limited mentoring opportunity, and a tactical, short-term approach to systemic challenges are hardly fertile ground for harvesting intergenerational knowledge sharing. That's why valuable "reverse-mentorship" programs created by a handful of corporate legal teams and law

firms are a rarity. Those that exist—Reed Smith is an example— provide an opportunity to exchange perspectives, experiences, knowledge, and no-how. Equally important is that these programs build trust, shatter stereotypes, promote team building, bridge generational language barriers, and advance mutual respect, understanding, and empathy. Humanizing the legal sector would help address its health, well-being, performance, and sense of purpose.

What *can* the legal industry do to cure its legacy cultural hangover? How can it create an environment that is more attractive and welcoming to the multidisciplinary, holistically diverse, collaborative, curious, agile emotionally intelligent, learners-for-life, customer-centric, socially aware, and compassionate workforce required to meet the changing needs of business and society-at-large? Is this a mirage?

Here are several recommendations for fostering a culture that defines itself by those cpre values and qualities. The points below apply not only to intergenerational collaboration but also to diversity, equity, and inclusion (DEI) and the enterprise-wide digital journey.

1. Andrew Carnegie defined teamwork as "the ability to work together toward a common vision…(and) to direct individual accomplishments toward a common vision. It is the fuel that allows common people to attain common results. The legal function must jettison its zero-sum mindset in favor of collaboration, teamwork, and holistic diversity in pursuit of common goals and a shared purpose."

Nota Bene: legal stakeholders.

2. The generations have a great deal to learn from and teach each other. This is emblematic of the value of diversity more broadly. Law's lack of diversity, knowledge-sharing, and misalignment with its clients and the wider society have contributed to an erosion of public trust in lawyers, the legal system, and the rule of law. Without it, democracy as we know it will be in the rearview mirror.

It's past time to reverse that trend and to create a more humane, diverse, customer-centric, socially responsible, efficient, transparent, accessible, affordable, scalable legal function that is far less lawyer-centric and far more multidisciplinary. All five generations of legal professions, together with legal consumers and those with unmet need for legal products and services should have a voice in this process.

3. The legal industry must focus more on the health and well-being of its workforce. Humanity is a good place to start; the legal industry undervalues it presently. Intergeneration collaboration will help. It provides intrinsic and extrinsic value to individuals, the wider workforce, enterprise, and its customers.

4. In September 2021, Bloomberg Law's Attorney Workload and Hours Survey reported that nearly half of all lawyers surveyed said they were actively looking for new jobs or open to offers. This suggests that money alone cannot solve the profession's well-being, health, and lack-of-purpose issues.

5. While there are no panaceas for these interrelated challenges, they clearly emanate from a common source: an industry culture whose values no longer resonate with many in its workforce, business, and society. This is both a long and short-term issue for the legal industry. The can cannot be kicked down the road much longer.

6. Younger generations need hands-on exposure to those that have "been there and done that." They have much to teach their elders, too. Seniors benefit from collaboration with younger generations in a legion of ways—not least of which is remaining relevant and continuing their own evolution as professionals and human beings. Those in mid-career can benefit from exposure to the generations they sandwich. They are the bridge between what was and what will be; that is valuable context for the need to adapt and forge a mindset and professional course correction.

7. Intergenerational collaboration addresses one of the legal sector's long-term challenges: how will the next generation(s) obtain the hands-on experience to lead the organization in the future and earn the trust of colleagues and clients? Intergenerational initiatives will enable current leadership to mentor and vet leaders of the future. Conversely, younger generations will have a "safe place" to offer their elders counsel designed to make them better leaders and communicators, especially with younger workforce members.

8. Intergenerational collaboration should not only be fostered between/among licensed attorneys; it should also be multidisciplinary and cross-function as well. This derives from an enterprise culture that values a holistic, agile approach to problem solving unconstrained by rank, seniority, or the politics of internal fiefdoms.

A digitally mature enterprise is one that breaks down traditional barriers to collaboration and recognizes that complex challenges require a multiplicity of skillsets, perspectives, and experiences to solve. Legal delivery, for example, requires the collaboration of legal, data, IT, HR, design, operations, customer relations, and other disciplines to be effective. Likewise, the legal function is not self-contained; to proactively identify and defend against risk, it must collaborate with other functions within the enterprise. This is the application of Carnegie's definition of teamwork.

9. The legal industry should embrace more flexible work arrangements to leverage its

flexible work arrangements to leverage its knowledge-based workforce. Presently, most firms, corporate legal teams, and other providers take an "all in or out" approach to more flexible working arrangements. They are losing valuable talent at a time when it is desperately needed. Professionals understand that flexibility does not relieve them of the obligation to meet deadlines and do what they commit to.

The industry should invest in multidisciplinary and intergenerational programs designed to promote personal engagement, shared learning, and other collaborative activities.

10. Investment in the workforce should be a cultural cornerstone, not a tag line. It is part of a long-term strategy designed to adapt and respond to the rapidly changing needs and expectations of business and the wider society. It involves its entire multigenerational workforce, not just a designated few. It is essential to organizational sustainability.

11. Many large corporations have established close ties with universities and colleges to "custom design" curricula and experiential learning programs that better prepare students for the marketplace and, for some, employment in the sponsoring company. This is a "win-win" process that the legal function should adopt. It should go beyond collaboration with law schools and also include: business, computer and data science, engineering, and other areas that intersect with legal delivery.

12. Legal providers and others in the sector should include intergenerational collaboration as part of their DEI strategic plan. It should also be a part of succession planning as well as overall strategic planning.

13. Culture is a reflection of group self-identification and its core values. Intergenerational collaboration helps bridge the generational divide by expanding learning while finding common ground. A cohesive multigenerational workforce is better equipped to meet current challenges and to anticipate new ones. In the longer term, it promotes corporate sustainability by advancing succession planning and identifying young leaders across the organization.

14. Culture may emanate from senior leadership, but it requires leaders throughout the organization. Legal culture has frowned upon mercurial rises and bold, young leaders. It would be prudent to reconsider its hardline stance. For example, senior management should consider having one or more "young leaders" (e.g. under 30) to serve in leadership, perhaps on a rotating basis. This will send out a signal that the organizational elders do not have a monopoly on good ideas or a stranglehold on leadership. While experience is certainly an element of leadership, lack of it should not hold back those who have demonstrated "the

right stuff" to solve problems, inspire others, lead by example, and show compassion while being passionate.

Conclusion

Creating an organizational culture that is holistically diverse in its composition, unified in its purpose, and team-oriented, customer-centric, and socially committed in its orientation is a recipe for digital success. This blend is ideal for tapping into the latent potential of a multigenerational workforce to drive positive impact to individuals, the enterprise, its customers, and society.

Generations reflect the societal shifts that helped to shape them. Empathy, emotional intelligence, critical thinking, intellectual agility, curiosity, grit and teamwork are among a short list of character traits that transcend generational, cultural, socio-economic, and other differences. When these traits are leveraged, everyone benefits.

About the Author

Mark Cohen is CEO of Legal Mosaic, a legal business consultancy. He serves as Executive Chairman of the Digital Legal Exchange, a global not-for-profit organization created to teach, apply, and scale digital principles to the legal function, and as the Singapore Academy of Law LIFTED Catalyst-in-Residence. Mark has held Distinguished Fellow and Distinguished Lecturer appointments at Northwestern University Pritzker School of Law, and Georgetown Law as well as at numerous foreign law schools including IE (Spain), Bucerius (Germany), and the College of Law (Australia).

The first thirty years of his professional career were spent as a "bet the company" civil trial lawyer--decorated Assistant U.S. Attorney, BigLaw partner, founder/managing partner of a multi-city litigation boutique, outside General Counsel, and federally-appointed Receiver of an international company conducting business across four continents. He pivoted from the representation of clients to 'the business of law' approximately fifteen years ago. Mark co-founded and managed Clearspire, a groundbreaking 'two-company model' law firm and service company. The Clearspire model and lessons learned from it are the foundation upon which my current activities are fused with the practice portion of my career. And Last but not least: Marc is a renowned speaker and shares his insights in the Global Legal Market.

Legal Operators thanks Mark for his inspiring contributions. Follow Mark on Twitter or LinkedIn, or visit his website Legal Mosaic

All Articles by Mark are also published at Forbes

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MEASURING THE SUCCESS OF AN E-DISCOVERY PROJECT

Ari Kaplan speaks with Vincent Liu, senior project manager at Level Legal, a provider of e-discovery managed services.

Ari Kaplan
Tell us about your background and your role at Level Legal.

Vincent Liu
I began my career in e-discovery in 2002 at Valora Technologies, where I was responsible for document coding. I then held various senior project management roles with several other vendors before joining Level Legal in January 2023.

Ari Kaplan
How does your team measure the success of an e-discovery project?

Vincent Liu

One of the reasons why I came to Level Legal was because of its core values. The team really believes and practices them, which are: give a damn; get it done right; show respect; and, deliver delight. As long as we do all four of those core values, the customer is happy, we've produced everything on time, and everything is accurate, that is a successful project. We also hold a post-mortem or retrospective on every project, where we review the experience with the customer to identify ways that we can improve on the next matter. It is a collaborative effort and a key to our success.

Ari Kaplan

What are some best practices for managing an e-discovery project cost-effectively, but also while maintaining quality and completeness?

Vincent Liu

Start at the left of the EDRM to understand how you are collecting documents and from how many custodians to ensure that you are not over-collecting. It is also critical to deploy the proper technical expertise to effectively manage the project. In addition, segregate chunks of your data into your reviewable set and prioritize

deduplication. At Level Legal, we focus on dataset reduction while also tracking every record in the dataset to maximize accountability.

Ari Kaplan
What is the role of artificial intelligence now and how do you see that role changing in e-discovery?

Vincent Liu
I am fascinated with AI. Of course, it is early everywhere, but it will definitely play a part in the industry. I do not, however, see it as a replacement for attorneys or even technologists. Rather, it will be more of an enhancement and create new jobs in the form of prompt engineers, for example, who can help teams maximize the use of this technology.

Ari Kaplan
As the market continues to change, what skills and experiences are necessary for success as an e-discovery project manager?

Vincent Liu
Technical expertise is paramount. Project managers need to be expert users of their review platform of choice. Communication skills are also essential. Being clear, concise, and coherent in your communications with your team and clients is important for transparency and in creating a seamless experience. It also helps with anticipating problems before they arise. In fact, that is closely connected to our core values of delivering delight. So rather than simply answering a client's question, I ask about their ultimate objective and both address the immediate need and anticipate future challenges to address them in advance. Finally, analytical skills and the ability to think creatively are critical. Understanding how something works is helpful, but successful project managers can evaluate unique problems and help their clients develop solutions rapidly and with confidence.

Ari Kaplan
How do you see e-discovery evolving?

Vincent Liu
E-discovery will remain heavily tied to technology. AI will, of course, be a significant factor in the development of this field. As a result, rather than fear technology, professionals, especially project managers, need to embrace it and use it to benefit their clients.

About the Author
Ari Kaplan (http://www.AriKaplanAdvisors.com) regularly interviews leaders in the legal industry and in the broader professional services community to share perspectives, highlight transformative change, and introduce new technology at http://www.ReinventingProfessionals.com.

Click here to listen to his conversation with Vincent Liu.

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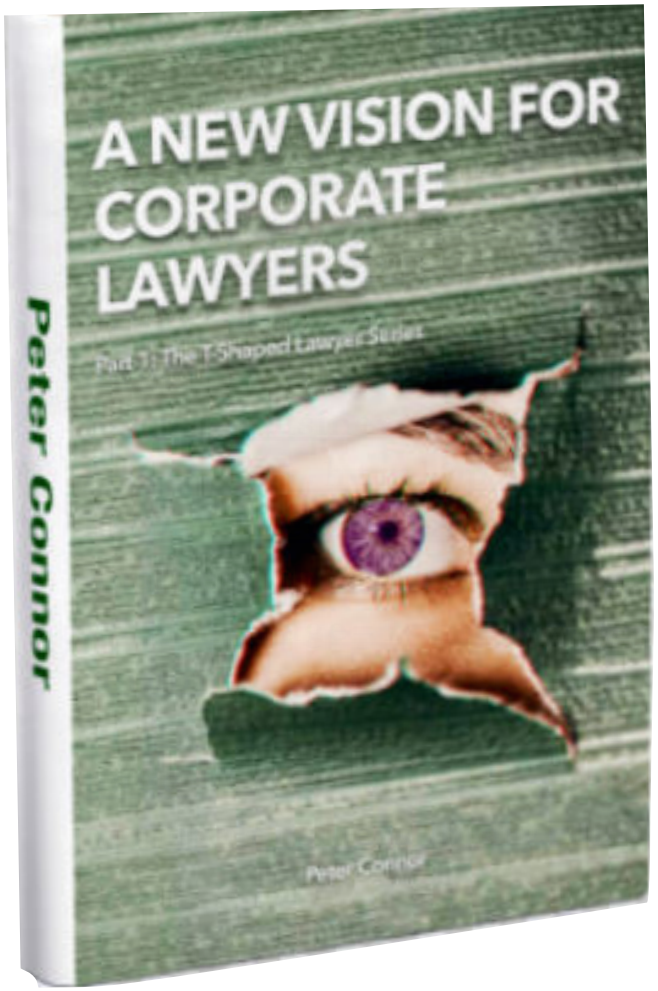

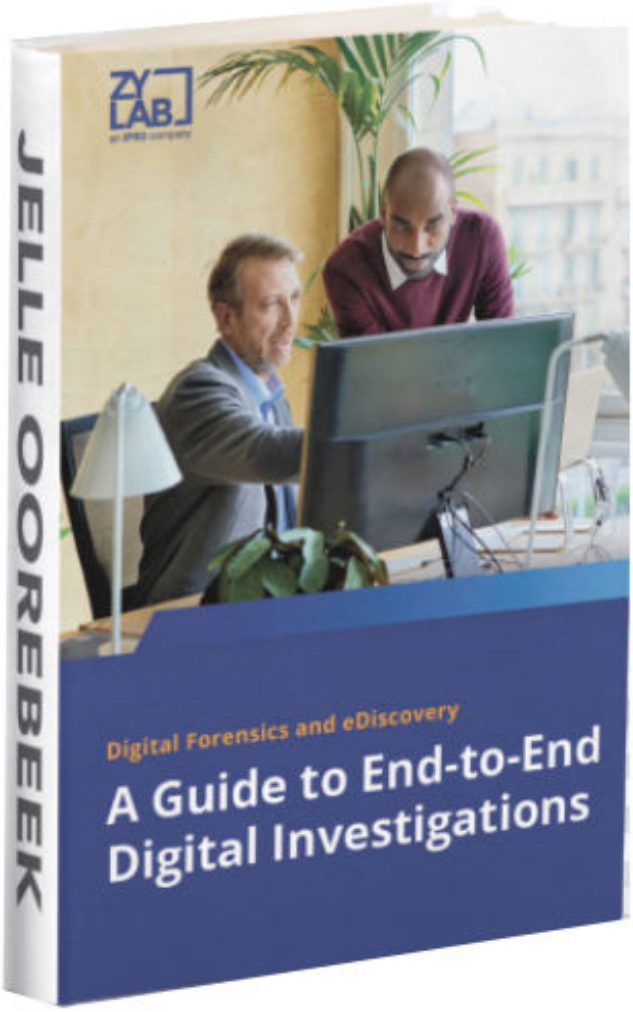

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THE POWER OF HUMAN SKILLS: BREAKING THE NOTION OF SOFT SKILLS

By Eve Vlemincx, Strategic Advisor, Advisory Council Member for Harvard Business Review and is a Course Facilitator at Stanford Graduate School of Business.

Introduction

In an age defined by digital transformation, the legal industry is undergoing a significant shift. While legal expertise has long been the foundation of success in this field, the emergence of human skills has proven to be a game-changer. Often overlooked, these interpersonal competencies are now essential for motivating legal teams, delivering exceptional client experiences, and adapting to the demands of the digital landscape. In this article, we delve into the profound relevance of human skills in the legal industry and highlight their transformative power.

The changing landscape of legal skills

Traditionally, the legal profession placed a heavy emphasis on hard skills, such as legal research, drafting contracts and courtroom advocacy. While these technical proficiencies remain critical, the digital era calls for a broader skill set. Human skills, including communication, collaboration, empathy, adaptability, and emotional intelligence, have become indispensable in navigating the complex legal landscape and engaging with clients effectively.

Within law firms and legal departments, effective teamwork and communication are vital for success. Today, legal professionals often collaborate on cases across different offices, time zones, and even jurisdictions. By cultivating strong human skills, such as active listening, clear communication, and empathy, legal leaders can inspire their teams to excel. Motivated and engaged professionals are more likely to contribute innovative solutions, enhance productivity, and foster a supportive work environment.

Clients seeking legal services increasingly expect a personalized and tailored experience. Human skills are pivotal in creating a positive client journey. Professionals who

possess exceptional communication skills can convey complex legal concepts in a clear and accessible manner, ensuring clients understand their options and feel supported throughout the process. Empathy and active listening enable legal professionals to genuinely understand clients' concerns, build trust, and deliver superior client experiences.

The digital revolution is transforming the way legal services are delivered. Amidst these changes, human skills become even more valuable. Lawyers who demonstrate adaptability and a willingness to embrace technological advancements can leverage these tools to enhance efficiency, streamline processes, and deliver services that align with clients' evolving expectations. Human skills empower legal professionals to navigate the evolving digital landscape with confidence and resilience.

Rather than categorizing these essential competencies as "soft skills," the legal industry must recognize their true significance. By reframing the conversation and highlighting the transformative power of human skills, we can foster a culture that values emotional intelligence, collaboration, and adaptability. It is time to embrace these competencies as "essential skills" and integrate them into legal education, training programs, and professional development initiatives.

Conclusion

Digital transformation is not just about the next tech thing. To be succesful the importance of human skills cannot be understated. Beyond legal expertise, lawyers and legal professionals must possess effective communication, empathy, adaptability, and collaboration skills to thrive in this dynamic landscape. By prioritizing the development and integration of human skills, the legal industry can elevate client experiences, foster innovation, and empower legal professionals to navigate the complexities of the digital era with resilience and confidence.

About the Author

Eve Vlemincx is a strategic advisor with expertise in a wide array of areas including legal digital transformation, innovation and leadership.

She serves as an advisory council member for Harvard Business Review and is a Course Facilitator at Stanford Graduate School of Business. Eve is highly sought after as a keynote speaker and guest lecturer in various professional settings. Notably, she has been honored as a five-time recipient of the Stanford GSB LEAD Award.

Operating at the dynamic intersection of legal and business, Eve holds certifications

from esteemed institutions such as Oxford, Harvard, Kellogg and Stanford Graduate School of Business. Additionally, she brings substantial experience as a seasoned lawyer specializing in corporate law and restructurings.

Eve's guiding philosophy is centered on working smarter, not harder, as she helps individuals and organizations navigate the complexities of today's rapidly evolving landscape.

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Keynote Speaker at Summit by the Sea

COLONEL DAVID M. ROZELLE, MORE THAN AN INSPIRATION

By Colin McCarthy

It is with immense honor that I get to announce one of the most extraordinary human beings to be the keynote at Summit by the Sea this Sept in Santa Barbara, California with Legal Operators!

Some of us are very fortunate to live good and somewhat interesting lives but Colonel David M. Rozelle is a different cup of tea altogether.

Here goes - I was looking for someone to deliver a speech on resilience. Somebody who lived through the wars and has all the scars to prove it. Somebody despite the scars and

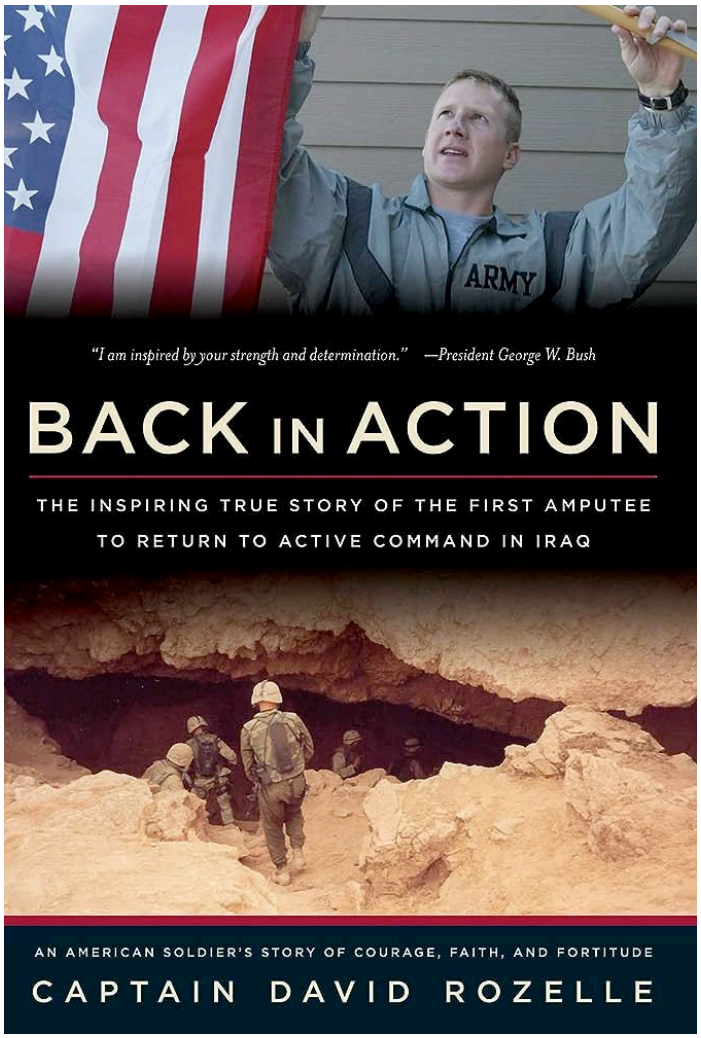
wounds, hold their head high and rush back into battle because they have a higher purpose.

After being introduced to David by his high school football team mate Jason Smith, I soon realized that I was dealing with one of the most inspirational people I've ever met. David has lived 10 life times in this single life. I'm so excited to introduce him to our legal operations leaders this September in Santa Barbara. This will be an inspiring and unforgettable experience for you!

Colonel (Retired) David Rozelle is an inspiration and icon among Military Amputees over the last twenty years, and recently completed over twenty-six years of honorable service in the Army. David served primarily as an Armor/Cavalry Officer and led Soldiers in three tours in Iraq and one in Afghanistan. David lost his right leg below the knee to a land-mine in Iraq in June of 2003, during his first deployment. Stationed at Fort Carson at the time, David found outdoor recreation to be the best therapy during his recovery and worked with several charities to improve

opportunities for returning veterans. By returning to Iraq, he became the first military amputee to return to command on the same battlefield as amputation since the US Civil War. In 2005, David published a "NY Times Bestseller" book, Back in Action, which detailed his injury and return to command in the Cavalry. In 2006, while delivering the Military Advanced Amputee Training Center at Walter Reed, David further inspired the country by qualifying for and then winning his division in the Ironman Championship in Kona, Hawaii. Despite his retirement to South Carolina, David continues to serve as an executive leader for the State of South Carolina Department of Veterans Affairs. In his free time, he remains active in supporting his fellow military injured.

Only 7 weeks to the summit! and I will be dropping speakers and topics on LinkedIn over the next few weeks. This year is going to be something special!



Click here to order his book

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WHAT ATTENDEES ARE SAYING ABOUT SUMMIT BY THE SEA 2022

"Summit By The Sea is a unique experience to hear from and meaningfully interact with leaders in Legal Operations. You will learn, teach, and grow with your colleagues, make new connections, and come away with ideas you can actually implement for the benefit of your business and employees."

Angela Dougan Sherrer

VP & Chief Counsel, Data and Technology I Walmart

WHAT ATTENDEES ARE SAYING ABOUT SUMMIT BY THE SEA 2022

"Summit By The Sea is the perfect convergence of Legal Operations and legal technology thought leaders from diverse backgrounds and disciplines. The program facilitates dynamic and engaged discussions via thought-provoking deep-dives that provide you with the tools you need to solidify your role as a strategic advisor to the business."

Shani Pipkin
Manager, Legal Operations I Pulte Group

"Summit By The Sea was one of the best conferences I've been to. The speakers were top notch, the table discussions were well moderated and a great way to learn from peers. The location was stunning and I walked away with great new connections and people to learn from. I highly recommend attending this conference!"

Karen Helten
Outside Counsel Senior Manager I Salesforce

"Summit By The Sea was one of the first conferences that I have attended where I got connected with industry peers that are responsible for making decisions on legal technology, process implementation, and finding solutions for similar pain points. The conference provided time for us to share insights and advice during roundtable discussions and hear industry trends from keynote speakers in different fields. Luckily, this is a smaller intimate conference that really allows you to build connections without feeling overwhelmed. I walked away with a different mindset and a better plan to drive efficiency with my law firms and legal technology."

LaTrece Johnson
Head of Legal Operations, Palo Alto Networks

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The Future of Legal Operations: A Look Ahead

The legal industry is evolving at a rapid pace, and with it, the role of legal operations professionals is becoming increasingly vital. Legal operations professionals are responsible for managing the business side of law firms and legal departments, including everything from financial management to technology implementation.

As the legal industry continues to change, so too will the role of legal operations professionals. In this article, we will explore some of the trends that are shaping the future of legal operations.

Increased Focus on Data Analytics

One of the biggest trends in the legal industry today is the increased focus on data analytics. Legal operations professionals are increasingly using data analytics to help them make better decisions about everything from staffing to billing. For example, data analytics can help legal operations professionals identify which attorneys are most efficient and which clients are most profitable. This information can then be used to make staffing

decisions and pricing decisions that improve the bottom line.

The Rise of Artificial Intelligence

Another trend that is shaping the future of legal operations is the rise of artificial intelligence (AI).

AI has the potential to revolutionize the legal industry by automating routine tasks and providing lawyers with more accurate and comprehensive information. Legal operations professionals will play a critical role in implementing AI systems and ensuring that they are integrated seamlessly into existing workflows.

Increased Collaboration Between Legal Operations and IT

As technology becomes more important in the legal industry, legal operations professionals will need to work more closely with IT departments. This collaboration will be critical to ensuring that technology is implemented effectively and that it meets the needs of both lawyers and clients.

Legal operations professionals will need to be able to communicate effectively with IT professionals and understand the technical aspects of new software and hardware.

The Importance of Cybersecurity

As the legal industry becomes more reliant on technology, cybersecurity will become increasingly important. Legal operations professionals will need to work closely with IT departments to ensure that law firms and legal departments are protected from cyber threats. This will involve implementing robust security protocols, training employees on cybersecurity best practices, and staying up-to-date on the latest threats and trends in cybersecurity.

The Growth of Alternative Legal Service Providers

Finally, the growth of alternative legal service providers (ALSPs) is another trend that is shaping the future of legal operations. ALSPs offer a range of services, from document review to contract management, at a lower cost than traditional law firms. Legal operations professionals will need to work closely with ALSPs to ensure that they are providing high-quality services and that they are integrated effectively into existing workflows.

There are pitfall in succes of Legal Operations, now and in the future

There are several potential pitfalls in the development of legal operations. Think about:

1. Lack of buy-in from key stakeholders: Without support from senior leadership, legal operations initiatives may struggle to gain traction.

2. Resistance to change: Legal professionals may be resistant to changes in their workflows or processes, particularly if they are accustomed to working in a certain way.

3. Limited resources: Legal operations teams may face challenges in securing the resources they need to implement new technologies or processes.

4. Data quality issues: Legal operations initiatives often rely on accurate data to drive decision-making, but poor data quality can undermine the effectiveness of these efforts.

5. Cybersecurity risks: As legal operations become more reliant on technology, there is an increased risk of cybersecurity threats such as data breaches or ransomware attacks.

It is important to address these potential pitfalls proactively to ensure the success of legal operations initiatives.

How to become a successful Manager

To become a successful legal operations manager, there are several competencies that are essential:

Project management: Legal operations managers need to be skilled in project management, including planning, executing, and monitoring projects to ensure they are completed on time and within budget.

Communication: Effective communication is critical for legal operations managers, as they must be able to communicate complex legal and technical information to stakeholders at all levels of the organization.

Data analysis: Legal operations managers must be able to analyze data to identify trends and make informed decisions based on that data.

Technology proficiency: Legal operations managers should have a strong understanding of technology, including legal software and other tools that can help streamline processes and improve efficiency.

Financial acumen: Legal operations managers need to have a solid understanding of financial management principles, including budgeting, forecasting, and cost analysis.

Change management: Legal operations managers should be skilled in change management, including the ability to manage resistance to change and facilitate the adoption of new processes or technologies.

Legal knowledge: While legal operations managers don't need to be practicing attorneys, they should have a strong understanding of legal concepts and terminology to effectively manage legal operations initiatives.

Teamwork: To become really successful in your role of Legal Operations Manager it is important that you understand that success is based on the joint outcome of your team, and not your output as manager. Being able to share information with your team members is key in the overall succes of the team.

Conclusion

The future of legal operations is bright, but it will require legal operations professionals to be adaptable and forward-thinking. By staying up-to-date on the latest trends in data analytics, artificial intelligence, IT collaboration, cybersecurity, and alternative legal service providers, legal operations professionals can help their firms and departments stay ahead of the curve.

The role of legal operations professionals is becoming increasingly important in today's legal industry, and those who are able to embrace change and innovation will be well-positioned for success in the years ahead.

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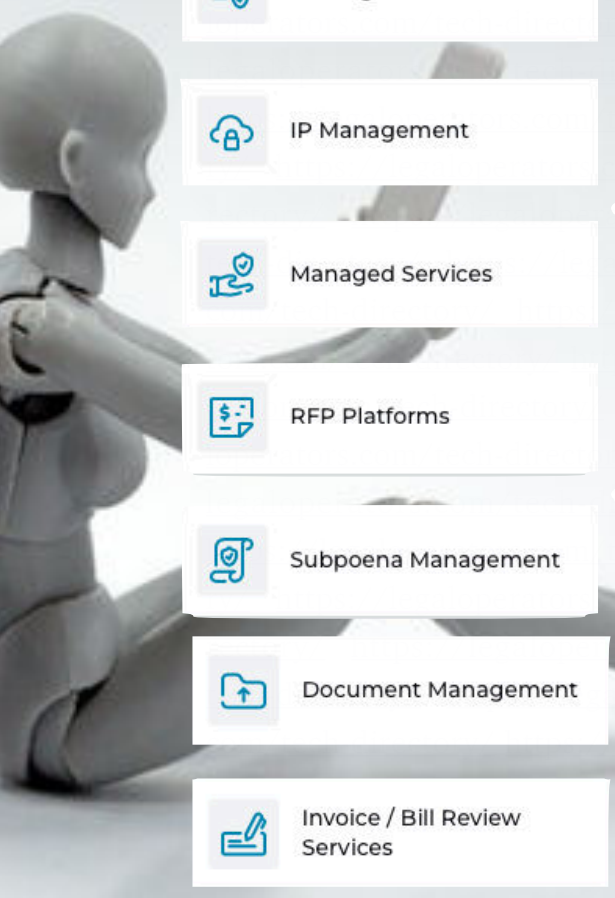

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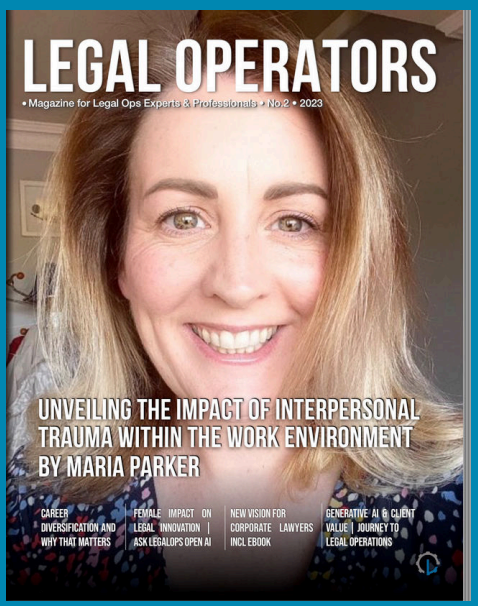
- Specialized Legal Advice
- Invoice / Bill Review Services
- Privacy Consulting

LEGAL OPERATORS PUBLICATIONS



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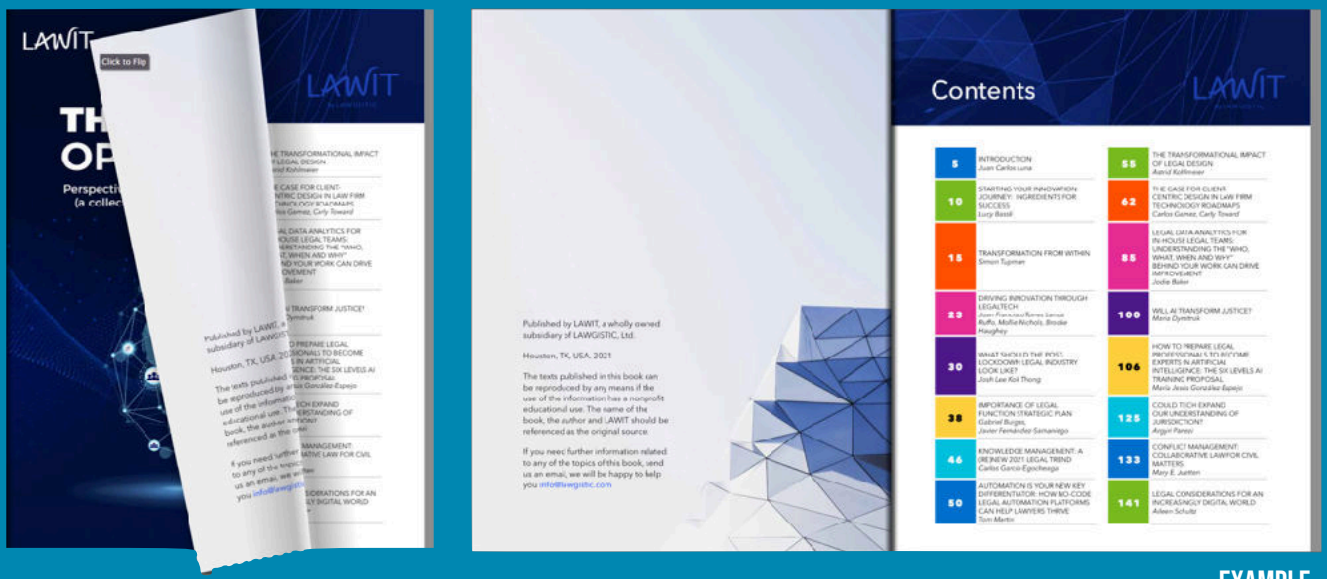

EXAMPLE

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THE LEGAL OPERATORS INNOVATION HUB

Educate yourself in our Innovation Hub. A collection of content organized in over 38 different legal operations categories of interest including webinars, white papers, and expert resources. Click on one of our category listings below or search our Innovation Hub by Category, Resource Type and Access level at our website.

Artificial Intelligence

Business Intelligence Tools

CLM

Consulting Services

Contract Review

Contract Review & Automation

Data Governance

Diversity

Document & Case Review

Document Management

e-Discovery

eBilling

Enterprise Management (ELM)

Knowledge Management

Legal Hold

Legal Operations Consulting

Legal Spend

Legal Spend Management

Matter Management Software

Outside Counsel Management

Pricing Models

Records Management & Retrieval

Risk Management

Subpoena Management

Thought Leadership

Workflow Automation (and more)

EZINE USAGE

For all devices

Legal Operators is a responsive designed magazine. Responsive design means that design and development respond to the user's behavior and environment based on screen size, device/platform and orientation. Besides a responsive flip book version the magazine is also published as a downloadable PDF.

Enrichment & Linking

To increase content value the magazine is enriched with meta data and linking to a variety of outside resources. Meaning that you are able to access in-depth and/or supporting information next to the articles. Video's and podcasts are linked to their original sources, and eBooks or eZines are most of the time just one click away, and directly accessible.

The Flipbook functions (online reader version)

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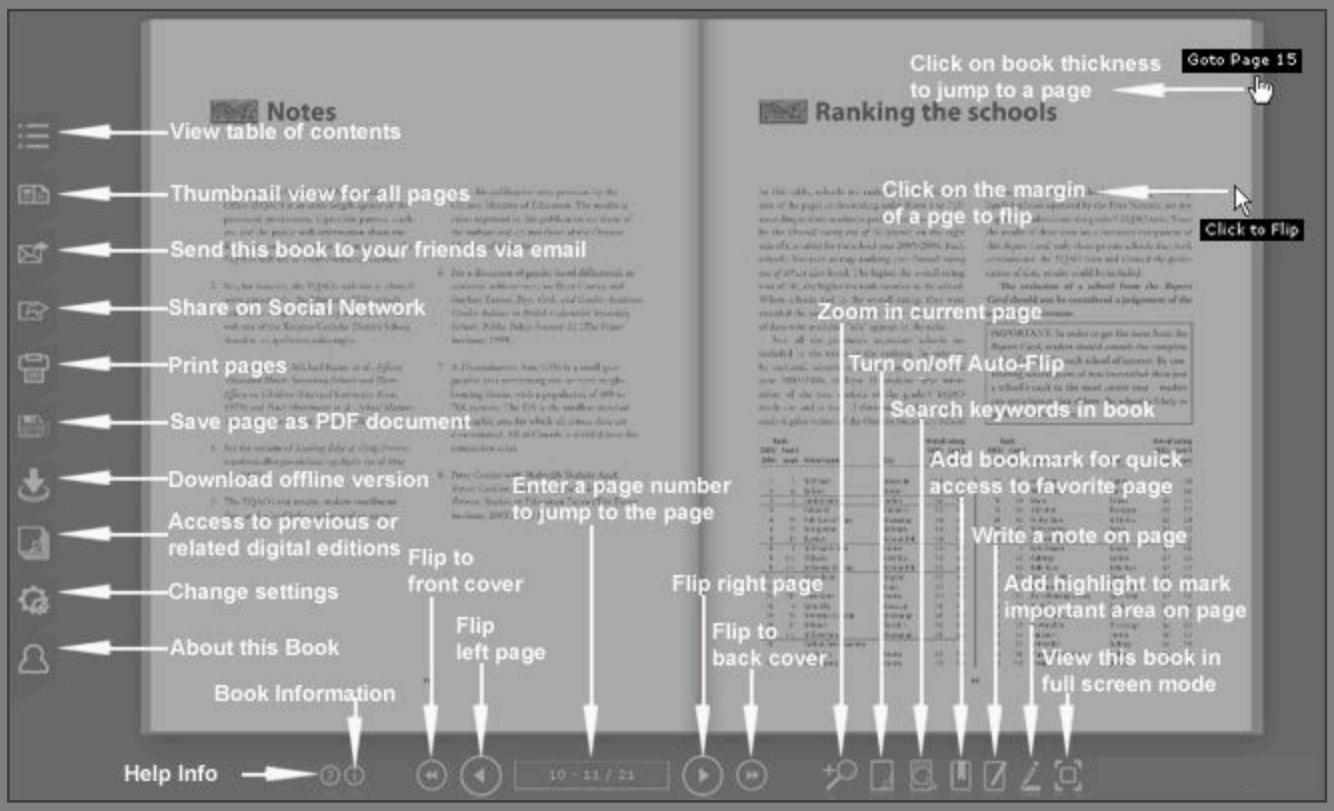
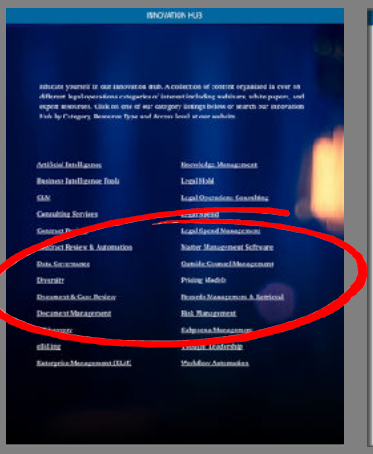


Some linking examples



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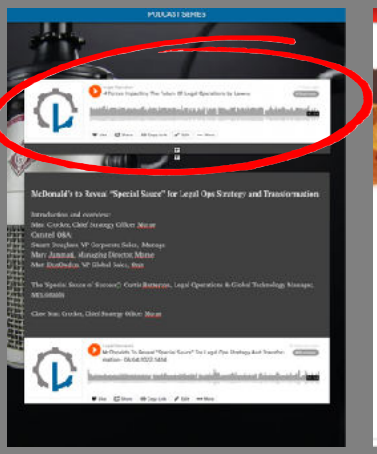

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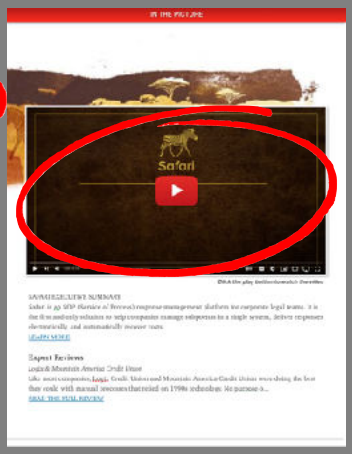

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DIVERSITY & INCLUSION

For Legal Operators diversity and inclusion are important topics. Luckily we see a lot of organizations prioritizing these topics and starting to roll-out dedicated programs. However there is still a lot to learn, and why not learn from each other?

Therefore we welcome everybody who is willing to share their experience, programs, what works - what not, challenges and more in an article published in Legal Operators eZine.

Feel free to send your article, article outline, or idea to Colin McCarthy.