

LEGAL OPERATORS

• Magazine for Legal Ops Experts & Professionals • No.4 • 2023

KATRI NOUSIAINEN ON MARKET DEVELOPMENTS, ETHICS, LEGAL DESIGN & TECH

WATCH A UNIQUE
CONVERSATION WITH
AN AI AVATAR

WHO WILL TRAIN
DIGITAL TALENT AT
SCALE

THE AI ACT IS COMING
WHAT'S IN STORE

PRIORI'S BASHA
RUBIN HELPING IN-
HOUSE COUNSEL

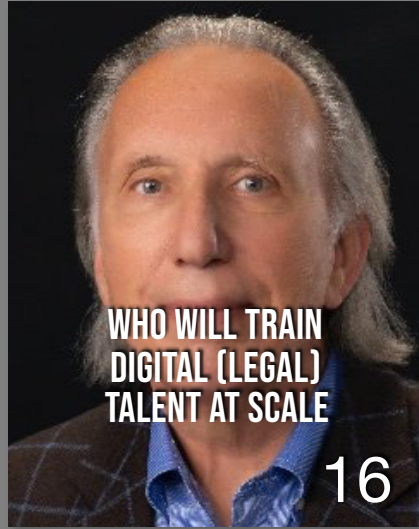


LEGAL



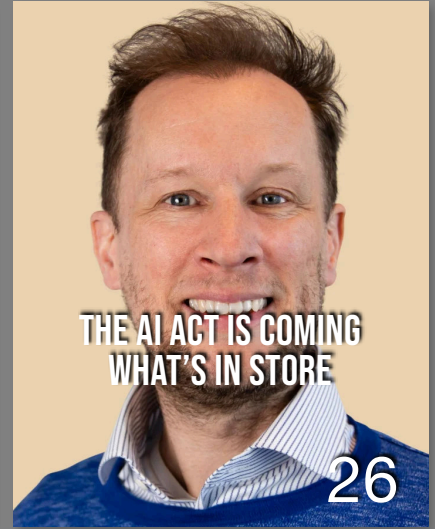
**INTERVIEW WITH HARVARD'S
KATRI NOUSIAINEN**

06



**WHO WILL TRAIN
DIGITAL (LEGAL)
TALENT AT SCALE**

16



**THE AI ACT IS COMING
WHAT'S IN STORE**

26



**HOW TO ACHIEVE PROCESS
ADOPTION IN LEGAL**

34



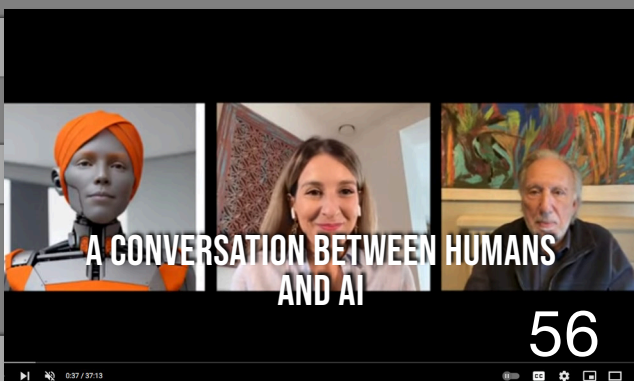
**INTERVIEW WITH PRIORI'S
CEO BASHA RUBIN**

46



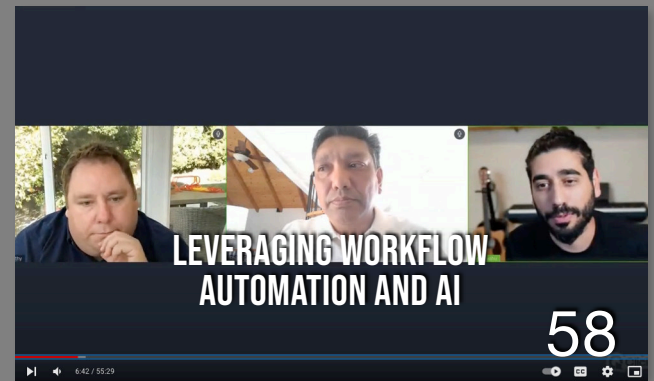
**DATA MANAGEMENT AND
LEGAL TECHNOLOGY IN
FINLAND**

52



**A CONVERSATION BETWEEN HUMANS
AND AI**

56



**LEVERAGING WORKFLOW
AUTOMATION AND AI**

58

...AND MORE

<u>Katri Nousiainen On Market Developments, Ethics, Legal Design And Tech & Ai, An Interview, Editorial Dept.</u>	06
<u>Welcome Robin Zavacky Ponce, Colin Mccarthy</u>	15
<u>Who Will Train Digital (Legal) Talent At Scale? Mark A. Cohen</u>	16
<u>The Ai Act Is Coming – What’s In Store? Arnoud Engelfriet</u>	26
<u>How To Approach “Full” Process Adoption In Legal Ops With No-Code Workflow Automation & Ai, Sagi Eliyahu</u>	34
<u>Basha Rubin Helps Hundreds Of In-House Teams To Find The Right Legal Provider For Their Next Project</u>	46
<u>Data Management And Legal Technology In Finland, An Interview With Heikki Ilvessalo, Ari Kaplan</u>	52
<u>Video: A Conversation Between Humans And Ai, The Future Of The Legal Profession, Georgia Vulcano (Special Thanks To M.A.Cohen)</u>	56
<u>Video: How To Achieve Process Adoption By Leveraging Workflow Automation And Ai A Discussion Between Colin Mccarthy, Rajan Gupta, And Sagi Eliyahu</u>	58
<u>The Legal Operators Tech Directory, Legal Ops Editorial Dept.</u>	60
<u>The Legal Operators Innovation Hub, Legal Ops Editorial Dept.</u>	62

A special thanks goes out to Katri Nousiainen, Mark A. Cohen, Arnoud Engelfriet, Sagi Eliyahu, Heikki Ilvessalo, Ari Kaplan, Basha Rubin, Georgia Vulcano, and Rajan Gupta

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

This issue of Legal Operators starts with an interview with Katri Nousiainen, a Resident Research Fellow at Harvard Law School and also active in the Management Program at Harvard University. She talks about Market developments, Ethics, Legal Design, and Tech & AI. Mark A. Cohen again has an excellent contribution to training Legal talent and Arnoud Engelfriet shares valuable insights into the new AI act. Process Adoption in Legal Ops with No-code Workflow Automation & AI is presented by Sagi Eliyahu, and we learn more about Priori founder Basha Rubin in an interview, and how she helps hundreds of in-house teams to find the right Legal provider. Ari Kaplan Had an interesting conversation with Heikki Ilvessal on Data Management and Legal Technology in Finland and last but not least we have to interesting video. The first one is a conversation with an AI Avatar about legal developments, and the second one is a conversation on How To Achieve Full Process Adoption by Leveraging Workflow Automation and AI (see also article by Sagi Eliyahu).

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

Management
Legal Operators
Mr. Colin McCarthy

Editorial/Publisher
Chief Publishing J.Peters
Editorial Dept.

leadership, and increase your brand awareness throughout the industry. Make yourself heard, increase engagement and let us help you to share your message thru eZines, eBooks Whitepapers, Webinars, and events. 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 edition!

In community spirit,
Kind Regards,



Colin McCarthy, CEO



POWERED

Content Inquiries

colin@legaloperators.com

joek@legalbusinessworld.com

Design & Layout

LateNight studio's

International

Photography

Pexels & Unsplash

© Legal Operators™



KATRI NOUSIAINEN ON MARKET DEVELOPMENTS, ETHICS, LEGAL DESIGN AND TECH & AI


An Interview with Harvards' Katri Nousiainen



Katri, could you tell us something about yourself, your drive and passion for the legal market, and your current work?

I am a Lawyer and Professional in Legal Education. Currently, I hold a Resident Research Fellow position at Harvard Law School in the Program on Negotiation (PON), and I am a Teaching Faculty in a Management Program at Harvard University.

In addition to my work at the Program on Negotiation, I am also affiliated with the University of Cambridge Law (the United Kingdom) and with the Hanken School of Economics (Finland).



Before joining Harvard Law School, I was affiliated with the University of Berkeley Law (the USA), Center for Law and Technology (BCLT), and the Aix-Marseille School of Economics (France).

I hold a PhD, specializing in areas such as contract and commercial law, legal design, negotiation, and law & technology. I have also gained a European Master in Law and Economics (EMLE) LL.M, a Master Universitario di primo livello, a Master d'Analyse Economique du Droit et des Institutions, and a BA in Law.

In my work, I support and assist companies, educational institutions, and other operators in improving the quality and efficiency of their processes, products, and services within the tools and methods of law & tech, innovation, and legal design. I also assist and train companies and various other operators in negotiation and organizational dispute resolution. Some topics that have recently gained more interest have related to emotions and interpersonal skills, as well as to ways how to be a successful leader and how to foster inclusion and understand various cultural and social dimensions in relationships.

You conducted pioneering empirical research on the impact of legal design and ethics in commercial contracts using the lens of law and economics. Can you tell us more about this research project and its outcomes?

Sure! In one of my research paths, I am conducting empirical research on Legal Design in Negotiation and Commercial Contracting employing the Law and Economics lenses. My work intends to scientifically measure the impact and value of legal design and to find, for example, metrics to assess efficiency and quality in negotiation and contracting practice. I am especially interested in employing technology within law, economics, and legal design.

My research addresses the pressing problem of information asymmetry, exclusion, and lack of transparency in negotiation and commercial contracting practice. People often have no understanding of their contractual legal rights and obligations. In the empirical part of the research, I redesign commercial contracts with legal design – to foster and promote inclusion, equity, and transparency in society by making law and legal services more approachable, user-centric, and accessible for all. My empirical research aims to create a systemic impact on society, and it intends to bridge between scientific research of academia and practical business life.

The empirical study has demonstrated and

approved the claim that the legal profession could greatly benefit from Legal Design in bringing comprehensibility to negotiation and contracting practice. Employing Legal Design has been shown to increase efficiency and provide for greater quality in legal practice. The empirical study found that legal designed commercial contracts were more comprehensible than traditional legalese contracts - even to lawyers and sophisticated parties. Almost $\frac{2}{3}$ of the participants preferred the Legal Designed contract over the traditional legalese contract! The results of the study further revealed that around 70 % of the participants were not able to comprehend the traditional written legal terms and found them ambiguous, and nearly 90% of the participants pointed out that there is further room for improvement within the clarity of the terms.

Even though the conducted empirical study has been a pilot and a single experiment in a particular industry, the results are still greatly promising and support the learning from other fields of science and their best practices being applied within the law. We can infer from these novel results that more comprehensibility is needed in the negotiation and contracting practice and that Legal Design can bring systemic impact in society in decreasing information and knowledge asymmetry. Moreover, through this empirical study, Legal Design has been demonstrated to be a useful scientific tool and method in searching for a solution to improve legal

quality. In addition, this study has more far-reaching implications for negotiation and contracting generally, and particularly for industries in transition. The work demonstrates that there is a pressing call for better legal quality and that Legal Design could be the key! Through the work on legal design, I have learned that it is also well-suited to be employed within emerging and new technologies. For example, this could be pivotal in the current rise of new quantum technologies such as quantum computers.

In a recent article you wrote: ‘Although the new quantum technologies are still at the early stage of commercialization, they have already begun to influence the structures of society’. Can you elaborate on this?

One of my other research paths concentrates on understanding and analyzing the various implications and applications of emerging quantum technologies and their impact on law, economics, sustainability, and society at large. There are/will shortly be published academic articles, several book chapters, and podcasts on this subject, with my colleague Dr. Joonas Keski-Rahkonen, a postdoctoral researcher in the Department of Physics at Harvard University, where we carefully discuss some of the commercial applications and implications of quantum to the legal arena. We also address and discuss transatlantic collaboration, international legislative framework, accelerated innovation process-

es, intellectual property rights dimension, as well as the dual-use character of these emerging technologies – just to name a few. Moreover, we have introduced a Quantum roadmap- Law, Economics, Sustainability, and Society - LESS is more! The Quantum Roadmap will guide legal professionals and public authorities through its 5 principles, to achieve a more sustainable and democratic approach within emerging technologies. Legal Design can contribute to the second quantum revolution as it can help in building a transparent, ethical, and inclusive quantum ecosystem through its user- and human-centric approach.

You’re also active in the educational field. What activities do you do?

Besides conducting academic research, I greatly enjoy giving expert lectures and training on various practice areas of Negotiation and Dispute Resolution, Contract and Commercial Law, Legal Design, and Law and technology. I also educate via speaking and organizing workshops at conferences and seminars across the USA, Europe, and LATAM.

I am currently teaching Negotiation and Organizational Dispute Resolution at Harvard. This is one of my favorite courses to teach as you get to work with students around the globe. I believe in holistic and experimental teaching approaches, and thus in my classes we conduct various case studies, role plays,

and simulations to learn and practice negotiation skills. I love hands-on exercises and I greatly enjoy seeing my students improving their interpersonal skills and self-reflecting their negotiation practice. It is always a valuable learning process for me too!

Some other courses and teaching topics that have lately gained growing interest are often within the intersection of law and technology. For instance, my recent course on Legal Design and Ethics in Commercial Contracting in Law and Economics Framework has been very well received by the audience and has been awarded for its high quality and peer-recommendation already several years in a row. For me this implies that there is room and need for further courses to be taught at law schools that comprise an interdisciplinary approach, ideally within the intersection of law and technology, incorporating innovation, economic analysis of law, and legal design.

As another example, my recent course on Quantum to Law has brought a lot of interest from legal professionals. They wish to better understand new technologies, especially the second quantum revolution, and what kind of implications and applications it will have on the legal profession and the legal field in general. The course approaches quantum technology through law, economics, sustainability, and societal lenses.

Moreover, a recent module within emerging

technologies is the European Commission Flagship Leadership Program on quantum technologies, where I discuss our Quantum roadmap- Law, Economics, Sustainability, and Society through its 5 principles. It is great to see that in the European Union area educating people on emerging technologies is regarded as highly valuable and that it is supported through international collaboration and the European Commission to create a flourishing quantum eco-system. It is crucial that inclusion and learning take place, and that information is made available for lay people.

With the increasing importance of areas like diversity, legal operations, AI, etc. there is an increase of professionals working in the legal market that don't have a background in Law. Purists will tell you that working and being successful in the legal sector a law degree is mandatory. What are your thoughts?

To succeed as a legal professional, it is no longer enough just to know the law - rather the competitive advantage of firms/professionals lies nowadays within human-centricity, by which I mean, that we should legally design our professional services in a way that they bring measurable added value to the end-user, and that the clients sees that their needs are being recognized and answered. Legal design can be the key to improving the quality of current practice. Thus, I see that all lawyers should get familiar

with this interdisciplinary and innovative way of approaching law and legal practice.

Just to underline, working and being successful in the legal sector does not require that one has a law degree. It can be beneficial to understand the legal framework but having a law degree is not a prerequisite for success. Again, we need to better understand the great added value that interdisciplinarity can provide for the legal market and practice. Often, we reflect and learn the most when we collaborate with people with different thoughts and lenses. Law or legal market is no exception here, thus we should stop making “lawyer” silos and rather welcome various professionals to provide their expertise to increase the quality of legal practice. I believe that interdisciplinary collaboration is the key here.

We see companies thriving due to professionalizing Legal Operations, but it looks like law firms, besides a handful of large/big law firms, stay behind. What do you think is the reason for the lower grade of acceptance amongst law firms?

I do recognize this phenomenon! I believe that some of the challenges concern understanding the purpose/object at hand, the user, and finally, the well-thought implementation. For instance, too much legal software is being sold without understanding the end user and their needs. Concepts, challenges, and needs are often not clear for the sellers

of the services and then, unfortunately, the clients get disappointed when they feel that technology did not solve their challenge. Frankly, technology does not solve all the challenges that we have. However, it can be beneficial and bring advantages if we know exactly what we are trying to solve or improve.

Do you see risks in this delayed acceptance leading to a slower rate of professionalization of their legal operation?

As innovation theories recognize, continuous innovation is a prerequisite for a successful and ongoing business. Innovative companies that can serve their clients with high quality, and in a more efficient and user-centric manner will get a competitive advantage before their Legal Operations practice becomes the new mainstream. On the other hand, you may wish to learn from existing best practices and see which of them fit your business operations – so that you would not duplicate some challenges that others might have faced before you.

I personally trust the path dependency process. Markets will work on themselves, and we should not interfere too much. I see competition as a good thing, as often a lack of it can form even further disruptions. It's been said that innovation is the key to success in entrepreneurship and that everyone wishing to make a profit needs to innovate to be successful. I believe that innovation is

often the welcomed prerequisite for change. Sometimes, surprisingly, a change can be more welcome than we could have initially thought of. I believe that the natural evolution of the market can bring good outcomes. Again, Legal Design can support and foster successful change in the legal market. Innovation and technology can be a fast train, and you don't want your law firm to be late for this party!

Is legal design a helpful 'tool' in understanding legal operations and implementing for instance legal tech and AI, and how?

Here as well, Legal Design can come in handy as it is based on the idea of human-centered design in solving and improving services, processes, and products. Legal Design fosters transparency, and I firmly believe that good communication is also the key here to diminish information and knowledge asymmetry between different parties, and to create value and bring efficiencies! Legal design helps to better understand the various stakeholders and their working environments in legal operations, and thus, it supports and fosters implementing, for instance, legal software(s) in a user-centric manner.

Do you think that Law Schools understand the need to change the traditional curriculum that is mainly based on the law practice to a curriculum that also has

an eye for the business side of law (e.g. legal operations, innovation, tech, diversity, etc.)?

My teaching approach is collaborative, compelling, and inclusive. Skills that future law graduates need to have in their academic toolbox are greatly different from past decades. Present-day law graduates could benefit, for instance, from having a wide understanding of the ideal traits of leadership, good governance, ethics and empathy, technology, and the systemic impact of various phenomena present in the world today. A more inclusive approach to learning could teach the students to question more, express themselves better, collaborate with professionals of different fields, and further improve their soft skills, like empathy. I believe these are some of the skills that may be needed in founding and supporting the world's most successful universities, companies, and society as a whole.

Technological, innovative, and interdisciplinary skills are also something that, in my view, have become gradually more important in working life. Technological tools and innovative approaches are steadily entering the legal field. We have seen new professions emerging inside the legal profession, many of which consist of employing technology and applying innovative practices such as legal design. You may find people, for instance, working in new positions on legal operations, being legal designers, or selling

legal tech to law firms. There is no doubt that the Legal Profession is in transition, and we should prepare lawyers for this change. I highly recommend current and future lawyers to have interdisciplinary studies on subjects such as design thinking, negotiation and dispute resolution, law and economics, legal design, cognitive sciences, and law & tech in their professional toolbox helping them to adjust and foster the transition of the legal field!

Business schools are important here too, since more interdisciplinary understanding is needed between fields and professions. It would be beneficial for lawyers to understand numbers and especially financial sheets to be able to understand the big picture and work for their clients' best interests. Last but not least, we need to also further bridge between the business of law and academia to answer the needs and demands of working life in transition. This could be done through law and business school curriculum development.

As Law Schools are the breeding ground for a lot of legal professions. Compared with other branches we see that a lot of legal professionals are change averse and we see a slow acceptance of tech & AI. Should we change the curriculum to fix this?

Changing the curriculum may take time, but the change is inevitable. The legal profession is transitioning, and we need to be able to

provide the best tools for current and future lawyers to serve their client's best interests with the best possible tools available. Law schools have the responsibility to offer students an opportunity to learn about these tools and how to employ them. We have quite a good understanding, for instance, of how through Legal Design and law & technology we can improve the quality in the legal field. Now we just need to support the change and collaborate for the future of law and the legal profession!

As a woman in the legal market, was it harder for you to climb the ladder and is there a difference between professional life and academic life? Do you have tips for women who are looking for a career in the legal sector?

Diversity is welcomed in the legal and law teaching profession. As a single mother of a child of elementary school age, I have personal experience with some of the challenges people might face when pursuing their career interests. My own legal and academic career might not have even been possible without the generous support of my society, dear and trusted mentors, and supporting peers. Thus, I have always wanted to give back to my community whenever I can. I am supporting pro bono lecturing, student mentoring, and community work. Teaching is my operative word. I have taught, for several years, in community schools and at supportive programs to

help hundreds of students hopefully succeed with their pre-examinations for law schools. I hope that my small contribution to teaching will support and foster equity, inclusion, and diversity among future law school students.

If you desire to launch a career in the legal business sector, then get yourself familiar with Legal Design and make it at the core of your business strategy. It will help you to understand your prospective end-users, find new prospective business segments, be innovative and value-creating, gain competitive advantage, and reduce transaction costs. Further, practicing Legal Design will signal to the market (and your customers) that you are transparent, trustful, and worthwhile to contract with! Reading the [General Theory of Legal Design](#) will get you started with Legal Design and can help you assess and mon-

itor important metrics. Learn from the interdisciplinary best practices and make them work for the benefit and advancement of your prospective business and career. As the legal profession is in transition, I would advise having legal design as your core strategy from the very beginning.

My advice for women who are looking for a career in legal or law teaching profession:

Reach out to a person you think you would like to learn from – ask for their mentorship. You can help others too – it is really rewarding! Create your network and a small circle of trustees who have your back! Finally, my favorite saying: trust yourself and go the extra mile- it’s never crowded!

We thank Katri for her excellent contribution and sharing it with our readers.



Partnership Opportunity

Eagles Vs Cowboys

December 10th, 2023

AT&T Stadium



VS



Gain access to the largest network of legal operations decision makers.




WELCOME ROBIN ZAVACKY PONCE



Legal Operators is thrilled to announce that Robin Zavacky Ponce has joined Legal Operators leading up our Events.

I encourage folks in the Legal Ops community to reach out and connect with Robin. She's as cool as you get!

Robin has been executing memorable events for over 8 years at well known tech giants such as Google, Facebook and Intuit. Detailed and social, she combines her love of bringing people together via events while also driving needs of the business for all parties. She loves a good dirty martini and strives to continue to learn from people different than herself.

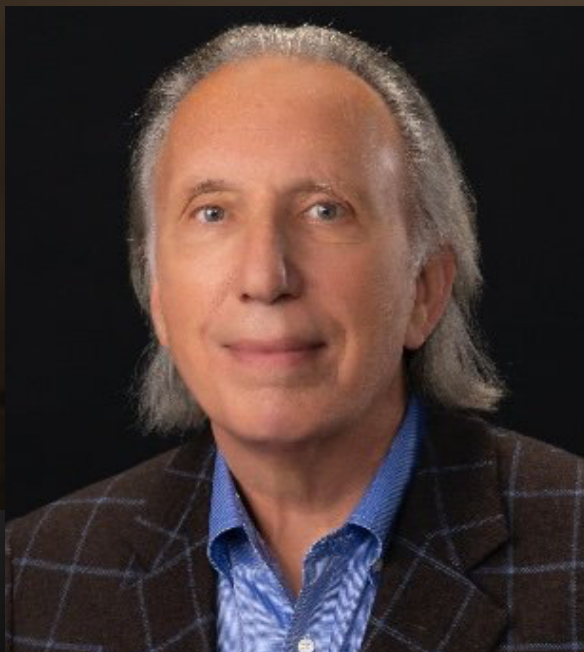
Welcome aboard Robin!

Looking forward to seeing many of you soon at our events in New York (16 November 16th), Dallas (December 10th) and San Fransisco (December 14th) and to introduce you to Robin.

Colin McCarthy

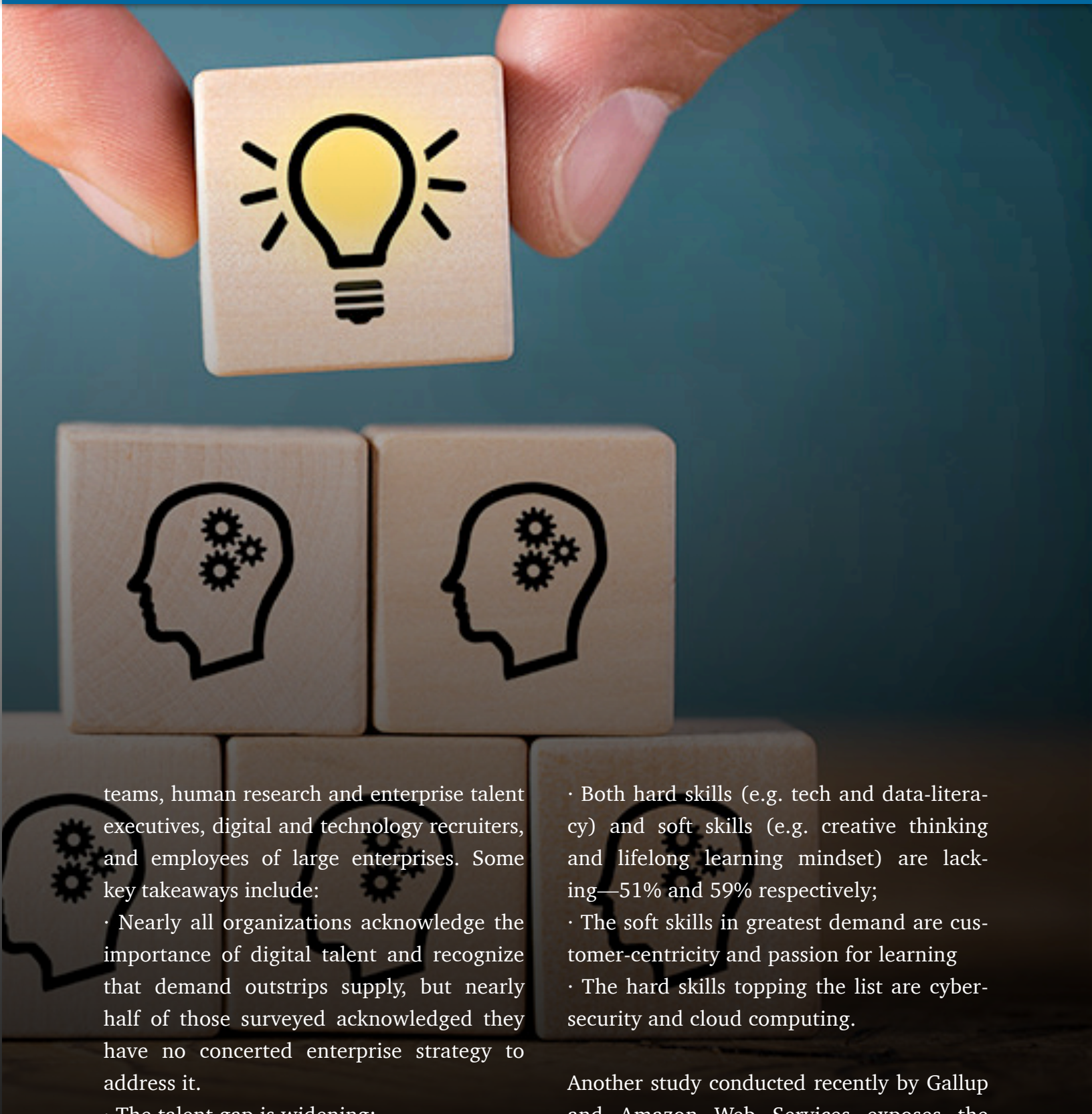
WHO WILL TRAIN DIGITAL (LEGAL) TALENT AT SCALE?

By Mark A. Cohen



The acceleration of change is straining human capacity to adapt. The implications are profound for individuals, families, business, societies, geopolitics, and the planet. How can humanity meet the challenges change poses and realize the opportunities it presents? The urgency of adaptation is already impacting the workforce, business and society.

Business is confronting an acute **digital talent** gap. A recent **global, cross-sector study** by Capgemini, in collaboration with LinkedIn, reveals the breadth, depth, and severity of the talent gap. The Capgemini findings are based on interviews of approximately 1,250 leadership



teams, human research and enterprise talent executives, digital and technology recruiters, and employees of large enterprises. Some key takeaways include:

- Nearly all organizations acknowledge the importance of digital talent and recognize that demand outstrips supply, but nearly half of those surveyed acknowledged they have no concerted enterprise strategy to address it.
- The talent gap is widening;
- The talent gap is no longer confined to HR; it is an enterprise challenge affecting all areas of business;

- Both hard skills (e.g. tech and data-literacy) and soft skills (e.g. creative thinking and lifelong learning mindset) are lacking—51% and 59% respectively;
- The soft skills in greatest demand are customer-centricity and passion for learning
- The hard skills topping the list are cybersecurity and cloud computing.

Another study conducted recently by Gallup and Amazon Web Services exposes the severity of the digital skills gap and the stakes for bridging it. For example, it found in the UK:

- Only 11% of the workforce possess digital skills
- 72% of UK businesses have vacancies for workers with digital skills
- 68% find it difficult to hire the digital workers they need
- Investment in advanced digital skills could raise the annual GDP in the UK by 67.8bn GBP

The digital skills gap is easier to detect and quantify than to resolve. *Who will train digital talent, and how can that process be accelerated and scaled?* This article examines the enterprise response to the challenge, then applies lessons learned to the legal function.

Business Is Transforming Its Strategic Talent Management Strategy To Stanch The Skills Gap

What *is* digital talent? The question is best considered from the marketplace perspective—what skills do employers across different sectors, geographies, and functions require? The World Economic Forum (WEF) recently released its [2023 Future of Jobs Report](#), listing the top 10 most important skills for today's workforce. The list includes: analytical thinking; creative thinking; resilience, flexibility, and agility; motivation and self-awareness; curiosity and lifelong learning; technological literacy; dependability and attention to detail; empathy and active listening; leadership and social influence; and quality control. These skills do not align with what is being taught at most schools

and higher educational institutions. Business—and the workforce—must rely on other sources for acquiring the technical and emotional intelligence skills required by digital business. That is why business is transforming its strategic talent management strategy.

Business is not putting all its chips on higher education to stanch the talent gap; it cannot sit on the sidelines until the legacy [higher education model is disrupted](#). Nor will cosmetic changes to legacy enterprise talent management programs suffice. Bold new approaches are required. That is why market leading companies across sectors are effecting proactive, data-backed, top-to-bottom transformation of their strategic talent management programs.

Higher educational institutions have grown and prospered by filling seats with the implied promise that a degree is a passport to marketplace advantage. That process has been fueled by HR leadership's degree funnel—diplomas were a proxy for competence, intelligence, and social skills.

The legacy higher educational model, fueled by readily available government and private loans, has produced a student loan crisis of epic proportions. The US figure is [\\$1.75 trillion](#). Crushing student debt, diluted degrees, a dearth of experiential learning, and grads lacking hard and soft skills are the byproducts of an anachronistic higher educational.

[Harvard Business School](#) and Accenture recently analyzed “middle-skill” jobs (e.g. some education or training beyond high school but not a four-year degree). They found no productivity change between college grads and those lacking a degree. The trend lines point to more on-demand skills based and experiential learning and fewer diplomas. In a world where creative thinking is more prized than memorization; experience eclipses doctrinal learning; a “we” mindset replaces a zero-sum, “you or me” one; and a learner-for-life more than an intellectually stagnant degree holder, business is taking steps to produce the talent it needs. The urgency to fill existing and prospective positions with digital talent and to upskill those already in the workforce are among the reasons why leading companies have boldly assessed and transformed their enterprise talent management strategies. Some key initiatives leading companies are undertaking include:

- Direct involvement by the C-Suite in the formulation of the enterprise talent strategy and lifecycle;
- A paradigmatic hiring shift from diplomas to skills;
- Increased investment in upskilling and career advancement to promote retention and to identify high-performers early on;
- Targeted collaboration with universities focused on training in areas of existing and projected talent supply demand/
- Promoting a learning-for-life mindset and encouraging creative thinking, cross-cultural

collaboration, and forging a culture that values these and other humanistic values.

- Collaborating with other companies to create joint solutions for fulfilling skill demand
- The talent issue has been elevated to a top C-Suite priority [PwC’s 18th Annual Global CEO Survey](#) found that 61% of CEOs identify retention of skills and talent as a key issue over the next five years.

The [ability to acquire and manage talent](#) is the second most cited critical capability for tomorrow’s CEO’s. McKinsey [analyzed](#) the results of 200 large-scale digital and AI transformations, concluding that “long-term success comes when the C-suite fundamentally changes their talent, operating model, technology and data capabilities.” This is true across industries, enterprises, and functions.

Talent management is no longer the sole province of HR departments; it is a pan-industry matter emanating from the C-Suite. Talent, purpose, and corporate culture are inextricably bound; the success of one depends upon the success of the enterprise developing the others. Business must create a culture that values teamwork, humanity, customer-centricity, ethical behavior, diversity united by common purpose, and a relentless desire to improve.

The degree filter for hiring talent is being replaced by a focus on skills. Companies are no longer dismissing a large pool of potential

talent because they lack a degree. A recent [Salesforce survey](#) found that among hiring leaders, 82% of those surveyed said that skills are the most important attribute when evaluating candidates. Only 18% said that relevant degrees more important.

This transformative hiring shift has many salutary effects for individuals and business. For individuals, it relieves them of the onerous economic burden of degree programs whose return-on-investment is highly uncertain and often marginal; accelerates their entry into the marketplace and extends their earning years; provides invaluable marketplace experience; focuses recruitment on skills that fill needs, not degrees that often do not, and provides upskilling/advancement opportunities.

For business, the focus on skills over degrees expands the talent pool, promotes a more organically diverse, equitable, and inclusive workforce; accelerates the process of filling enterprise needs; and creates a skills-based culture that encourages agility, constant learning, and collaboration.

New educational and training models are already scaling. Coursera and Udacity are two of a growing number of high-quality, online institutions offering vast catalogues of courses taught by leading academics and “pracademics.” Their technology-enabled platforms, on demand accessibility, practical training, and skills-based approach are

an antidote for the binary “go to school or go to work” legacy university model.

Companies are also doubling down on efforts to [up-skill](#) their existing workforce and to provide career advancement opportunities. This is neither an easy, fast, or universally successful undertaking. Too often, many in the workforce say they are “too busy with work” to invest time in learning programs. This is a mistake in the short and long-term. Upskilling may not be job insurance, but it enhances marketability and broadens career options. Companies can only provide the opportunity to upskill; individuals must seize it. As Richard Branson said, *“Train people well enough so they can leave, treat them well enough, so they don't want to.”*

In addition to launching internal upskilling and career advancement programs, business is also tapping into programs being launched by tech giants. Those programs have initially focused on Microsoft [recently announced](#) a new AI training initiative aimed at expanding access to AI skills through free coursework. Developed in partnership with the by Microsoft-owned LinkedIn organization, the coursework will be offered through LinkedIn’s training platform. The coursework will cover introductory concepts of AI and responsible AI frameworks. Following completion of the course, participants will receive a Career Essentials certificate.

Microsoft's initiative comes on the heels of the explosive growth of interest—and mounting anxiety—spawned by the November 30, 2022 public release of Chat GPT. Since then, generative AI has dominated front pages as well as tech columns. The “coming out” of generative AI and the ambivalent response it has drawn is emblematic of the parodical nature of digital age. The fever pitch of interest and enthusiasm has been mixed with deep concern among leading AI experts of existential threat(s) that AI could trigger. Bill Gates and Open AI CEO Sam Altman are among a group of vaunted interdisciplinary signatories of a 22-word [statement admonishing](#) that “mitigating the risk of extinction from AI should be a global priority alongside other societal-scale risks such as pandemics and nuclear war.”

Another paradox of the digital age is that as reliance on technology increases, so too has humanity (soft skills) taken on heightened importance. Empathy, collaboration, curiosity, and passion are among the core attributes that separate humans from machines. They are increasingly valued at a time when change has accelerated; the path forward is less certain; and challenges are complex.

Collaboration between and among companies to support common needs—coupled with a marked expansion of strategic partnerships—is another antidote to the skills gap. Google recently launched a [Career Certificate program in cybersecurity](#) in response to a critical shortage of skilled talent. The

program can be completed in less than six months, with no prior experience required. Upon completion, graduates can connect directly with companies that hire cybersecurity professionals, through a consortium of more than 150 employers including American Express, Colgate Palmolive, Mandiant (part of Google Cloud), T-Mobile, Walmart, and Google. At the time of this writing, more than 150,000 have registered for the course. The foregoing are some of the ways business is taking on the digital skills gap. This is a helpful roadmap for the legal industry to follow. One might fairly question the urgency the legal function attaches to its skills gap. Of greater importance is whether the C-Suite, big tech, and GC's recognize the existence and implications of law's skills gap. There is mounting evidence that they do, and that will accelerate transformation to a new legal training paradigm.

Who Will Train Digital Legal Talent?

Law's digital skills gap is not new; the author initially examined the problem in a [2017 Forbes article](#), concluding [law schools are not the answer](#). Fresh approaches are required to align the legal function with business and the wider society. [Digital legal talent](#) will come from more result-driven, tech-enabled, data-backed, collaborative, multidisciplinary approaches to education, training, and career development, not from the legacy model.

The legal digital skills gap is not simply an

internal functional challenge. It negatively impacts business, clients/ customers, and society. Much is riding on the development of digital legal talent; the legal function can drive far more value to the enterprise than it presently does. For example, it can [facilitate commerce](#) not impede it; combine legal training with data analytics to transform the litigation function to “early risk detection, remediation, mitigation, and resolution;” and contribute to enterprise risk assessment, government relations, revenue creation, regulatory and compliance, among a host of other things.

The latent potential of a digital legal function extends beyond business. It has the opportunity to drastically reduce the access to justice crisis by building on the pioneering work of “retail” legal companies like LegalZoom and Rocket Lawyer. This will have important social and societal consequences, both of which have been largely overlooked by the corporate segment of the legal industry.

The question remains: who will train digital legal talent?

During the past few years, an alphabet soup of legal training programs has been spawned—T, L, and O-shaped lawyers among them. Each offers a list of supplemental skills for contemporary lawyers—a helpful start. What is missing, however, is *how to train them at*

scale, how to apply training to real-life problem solving, and convincing the profession at large—notably law firms and corporate legal departments—that digital training is every bit as pressing as the demands of everyday work. Legal “bootcamps” and executive training programs, likewise are not scalable solutions to the digital skills gap process.

Richard Susskind, the legal Nostradamus, recently published the Third Edition of “[Tomorrow’s Lawyers](#).” Susskind graphically and concisely lays out a legal delivery and career trajectory that is markedly different from the legacy norms. He enumerates a list of new legal roles (e.g. legal design, data analytics, technology roles, etc.). Reverse-engineering these and other roles would provide a helpful starting point for upskilling today’s lawyers to become tomorrow’s. Imagine if, as Susskind suggests, every corporate legal department and law firm directed their workforce to learn a new skill every six months and set aside time for that process? That would be a start, not only in skill-building but also developing a learning-for-life mindset.

The Digital Legal Exchange (www.dlex.org), is a unique, global not-for-profit formed in 2017 focused on enterprise digital transformation, especially as it relates to the legal function.

The Exchange is comprised of senior legal

and business leadership of approximately 50 global leading member companies. A faculty of thought leaders and market movers from business, law, technology, government, regulators and educators collaborate with members in a variety of ways. The list includes: focused discussions on digital transformation-related issues; creation of proprietary member content as well as materials for general distribution; sharing member digital challenges and experiences in a safe environment to forge solutions; and tackling the legal digital skills gap. This involves digital benchmarking, creating best practices, and building a collaborative community that shares lessons learned from their digital journeys. Talent has emerged as a focus of the Exchange because of the universal challenge it poses to members.

The Exchange advances a multidisciplinary, holistic, data-backed, tech-enabled, approach to enterprise problem, elevating the role of the legal function. Its Faculty Advisors, 35 global thought leaders and doers with deep expertise in different, interrelated facets of digital transformation, are a “Dream Team” for scalable digital legal training and career development. Strategic partnerships with e-education, multidisciplinary consulting companies, and tech Goliaths have the potential to accelerate, scale, and integrate the training process with real-time problem solving.

This is a blueprint for future digital legal

training as well as the accelerated integration of law with business, technology, and the future of training and career development.

Goliath tech companies are already expanding their footprint in the legal industry. For example, Thompson Reuters partnered with Microsoft to support contract drafting. Soon, in-house counsel can use generative AI-powered Microsoft 365 Copilot to draft contracts. As the attorney works on the agreement in Copilot’s version of Microsoft Word, the suite of Thomson Reuters legal tools can be enlisted for assistance. This is one example of how Thomson Reuters is applying generative AI to assist in legal work. The company has since announced plans to incorporate generative AI across its entire suite of legal tech products.

Unsurprisingly, many in the legal establishment are taking a “Curb Your Enthusiasm” approach to AI application to legal. A recent Southern District of New York case involving a lawyer who filed a motion replete with bogus case citations provided by ChatGPT made headlines. It has become a cudgel wielded by many firms against AI. This parallels the knee-jerk defensive opposition of legal academics to AI, citing the potential for plagiarism, not AI’s immense value as a learning tool. Fear mongering and stasis remain the tools of many in the legal establishment. That is why legal disruption will come from business.

Conclusion

As AI and other technological advances improve at an ever-accelerating rate and become more embedded in legal practice, two seminal questions emerge: (1) where does specialized expertise live if the legal thought process is performed by a computer “co-pilot?;” and (2) if legal training relies too heavily on AI to guide critical thinking, how do they learn the critical thought process required for excellence as a lawyer?

AI raises a host of other ethical, economic, and philosophical questions not only for law but also for [other professions](#). Erik Brynjolfsson, an eminent Stanford economist focused on the effects of information technologies on business strategy and digital commerce, recently published [article](#) on the promise and perils of human-like AI. He describes two different types of AI: augmentation and automation. Augmentation collaborates with humans to perform tasks and democratizes the process; automation replaces humans and places tremendous power in the hands of the creators. This divergence has profound political, economic, and human consequences.

The legal function should have a strong voice in this discussion. To do so, it must first possess digital agility.

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. Follow Mark on [Twitter](#) or [LinkedIn](#), or visit his [website](#) Legal Mosaic.

All Articles by Mark A. Cohen are also published at Forbes

**10TH
DECEMBER**

12PM CDT - 3:30PM CDT



**LEGAL
OPERATORS**

LEGAL ROUNDTABLE EVENT

Tackling AI & LEGAL TRANSFORMATION

LIVE! BY LOEWS - ARLINGTON, TX

1600 E RANDOL MILL ROAD, ARLINGTON, TX, 76011, US

★★★★★ FOLLOWED BY ★★★★★

EAGLES VS DALLAS COWBOYS

**@ AT&T STADIUM
PRIVATE SUITE**

4PM TO LATE



**CONTACT COLIN@LEGALOPERATORS.COM
IF YOU'RE INTERESTED IN ATTENDING**

THE AI ACT IS COMING – WHAT'S IN STORE?

By Arnoud Engelfriet



The widespread and fast adoption of AI has prompted serious concerns. From algorithmic bias to erosion of personal autonomy, AI technologies have had unintended consequences that impact the lives of people across the globe. Such risks have stirred public and policy debates, leading to an increasingly urgent call for effective regulation. The European drive to regulate AI was sparked by these ethical concerns, although it is also part of a broader approach, called the Digital Decade 2030.

Act

A stylized map of Europe is centered on a dark blue background. The map is rendered in a lighter blue color. Several large, yellow, five-pointed stars are scattered across the background, some overlapping the map. The word "Act" is written in a large, bold, yellow font on the left side of the page, with the "A" being particularly large and partially cut off by the edge of the page.

The call for ethics in AI

There is a growing realization that the impact of AI goes beyond technological efficiency and enters the realm of human rights, societal values, and fundamental ethical considerations. The last five years in particular have prompted an increasing public and academic dialogue on the need for ethical frameworks that ensure these technologies are designed and deployed responsibly. This wave of attention, while partly driven by academic interest and foresight, has been propelled into mainstream discussion by several high-profile incidents

that have exposed the darker side of AI, notably the 2018 Facebook/Cambridge Analytica scandal.

The ‘techlash’ that was the result of these and more incidents set in a period of increased attention to ‘honest’ or ‘ethical’ AI. Initially, the main effect was to produce codes of ethics, that made large promises of fairness and transparency (“virtue signaling”) but did little to change the actual products or services. As already known from the field of business ethics, changing a company’s behavior requires more than ethical

statements: “[w]hen ethical ideals are at odds with a company’s bottom line, they are met with resistance”. Hence the logical next step – calls for legislation.

The EU first signaled its intentions to regulate AI in a Commission strategy document in April 2018. The three aims of the strategy were to boost the EU's technological and industrial capacity and AI uptake, encouraging the modernization of education and training and ensuring an appropriate ethical and legal framework, based on the Union's values and in line with the Charter of Fundamental Rights of the EU. The work resulted in an ethical framework regarding “Trustworthy AI”, the key term underlying all AI regulatory efforts in the EU. These Ethics Guidelines for Trustworthy AI systematically analyze ethical concerns in AI and propose a concrete framework for addressing them. The framework consists of three components:

1. AI should be lawful, complying with all applicable laws and regulations;
2. AI should be ethical, ensuring adherence to ethical principles and values; and
3. AI should be robust, both from a technical and social perspective, since, even with good intentions, AI systems can cause unintentional harm.

The AI Act seeks to regulate AI from the perspective of enforcing each of these components, and does so from a risk-based per-

spective. Its provisions do not merely ban or restrict certain actions, but tie compliance requirements to risk management or ban activities that present specific risks to human beings.

For implementors of AI, the Guidelines translate these principles into seven concrete requirements:

1. Human agency and oversight, including fundamental rights, human agency and human oversight.
2. Technical robustness and safety, including resilience to attack and security, fall back plan and general safety, accuracy, reliability and reproducibility.
3. Privacy and data governance, including respect for privacy, quality and integrity of data, and access to data.
4. Transparency, including traceability, explainability and communication.
5. Diversity, non-discrimination and fairness, including the avoidance of unfair bias, accessibility and universal design, and stakeholder participation.
6. Societal and environmental wellbeing, including sustainability and environmental friendliness, social impact, society and democracy.
7. Accountability, including auditability, minimisation and reporting of negative impact, trade-offs and redress.

Autonomy as a definitional key

While these ethical guidelines give a clear indication of which aspects of AI are to be

regulated and to what end, a key issue is missing – what exactly is Artificial Intelligence? The leading handbook *AI: A Modern Approach* alone presents eight different definitions of AI organized into four categories: thinking humanly, acting humanly, thinking rationally, and acting rationally.

In their 2018 Communication that kicked off the process that would ultimately produce the AI Act, the European Commission gave a loose definition of AI: “Artificial intelligence (AI) refers to systems that display intelligent behaviour by analysing their environment and taking actions – with some degree of autonomy – to achieve specific goals.” While this definition still uses the problematic term ‘intelligence’, it did provide a hint for a new approach to define AI: autonomy. The AI Act is poised to adopt the 2019 OECD definition of “a machine-based system that is designed to operate with varying levels of autonomy and that can, for explicit or implicit objectives, generate outputs such as predictions, recommendations, or decisions that influence physical or virtual environments”.

The given justification is to align with international developments and to provide a definition that is flexible enough to accommodate the rapid technological developments in this field. Its choice for autonomy as key criterion underlines the risk-based approach of the AI Act: generally speaking, it is precisely because AI systems

can operate autonomously that many of the associated risks occur. It is true that this definition captures many algorithm-driven systems that would not directly be called “AI” in their marketing literature. However, given the risk-management nature of the AI Act this outcome is unavoidable.

Three levels of risk

The AI Act seeks to regulate AI from a risk-based perspective. The term ‘risk’ here refers to risks to humanity: health, safety, fundamental rights, democracy and rule of law and the environment. AI systems thus cannot be considered in isolation but must be evaluated after identifying potential risks to any of these aspects.

In broad terms, the AI Act divides AI systems into three categories:

1. Unacceptable risk AI. This type of AI threatens basic human values or dignity to such an extent that it simply may not be put on the European market. Next to subliminal manipulation and social credit systems, real-time biometric monitoring is a prominent example.
2. High risk AI. This category of AI poses significant risks, but its benefits may outweigh those of sufficient precautions are taken. The bulk of the compliance work under the AI Act relates to this type of AI system.
3. Low risk AI. An AI system that does not meet the high-risk category is deemed “low risk” and only faces minimal

requirements such as transparency regarding its status as an AI and not being allowed to make decisions on human behavior or actions.

There is also a “regulatory sandbox”, the purpose of which is to foster AI innovation by establishing a controlled experimentation and testing environment in the development and pre-marketing phase with a view to ensuring compliance of the innovative AI systems with the AI Act and other legislation. Participation by human subjects should only be possible with specific informed consent.

Some of the biggest debates surrounding the AI Act focused on which AI system should be classified where. The approach chosen is to recite all unacceptable risk AI practices in the AI Act itself, to provide maximum clarity and a clear barrier to changes: this would require a new version of the Act. High risk AI is defined in a two-step approach: an annex lists certain “critical areas and use cases”, and the Act deems an AI practice “high risk” if a use or area “poses a significant risk of harm to the health, safety or fundamental rights of natural persons”.

Examples of high-risk areas include employment, access to essential services, law enforcement and the administration of justice. An AI system in any of these areas thus must be checked for specific risks it may cause: a job applicant screening algorithm may be biased against certain ethnic groups,

access to services may be harder for the poor or may unfairly threaten the environment, and so on. If such a risk is identified, the AI system is high risk and faces a mountain of compliance items. However if the risk can be minimized (or is not present to begin with), the AI system would not be high risk even if it operates in a high risk area. There is some debate still on the burden of proof: may an AI provider simply self-certify that no risks are present, would an impact assessment or other formal analysis be required or would prior involvement of a supervisory authority be necessary?

Geographical application

The AI Act is a European law, but there is a peculiarity with such legislation: the Brussels effect. As one of the largest and most integrated economies in the world, the EU's stringent regulations often set the standard for global norms. An early example is the 2007 REACH Regulation (Registration, Evaluation, Authorization, and Restriction of Chemicals): chemical companies must identify and manage the risks linked to the substances they manufacture and market in the EU. Its influence has extended beyond EU borders, leading chemical companies worldwide to adopt similar practices to ensure market access in the EU. The 2016 General Data Protection Regulation (GDPR) is also widely cited as exhibiting a similar effect in other countries.

The AI Act clearly follows the lead of the

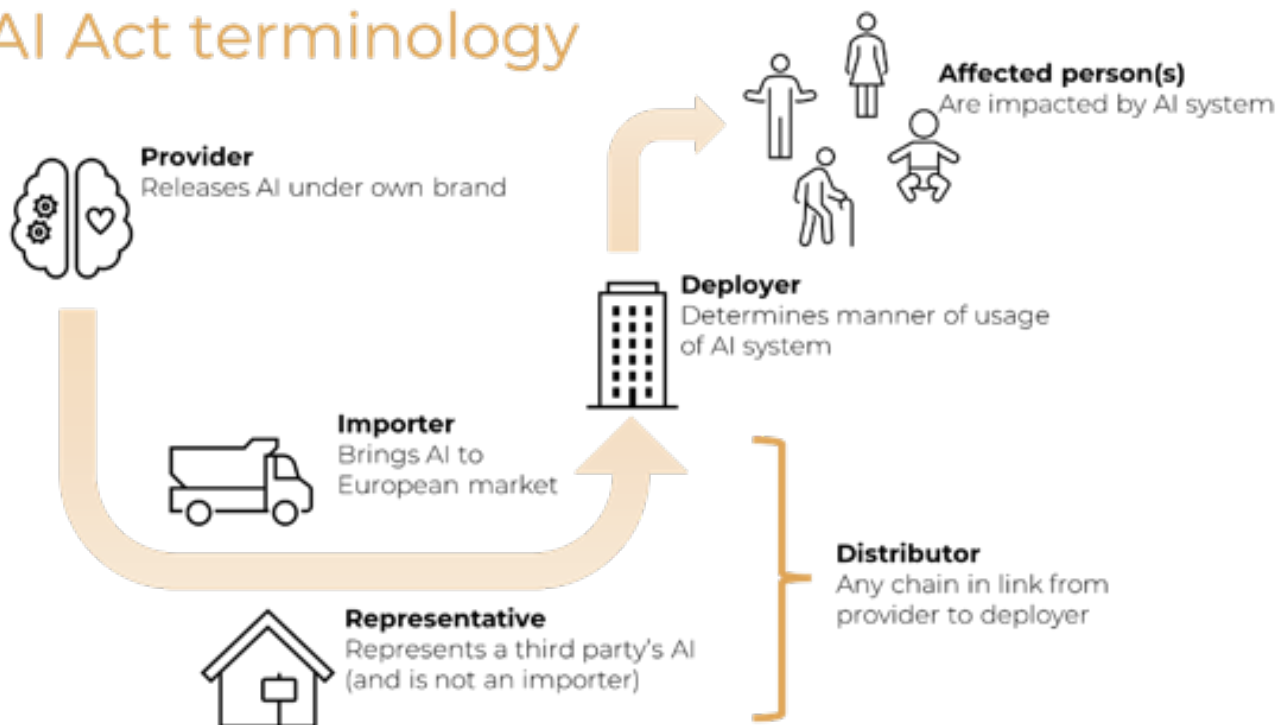
GDPR in setting a worldwide scope. The schematic below illustrates the key terminology of the AI Act. A provider of AI systems creates and/or releases an AI under its own brand, and a deployer brings this system to the market. (These can be one and the same entity, of course). A deployer may need an importer or other distributors to get the AI system to its market. Finally, the use of an AI system may impact certain affected persons who may or may not be aware of the AI system's very existence.

Under the AI Act, any provider established in the European Union is subject to its regulations. The same applies to a deployer, as well as to importers and distributors who first introduce the AI system into the European market (e.g. Google's Play Store or

the Apple App Store). These are the clear-cut cases. More controversial is the case where the deployer is outside the EU and the AI system's output is "is intended to be used in the Union". This may apply to a European firm outsourcing certain work to a third party outside the EU, with the third party employing an AI to do the work.

A remote surveillance or analytics operation would also fall under this provision. The third party doing so would be required to appoint a representative in the EU, who would be legally liable for any failures to comply with the law by the non-EU provider and/or deployer. (This mechanism was borrowed directly from the GDPR.) If no representative is appointed, any use of the AI system is banned in the EU.

AI Act terminology



Compliance work

If and when an AI system is deemed to be high risk, its introduction on the European market is subject to stringent requirements. These are aimed at reducing the risk, e.g. through formal assessments of any bias and documented steps taken to explicitly balance output. Data management and risk management processes must be put in place and personnel must be trained to diligently work with AI systems, rather than blindly accepting their output. Full transparency of the system's design (in terms of data provenance and algorithm operation) is required, as is the use of the highest standards in cybersecurity and robustness. A quality management system serves as a backstop and stimulates constant improvement and error correction. Full documentation and information should be available to both supervisory authorities and affected persons.

Readers may be familiar with the old CE logo; “Conformité Européenne” is a 1992 EU standard for certification that a system meets European regulatory standards. The AI Act will elevate that standard: an AI system may only be brought on the market if it has the CE logo, and to be allowed to do that, full documentation must prove a proper assessment of all risks has been made, with steps to reduce impact and processes to maintain quality.

The CE logo also triggers a different aspect of EU law: a product that carries defects

despite its bearing of the logo is considered noncompliant and its producer subject to civil claims for damages from purchasers. The burden of proof is reversed: if the purchaser can establish a reasonable link between damage and the apparent defect, the producer must show convincingly that no such link is in fact present. Otherwise, the producer will have to pay for the damages in full – and no small print or terms of service can prevent that. Combine this with the rising trend of mass tort claims in European countries and you understand why AI providers are getting worried.

Worries exist all the more because of the planned system of supervisory authorities, with powers to impose fines up to 10 million Euros for compliance violations and up to 40 million Euros for releasing unauthorized high-risk or prohibited AI systems onto the European market. Additional powers have not been settled yet but are likely to include a ban on further use of the AI system or even the destruction of the underlying dataset.

Moving forward in the age of the AI Act

The AI Act is a wake-up call for businesses, developers, and stakeholders to prioritize ethical considerations, human rights, and societal values in their AI endeavors. The Act's risk-based approach, with its clear categorization of AI systems, underscores the EU's commitment to ensuring that AI serves humanity responsibly and safely.

The message is clear: passive observation is no longer an option. The challenges posed by the AI Act are manifold, from ensuring compliance with its stringent requirements to navigating the potential legal and financial repercussions of non-compliance. Yet, these challenges also present an opportunity. By actively working towards compliance, organizations can not only mitigate risks but also position themselves as leaders in the responsible development and deployment of AI. The time to act is now. Embrace the AI Act's principles, invest in ethical AI practices, and lead your organization into a

future where AI is not just technologically advanced but also ethically sound.

About the Author

Arnoud Engelfriet is director and Chief Knowledge Officer of ICTRecht Legal Services in Amsterdam, the Netherlands. He is the author of the upcoming book “AI and Algorithms: Mastering Legal & Ethical Compliance”, from which the above text is an edited pre-publication. The book will appear in January 2024 and can be pre-ordered through: MasteringAIcompliance.com



The book is also key study material for our [CAICO-certified course to become AI Compliance Officer](#)

COMING SOON

WRITTEN FOR LEGAL PROFESSIONALS, COMPLIANCE OFFICERS AND AI PRODUCT MANAGERS, THIS BOOK PROVIDES THE KEYS TO UNDERSTANDING THE EVOLVING LANDSCAPE OF AI LAW, PRESENTING CLEAR, ACTIONABLE INSIGHTS ON HOW TO APPLY LEGAL RULES AND ETHICAL GUIDELINES IN AI DESIGN, DEPLOYMENT, AND OVERSIGHT


HOW TO APPROACH “FULL” PROCESS ADOPTION IN LEGAL OPS WITH NO-CODE WORKFLOW AUTOMATION & AI

Leveraging new technologies to improve process adoption, increase capacity, and help Legal better serve the business

By Sagi Eliyahu



Picture two distinct and well-intentioned legal operations teams. One succeeds, consistently and at scale, in lowering risk and ensuring compliance. It leverages legal technology of all kinds—from CLM and e-billing systems to AI-powered workflow automation—both to increase its own capacity as well as to create seamless process experiences for employees. It markets and sells itself effectively as a partner both to Legal and to the business. It measures impact. And as a result, it succeeds in helping Legal better serve the business—as it creates meaningful, regular business value for the organization.



That other legal ops team? It tends to spend all its time putting out fires, chasing follow-ups, and manually compensating for its processes' functional limitations. It doesn't think strategically about what it hopes to get out of the monolith technologies it invests in, how to measure impact, or where those technologies fit into their process experiences. (Does it really make sense to implement and force people to use a CLM without understanding what kinds of requests are coming in?) In this way, it perpetuates Legal's reputation as an

inhibitor of innovation, as opposed to an incubator of it. It provides less strategic support to Legal and less business value to the organization.

The core role of legal operations teams is enabling the legal team to serve the rest of the business better. But how can it do this? As is true of any other operations team, it all boils down to process. Or, more importantly, whether the people within the team and throughout the rest of the organization are following the process. Efficiency, innovation,

compliance—all hinge on getting employees to follow your processes as they're designed.

The problem is, generally, employees don't follow legal processes as they're designed, if at all. By some estimates at least two-thirds of employees admit to routinely skipping legal policies and procedures—and that's just the percentage of employees willing to admit to their rogue behavior; the actual number could be much higher.

If you hope to elevate either the importance or capacity of the legal operations team within your organization—if you aspire to do the work that organizations very much need modern legal operations teams to be able to do—your first step must be aimed at reversing this trend.

The problem of low process adoption within legal

In legal, low process adoption creates all kinds of damaging downstream effects:

- Stifling manual work. When people don't follow legal processes, it burdens legal ops teams with lots of taxing manual work, such as personally following up with employees, manually updating data systems, etc.—to the point that 76% of legal teams find it challenging to manage workloads, according to Ernst and Young.
- Increased risk; diminished capacity; decreased confidence. When legal ops teams are spending all their time putting out fires

and jumping haphazardly from task-to-task, it compromises both their ability and the ability of lawyers internally to focus on more mission-critical work. It jeopardizes efforts to mitigate risk and in fact actively creates risk. Less than 5% of general counsels say they are “very confident” in their ability to manage complex legal risks. (Ernst and Young.)

- Negative impacts on the rest of the business. The downstream effects aren't limited to legal. A full 50% of sales leaders say legal process obstacles have resulted in lost business. (Onit.)

For as evidently damaging as all this seems, one obvious question is: Why does this problem persist? One answer: Many legal ops teams think fundamentally cumbersome processes something of a necessary evil. This stems from a particular mindset that legal operations teams have long brought to this task of designing and delivering internal processes.

Let's call it the “compliance mindset.”

The compliance mindset prioritizes auditability over experience, playing it safe over providing new value. It compels legal operators to:

- Pack their processes with laundry lists of static, undifferentiated manual steps, and then put the onus of figuring out how exactly to follow those steps completely on employees.



The “compliance mindset” and its pitfalls

As legal operations matures, innovators are putting experience first

Compliance mindset Process first	Experience mindset People first
Lots of documentation	Guided, intuitive UX
Single point of intake	Omni-channel intake
Best point solutions	Orchestrate people, processes, and data
Fearing AI	Embracing AI

- Funnel requesters into rigid, single-source intake portals and huge complicated legal systems—meaning, often, for employees to correctly do things like submit new intake requests, they have to learn how to navigate a new UI and remember to go there anytime they want to submit a new request (which requires more change management).
- Generally avoid innovative technologies—which threaten, in theory, to compromise compliance efforts.

All this results in processes that require employees to manually fill out multiple forms and copy/paste data stored in several different systems just to provide legal teams with the information they need to eventually complete their request. They lack visibility into the status of the requested action—and generally frustrate everyone who has to engage with them.

Over time, such processes serve to do far more than simply foist manual work onto the laps of legal teams. They kick off what we call the “adoption death spiral,” which begins when employees stop following legal processes altogether. When this happens, legal operations teams stop updating the process, because why bother? The process deteriorates further, becoming more

unusable and frustrating, with longer wait times and less responsiveness.

At which point, legal ops teams find themselves spending all their time and burning all their energy doing manual, compensatory work.

There is, however, another way.

The potential of prioritizing process experience

The way out of the “adoption death spiral” is embracing an “experience mindset.” What is an “experience mindset”? At a base level, it’s a reimagining—made possible, in part, by newly [powerful legal technologies](#)—of what legal processes are fundamentally for. It stipulates that to get people to follow your processes, you need to improve the experience of engaging with them. The goal is not merely to maintain compliance—and to force people to adapt their behavior in the

process—but to maintain compliance by incentivizing engagement. To do that, you focus on improving the experience.

[ered intake experience](#) that employees interact with using plain language and that can automatically resolve simple requests, such as FAQs, or even requests for new document generation, depending on what data sources you've given the AI access to on your back-end.)



The “experience mindset” and its benefits

As legal operations matures, innovators are putting experience first

Compliance mindset Process first	Experience mindset People first
Lots of documentation	Guided, intuitive UX
Single point of intake	Omni-channel intake
Best point solutions	Orchestrate people, processes, and data
Fearing AI	Embracing AI

The benefits of these kinds of processes are clear. Consider a legal process that employees can not only initiate from anywhere, but that understands their needs in real-time, dynamically adapts to those needs, and introduces to those employees only what next steps, information, and questions they actually need to take, access, or answer in the moment, in accordance with the nature of their initial request. Processes that can do this sort of thing provide obvious value, and not only to legal, but for employees.

The “experience mindset” inspires legal ops teams to create processes that are:

- Guided (meaning automated, and with compliance built in), intuitive, abstracted, and simple; anybody should be able to follow them, even without training.
- Application-agnostic, holistically connected, and able to accommodate employees' unique needs, preferences, and contexts.. (For example, intake processes that employees can kick off from inside Slack, Teams, or email.)
- Capable of resolving employees' problems and answering their questions rapidly—while providing transparency into the status of requests that require intervention from a lawyer. (For example, an [AI-pow-](#)

information, and questions they actually need to take, access, or answer in the moment, in accordance with the nature of their initial request. Processes that can do this sort of thing provide obvious value, and not only to legal, but for employees.

Which is why, if pressed, every legal ops professional would tell you that these are the sort of processes they'd deploy, if they could. But, for a long time, many of those same legal ops professionals would have quickly told you that the technological rigor required of such powerful processes makes managing them impossible—at least not without significant IT support.

For a time, this might have been true. But it's not anymore.

The role of no-code workflow automation and AI

Recall the last time you purchased anything on Amazon, or browsed for a new playlist on Spotify. The experience was very likely guided, intuitive, and as economical as possible.

Such experience-driven processes are the norm for consumer-facing processes. It's entirely feasible to create internal processes that feel the same way.

Even without the involvement of IT, legal operations teams have at their disposal everything they need to design, deploy, and iterate upon precisely these kinds of internal process experiences.

This is due, in large part, to recent advancements in [no-code workflow automation and AI](#).

Customization and control with no-code

Historically, in order to create processes that allow employees to kick off intake sequences from Slack, Teams, or email, or that otherwise connect siloed technology systems—even simply to manage automation tools in a very basic sense—legal ops teams needed the help of trained developers and IT.

No-code interfaces and process builders, however, empower legal operations teams to customize and automate business logic by themselves.

Admittedly, an investment in learning how to customize that business logic remains necessary. But the newest tools in the legal space have made huge leaps in simplifying this process, allowing these no-code tools to connect with and wrap around your organization's existing systems, empowering legal ops to easily configure and deploy automations that optimize matter management end-to-end.

For example, with [Tonkean's LegalWorks platform](#)—an AI-powered no-code process orchestration and workflow automation platform for legal ops teams—you can create workflows that:

- Intake and triage legal matter requests from all manner of intake channels

- Automatically handle escalation and exception flow in accordance with whatever business logic you set up

- Enforce compliance in accordance with your policies every step of the way, depending on the governance structures and conditions you build into the workflows on the back-end.

Tonkean connects with and wraps around the entirety of your organization's operational infrastructure, including legal's many different policies, data systems, and tools. This allows legal ops teams to build and deploy processes that can meet employees in

whatever tools and environments they already spend time in—all without having to rely on IT. Connect to the controls you already have. Meet employees where they are.

Think of it like a truly modern, newly dexterous ELM, capable of providing a more intelligent and automatable form of knowledge and matter lifecycle management.

More generally, no-code interfaces give legal ops teams the ability to operate in a truly agile fashion. They extend to legal ops the ability to deliver solutions and fix problems in an iterative, incremental, and adaptive way. They provide the ability to deploy, at the end of each iterative segment of the cycle, a version of the solution you're working on, implement feedback, and then repeat that process over and over until you have the most effective, elegant version of the solution possible.

Rapid resolution with safe implementation of AI

Of course, to provide personalized and valuable process experiences, you need more than just increased control over process design. You need more, even, than just the ability to more holistically connect with and utilize your organization's policies, data, and tech. You also need the ability to deliver rapid resolution—to proactively anticipate your employees' needs, immediately answer frequently asked questions, and automatically generate bespoke documents. At least, if

you want to create process experiences that are not only convenient, but that create new, innovative value, that's what you need.

And that's where AI comes in.

Within legal, there's a lot of trepidation about investing in AI. The concern is mostly rooted in liability, and it's entirely valid. Large Language Models (LLM) like GPT are safe to use for legal processes—if you use them correctly, apply them to the right tasks, and ensure that any necessary guardrails are in place. This is to protect data privacy and security, client confidentiality, accuracy in automation, auditability, and [risk reduction](#).

Legal professionals are right to be wary of relying on ChatGPT to dispense legal advice. First of all, the liability for a company that allows an LLM to give out advice of that nature is sky-high, and one of the core tasks of legal professionals inside of organizations is to reduce risk. In that sense, using an LLM in this way is antithetical to their mission. And even if an LLM like ChatGPT returns what appears to be solid legal advice, you have to validate that result with an attorney to be safe anyway, which mostly defeats the purpose of using it in the first place.

Leveraging AI in such a way belies a misunderstanding about how AI works and what's truly most exciting about it, at least in legal ops.

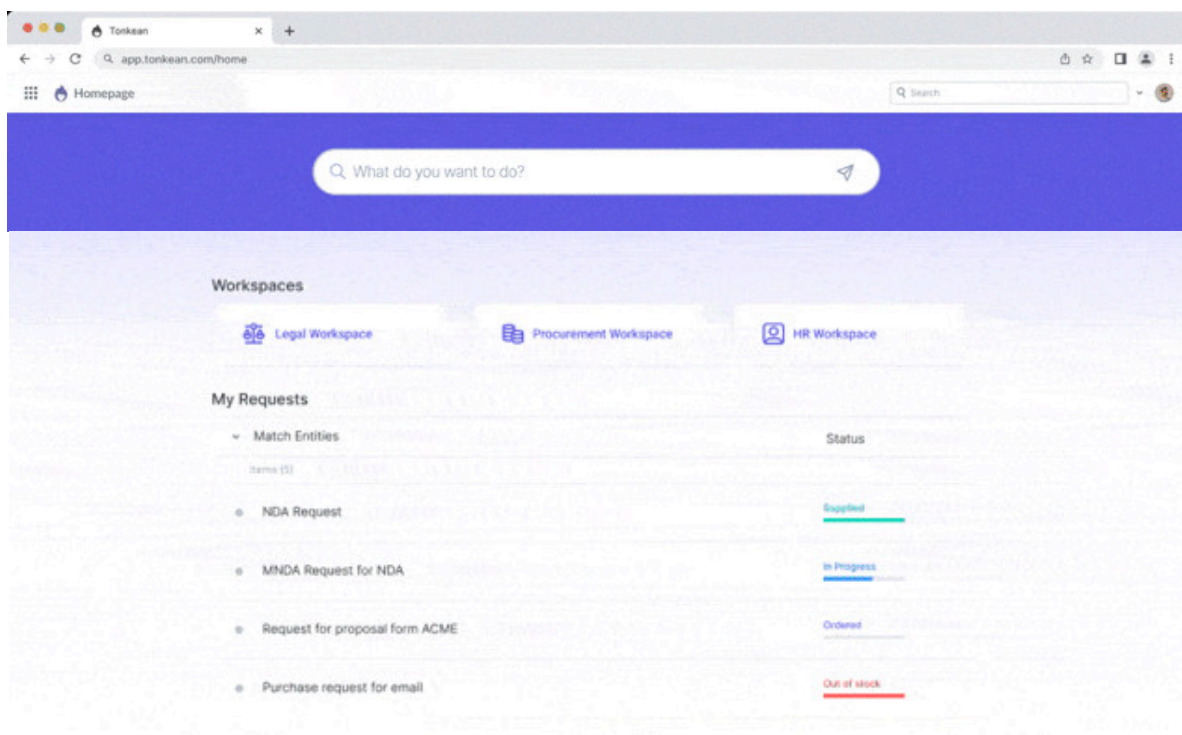
Though the ability of tools like ChatGPT to generate fluid spools of original content can feel a lot like magic, it's really more or less just very fancy pattern matching that's limited only to what data sources you specifically give it access to.

What's "magical" about them as it pertains to legal operations is their ability to help employees rapidly find information contained in—or answer questions pertaining to—data sources such as your organization's internal policy documents, knowledge base, or CLM. The legal ops teams designing the processes that service AI functionality for employees when they need it will always maintain control over what those data sets are. These models are already trained on lots and lots of data—that's part of what makes them so powerful—but when applied to your organization, you determine what

sources they pull from. You supply your data, and that's what the AI looks at—not all the collected data across the world that may be related to your request.

But let's not downplay how significant of an improvement AI can provide. Let's say a member of your sales team wants to ask legal for an NDA form for a client. Before, they'd probably email a shared departmental inbox, and then wait until someone was able to manually create an NDA for them, likely only after additional back-and-forth.

With an [AI-powered intake experience](#), that employee can now use plain language prompts to ask the AI intake portal to generate the NDA for that client. Within seconds, the AI finds the Salesforce entry in your organization's database, along with the proper NDA form, and produces it for the employee.



A platform like Tonkean provides an even wider variety of protections. For example, if you're in legal ops and you're crafting the business logic for a given process—say, how to triage intake—you can tailor the platform to flag messages containing words like “privileged,” “internal use only”, and “confidential,” and then route the request to a person in your organization for manual review.

These layers of protection and the ability to triage and coordinate requests are critically important. It's this ability that enables teams to leverage the incredible power of AI tools like GPT-4 while still maintaining the [appropriate controls and security](#).

There are some general best practices you can follow when you're vetting an AI tool:

- Ensure human-in-the-loop design, which creates transparency and enables people to see how an AI is working and step in if need be.
- Use it for narrowly defined applications (even with powerful generative AI like GPT).
- Understand the concerns germane to your vertical (e.g., there are different things to worry about between HR versus procurement versus legal).
- Make sure it's purpose-built for what you need; that is, use an intake tool that's

powered by GPT but that you have complete governance over, like the [Tonkean AI Front Door](#), rather than just letting everyone use GPT with no parameters or clear goals.

Assuming that you're following best practices—and that you as a legal ops function are in fact building these best practices into your legal processes themselves—you have everything you need to provide a revolutionary process experience, one that will solve their problems or answer their questions within seconds.

You can be sure you'll combat fewer process adoption problems when that's the case.

Here are other examples of what capabilities AI-powered workflow and process automation can provide your legal ops team:

- Create processes that automatically triage and classify unstructured inbound business requests, including by using NLP to gauge the urgency of each request.
- Automatically handle simple requests, either by generating new documents or answering FAQ. (Tonkean's AI Front Door, the AI-powered intake experience that's accessible to employees via email, Slack/Teams, or a customized web portal, does precisely this. It lets employees ask for what they need using common language prompts, like “What NDA form do I need for the ACME account?” The Front Door

will “understand” the context of the question and reply with the necessary form, for example.)

- Automatically route more complex tasks to the right person or group in the organization.
- Entirely eliminate the need for change management. (For example, if your intake experience revolves around an AI-powered chat interface, like the Tonkean AI Front Door, which employees can “open” from inside whatever application environment they like spending time in, because Tonkean wraps around whatever tools, policies, and apps your organization already uses, often they’ll be able to find the document they need or obtain the information they’re looking for within Slack, or Teams, or email, without ever having to navigate to another app.)

Get started with intake

So you’re ready to get started using no-code workflow automation and AI tools to modernize your legal processes—and, in turn, get every employee in your organization to finally begin following them. Where should you start?

There are several examples of low-hanging fruit. One is your email inbox. If you’re like most legal ops teams, you likely right now manage intake predominantly through email, though you likely do it inefficiently;

you might use something like ServiceNow to manage a ticket system, but because employees don’t follow your legal processes and still simply send requests into you via email, you might be manually creating tickets in ServiceNow by transferring the content over from email.

Or, let’s say you’re a bit more sophisticated, and though you’re still managing your email inbox manually, you’re using ChatGPT to do things like quickly extract data from the legal documents that are sent to you via email.

With a tool like Tonkean, you can automate all of this, and at scale.

For example, you can tie an email inbox automation to a department-level inbox and, from there:

- Monitor emails sent into the shared legal email inbox
- Detect when emails have an attachment that needs review
- Automatically run the attachment through GPT
- Extract exactly the values you’re looking for
- Automatically send that information to the appropriate human inside whatever system they enjoy working in—Slack, Teams, Gmail, etc.

You can also funnel all this information—from the initial email to the action taken on

the data extracted from it—into one centralized portal.

GPT gets things wrong sometimes, so you can also make edits to both the data and the correlated workflow inside the Tonkean portal view.

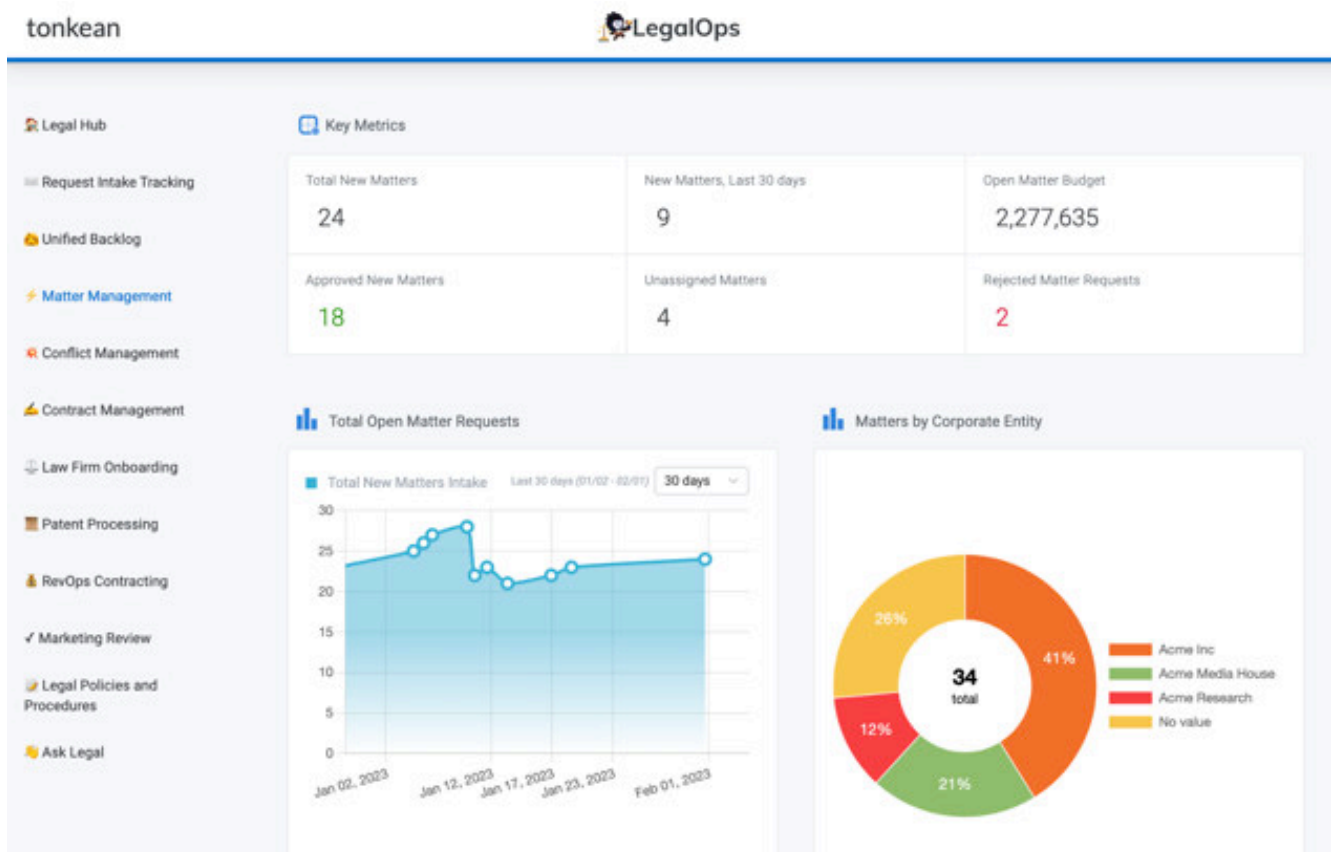
And just like that, you provide the power of AI to your employees at the process level at scale.

What's next?

The above is just a sampling of what workflow automation can do for your legal processes.

But it's a step that's crucial for your legal operations function to take. Legal departments around the world are talking daily about the importance of finding a way to leverage AI and workflow automation to meet the demands of the modern legal department.

The best place to do that—when it comes to not only providing a more valuable employee experience but up-leveling your own performance and capacity as a function—is at the process level. Legal ops teams are in many ways ultimately products of the processes they design and deploy. You are only ever as excellent, efficient, or as valuable as the experiences you provide.



[Learn more about how Tonkean can help your legal ops team achieve full process adoption with workflow automation and AI here.](#)

About the Author

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.

Click below to read the interview with Sagi

AN INTERVIEW WITH SAGI ELIYAHU

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

© Magazine for Legal Operation Professionals

Magazine for Legal Operation Professionals - 7

[Read the interview with Sagi here.](#)

BASHA RUBIN HELPS HUNDREDS OF IN-HOUSE TEAMS TO FIND THE RIGHT LEGAL PROVIDER FOR THEIR NEXT PROJECT

An Interview with Basha Rubin



Basha Rubin and co-founder Mirra Levitt

Can you please tell us why you founded [Priori](#) and the opportunity you saw?

My co-founder Mirra Levitt and I met as classmates at Yale Law School during the Great Recession. It felt like a moment of reckoning for the legal industry. At the same time, we saw the rise of marketplaces like Uber and Airbnb which have become household names a decade plus later. We saw an enormous, untapped opportunity to build a transparent marketplace for legal services and wanted to be part of transforming the industry. With such a marketplace, anyone or any

company could find the right lawyer at the right price right away.

When we first launched in 2013, we were focused on connecting small businesses with a vetted network of attorneys at fixed fees, wherever possible. Ultimately, though, we found product-market fit with larger companies that have legal departments of all sizes. Our clients are everything from fast-growing technology companies to Fortune 500 businesses, including some of the Fortune 10. They see Priori as a way to reduce outside counsel spending, identify local counsel and niche expertise, achieve diversity goals and manage flexible resourcing.

What inspired the creation of your new product, Scout, and how do you envision it contributing to the evolution of outside counsel management?

We started hearing from many of our power users that they not only wanted to be able to use Priori's powerful search and hypergranu-

lar data structure to identify new outside counsel (the core Priori Marketplace use case) but also to manage knowledge about their existing panels.

We started working with a group of beta users including Hearst, Marsh McLennan, Zimmer Biomet, Orrick and a Fortune 10 company to bring the idea to fruition and launch Scout. Scout operates as the missing piece in legal departments' tech stacks, empowering legal teams to make more confident hiring decisions about their outside counsel, preferred panels and law firm relationships. We collect, structure and analyze data from a wide range of sources about lawyer and law firm experience, expertise, pricing and diversity to make it "decision-grade" so legal departments can have a full picture of their firms' capabilities and manage the success of a panel program over time.

In today's rapidly changing legal landscape, could you identify key industry

trends or challenges that influenced your decision to expand Priori Marketplace to include legal operations professionals?

It's simple — enormous demand. We started seeing an overwhelming demand on our marketplace for flexible legal operations support across a wide range of skill sets. We are responding to that demand to connect legal operations teams with legal operations professionals who are looking for opportunities.

Legal operations has matured alongside Priori over the years. When we first started Priori, few companies had a legal operations department, and now it's table stakes for most legal teams and their legal operations strategies are increasingly complex. That shift is because of the incredible impact and value that legal operations professionals can drive in making legal departments more efficient, from outside counsel management to budgeting to implementing new technologies that transform the way legal work is done.

How does your legal marketplace differentiate itself, particularly in providing high-caliber Legal Operations professionals to meet the unique needs of your legal department clients?

Data and technology have always been core to Priori. For example, we collect thousands of data points about the providers on our

network, whether that's related to their practice areas, expertise, experience in certain jurisdictions or with certain judges or diversity, among many others. We use that data to match those providers quickly with the best-fit opportunities. We've also built technology to handle and improve every stage of the process of finding, hiring and managing providers from initial RFP and bidding all the way through to billing and invoicing. We've taken exactly the same approach to adding legal operations professionals to the network, mapping the industry and using data to connect the right professionals to the right opportunities.

Could you share some examples of the innovative solutions Priori enables and the impact it has on legal operations?

Priori's Marketplace has two key aspects:

1. a global vetted network of attorneys, legal operations professionals and alternative legal services providers in all 50 states, more than 70 countries and spanning 700+ practice proficiencies and,
2. an end-to-end technology platform, as described above, that aims to drive efficiency throughout the lifecycle of identifying the right attorney for the project and working with that attorney in a frictionless way.

What this means for our clients — whether they're looking for a drone lawyer with

experience in a specific non-US country, looking to support their sales team with additional contracting support during end-of-quarter surges or finding cost-savings opportunities for low-to-medium risk/complexity work — is that they can find exactly the right provider at the right price anytime.

This is transformative for many legal operations teams for a few reasons:

- Legal operations can be responsible for managing spend to a budget (and as we often saw this year, a smaller one than in years past), and Priori offers a mechanism to achieve those goals;
- Legal operations teams are often called upon to identify the right lawyers in tricky situations, and Priori can do that for them; and,
- increasingly, many legal departments are strategically using a smaller core team and flexible resourcing to responsively and flexibly scale up and down as needed, and Priori is often the key partner for that goal.

As a successful entrepreneur in the legal sector, what actionable advice would you offer to legal professionals seeking to adapt to industry changes and remain competitive?

Network through communities like Legal Operators, of course! There are now many industry groups like Legal Operators that offer legal operations professionals the op-

portunity to connect with like-minded professionals, learn about best practices and meet with vendors to understand the evolving technology landscape.

Looking ahead, where do you see the future of legal departments and the emerging field of Legal Operations heading?

Here are a few of my takes on the future legal department as it relates to marketplaces and flexible talent:

Adaptability and Flexibility: As businesses need to be nimble and responsive to increasingly complex global situations, we anticipate that legal departments will have smaller permanent headcounts with lawyers who are close to the business and will use marketplaces like ours to scale their teams up with support and niche expertise as needed.

Variety: Law departments are becoming increasingly sophisticated in that they are hiring a “best-fit” attorney/firm/provider for their legal projects, and that means more variety in the kinds of suppliers they use, including BigLaw, boutique firms, solo practitioners, “new law” companies, technology companies and process outsourcers.

Complexity: As the velocity of new kinds of technologies available to legal departments continues to accelerate, we expect that legal departments will need specialized talent to manage those implementations, stay

abreast of new developments and train legal teams.

In the ever-evolving legal industry, Artificial Intelligence (AI) and Automation are becoming increasingly prominent. Could you share any insights into how your business is leveraging AI or considering its use to enhance the efficiency of legal talent placement for your clients?

We're currently using AI in Scout to bring together and structure outside counsel data from a wide variety of sources about attorney and firm experience, expertise, performance, pricing and more. This allows legal departments to find the right attorney or firm for their need at that moment with minimal friction, taking administrative tasks off of our users' plates and freeing them up to spend more time on strategic tasks that deliver business value.

We're working on a number of other use cases that we will announce soon!

About Basha Rubin

Basha Rubin is the CEO and Co-Founder of Priori. She writes and speaks extensively on how technology is changing and will change the marketplace for legal services. Her work has been featured in Forbes, Techcrunch, Entrepreneur and Corporate Counsel, and she has spoken at ABA Techshow, Women in Legal Technology Conference, Clio Cloud Con-

ference, SXSW, Reinvent Law, SOLID Conference and Legal Geek.

Awards

2018, [ABA Journal Legal Rebel](#); 2019, [Financial Times Top 10 Legal Business Technologist](#); 2018, [LTRC Woman of LegalTech](#); 2020, [Fastcase 50 award winner](#), Part of Baylor Law School's "The Braintrust." Priori 2023 Awards: [New Law Company of the Year](#) Legalweek Leaders in Tech Law Awards; [Inc. 5000 Fast-Growing Private Companies list](#); [Inc. Power Partner Awards list](#); Buying Legal Council Legal Procurement Award - Best Value Initiative (Vonage & Priori)



Expanding Horizons for use of ALSPs in challenging business environments

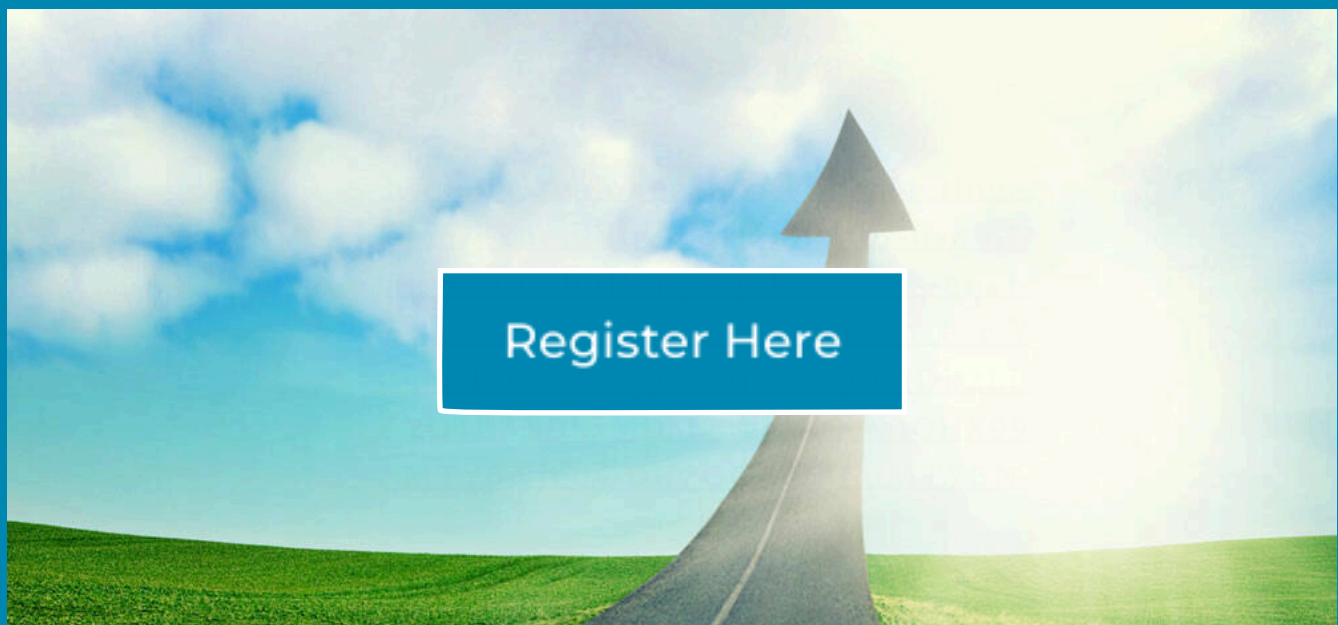
November 14, 2023 @ 10:00 am - 11:00 am UTC+0

In the post-COVID era of budget cuts and widespread layoffs, the opportunities for ALSP providers are growing. Legal departments are being squeezed more than ever, so new areas of cost savings must be explored to meet budget targets.

Third-party subpoenas, law enforcement requests, garnishments, levies, liens, DSARs, AML due diligence and tracking are high-volume, repeatable legal/compliance tasks.

They're areas where companies can utilize ALSPs to reduce the costs of achieving compliance for these required processes. In this new age of efficiency, companies need to break out of the status quo and reconsider handling of repeatable processes.

Update your knowledge and learn more! Register to watch this event.



DATA MANAGEMENT AND LEGAL TECHNOLOGY IN FINLAND

Ari Kaplan speaks with Heikki Ilvessalo, the co-founder of Ilves, a legal data consultancy and software firm, in Finland, the founder of the Finnish Legal Tech Network, and the co-organizer of the Nordic Legal Tech Day in Helsinki on November 15, 2023..



Ari Kaplan

Tell us about your background and your work at Ilves.

Heikki Ilvessalo

I started my career as a lawyer and was the development director for a leading law firm in Finland for 13 years. Throughout my career at the firm, I was responsible for overseeing all aspects of business advice from practicing law to orchestrating the firm's entire strategy process. Based on my expertise, I help legal professionals and organizations to gain better results by creating a digital transformation agenda and understanding the frustrations of

legal innovation. We have developed a data platform backend Ilves EMIE with multiple connectors to the most common applications, such as document management systems iManage, SharePoint, and Microsoft 365, as well as to external data sources. We've created an enterprise product suite, primarily targeting law firms to centralize data and bring it into one place through an API for that information and offer very easy-to-use apps.

Ari Kaplan

How do you incorporate client feedback into your platform?

Heikki Ilvessalo

We incorporate client feedback from clients when developing new features. We also

have a Gen AI lab for our clients and other innovative law firms that want to develop new-generation apps with us and integrate those use cases that are most valuable for lawyers.

Ari Kaplan

When did you create the Finnish Legal Tech Network and why was it important at the time?

Heikki Ilvessalo

The network was founded in 2019. During my years at the law firm, I discussed with my peers at other law firms if they would be more open to sharing experiences about legal tech developments. I found its creation inspiring and also felt privileged to assume the role of administering the network. Today,

it has grown and has become a forum for over 180 members from law firms, corporate legal teams, legal service providers, legal tech developers, and legal design vendors. It is now the most active legal tech network in Finland. It is a forum for innovation and shared learning, which serves as a strong foundation for further development of the entire legal ecosystem in the country.

Ari Kaplan

What are law firms and legal departments in Finland looking for in a legal tech solution?

Heikki Ilvessalo

It depends of course on the size of the firm, but in general, it seems like many have already established multiple systems and are now looking for integrations between them to offer a more centralized view. We help them by offering integrations as a service.

Ari Kaplan

You created a framework for implementing legal tech. How do teams use it for digital transformation?

Heikki Ilvessalo

Based on my law firm experience and conversations with my peers, I realized that many professionals need a starting point for their digital transformation initiatives. My goal was to create a resource that serves all parties in the legal field and can be dynam-

ically updated as the industry changes. Vendors might use this framework to position their products and law firms can use it to analyze each component of their strategic capabilities.

Ari Kaplan

You are the co-organizer of the Nordic Legal Tech Day in Helsinki on November 15, 2023. What can attendees expect?

Heikki Ilvessalo

Attendees can expect a great event, which we have offered over the past two years in Helsinki. It's the only legal tech event in Finland featuring international speakers and thought leaders. We have a full day of presentations, ranging from discussions on the future of the profession and leading change to in-house perspectives and managing law firm innovation. There will also be networking and valuable debates on emerging topics.

Ari Kaplan

Why did you release a map of Finnish legal tech vendors?

Heikki Ilvessalo

A very good friend created the first version of the map five years ago to help buyers identify legal tech solutions. I updated it with Kaisa Kromhof from M-Files Ment because there are so many new legal tech and legal design companies, whose offerings and solutions overlap, and we knew it

would be a useful resource. It highlights the companies that are growing rapidly and internationally.

Ari Kaplan

How do you see legal tech in Finland evolving?

Heikki Ilvessalo

It’s evolving fast even in our small market, and it is attracting significant investment. Some Finnish legal tech companies are already big, while others are growing quickly after successfully raising money. There is positive progress and active collaboration in many areas.

About the Author

Ari Kaplan (<http://www.AriKaplanAdvisors.com>) regularly interviews leaders in the legal industry and the broader profes-

sional services community to share perspectives, highlight transformative change, and introduce new technology at <http://www.ReinventingProfessionals.com>.

Listen to his conversation with Heikki Ilvessalo here: <https://www.reinventingprofessionals.com/data-management-and-legal-technology-in-finland/>



LEGAL BUSINESS WORLD



INTERESTED IN MORE LEGAL BUSINESS INSIGHTS? READ THE LATEST ISSUES OF LEGAL BUSINESS WORLD'S MAGAZINE ON THE BUSINESS OF LAW

READ NOW

A CONVERSATION BETWEEN HUMANS AND AI



The future of the legal profession, functions and market

By Georgia Vulcano, with thought leader Mark A. Cohen and ChatGPT AI

Georgia is a US/European lawyer with a background in human rights and international law. She worked in both global organisations and digital start-ups across Latin American and Europe, helping cross-functional and cross-cultural teams define the legal path to develop and innovate in a sustainable and human centered way. She currently works as a Global Digital Ethics Manager for Anheuser-Busch InBev in Belgium.

She created this video as a creative experiment in which Thought Leader Mark A.

Cohen, and ChatGPT as an AI Avatar take part in a general discussion around the legal function. Not only the current state is being discussed, but also the future.

We (Editorial Dept.) found it not only fun to watch but also inspirational. It made us wonder how far away we are from having AI playing a significant part in legal processes, what are the pitfalls and what is the danger of accepting AI at face value in modern society?

CLICK THE VIDEO AND WATCH IT



▶ ◀ 🔊 0:37 / 37:13



HOW TO ACHIEVE FULL PROCESS ADOPTION BY LEVERAGING WORKFLOW AUTOMATION AND AI

A discussion between Colin McCarthy, Rajan Gupta, and Sagi Eliyahu

Are legal operation professionals more driven by product then service? Does efficiency in workflow equals a high ROI?

Is change management important qualification for legal operators, and is in-depth knowledge of Tech, Automation, AI and database management a requirement for the modern Legal Operation professionals?

Rajan Gupta, Sagi Eliyahu, and Colin McCarthy discuss the change and evolution of Legal Operations. They discuss profession-

als working in legal operations, the influence and benefits of Tech and AI solutions in workflow automation, and much more.

CLICK THE VIDEO AND WATCH IT



6:42 / 55:29



THANK YOU TO OUR EVENT SPONSORS!

WE LIKE TO THANK OUR EVENT SPONSORS FOR A SUCCESSFUL AND INSPIRING SUMMIT BY THE SEA. THEIR PARTICIPATION AND CONTRIBUTION MADE IT POSSIBLE TO ORGANIZE A SUCCESSFUL EVENT FOR PROFESSIONALS FROM ALL OVER NORTH AMERICA.

brightflag



Consilio

exterro

iManage

KNOW
ABLE

LINKSQUARES

onit

PRIORI

SPOTDRAFT

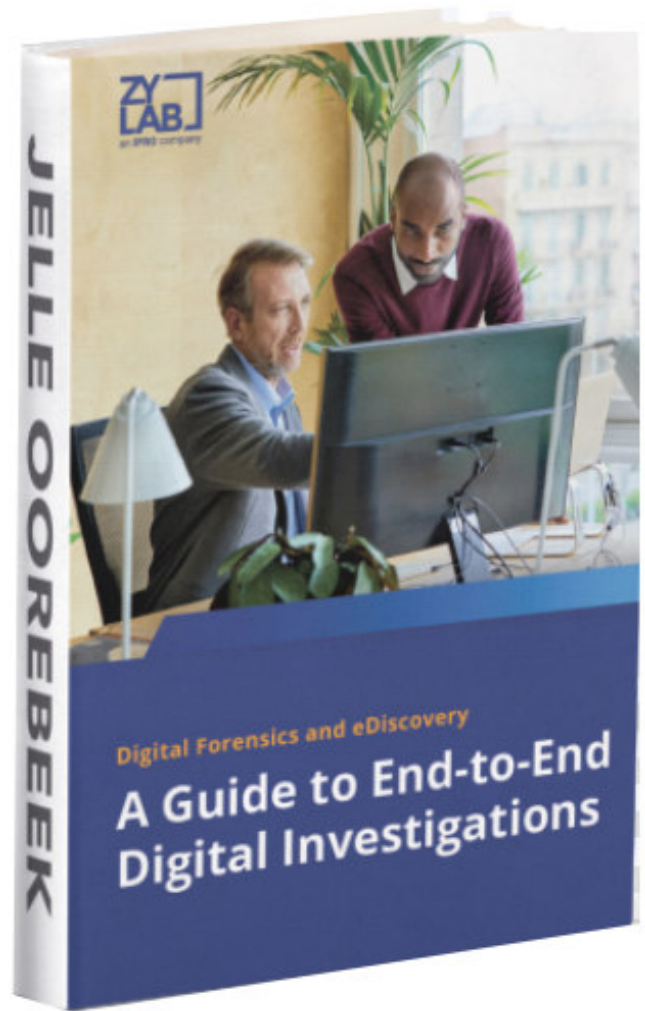
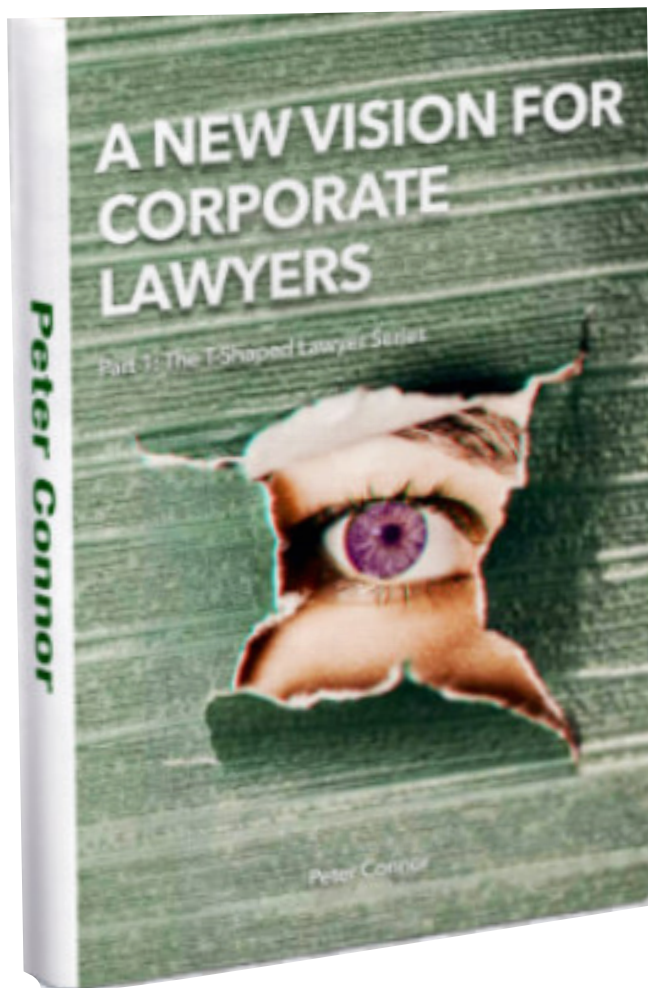
Wolters Kluwer

ZENTLAW

powered by



Free Perks for Readers



Click on the cover(s) to read the eBook


























THE LEGAL OPERATORS TECH DIRECTORY

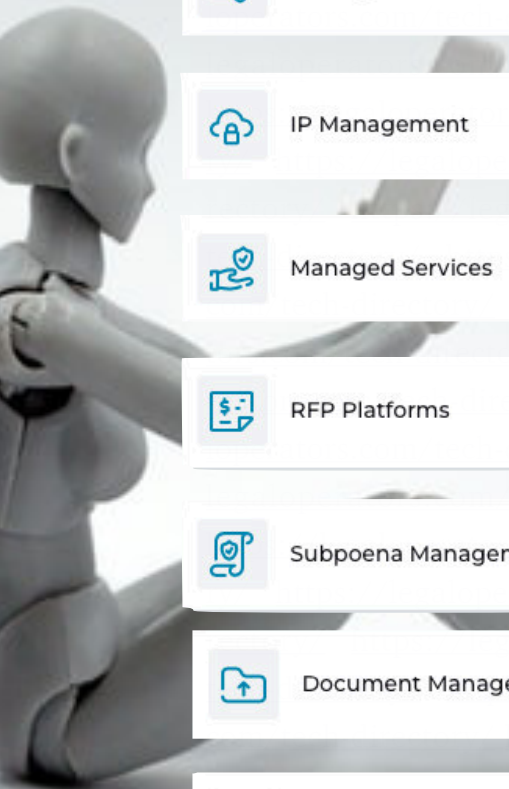


BROWSE TECH DIRECTORY

Explore industry leading product and service offering images and videos, reviews by experts, marketing and sales collateral, company website and contact information for each listing.

[Search the entire Tech Directory](#) or click on one of our category listings below.

 Artificial Intelligence	 Business Intelligence Tools	 Compliance Software
 Contract Review & Automation	Diversity Tech	 Document & Case Review
 eBilling	 eDiscovery	 Enterprise Management (ELM)
 IP Management	 Legal Hold	 Legal Operations Consulting
 Managed Services	 Matter Management Software	 Outside Counsel Management
 RFP Platforms	 Risk Management	 Secretarial Services
 Subpoena Management	 Workflow Automation	 Contract Management (CLM)
 Document Management	 Legal Spend Management	 Specialized Legal Advice
 Invoice / Bill Review Services	 Privacy Consulting	



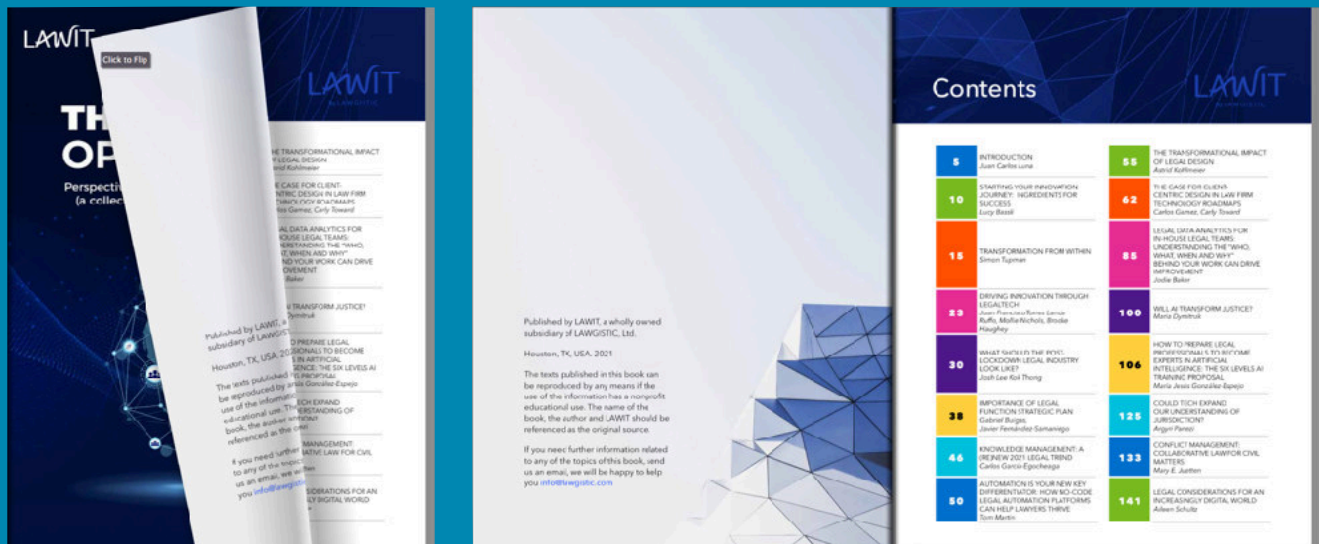


Go to the [innovation hub](#) and select magazines, articles and more

SHARE YOUR WHITEPAPER WITH +60K READERS

-A UNIQUE CONTENT MARKETING SOLUTION BY LEGAL OPERATORS-

WE'LL MAKE A PROFESSIONAL EBOOK FROM YOUR WHITEPAPER AND SHARE IT WITH +60K PROFESSIONALS IN THE LEGAL INDUSTRY



EXAMPLE

[CONTACT US HERE](#)

ALL OUR PRODUCTS ARE RESPONSIVE. MEANING THAT THEY SCALE AUTOMATICALLY TO THE DEVICE USED (PHONE, TABLET, EBOOK, KINDLE, DESKTOP, LAPTOP ETC.)





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 \(and more\)](#)

ENRAGE

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.



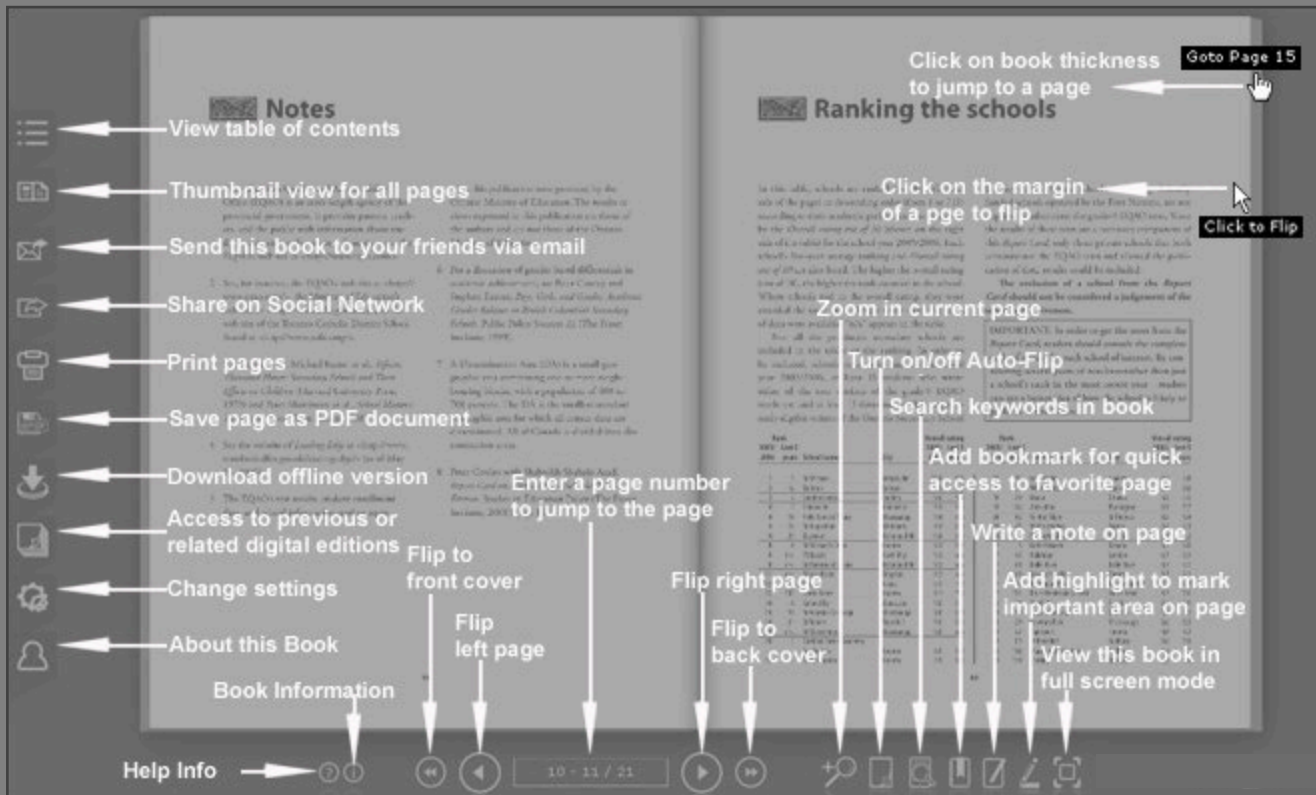
Enrichment & Linking

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.

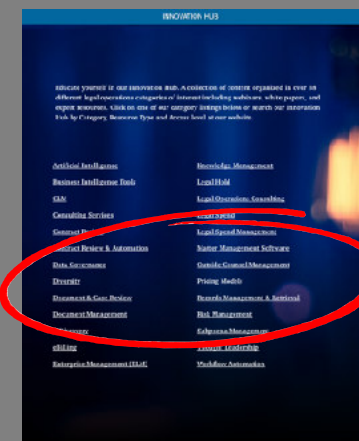


The Flipbook functions (online reader version)

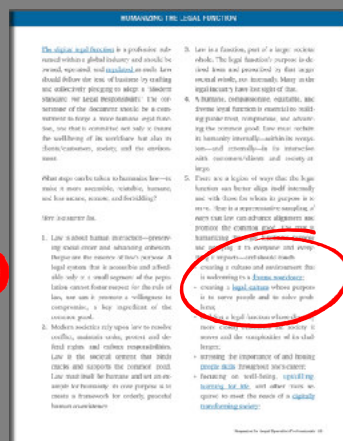
The following image shows all the features of this magazine. You may not see some of the features, (or are disable) due to the digital rights, device, or used browser.



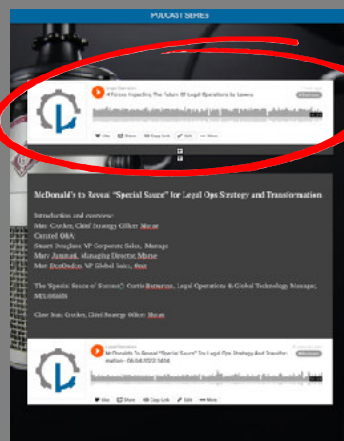
Some linking examples



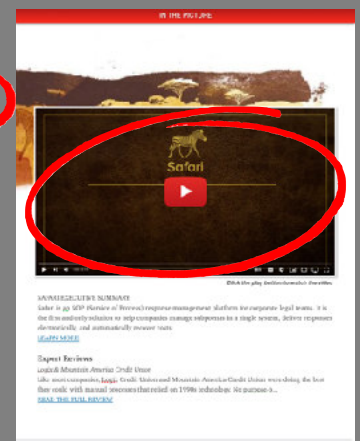
Jump to the category



Links in Articles



Play Podcast



Play Video

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](#).

