



LEGAL IT TODAY

COMMENTARY, STRATEGY AND MARKET INTELLIGENCE FOR THE GLOBAL LEGAL TECHNOLOGY COMMUNITY

20
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2017



**Global Legal IT providers:
what's all the fuss about?**

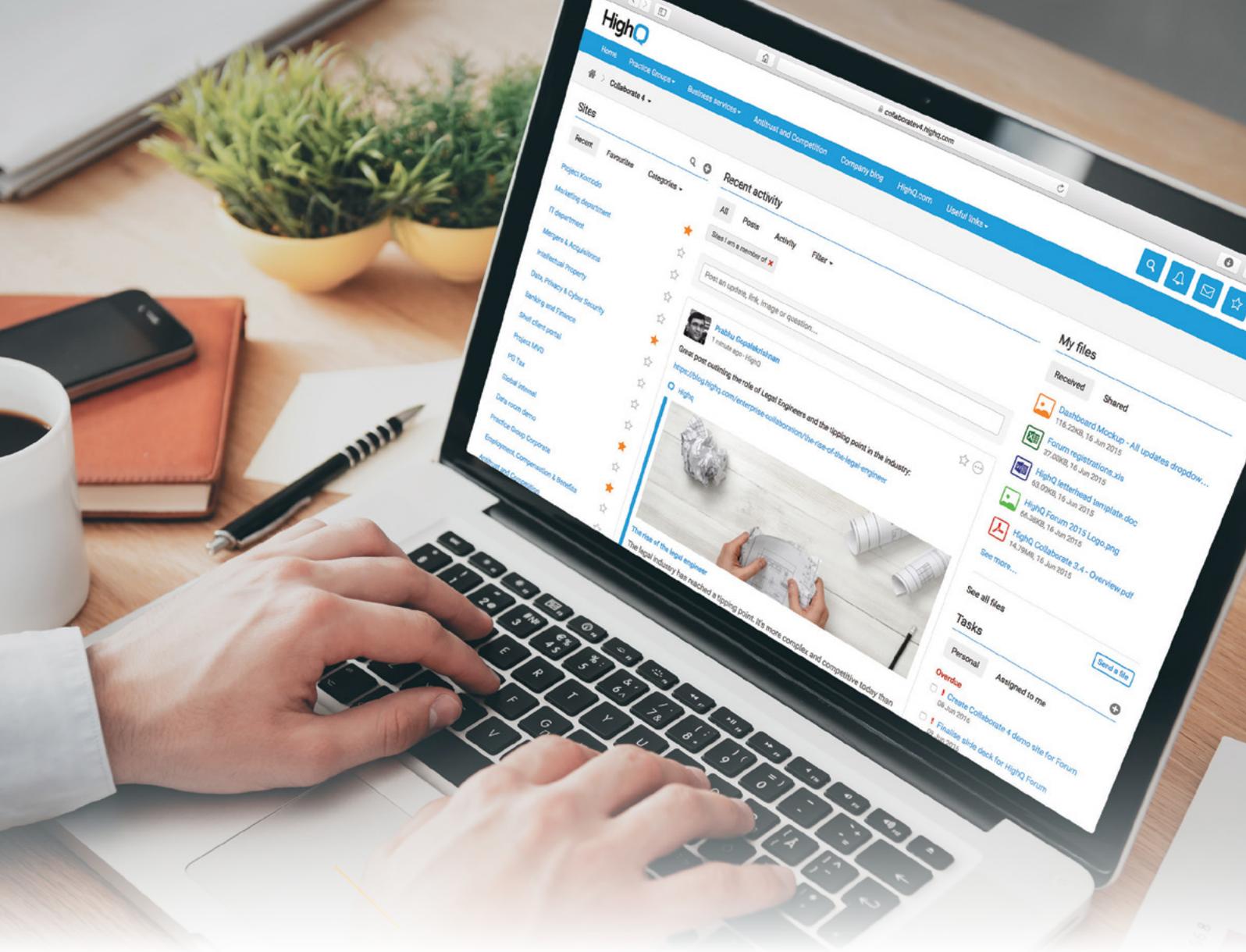


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burden for lawyers?**



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LEGAL IT TODAY

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From the editor

Welcome to Issue 20 of Legal IT Today!

I hope you are all looking forward to a well-earned break at the end of a successful year. As we head into 2018, we asked some of this year's contributors for their thoughts on 2017 and their plans for next year. There were some fascinating responses. Hélder Santos says he was inspired this year by the Borussia Dortmund fans who used Twitter to find Monaco supporters a bed for the night when a terrorist attack delayed the match between the two teams for 24 hours, while Ann Gorr was inspired by her encounter with some of the young tech leaders of the future.

As for the changes our authors would make in the legal IT industry if they could, Joe Davis and Esther Dediashvili would like to see companies being more open to learning and experimentation with new technologies, while Richard Tromans would close down all legal IT functions inside law firms immediately. He wants the management team of partners to make all decisions about legal AI and automation. Well, one can dream...

And when we asked our authors who in legal IT they would most like to meet, three of them chose Richard Susskind. While the Professor's theories may not be accepted by everyone, they certainly seem to have made him very popular! A big thank you to all the authors who responded to our questions with such thoughtful and creative answers—but then what else would you expect from people who write for Legal IT Today?

Now, I have a confession to make: I am an inbox manager. I take great pride in reading all my emails, dealing with them promptly and making sure that I never have too many in my inbox at any one time. It makes me feel that I am in control of my work. But am I really? Am I spending so much time reading and replying to emails that I am neglecting other, more important tasks? As well as being an essential productivity and communications tool, is email a fatal distraction?

I started worrying about this while I was talking to Staffan Hugemark of Formpipe for this issue's vendor profile. One of the great advantages of Contentworker, he says, is that it does not sit in Outlook, enabling lawyers to spend less time on emails and more time on their cases. They love the 'peace and quiet' it gives them. This has really made me think about the way I work, and I have decided... oh, hang on, excuse me a second, I've got a new message...

Elsewhere in this issue we have Kim Craig, one of the confirmed speakers for Lexpo'18, explaining how law firms can do more with project management. Too many are focused solely on pricing, she says, and need to expand their gaze to how they can use project management discipline to enhance the client experience, not just measure their profit margins. They might be surprised at the results!

Joe Davis went to the MIT Legal Forum in October where the hot topics, you will not be surprised to hear, were blockchain

and artificial intelligence. Does that mean it was all hype, comparable to the 'irrational exuberance' of the dot com era, the gold rush, and the tulip mania of the 1600s? Of course not. As Joe explains, speakers from Watson for Legal, Context Labs, C4Coin, Monax, Evernym, Baker Hostetler and others ensured that those present kept their feet on the ground.

Ebbo Haantjes of law firm NautaDutilh has given us his recipe for a successful implementation of legaltech, in which the key ingredients are people, processes and tools. These all have to be combined in the right way for positive results. Otherwise, firms can end up with systems that are more of a hindrance than a help.

In his regular column, legendary innovator Ralph Baxter asks why law firms cannot be more like companies in other sectors in the way they think about technology. During his visits to manufacturers, for example, he has found people working side by side with machines without any problems. They do not view technology as a threat to them and their careers. Law firms, Ralph believes, need to embrace technology in an analogous way.

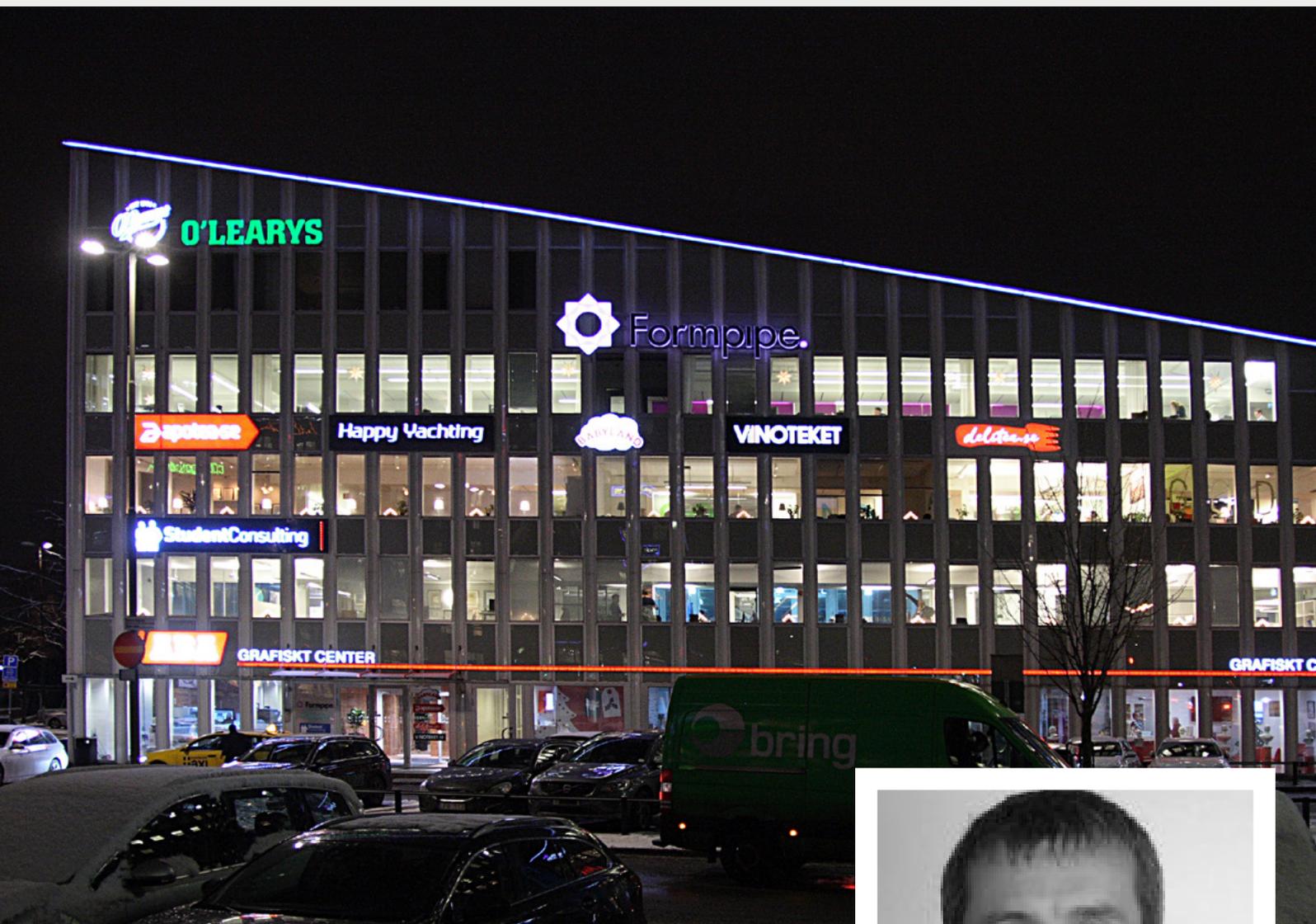
Seth Wilson and Ryan Grimes have contributed an article on a concept they are calling 'IT as a service' (ITaaS). In their vision of legaltech, firms can employ both an IT specialist and a legal technologist, who work together to take care of the technical side of the equation and the implementation, training and utilization of the technology respectively. It's an intriguing idea that could provide a useful model for many firms.

Jobst Elster considers the global nature of some IT providers and asks why that 'globalness' is not considered more of an asset. As he says, there are many advantages to choosing a global supplier, but many tech users do not seem to think very much about what a global supplier is and how they could benefit from using one.

For our regular 'Verdict' feature, we asked professional service organisations how they are adapting to the age of constant communication, and they offer some fascinating observations. One of the problems of social media, notes Rick Hellers, founder of the Association of Legal Technologists, is that 'it's not necessarily the good and powerful ideas that go viral, it's often the controversial and outrageous'. Did he have anyone in particular in mind when he wrote this, I wonder? It certainly made me think of one very well known and very powerful American...

That just about wraps it up for 2017. We hope you've enjoyed reading Legal IT Today this year. We wish you all the best for the holiday season and look forward to hearing about more of your exploits in 2018!

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What's happening at **Formpipe?**

BY JONATHAN WATSON

Microsoft Azure Stack will have a big impact in the DM marketplace because it will enable users to pinpoint where their data is stored, says Formpipe Intelligo chief executive Staffan Hugemark.

How long have you been at Formpipe?

Since 2012, although I actually started Intelligo in 1995. Following a series of acquisitions, we are now part of Formpipe, so that is the name we use—although the business unit that focuses on the legal vertical is called Formpipe Intelligo.

We moved into the legal area quite soon after the company started and began working on document management (DM). Everything we do now is around DM. We position Contentworker DM as a matter-centric document and email management system based on Microsoft SharePoint. We can do much more than that implies, but we find that what



people are looking for, fundamentally, is a solution to their document management problems. Our software is used worldwide by about 125,000 users at over 500 law firms and corporate legal departments.

Why did you decide to develop a product based on SharePoint?

A lot of organisations see SharePoint as a good way of dealing with their DM needs. However, while SharePoint has a very strong foundation and feature set for document management, it's not an out-of-the-box solution ready for effective matter-based document management. This is where Contentworker comes in and completes the picture.

We saw that there was a need to provide a consistent structure with automated creation of matter workspaces, where metadata was also applied automatically to make use of the full power of SharePoint search. That's why we decided to build Contentworker to give the user a matter-centric way of working in SharePoint. You can use the SharePoint infrastructure that a lot of companies already have, but we can give legal professionals a way of working that feels familiar and saves time and effort.

One of the biggest advantages of building on top of SharePoint is that we evolve along with Microsoft. You maintain SharePoint the same way you maintain all Microsoft products—with automatic updates and security patches. For customers, this means the total cost of ownership is much lower than with the traditional DM solutions. Software upgrades are implemented within two hours—making system maintenance effortless and efficient.

How do you see the DM market at the moment?

We find that law firms and corporate legal departments are looking for ways to get rid of their own infrastructure when it comes to servers and host them in the cloud. Contentworker is already available hosted by several partners in different countries and it will, in the near future, be available in the Azure Store (Formpipe is a Microsoft Azure Gold partner). With Contentworker in the Microsoft cloud, customers will enjoy document management tightly integrated with the rest of the Microsoft application stack in Office 365, such as Teams, OneDrive and so on.

Microsoft Azure Stack, which was released recently, addresses the concern some organizations may have around storage in the cloud by enabling them to control where the data is stored. They will be able to make sure that it is in the jurisdiction that they need it to be in. In the Netherlands, for example, we are working with The Sourcing Company to enable data that customers would normally store in an Azure environment to be stored on their servers. Data can still be connected to the rest of Office 365—it's just that some of the content will be stored locally. This is going to be very important for the entire market.

We want to help our users to stop being inbox managers and start being case managers

Are regulatory issues such as the General Data Protection Regulation (GDPR)—due to enter into force across the EU in May 2018—having a big impact for you?

GDPR means you need to have a DMS, as unstructured information (any personal data that happens to be in documents you've dealt with, such as a scanned passport) is included in its scope as well as structured information (such as details that have been deliberately added to a database). Companies will need features that can locate that personal information, identify it and remove it when they are asked to do so. Here again we see the advantage of being part of the Microsoft ecosystem, which makes GDPR yet another driver for us.

When are you going to provide a version of Contentworker that sits in Outlook? Lawyers live their lives in Outlook and they want everything there.

We want to help users focus on the matter and move away from being 'inbox managers'. We believe users would really prefer to stop living their lives in Outlook. Olaf van Haperen, managing partner at Dutch law firm Kneppelhout & Korthals, told Lexpo '17 earlier this year that his firm's lawyers enjoyed the 'peace and quiet' of using Contentworker. 'They loved the rest it gave you, the focus on the matter at hand, not being sidetracked by all the emails dropping into your inbox all the time,' he said.

We still give users easy access to their email, but it is saved into the matter and for this we provide several features in Outlook to do this automatically or manually with suggestions. If you have to go and look in Outlook for an email relating to a matter, you see you have new mail and you start dealing with it. In the matter-centric workspace, where

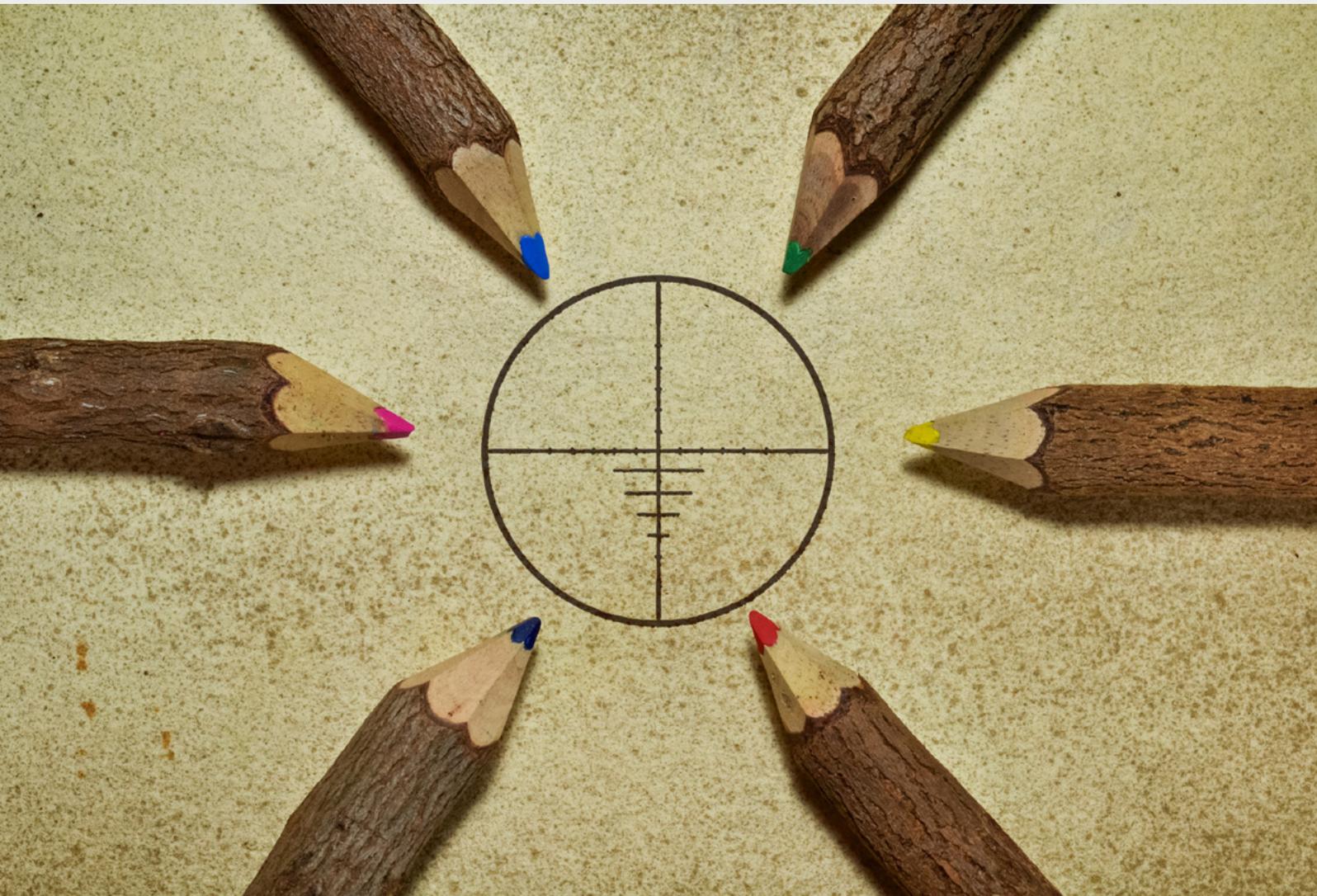
you see all the matter-related documents and emails (but no others) as they come in, you can focus on the matter and work there. We want to help our users to stop being inbox managers and start being case managers. And we think other providers are starting to come round to this point of view as well.

What's coming up for Contentworker?

One big thing for us is the Contentworker mobile app, which we introduced earlier this year. It gives users access to matter views and the documents and emails within them. Users can preview, email and download documents to use offline. Used with a mobile VPN, Contentworker Mobile allows users to edit Microsoft Office documents directly with a single click. It fully supports co-authoring, allowing multiple users to simultaneously work on a document from both traditional workstations and iOS devices.

We will also give more power to our users. When we deliver Contentworker today, we go through a series of workshops to set up and configure everything for the specific needs of the customer. But for Microsoft Azure Stack, we will offer a way to do all that independently. Contentworker will be a product that people can more or less buy off the shelf and deploy wherever they want in the world. We or one of our partners might still assist during implementations, but the idea is for people to use a guided interface to set the product up themselves and configure it in a way that works for them. Watch this space! ■





Legal **project management** is for **more** than **just pricing**

BY KIM CRAIG



Lexpo Speaker 

Some law firms are investing in project management programs, but often only in a limited way.

While the legal industry continues to explore and adopt project management, there remains an unevenness in the application of approaches, techniques and talent. Lingering debates persist in regard to the moniker 'legal project management,' waterfall versus agile, rigidity versus flexibility, lawyer or certified project management professional.

What seems to be less of a debate is whether project management has a place in legal. With organizations such as the American Bar Association, Corporate Legal Operations Consortium (CLOC), American Corporate Counsel (ACC) and the International Legal Technology Association (ILTA) all dedicating resources and time to educating and promoting legal project management (LPM)

awareness, BigLaw has steadily increased its focus in this area and, generally, law departments have come to expect it.

What seems to have gotten lost in the shuffle is the full life cycle of project management. Innumerable law firms have focused their LPM program almost exclusively on pricing, dedicating the majority of their attention to work being done under an alternative fee arrangement (AFA). This focus requires scoping and staffing decisions which are critical to the successful completion of a project BUT is done with a myopic internal motivation and a concentration on profitability.

While firms grapple with mechanisms to improve their ability to forecast and monitor AFAs—such as long, arduous debates over budget templates, task code usage, mandatory daily time entry, e-billing protocols and budgeting tools—they have lost sight of employing the core tenets and value of project management to ensure the effective and efficient delivery of legal services to meet client needs.

These core tenets involve:

- Developing a deep understanding of the matter objectives and client expectations.
- Defining project scope in alignment with client requirements and the identification of appropriate team resources to develop an accurate project budget.
- Determining the most effective project management approach that ensures project objectives are met and clearly lays out a path forward.
- Management and monitoring of the scope, schedule and budget to hold teams accountable with appropriate escalation paths, communication plans and risk management.
- Conducting project closure and post mortems to indoctrinate lessons learned in a concrete, pragmatic manner for the benefit of future projects and the organization's focus on continuous improvement.

Project manager vs. legal practitioner

The skills required to advance all of these objectives do not necessarily require someone with a project management certification. However, knowing how to right-size an appropriate project management approach and effectively

using tools and techniques in the world of legal services requires a seasoned individual who has experience planning and managing projects that have significant complexity and variability.

Project managers rarely work directly with the in-house legal team on the efficient and effective delivery of legal services

If this individual is going to be a legal practitioner, they must have the discipline to devote the required and significant time to their project management responsibilities in addition to the legal work they are required to perform. Often, in these cases, dedication to the project management obligations suffers and falls by the wayside in favor of attention to the legal substantive work. Having a dedicated project manager (PM) who is not attempting to play a dual role as a subject matter expert is more effective and productive.

There is an opportunity to create a new type of professional who can succeed in both the application of legal project management and as a legal practitioner—by changing the law school curriculum. A handful of law schools have begun the uphill battle of introducing project management and process improvement courses into their syllabuses. Incorporating these disciplines at the outset of a lawyer's educational journey and emphasizing the importance of balancing the responsibilities of both roles, heightens the likelihood of developing an effective project management lawyer. Couple that with a focus on the necessary soft skills required to manage teams effectively, plus facilitation, change management and conflict resolution,

and you have a strong candidate for this new hybrid role.

Value proposition

When law firms define the ROI for their LPM program based on the success of their pricing program, they miss the opportunity to define the value of project management to their clients. There is an affinity to the value proposition of project management expressed in other verticals and this is applicable here.

- Eliminates gaps between client expectations and results. Project managers always begin by focusing on project objectives and client expectations. Including key legal team members and client stakeholders in the planning process ensures consensus and thus it is possible to avoid cost overruns, rework, subpar quality and client dissatisfaction.
- Better predictability. LPM-led teams do a better job of planning and estimating the work to be accomplished. This results in more predictability around the project schedule, along with anticipating and planning for unforeseen obstacles and risks which may directly hamper the success of the project.
- Quicker launch and less re-work. Applying project management discipline encourages the reuse of successful processes, procedures and templates from similar projects. Recycling allows for a project to be ramped up more quickly and cost effectively, resulting in a reduced learning curve for the project team, less reworking and time savings that benefit the client.
- Quality assurance. With the project scope statement effectively drawn, good quality management processes can be outlined that will aid the team in understanding the needs of the client. With those specific needs identified, a comprehensive project plan will ensure that quality control mechanisms are designed and implemented to meet client expectations.
- Financial management. Improved financial management is dependent upon clear project scope, work estimates, project schedules and appropriate team composition. With the rigor of project management, more formal budgeting and enhanced tracking of the budget to actual costs can be measured, resulting in

better financial predictability and control. When done correctly, financial management processes will be developed for the early detection of overages or variations to the budget so that action can be taken to course correct and provide transparency to the project sponsor and team.

- Risk management. Potential risks are often identified at the outset of a project and then monitored throughout the project by the project manager. As a project unfolds, the PM is responsible for detecting additional risks not identified at the outset and escalating those as outlined in the risk management processes designed for that specific project so that action can be taken in a timely manner to mitigate and respond to the risk.
- Improving client satisfaction. Developing a proactive, multifaceted communication plan can help avoid problems on a project. Good project management plans include proactive formal and informal communication strategies, mechanisms and appropriate cadences which result in fewer surprises and provide greater transparency into the progress of a project.
- Project metrics. Defining project metrics and providing transparency to the project team will result in the team taking more ownership of the project, gaining a deeper understanding of how their tasks are related to others on the team and ultimately drive better results.

Law department emergence

Many large organizations have project management teams and resources embedded within their operational functions dedicated to driving key initiatives, whether technological in nature, organizational restructuring, mergers/acquisitions or otherwise. Rarely do these project managers work directly with the in-house legal team on the efficient and effective delivery of legal services.

When the earliest adopters in law firms began standing up LPM capabilities over a decade ago, they attempted to identify their cohorts within the client organizations. On occasion, law firm project managers were introduced to a client PM only to find that their familiarity with their in-house legal team was solely for the purpose of supporting technology deployments. This meant law firm project managers continued to struggle to identify counterparts who understood the importance of good project management protocols applied to legal services.

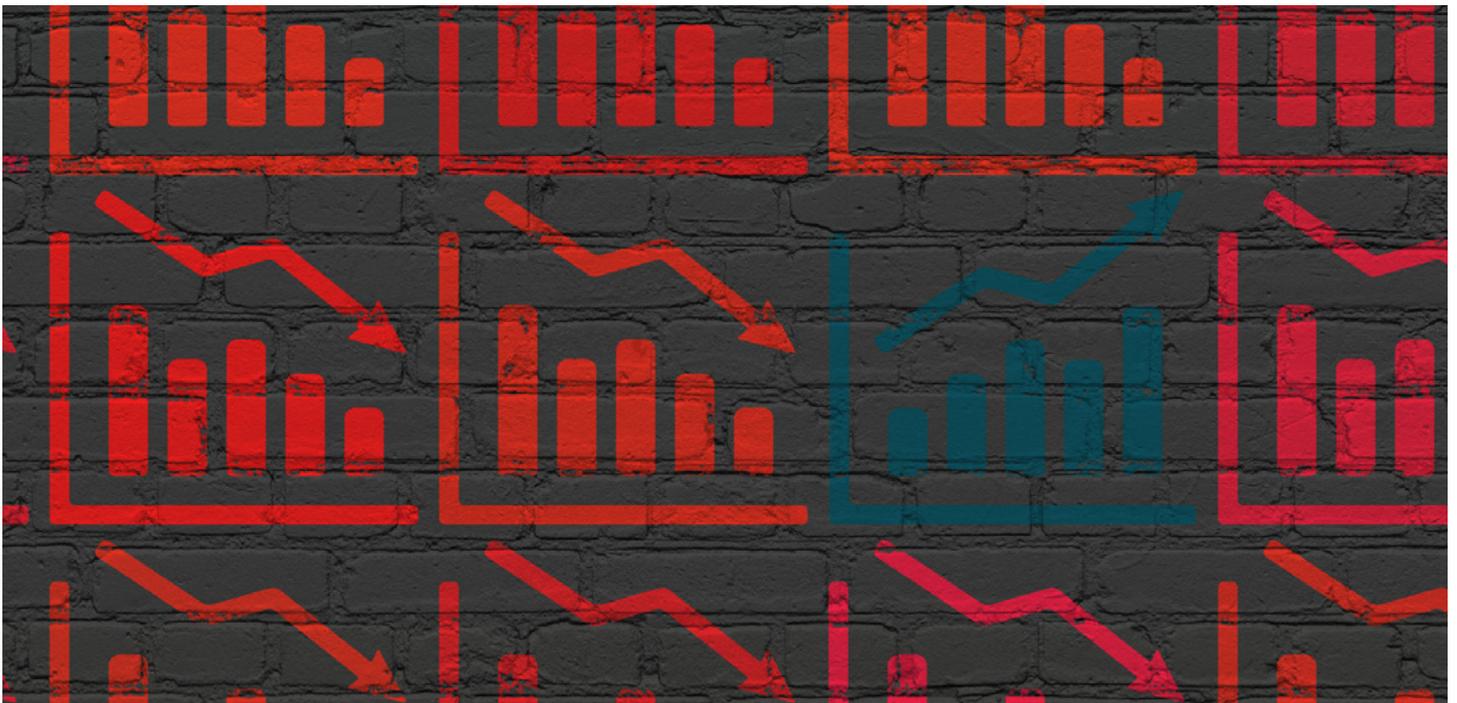
While the industry has not seen a surge of LPM programs within law departments, the groundswell of legal operations professionals is a welcome relief. Legal project managers and legal operations professionals are both concerned with financial management, efficiency, the application of technology solutions, data/metrics and alignment

between inside and outside counsel. There is a synergy and determination between these business professionals to improve the practice of law to the benefit of all involved.

Conclusion

LPM does not appear to be losing momentum and the emergence of the legal ops roles seem to have reinvigorated law firm efforts to invest in their project management programs. While the maturity of these programs varies from firm to firm, hopefully the expansion and permeation across the industry will lead to a new look at the core tenets of project management. For those law firms focused only on pricing, they need to expand their gaze to how they can use project management discipline to enhance the client experience, not just measure their profit margins. They might be surprised at the results—just ask the clients.

As Managing Director of Lean Solutions, Kim Craig leads one of the industry's most mature client-facing legal project management, process improvement and technology teams. These professionals help drive innovative business solutions by applying their expertise in process improvement and change management. Kim also provides consultation to in-house legal teams and Seyfarth Shaw lawyers to improve the practice of law. In 2011, she received the International Legal Technology Association's Professional Services Champion of the Year Award. ■





It's only **transformative** if you're **paying attention**—if you're not, it's **disruptive**

BY JOE DAVIS

Legal practitioners and technologists spent a couple of days at MIT's Media Lab at the end of October discussing the future of AI and blockchain.

Blockchain and artificial intelligence (AI) are no longer just buzzwords—they are maturing technologies that many believe will be key components of the next generation of solutions to a wide variety of challenges. Smart contracts, identity, currency, energy and real estate are just a few of the areas in which technology is beginning to outpace the law. The time has come for technologists to work together with law firms, corporate legal departments, governments and non-governmental organizations to establish and advance common goals.

Legal practitioners and technologists gathered at MIT's Media Lab on 30-31 October to discuss the future of AI and blockchain. The MIT Legal Forum was hosted by visiting scholar Dazza Greenwood, and brought together thought leaders from academia, law firms of all sizes, corporate legal departments and Fortune 500 companies, many of whom are members of the Global Legal Blockchain Consortium.

Rather than have attendees passively listen to panel discussions, the goal of the forum was to get various groups



interacting on a range of topics. 'We're talking about trying to put legal definitions around some of the emerging concepts that are coming out of this space,' explained Michael Casey, senior advisor for MIT's Digital Currency Initiative.

After a brief keynote by MIT's Professor Alex 'Sandy' Pentland, the event proceeded with a series of short talks intended to establish a common framework and vocabulary. Christian Smith, Technical Manager at MIT's Sociotechnical Systems Research Center, began with a high-level explanation of the common myths, misconceptions and confusions surrounding blockchain. 'Let's not talk about "the blockchain" in the abstract,' he said. 'There is no mystical superpower that makes mathematics and the laws of physics obsolete, and solves every problem we feel like invoking it for.'

Smith compared the current 'hype cycle' for blockchain to the 'irrational exuberance' of the dot com era, the gold rush, and the tulip mania of the 1600s. 'It's especially important that everyone here can cut through the hyperbole and exercise some good judgement,' he said.

Brian Kuhn and Shawna Hoffman, co-founders of IBM's Watson for Legal, took the stage next to discuss the interoperability of AI and blockchain. 'With more companies and law firms turning to blockchain and more data stored in distributed ledgers, there is a need for advanced analysis methods, which is where AI comes into the picture,' Kuhn said. 'Blockchain can help us verify, execute and record. AI can help us understand, reason and learn to identify meta trends.'

One attendee said she did not see the connection between AI and blockchain, other than the fact that they are both emerging technologies. This is a fair point: much of the marketing around AI has focused on its ability to read and understand non-structured data such as legal and medical documents, and by definition, blockchains hold highly structured data. The key here is that these are both game-changing technologies that have grown significantly in recent months, and the use cases in which both are used together are still being imagined.

Michael Casey returned to the stage with Dan Harple of Context Labs and Harrison Perl of C4Coin to discuss the potential legal challenges of a decentralized energy system that relies heavily on blockchain. Instead of rebuilding the same centralized power grid that was damaged by hurricanes Irma and Maria,

Blockchain can help us verify, execute and record. AI can help us understand, reason and learn to identify meta trends

their idea is to build solar microgrids. The power generated is owned by the system's users rather than by a public utility company. Leveraging Internet of Things (IoT) technology, all the data points produced by the microgrid are recorded on a blockchain, which allows the users to collateralize their stored energy and trade it for goods and services. In addition to the legal and technical aspects, this project involves humanitarian efforts and the economics of an entirely new system of trade.

'Smart contracts are not smart, and they're not contracts,' said Casey Kuhlman, CEO of Monax. The company offers a blockchain-based smart contract platform, though Kuhlman prefers to call it 'microcontracting'. He also offers up a slightly different definition of blockchains, defining them as 'event logs that are kept in sync across computers which are assumed to be operated by different legal entities'. Events in these logs can be evaluated by computation-based smart contracts that are specified in a conventional 'prose' contract.

The smart contract manages what Kuhlman calls the 'happy path,' or what happens when things go according to plan. He is quick to add that smart contracts should be used in an addition to, rather than a replacement for, the prose contract. For managing exceptions and dispute resolution, the prose contract remains tried and true. Kuhlman cites a prototype of parametric insurance in which Monax worked with Accenture to create microcontracts based on sensors in a French vineyard that were set up to track weather conditions. If the temperature in the vineyard dipped below a certain point for a period of time (variables defined in the smart contract), a payout would be triggered to the insured party. ▶



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The second day of the forum began with Drummond Reed's discussion of digital identity. Reed is the Chief Trust Officer for Evernym and the secretary of the Sovrin Foundation. 'How would you prove to someone that your social security number was your social security number?' he asked, prompting many in the audience to consider the notion of digital identity for the first time. In a post-Equifax hack era, since so much of the private data we would once have used to prove our identity is now publicly available, the notion of a self-sovereign digital identity is more important than ever.

Evernym and Sovrin's solution is a blockchain-based portable identity that does not depend on any centralized authority and can never be taken away. Reed offered up one of the more technical talks of the conference, adding that 'some of the largest networks in the world are already in discussions with the Sovrin Foundation, engaging with us on trust frameworks that will plug into this'.

He also explained that there were 24 stewards of the Sovrin network in 12 different countries, and that the newest member was law firm Baker Hostetler. Reed closed his presentation by noting that he had recently talked to US tax collection agency the IRS about the possibilities of using self-sovereign identity in filing tax returns, and together they determined that this one use case alone could save the government \$20bn per year. Adding in several other use cases brought their estimate up to \$100bn per year.

These sessions provide a few examples of the presentations at the Forum, offering unique views of emerging technologies. Other sessions included a panel on 'Women in AI and blockchain' and breakout sessions about the implications of blockchains and AI on VAT, bankruptcy proceedings, supply chains, crowdfunding, immigration and litigation. Each presentation and discussion highlighted the ways

in which the path forward depends on the technology and legal fields working together. Baker Hostetler CIO Bob Craig summed it up well: 'It's only transformative if you're paying attention—if you're not, it's disruptive. I want my law firm to be the one paying attention, to be able to deploy these transformative technologies for the betterment of our clients'.

Joe Davis has spent 17 years in legal IT, and is a member of ILTA's Program Planning Council. A frequent speaker and author on artificial intelligence and enterprise content management, Joe has led applications teams at several law firms and is currently consulting with a large corporate legal department. Prior to his IT career, Joe was a teacher, an entrepreneur and a DJ in a flea market. Contact him at joe@josephpdavis.com. ■

Make iManage Work ubiquitous*

*u·biq·ui·tous (adjective) Found everywhere.
Used by everyone.



Link2DMS*

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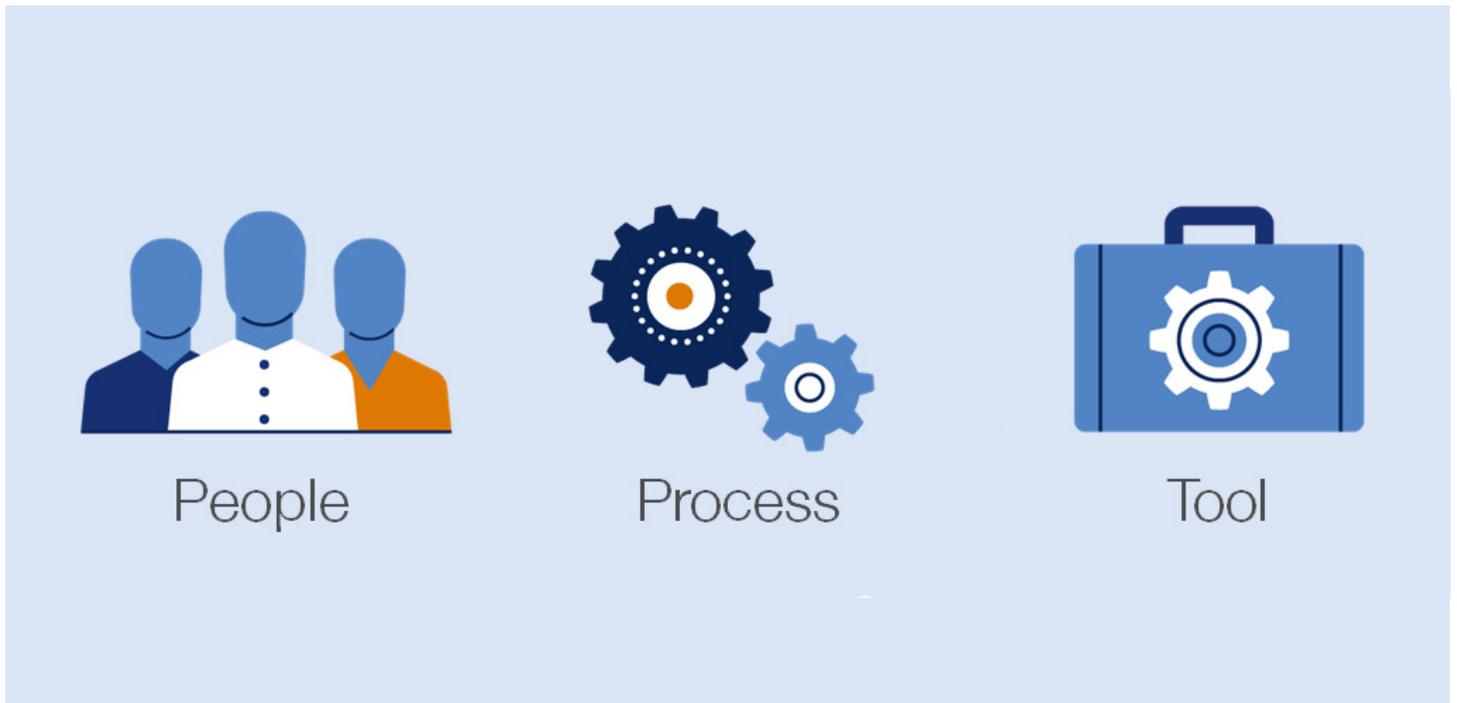


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Is legaltech a benefit or a burden for lawyers?

BY EBBO HAANTJES



Organisations need the right combination of people, processes and tools if they are to make the most of legaltech. Only with the right combination of these ingredients can effective transformation be achieved.

The sense of urgency as to the need for change has penetrated the field of legal services. All the leading law firms, as well as legal departments of major corporates, are engaged in a process of digital transformation and legaltech start-ups are mushrooming to meet the demand. But is a focus solely on legaltech tools the right one to ensure that the transformation will be truly sustainable? Or do other, non-tech factors also play a role?

It is important to keep an eye on whether the organisation in question is ready to make a success of the transformation. In this article, I argue that it is crucial for the organisation to

be actively prepared to do so. Otherwise, the technology acquired will be a burden rather than a benefit.

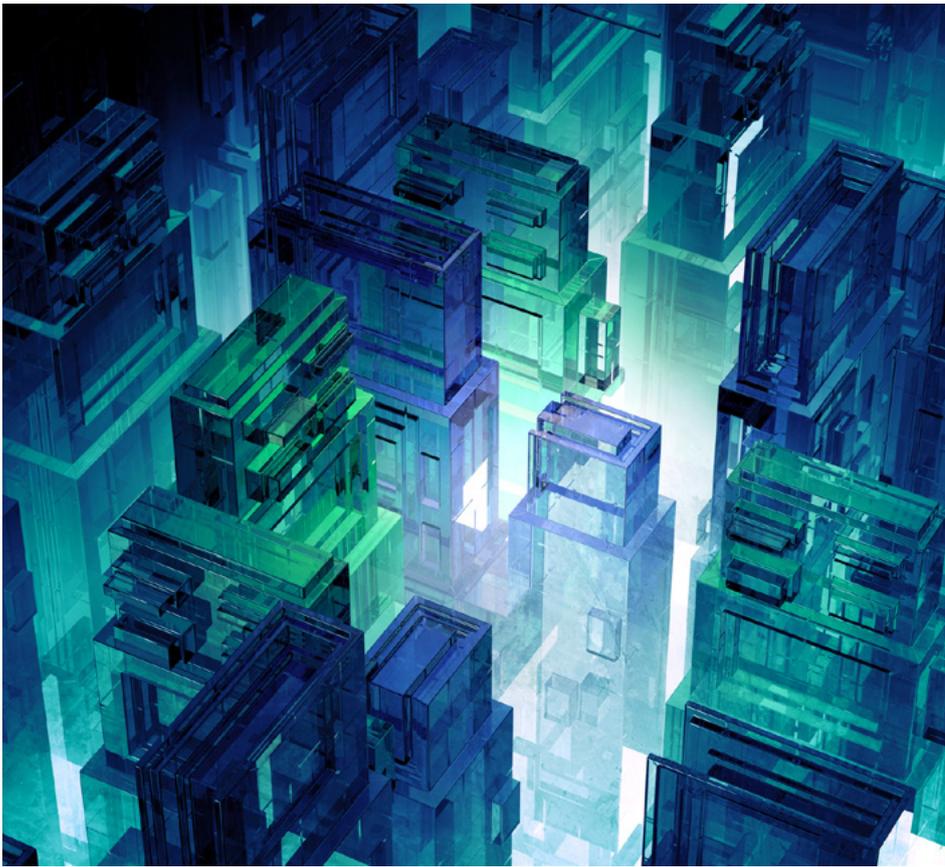
The recipe for sustainable transformation

Due to the wide range of legaltech tools (and accompanying solutions) on offer, the immediate focus is all too often on the 'promised' result. However, in order to achieve real added value from the tool and from the product or service for which the tool is designed—not to mention facilitating the ongoing development of that product or service—it is necessary first to be able to answer the following question in the affirmative: is the organisation ready? If not, it



will end up searching frantically, with its beautiful 'solution' in hand, for an appropriate way to use it.

To identify the potential for the sustainable deployment of a new tool, it is necessary to look at all three basic ingredients: the people, the process and the tool itself. Only with the right



combination of these ingredients can effective transformation be achieved.

People

People are the most important link in the acceptance of any new tool, as they are the tool's users, or the ultimate recipients of the relevant product or service. In the case of legaltech, these are the lawyers and the clients (internal or external) respectively.

Of these two categories of people, it is the client who determines the direction in which to go and sets the pace. He/she increasingly wants legal services to be provided faster, more efficiently and more expediently. The ultimate *raison d'être* of every lawyer is to fulfil the client's wishes or to solve his/her problems. If the tool is not up to the job, it becomes a hindrance rather than a help.

Unfortunately, lawyers themselves are often the obstacle to the successful use of legaltech tools. In the previous couple of decades, their 'digital fruit baskets' contained only Apples and BlackBerries; now, a lawyer needs to be a technological jack of all trades, in addition to having the skills to make effective and efficient use of all the new tools. In reality, there is something of a gap here—to put it mildly.

Fortunately, the increasing attention to legaltech has resulted in the emergence of specialists such as legal engineers, legal project managers and others with a combination of skills in technology, management and law. Through their ability to use legaltech tools to maximum effect, they have added enormous value in the legal services field.

However, this does not mean that the users (read this as the lawyers) can continue to wallow in a state of technological illiteracy. On the contrary, it is essential that they at least stay up to date with the tools in use. On-the-job training is a must. And an improved curriculum at universities (of applied sciences) containing such training (to lay a solid foundation) would be a welcome addition in this regard.

Process

Nowadays, lawyers must be 'lean' in order to survive. Methodologies such as Lean Six Sigma aim to increase client satisfaction and improve an organisation's (financial) results. By focusing on what is really important for the client and eliminating operational defects/errors, the number of steps in work processes is reduced (Lean) and there is less variability in the outcome of the processes (Six Sigma).

This may sound harsh, but where a work process has not been 'cleaned up' prior to the introduction of a new tool, the result is invariably a mess. The tool should be properly integrated into the activities undertaken by the organisation in providing legal services for which there is a significant demand from clients. If the activities into which the tool is to be integrated are not in sync, the organisation will never achieve the improvement in quality that the acquisition of the tool was intended to bring about.

Although this may seem very obvious and logical, in practice it still happens too little. Consequently, it is often the case that legaltech tools fail to be deployed to their full potential.

It is therefore important to set up the process in such a way as to make it possible, from the moment the tool is introduced, to measure whether the intended results are in fact being achieved. This data can in turn be used to steer a process of continuous improvement and help realise the tool's full potential.

Tool(s)

As already stated, there are many legaltech tools to choose from. Nonetheless, my advice when selecting a new tool is to look first at the technology ►

The aim is for new technology and processes to become as essential to the organisation as the telephone, the printer and the coffee machine

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already available within the organisation. As I said earlier, there is a high degree of inefficiency in the use of technology tools in the legal services sector. If all tools were actually used for the purpose they were acquired for, this would be an innovation in itself. A factory in which only half of the machines installed are used can never be truly cost-effective.

Is the tool appropriate for the intended purpose? Has it been integrated into the organisation's day-to-day work process(es)? Is there a queue of lawyers waiting to use it? Even if all these questions can be answered in the affirmative, using the tool is not necessarily a simple matter of 'plug and play'. It is often forgotten that the use of the tool entails not only the technology itself but the work performed by the person(s) tasked with managing the tool and its use within the organisation. This requires a sound knowledge not only of the tool itself but also of the organisation from both a technical and a legal perspective.

In other words, this person is the 'product owner' (to use the terminology of the Scrum framework) responsible for maximising the tool's added value. It is therefore all the more puzzling that this crucial role is often filled by individuals who lack the requisite expertise and training and, as a result, the organisation

*Why would you
buy a Ferrari
and then give
the keys to a
teenager with no
driving licence?*

fails to obtain the maximum benefit from the tool. Why would you buy a Ferrari and then give the keys to a teenager with no driving licence?

Legal operations

In addition to decisions on issues like how to maintain the tool, there are many facets to the efficient deployment of legaltech within an organisation. Even if all the steps described above have been properly implemented in the right order, it is still necessary to create a solid basis for sufficient attention to be paid on an ongoing basis to all new technology and processes. The aim is for these to become as essential to the organisation as the telephone, the printer and the coffee machine.

The emergence of legal operations departments within major corporates as well as law firms is a good start in this regard. The purpose of such departments is to ensure the optimal deployment of technology, processes and people in support of the organisation's legal practice, focusing not only on the technology but also on other key elements like training, project management and ongoing product development.

If this is done successfully, legaltech tools will be well grounded within the organisation and it will be accepted that for providers of legal services, the delivery of real added value no longer revolves solely around the lawyer, but around a combination of legal expertise and technology.

Ebbo Haantjes is the head of Legal Operations at international law firm NautaDutilh. His department provides law-related and other support services to the firm's legal professionals and its clients in the areas of knowledge management, process and project management, legaltech and innovation. Ebbo co-founded the NautaDutilh Lean Academy where he also teaches and holds a Lean Six Sigma Black Belt. ■

Embracing legal technology in outward facing client service

BY RALPH BAXTER

Technology is not merely a communication tool that adds to the cost of doing business, it is an essential element of modern service delivery.

Last quarter, I addressed changes technology companies should make in how they think about their law firm customers.

This time, I turn to changes law firms need to make in the way they think about legal technology.

Most law firms have a limited and outmoded conception of the role of technology. They see it almost entirely as an inward-facing part of their infrastructure. It is a modern extension of typewriters and telephones. It performs fundamental tasks that help organize and communicate information. Faster and prettier than the 1950s, but fundamentally the same functions with modern tools.

Law firms don't see much of a role for technology in outward-facing functions.

Law is a profession, after all, not merely a service. Lawyers deliver highly specialized value to their clients, enabled by extensive, specialized education and experience, and guided by ethical rules and judgments born of years of working through complex client challenges. Legal service is a domain reserved to those select human beings qualified to deliver it. Heaven forbid that we permit machines to perform client service.

These last three paragraphs may exaggerate the situation, but the basic thrust is accurate.

Contrast the way law firms integrate technology and human resources with the way most other businesses do. In any modern manufacturing facility, for example, humans and technology operate side by side as co-workers. The machines do those elements that engineering and machine learning permit them to do. The humans take care of the elements that require judgment, discretion, and other factors that cannot be programmed.

I recently visited several factories here in West Virginia to observe how this integration of people and machines works. It was illuminating and encouraging. Not only was the outcome amazing, everyone involved appeared to be delighted with the arrangement. The workers had more interesting job content,



production was faster and higher quality, sales were up and so were wages and profits.

Law firms need to embrace technology in an analogous way.

Law firms have already realized that much of the work embedded in legal service can be disaggregated and done by professionals who are not licensed to practice law. That realization is changing the human resource models of firms.

Law firms need to take the next step and realize that much of the work can be done even more efficiently and effectively by technology. At each stage of a client engagement, the technology can perform material portions of the work.

For starters, it can participate in the management of the way the work is performed: from assessing whether to take on a new matter, clearing conflicts, architecting the service plan, optimizing the staffing plan, budgeting, pricing, monitoring how the service delivery adheres to budget and plan, billing, collecting, profit analysis, client communication, to assessing client satisfaction. Intapp, for example, offers a suite of technology-based tools that assist in all of these functions and more.

Technology can perform elements of the work directly. Most firms use technology in e-discovery. Obviously the application of fact examination tools can be much broader.

Equally obviously, technology can draft documents that are similar and repetitive from matter to matter, in litigation and transactions. Why should a client ever pay for a lawyer to do a first draft when technology can so easily and readily draw on prior work?

Increasingly, the technology can do vital legal research. Lex Machina and Ravel Law tools provide profound insights into sophisticated legal issues in seconds. In fact, tools such as these make possible insights that literally could not be achieved by traditional methods.

And with each passing day there are more examples. Machine learning now enables an increasing scope of functions to be performed by technology, working in collaboration with lawyers and other professionals.

As with manufacturing, the implications of integrating technology into client service can be substantial and positive. The quality can be better: technology-assisted work assures a more complete and accurate analysis of relevant data, including sources of law, greater leverage of the value of prior work product, greater assurance of consistency across departments and offices, and on and on it goes. Job satisfaction of lawyers can improve as they focus more on matters that genuinely call upon their judgment and experience. And, of course, the work can be done faster and more cheaply, permitting greater client satisfaction, lower fees and higher profits.

To achieve these benefits, law firms need a change of mindset. Technology is not merely a communication tool that adds to the cost of doing business. It is an essential element of modern service delivery. While it does involve cost, the return on that investment is at least as great as hiring the next law school graduate.

In fact, in the world ahead, the positive impact of legal technology on the revenue line can be much greater than any other expense a law firm incurs.

Ralph Baxter is a legendary legal innovator, perhaps best known for the 23 years he spent as chair-man & CEO of law firm Orrick. During this time he launched several transformative initiatives that aligned Orrick more closely with its clients, including non-traditional talent and pricing models and the first global insourcing centre at a law firm. He is now a leading author and speaker and provides invaluable advice to law firms, corporate legal departments, legal technology companies and other new entrants in legal service delivery. He is also a candidate in the 2018 House of Representatives elections, seeking to represent West Virginia's 1st congressional district.



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Subscription-based technology management: a proposal for IT as a Service (ITaaS)

BY SETH R. WILSON AND RYAN GRIMES

Combining the strength of an IT services professional and a legal technologist is a good way of handling a lawyer or law firm's technology needs.

There is no lack of services or technology tools available to lawyers today. This is both good and bad. Good because options and competition help mature products quickly. Bad because lawyers are notoriously slow to adopt new technology for many different reasons (some legitimate; some not). The marketplace is crowded with programs, apps, and tools to assist in your practice. It is a good time to be alive for a nimble lawyer or firm.

One question we always ask is: 'What is your IT services plan for managing your technology?' If the answer is anything other than a very specific plan, then you don't really have a plan. In this article we will explore a new concept that combines the strength of the IT services professional (traditionally a vendor) and a legal technologist (usually a lawyer turned tech consultant) to suggest a new way of handling a lawyer or a firm's technology needs. We call it IT as a Service (ITaaS).

The concept is simple: the trusted IT professional designs and provides a turnkey solution to law office technology needs on a subscription basis, working alongside the legal technologist to implement, train, and utilize technology in the most effective manner possible. The IT pro can offer the technical know-how and assistance to keep the firm running, and the legal technologist helps implement software systems and workflows that help the law firm and addresses legal-specific technology ethics (see the American Bar Association's Model Rule of Professional Conduct 1.1).

The ITaaS model creates a win-win situation for both lawyers and providers. Lawyers can be confident that both sides of the technology coin are

being handled: the technical aspects by the IT professional and the legal considerations by the technologist. Both providers can offer training to allow staff to get more from their technology investments. Typically, the IT professional only handles the networking and troubleshooting, leaving a large gap between having the technology available and using it to its full potential. The legal technologist can help bridge that gap and bring the technology to life, helping to maximize the firm's return on investment.

In the past, lawyers would divide up management responsibilities with the other lawyers in the office. Typically, different lawyers would be responsible for the phone system, the copiers, human resources and computers. That model no longer works, as almost everything is networked together. Because of this, the tech-savvy lawyer in the small- to mid-size firm spends more time fixing than doing. This is a recipe for burn-out and frustration. ITaaS can help solve this problem.

Good technology has a way of making your law practice more efficient. More than that, it makes it more effective. You can streamline processes, be more mobile, and ultimately serve your clients much better than before. But with

Freeing the law firm's talent pool to problem solve, both from a legal matter perspective and an administrative perspective, will make for happier lawyers and firms

technology comes responsibility and ultimately you need to manage it on some level. Furthermore, cloud services bring additional data security questions as more of your data is housed outside of your firm's direct control. Finally, don't forget the humans. Technology is only as good as those who operate it.

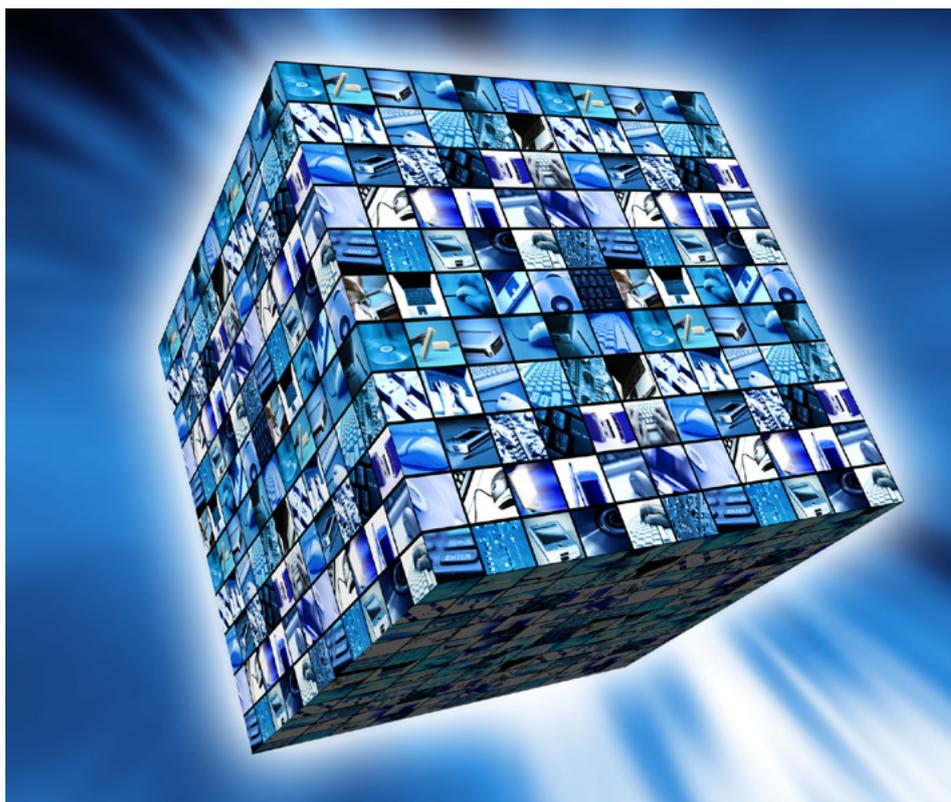
As you bring more and more technology into your law firm, management of your resources becomes more of a necessity than a luxury. If you don't manage your technology it will eventually manage you, both in terms of costs and potential risks. You know what you have and must know how to protect it. The ITaaS model provides ongoing and up-to-date reviews of systems and threats, helping the firm pivot when necessary.

Centralized management of your technology through ITaaS offers you some very tangible benefits that will ensure you are operating a secure and protected ecosystem for your law firm. Think about how much more confidence clients will have if you are able to address any data security concerns with them through your ITaaS agreement. Because threats change continually, a model that can keep pace with changes is a necessity in today's practice environment.

As technology becomes more and more mobile, you also need a way to secure your data from accidental loss or theft. You need the ability to securely wipe a device that has left your firm's possession. Security and compliance are a large part of our world now. Are your current IT solutions HIPAA-compliant? Are you following any compliance guidelines? Are you licensed appropriately for your users?

ITaaS will provide for centralized management of devices in your firm (computers, mobile phones, tablets; copiers, desk phones and so on). ITaaS will include policies, and applications you have licensed can be automatically installed as soon as users securely connect to the Internet. You can enforce things like disk encryption, enabling the firewall, and installing Microsoft Office. All of these tasks are handled in the background without the user having to do anything.

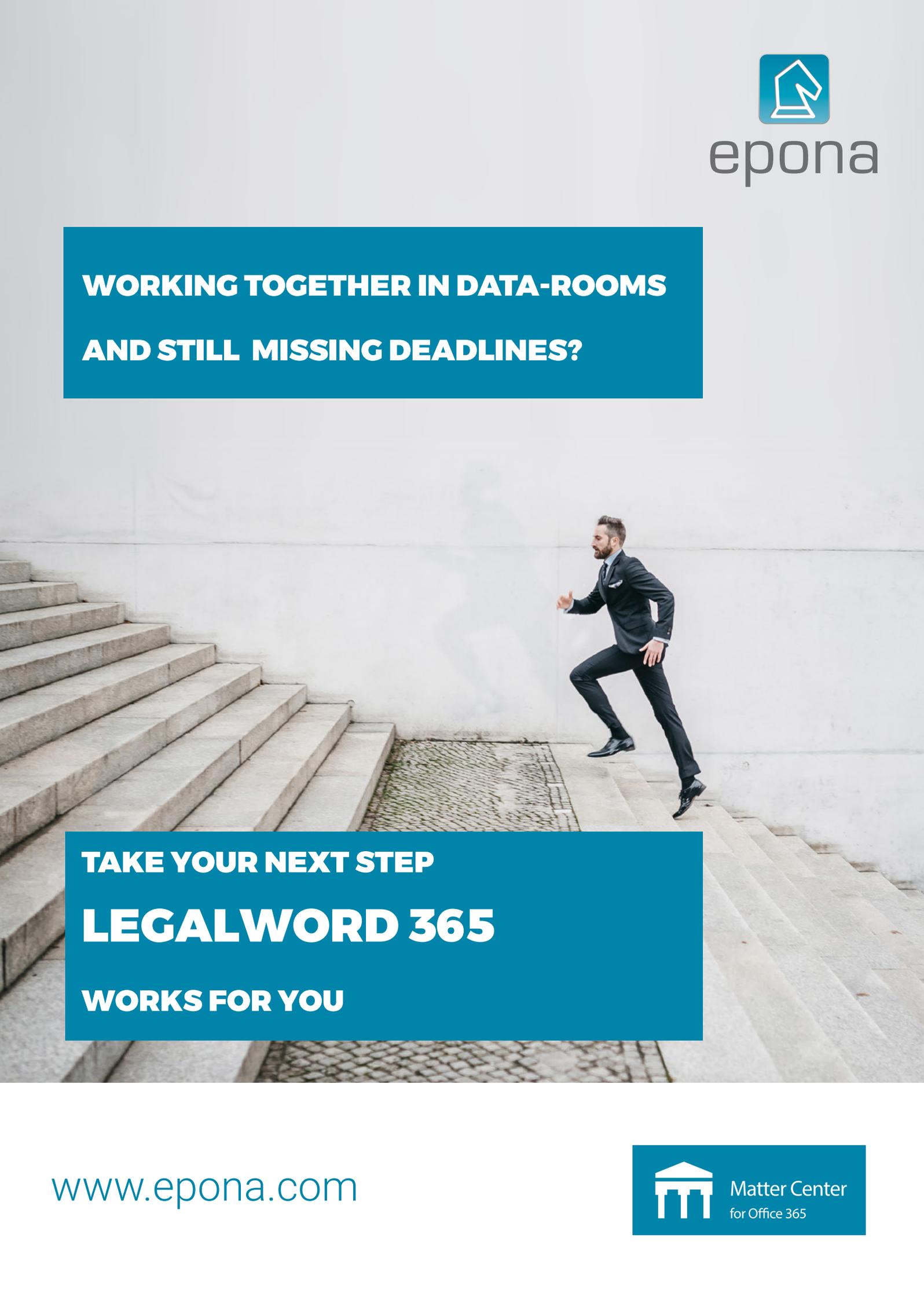
With a proper ITaaS plan in place, using technology for your firm will be an enjoyable experience that will ultimately transform your practice. Imagine utilizing an iPad Pro with an Apple Pencil to take notes while with a client. Those notes can then be sent to the office, where they will be transcribed ►





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before you even get back there. Your need for a legal pad will pretty much disappear. You can have secure access to case files remotely from a device less than an inch thick, instead of a bag full of pads and folders full of case notes. It's a good time to be a lawyer.

When did you last spend time thinking about the 'wow' of technology instead of the 'how'? There are so many great things you can be doing with the technology that is available today. Implementing an ITaaS model will free your time and resources to actually get stuff done.

Look for IT professionals and legal technologists to team up and form an ITaaS team for your firm. When lawyers are able to focus on being lawyers, instead of managing technology, they can learn how to better use technology tools. Freeing the law firm's talent pool to problem solve, both from a legal matter perspective and an administrative perspective, will make for happier lawyers and firms. Plus, your clients and bottom line will thank you. ▀



Ryan Grimes is the president of My IT Indy, which is dedicated to helping businesses be more efficient and profitable through the use of technology. He has worked on technology for over 35 years, starting with an Apple IIe! Ryan loves helping businesses grow and become more successful through planning and implementing appropriate technology solutions.

Seth R. Wilson practices with the law firm Adler Tesnar & Whalin in Noblesville, Indiana. He concentrates his practice on the intersection of technology and law. He works with attorneys and their firms to document and then automate the administrative parts of the law practice. The goal is to use and develop technology practices that are highly efficient but more importantly, highly effective, resulting in better served and loyal clients.



Global Legal IT providers: what's all the fuss about?

BY JOBST ELSTER



Do potential clients see the global nature of big IT providers as a plus when weighing up IT investments?

The discussion of global IT providers intrigues me. How often do you hear a supplier touting their global expertise and capabilities, and around-the-globe availability? Why should we care, and what does being global really mean to my business, my law firm? One could equally argue that depending on where you are located, the world is a lot smaller than elsewhere and a lot of what a global company brings to bear is already assumed.

I have been hanging out around global companies and multinationals within the legal space for the best part of 18 years. Back in 1999, I had been working with CMS/Data Corporation (remember the old CMS OPEN PMS, now Aderant Expert) for about four weeks when the company (and its PC Docs parent) was acquired by Solution 6, an Australian based, global professional services software provider.



At that time, based on my personal experience, 'global' meant having offices in major international cities and reporting to a boss many time zones removed, integrating cultures, accommodating geography-specific features/functionality and trying to serve clients adequately using software applications that often did not exist stateside. There was not much talk of global synergies and how the global IT provider status could be leveraged competitively. The world seemed much bigger then.

Going global—what's in it for me?

Let's fast-forward. About five years ago, BT Group acquired legal IT/technology specialist Tikit in a bid to strengthen its legal IT bandwidth and, according to the press release issued at the time, 'combine the strengths of Tikit's expertise, portfolio, relationships and deep understanding of the needs of the legal sector with BT's scale and breadth of products, creating a differentiated offering with the ability to supply, install, support and fix mission-critical IT applications and information and communication technology infrastructure through a single point of contact'.

While some might dismiss this as corporate marketing speak, I glean several noteworthy take-aways:

- Combining strengths. There's something to be said for having global bandwidth that enables true collaboration based on complementary capabilities and skills.
- Differentiated offerings. A true global supplier should be able to offer a 'one stop, one destination' solution for clients' IT and technology needs and provide the proper solutions, training and support in a contextual way.
- Communicate... through a single point of contact. With the advent of social media and communication overload, it is more important than ever to be able to rely on one central contact and point person. While it is unrealistic to think one resource has all the answers, they should be well positioned to provide guidance and at a minimum, to point you in the right direction.

Furthermore, there's a lot implied (but not stated) in the above that is equally as critical to the attractiveness of a global supplier:

- Economies of scale and scope. BT

Group's 2017 revenue exceeds £24bn; Thomson Reuters is a £11bn multinational mass media and information firm; and the RELX Group, previously known as Reed Elsevier (and owner of LexisNexis) is a \$6.8bn organization. There's something to be said for financial heft and stability when it comes to making 'bet the farm'-type technology decisions.

- Security and governance. Why not leverage your global partner's security and governance safeguards, policies and processes to address your own challenges? It's like working with a cloud provider on security. Their ability and responsibility to attain and maintain critical security certifications and standards far exceeds what any single law firm or local company might be able to do on its own.
- Accountability. Being able to rely on a business partner is critical, so you can take solace in the accountability that global partners have to their base and in turn to you. Accountability translates to reliability, which in turn equals peace of mind.

Managing risk

Let's talk about risk management. In a climate where companies are one major data breach away from financial ruin, not to mention reputational death, can you afford to deal with anything but a reputable company that can provide ironclad third party vendor security assurance and risk aversion?

According to risk management benchmarking data commissioned by compliance services group NAVEX Global, the top objectives for most corporations' third party risk management programs are to protect themselves against legal and financial risk, followed by complying with laws and regulations and protecting against reputational harm. When vetting potential or current third parties, risk management teams will often consult their financial statements and pertinent governmental reports, as well as talk to existing customers.

Be global, act local

According to Tikit's chief executive Katherine Ainley, the London-based IT provider's 'globalness' comes to bear in two distinct areas. 'One is the combination of our own IP and partner products and the ability to provide true ▶





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solutions that are best in class and span distinct but connected specialist areas,' she says.

'Second, our global bandwidth and expertise has proven to be a true advantage, especially since we have worked in a global setting—global teams, global partners and global clients—for quite some time and really understand how to leverage our shared expertise, how to move work between resources and regions, how to take advantage of time differences and engage in “follow the sun” activities to complete projects and how to replicate regional best practices on a bigger scale.'

In reality, there's a big advantage to being global when it comes to understanding global firms' challenges and issues and how best to collaborate with specific teams on the ground. It's comparable to professional athletes from the same sport talking to each other about training, performance

Can you afford to deal with anything but a reputable company that can provide ironclad third party vendor security assurance and risk aversion?

recovery or processing defeat. They share instant credibility and experience and are much more receptive to taking advice from one another. This is a major

benefit, especially in rapidly evolving IT environments where the pace of change is so extreme that only true collaboration can really address the fundamental business issues.

While the points above are not the be-all-end-all when it comes to working with a global partner, they will hopefully provide some direction when identifying the ideal collaborator and in making sense of what 'global IT provider' really means.

Jobst Elster is InsideLegal's Head of Content and Legal Market Strategy. He has served as a legal market strategist for the last 18 years, advising companies entering the legal market, involved in mergers and acquisitions, and expanding strategic operations overseas. Jobst regularly writes and speaks on legal technology, market research and leveraging market data, technology innovations and futures, legal marketing and big data. He can be reached at elster@insidelegal.com. ■





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How was your year?

We asked some of our contributors this year for their thoughts
as we move from 2017 to 2018

What's the most inspiring thing you've heard this year?

Helder Santos, Senior Business Technology

Manager, CMS: From talks, work/personal experiences, and discussions, this year I have gotten a great deal of inspiration for myself. But one thing that stuck in my mind was a spontaneous movement, rather than a speech or a talk, that showed me that the world can be a nice place.

I really like football, and last April a Champions League football game between Borussia Dortmund and AS Monaco was deferred after a bomb attack near the Dortmund team's bus. The game had to be postponed at short notice until the next night, but many of the away fans from AS Monaco did not have an additional night's hotel booking.

Shortly after news circulated about the number of people stuck without a place to stay, the Twitter hashtag #bedforawayfans began trending, helping to connect marooned supporters with locals who opened up their homes to them. There was no official request or organization behind it, it was just an idea that sprang up among fan groups before spreading via social media. It ended up reaching far and wide.

That demonstrates the character of people. Many fans enjoyed a wonderful evening's company and made new friends—and that's what football's all about. It was a great victory for humanity that so many people, also from other clubs and some not even football fans, joined in and opened their doors. This was a truly inspiring moment in 2017.

Ann Gorr, legal technology consultant: This past summer, I was invited to be part of a 'careers in technology' panel for 'We Connect The Dots,' which is a STEAM/STEM program for high school students held at Microsoft's Manhattan offices. I arrived early at the program to have the opportunity to see at first hand what the students were learning. It truly was an inspirational afternoon to see these young adults immersed in the state-of-the-art technologies that will be the focus of the future.

But the program wasn't just about the technology component—it focused on developing leadership traits, collaboration skills, the understanding that failure is a natural part of success, and the concept that learning is a lifelong journey. It was truly inspiring to listen to this next generation of tech leaders present to and collaborate

with one another during their learning segments and then interact with those of us on the career panel with some very inquisitive and unique perspectives about the potential of their future career journeys. It was one of the more memorable, humbling, hopeful, impactful, and inspirational experiences of my career.

Brian Podolsky, Practice Manager, Kraft & Kennedy:

At a recent vendor conference, I heard a new term—co-opertition. There were many different competing integration partners in attendance, and I was just one of them. And even though we are competitors, it is the partner community that makes the vendor's product a success. And partners can sometimes even help each other, making sure projects are done efficiently. Think of it as a 'pay it forward' situation. I thought that idea about a partner community was inspiring and could apply to other aspects of life.

Kim Craig, Managing Director, Lean Solutions,

Seyfarth Shaw: I've been inspired by the thinking that is rippling through the industry at large that the 'allied professionals' (f/k/a non-lawyers) bring significant value to their organizations whether within a law firm or in-house. I'm seeing a greater appreciation for their talents and experience in legal operations, project management, lean/process improvement, data analytics and technology solutions. That thinking will help propel teams forward in meeting internal and external client needs.

Joe Davis, consultant: The work being done to leverage blockchain and solar panels to create microgrids in the areas of the Caribbean that had their power systems damaged by the 2017 hurricanes. Rather than just rebuild the same vulnerable infrastructure, an entirely new and decentralized system is being built that not only restores electrical power, but also affords residents some economic power, as the tokenized electricity becomes a commodity they can trade for goods and services. It's a project that involves technology, law, economics, and perhaps most importantly, disaster relief.

Esther Dediashvili, Legal Knowledge Manager,

Fischer Behar Chen Well Orion & Co: 'Change has never happened this fast before, and will never happen this slow again' is one of the most inspiring phrases I heard this year—at Lexpo '17. It made me think about the legal industry in Israel, which has traditionally been slow to adopt technological advances compared to other countries where legaltech is progressing at an accelerated pace.

We don't do AI, we do HI... human intelligence

The phrase inspired me to contribute my part for the cause of raising awareness in the local legal sphere as to the benefits of integrating technology in the legal practice. My hope is that the realization that change is inevitable, and will happen faster than expected, will slowly start to penetrate the Israeli legal scene and mark a new chapter in the history of Israel's legaltech industry.

Jobst Elster, Head of Content/Legal Market Strategy, InsideLegal.com: 'We don't do AI, we do HI... human intelligence'. What started as a joke over breakfast with

fellow legal ITers quickly turned into a mission to find and engage with companies that not only advertised but delivered on the 'AI in legal' value proposition, as well as those that opted to pass on the AI hype train and channel innovation and technology progress elsewhere.

Ebbo Haantjes, Head of Legal Operations, NautaDutilh: The emergence of preventative law. It will drastically change legal provision, because 'solving a problem' will no longer be the core business of a lawyer (I hope).

Seth Wilson, Adler Tesnar & Whalin: Action trumps everything. It's important to have good information, but it's also important to get started. A similar concept is fail (and recover) fast.

Richard Tromans, artificiallawyer.com: Legaltech can really help with access to justice. Why? Because we need to address this immediately. ■

If you were to rule the legal IT world for a day, what is the one thing you would change about it?

Helder Santos: My current perspective and reality show me that inside the legal IT industry we are still trying to understand what is the next big thing! Blockchain, AI, robot lawyers, smart contracts... the list goes on!

The majority confuse innovation with invention. You don't have to invent the next legal big thing; innovation is about improvement. It's always saying: how can I do more and better for clients? How might I run the team better? How can we deliver legal advice better? Law firms see there is a lot of technology available that can empower them to be more innovative, but they only focus on the outer scope, forgetting their inner scope.

Therefore, my change would force people to focus on now—getting the industry to look at real challenges and opportunities that are here right now instead of discussing how the future will be in 10 years' time.

Ann Gorr: I would ban the use of technology acronyms. Those of us in the legaltech industry tend to allow acronyms to become part of everyday conversations and presentations

I would close down all legal IT functions inside law firms immediately



simply because we live in that world and are always eager to evangelize about the advantages of implementing those technologies. During client and project meetings, I now find myself stopping technology presenters mid-stream and asking the attendees: 'Do you know what "XYZ" acronym means?' When they usually respond with 'No!' (and a correlating look of relief that they didn't have to ask that question out loud in front of everyone else at the meeting), that at least ensures that the non-legal IT folks in the room gain a better grasp of what the legal IT team is discussing.

Brian Podolsky: I would force all legal IT vendors to create 64-bit builds of their Office add-ins. Too many firms struggle with the move to 64-bit Office because of a lack of support from some of their add-in vendors. Everyone needs to develop for 64-bit, and keep pace with the new update timelines of the Windows 10/Office 365 platforms.

Kim Craig: Organizations would recognize the importance of focusing on process and human behavior BEFORE purchasing expensive 'shiny objects' that they think will solve their problems. They need to 'do the work' on the front end before installing a 'magical solution'. Tech is powerful but without investing the time to really ►

understand what problem(s) an organization is trying to solve and understanding the change management challenges, the technology solution is bound to fail.

Joe Davis: I would encourage more learning and experimentation with new technologies. History shows that the people and companies that resist keeping up with technology almost never win in the long run, and the pace of change is only increasing. Look at Bitcoin's increase in value over the past year—or even over the past few months. That's not necessarily proof that everyone should be investing in it, but it is solid evidence that cryptocurrencies and the technologies that underpin them are disruptive forces worthy of consideration.

Esther Dediashvili: The legal profession is in many ways a backward-looking discipline. In a field built on the foundation of precedent, it's not surprising that lawyers are often apprehensive about adopting new technology. Some even contend that technology shouldn't be embraced because it's going to replace lawyers. As I believe that technology is not 'instead of' but 'in addition to' lawyers, I would encourage lawyers who are skeptical about legal IT to focus on exploring the potential benefits of technology (such as efficiency gains, improved quality and new business lines) and how to use these innovative tools to improve legal service delivery.

As John F. Kennedy said: 'Change is the law of life. And those who look only to the past or present are certain to miss the future.' In order to succeed as law firms operating in the new economy, I believe organisations should be more open to experimenting with new technologies. Naturally,

experiments involve both successes and failures, and even though it runs contrary to much corporate thinking, failure should be an option. It almost always leads to success, and should be celebrated. It took Thomas Edison more than 10,000 tries to perfect the light bulb, after which he famously stated: 'I have not failed. I have just found 9,999 ways that do not work.'

Jobst Elster: While this is not exclusively a legal IT phenomenon, I would have to say more accountability surrounding M&A, especially as it relates to delivering customer value and being honest about it. I am so cynical when it comes to 'vendor X acquired Y' announcements and the promises of greener pastures for the customer-prospect-stakeholder ecosystem. Prove me wrong and show me a legaltech deal that makes sense beyond the dollars and cents of the board room.

Ebbo Haantjes: Standardization of the most common legal documents. Only then we can use AI properly.

Seth Wilson: Single point of entry for data and use throughout the life of a matter with each system having the secure ability to easily communicate with other systems. Both from an automation and a knowledge management standpoint.

Richard Tromans: I would close down all legal IT functions inside law firms immediately and demand the management team of partners made all decisions about legal AI and automation. Any external IT input can then be serviced by professional legal engineers. ■



Who in the legal IT industry would you most like to meet and what would you ask them?

Helder Santos: For a long time I have considered Professor Richard Susskind as an authority in the legal IT industry, therefore he would be my choice. In his book 'The Future of the Professions: How Technology Will Transform the Work of Human Experts,' he predicts the decline of today's professions and describes the people and systems that will replace them. He argues that the current professions are antiquated and no longer affordable and explains how 'increasingly capable systems' will fundamentally change the way that professional expertise is shared.

I would ask him whether he thinks that the skills of the lawyer will complement the skills of the computer, or whether the computer will do better without lawyers!

Ann Gorr: With so much of the legal IT world trending towards AI and process management, I think that I'd like to have the opportunity to meet Richard Susskind. I don't have a particular question to ask—I would rather learn about the personal and professional experiences, drive, personality and philosophies that placed him on the pathway to becoming a subject matter expert.

Brian Podolsky: Having been in legal IT for over a decade with Kraft Kennedy, and having attended about seven ILTA conferences, I have met and spoken to many of the leading minds in the industry. So instead, I will mention the most impressive legal IT mind I've encountered—Alvin Tedjamulia, CTO at NetDocuments. Alvin has always been at the forefront of legal technology over the past 30 years. If you've been lucky enough to witness one of his presentations, you will already know they are uniquely entertaining while being extremely technical.

Kim Craig: I would want to talk to innovative IT leaders OUTSIDE of legal as I believe we have much to learn from other verticals.

Joe Davis: Serial entrepreneur Justin Kan, founder of Atrium LTS, a combination 'technology-first law firm' and legal technology company. Kan has been a partner at US seed accelerator Y Combinator, and a founder of Justin.tv and Twitch (he sold the latter to Amazon for \$970m). With a long history as an entrepreneur and investor, Kan is certainly an experienced consumer of legal services. I would be very curious to talk to him about how he feels he can bring a fresh point of view to building not only a legal technology company but also an actual law firm from the ground up.

Esther Dediashvili: I'm a huge fan of Professor Richard Susskind and would be delighted to meet him. He's a true visionary of the legal profession and the effect of technology on the legal sphere as a whole. His book 'Tomorrow's Lawyers' is one of my favorites, and I believe it's a must-read for anyone involved in the legal sector.

Given that the legal industry is traditionally considered as conservative and often reluctant to embrace innovative technology, I'd like to ask Professor Susskind what his thoughts are on how to bring about change in the legal sphere on several levels:

- adoption of technology by law firms to enhance legal service delivery;
- incorporation of technology into the education of future lawyers to equip law students with the skills needed to be successful in the 21st century; and
- leveraging technology to facilitate public access to justice.

Jobst Elster: I sometimes have debates with friends about what musician or group I would have wanted to see before they broke up/stopped performing (or living). So in terms of who to meet in #legallIT, I want to (re)introduce an old friend and colleague who is no longer with us but inspired (and continues to inspire) scores in our legal space. Ross Kodner was a law office technology giant whose infectious 'teach and preach' style moved many and inspired many others to follow in his footsteps.

I met Ross through InsideLegal's CEO JoAnna Forshee who together with Ross annually orchestrated 'The Dinner', a who's who of legal technology movers and shakers and just plain fun, cool and brilliant people. I often think of Ross and how he would navigate the current legal landscape and continue to 'preach'. I discuss topics like attorney technology proficiency and competence and think 'man, Ross was saying that decades ago'. For those of you not familiar with Ross and those of you who miss him like I do, take a few minutes and take in Craig Ball's Ross Kodner tribute from 2013.

Ebbo Haantjes: Bharat Anand, author of 'The Content Trap'. I would like to ask how we can use his theories and examples for digital change in legal provision.

Seth Wilson: With social media, we have more access to leaders than ever. I would like to sit down with Jack Newton of Clio and discuss the future of automation and analytics in the legal industry.

Richard Tromans: Not really a legal tech person, but Nick Szabo. I would ask: is this what you wanted to happen with smart contracts? ■

I'd like to ask Bharat Anand, author of 'The Content Trap', how we can use his theories and examples for digital change in legal provision



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What are you hoping to achieve in 2018?

Helder Santos: Looking ahead to 2018... I want to keep growing at the company where I work currently and ensure its continued excellence. Some of the nice things we did last year have energized me and made me very confident and excited about my future there. Any strategies and effort I employ in 2018 will be to sustain and build on that success. Personally, I intend to learn and grow, teach and share—this is fundamental to my happiness. If I'm not learning, I'm dying. And if I'm not sharing what I've learned, I feel like I'm wasting those lessons.

Ann Gorr: I'm so very blessed in many ways but especially in that I love my career and the opportunities and challenges that are placed in front of me on a daily basis. In 2018, I'd like to do a better job of juggling the work/life balance scenario.

Brian Podolsky: I am looking to help my clients move their DMS to the cloud, and make them realize they've made the right choice. Whether it's with iManage Cloud or NetDocuments, law firms have the ability in 2018 to take advantage of very exciting new cloud technology. iManage's RAVN acquisition brings AI and data classification into the fold, and NetDocuments' recent acquisition of ThreadKM brings incredible collaboration at both the document and matter levels. It's going to be a big year.

Kim Craig: Continue to work with in-house legal teams bringing design thinking, lean and project management disciplines together to help them improve their legal operations and service offerings, addressing the change management challenges for execution. Additionally, I would like to continue to build bridges between law firms and law departments through joint initiatives, including continued investment in law school content and education encompassing the 'business' of law.

Joe Davis: Blockchain is the technology that has me the most excited right now. It has so many potential applications, yet is still in its infancy. I have heard it compared to the internet in 1995—still in its experimental

Blockchain has been compared to the Internet in 1995—still in its experimental phase, but capable of changing everything



phase, but capable of changing everything. In the coming year, I plan to continue to deepen my knowledge of blockchain on a technical level, and to broaden my understanding by talking to the innovators who are applying it in different contexts.

Esther Dediashvili: As a legal knowledge manager, my primary goal next year is to continue identifying and making accessible the most valuable knowledge assets that will empower the firm's entire professional team with the information and insights necessary to maintain industry leadership, as well as facilitating internal processes through technology to enable more efficient legal service delivery. In other words, I intend to keep promoting innovative KM and legaltech initiatives that will both maximize business value and client satisfaction.

Jobst Elster: If Bon Jovi 'gives love a bad name', my focus will be on giving legal content marketing a good name. I consume and create more content than the average legal ITer and can quickly differentiate the insightful and thought provoking, well intended stuff from the deliberate, cumbersome and uninspired content that best ticks the 'content for content's sake' box. As legaltech professionals, I feel we have an obligation to focus on the former and really make our words count—especially when the sheer amount of content we consume and have access to is quickly spiralling out of control. Before you write your next blog post or begin work on that ebook, give some thought to why and how it can and should benefit your audiences and actually help move the legal education needle in the right direction. If content is king, let's make 2018 the year we polish and return the crown.

Ebbo Haantjes: To communicate more in pictures than in words.

Seth Wilson: Greater automation of routine tasks. I would like to see lawyers more focused on being lawyers, rather than entering data. I'm focused on leveraging data in 2018 to better serve clients.

Richard Tromans: Peace, love and goodwill to all AI systems.

In **the age** of **social media** and
in the year **2018** and beyond,
what do professional **service
organizations** need to look like to
be **relevant** and **add value?**

We asked professional associations how they are adapting to a world
dominated by new ways of communicating



THE VERDICT

Gary T. Swisher II, CLM

ALA President / Chief Administrative Officer, Clark Partington

Keeping connected with members

Think back 10 years ago to how you received information. Facebook hadn't infiltrated our daily lives to the degree it has now. Twitter was still in its infancy and LinkedIn hadn't yet evolved into the professional platform that it is today. Smartphones were just starting to roll off the shelves, giving many a powerful, pocket-sized way to stay connected constantly.

Today's younger professionals have grown up with these methods of communication as their default mode of information gathering. These platforms are a vital way to stay connected daily to members—particularly to this new audience.

With that in mind, social media provides a great platform for showcasing the benefits of being an ALA [Association of Legal Administrators] member. Here are some things we keep in mind:

- Start a conversation. It can begin with you posting a question to your followers, or responding to a thread where a member tags you and/or asks a question. It's all about generating consistent engagement.
- Connect to member needs. Social media is a great platform for listening to what your members are saying and where they are saying it. It's particularly useful for on-site events. Members will often tweet what sessions they are finding most helpful, or where we can make improvements. Take that information to heart and use it for future events.
- Be an industry leader. If someone in one of our social feeds posts a question about succession planning, we use it as an opportunity to highlight the resources ALA



has available to help members navigate the daily challenges they face as legal managers. Whether it's a link to a related legal management article, or information about an upcoming webinar or conference, this is another way to provide customer service to our members, while reinforcing the value we already provide.

- Make it visual. Our posts with images tend to generate the most engagement. These days, people are inundated with information. Text is easier to scroll past; an image will catch the eye. At our Annual Conference & Expo, we also work to get video testimonials from members. Who better to tell a member about what ALA can offer than another ALA member? We then have those videos to share across all our communication channels.
- Follow them back. By following members via social media, you can keep a finger on the pulse of the issues and challenges they face, better positioning you to proactively provide solutions to those challenges.

Social media is all about staying connected to things we care about and finding information. If you always keep that basic foundation in mind, it will go a long way to help drive home your message. ■



Richard Hellers

ALT Founder / President & CEO, nQueue

Lean in: adding value in a social media age

Not that long ago, we used to get our information in the mail. There would be a letter requesting, stating or arguing something, and we would have a day or two to consider, draft, review, finalize and send a response. Then

FedEx and faxes sped up the process before email sped it up again. And in today's world of social media, a response is expected instantly, with little time to worry about articulating a substantial argument. More important is getting it out there first to set a tone.

Information today moves much faster, is less structured and passes through a wider audience. All that means that more people have a chance to hear what's being said, but it also means there is so much more information out there that it is hard to find the nuggets of value. It's not necessarily the good and powerful ideas that go viral, it's often the controversial and outrageous.

Even emails are often cc'd to dozens of people who would not have been stakeholders in a paper environment, and broadcasting to a wide audience can mean losing control of the message. You can't see who is reposting and receiving it and you cannot regulate how the message may change. Even if it's a powerful thought, you cannot control what happens to it and how it evolves. Get comfortable with that. ►

So how can you be relevant and add value in the social media age? Use social media as a billboard, but try to engage clients on a deeper level. Lean into consensus building. As it is so easy to include more stakeholders in every idea, building consensus is more critical than ever. And while that can be frustrating and time consuming, the good news is that consensus building is how ideas get discussed, vetted, expanded, confirmed, rejected and improved. Ultimately, the result is better.

Social media tools have not only provided new means of communication, but new expectations as well. Speed and responsiveness are no longer optional. And everyone expects to be heard. It's not a bad thing: there is value in moving fast and value in collecting input. Embrace these expectations and you will remain valuable and relevant. ■



Angela P. Dowd

ILTA President / Director of Practice Innovation, Burns & Levinson LLP

The death of the billable hour, the rise of alternative fee arrangements, lean legal operations, process improvement, disaggregation of services, artificial intelligence and blockchain. These are just a few of the many ideas that are confronting people working in the legal industry every day. The common thread among these trends is just how quickly and profoundly they are transforming legal practice.

Each member entity can't maintain relevance on its own. By creating an environment for professional connections, education and peer networking, ILTA is uniquely positioned to help our community of members and their organizations not only adapt to, but also lead and shape this change to remain current and relevant. Our long history of peer-powered service and well-earned reputation for leveraging our collective knowledge and experience give the ILTA community the broadest view of where the legal industry has come from, where it is today, and where it needs to be headed.

Building on our strong history, ILTA tracks our organization's course to best achieve ILTA's core purposes and core values. Our mission statement probably says it best: ILTA is here to provide the premier environment for peer connections, education and collective intelligence to leverage the strategic advantages of technology in the legal profession. We want to elevate the legal profession through technology and operational excellence by

creating opportunities for connections, collaboration and collegiality; serving as a trusted source of quality, unbiased and accurate information; fostering lifelong learning; nurturing professionalism; and advancing the business, operations and delivery of legal services. Equally important to us is remaining focused on delivering superior value to every one of ILTA's 20,000+ members throughout North America and Europe by crafting and implementing relevant strategic goals that resonate with them.

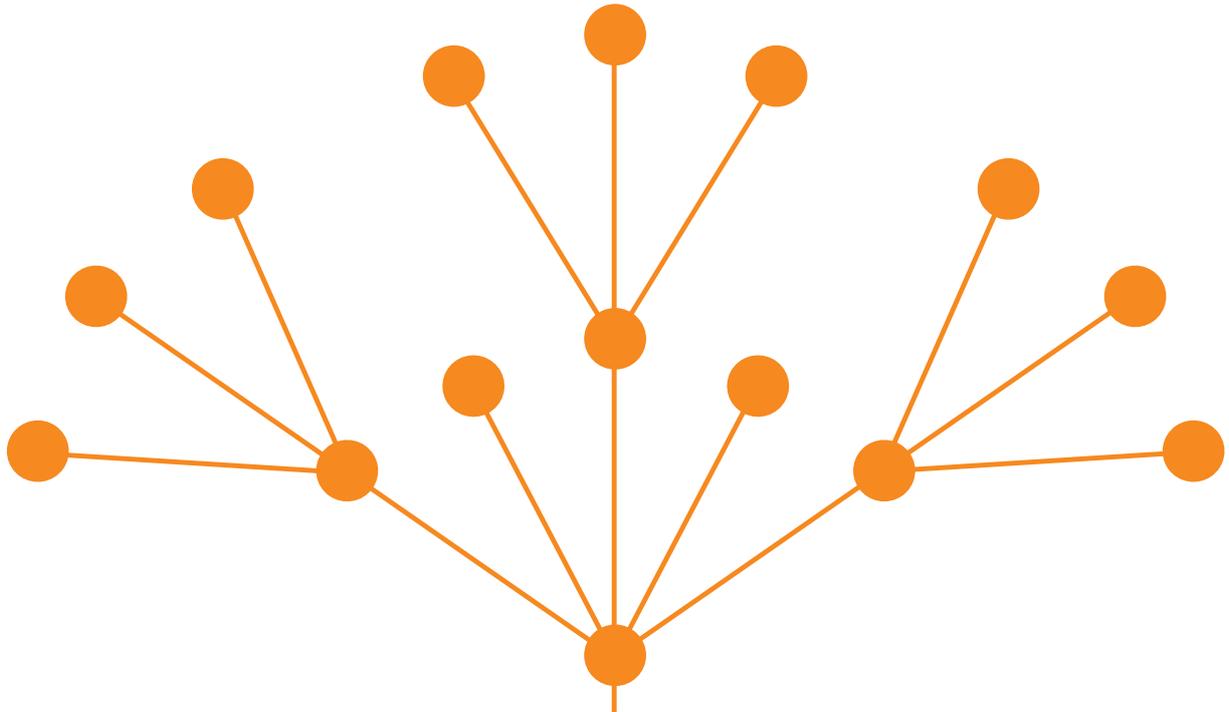
Our members consistently tell us how they have benefited from the knowledge and connections received through ILTA; I personally can attest to the difference it has made to me throughout my career. As the legal industry continues to change and the pace of technology continues to increase, we want to ensure that the value ILTA brings our members keeps pace. We want to improve access to information by connecting members to the most relevant and highest quality information when they need it. We want to deliver expert, trusted content that empowers members to develop professionally and have a positive impact on the legal profession. We want to strengthen peer connections through consistent, frequent, flexible, and meaningful networking opportunities. And we want to increase inclusiveness to better reflect our diverse constituents that make up both our membership and the broader legal community.

The bottom line is that we hope and are working very hard to remain true to ILTA's tradition of providing so much benefit to so many members, while also becoming an even stronger organization that will meet and exceed the needs of the evolving legal industry and our membership for a long time to come. ■

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Greg Lambert

President, American Association of Law Librarians (AALL) /
Chief Knowledge Services Officer, Jackson Walker LLP

In this era of instant communication, social media and niche area competition, professional service organizations have never been more critical. As AALL president, I see the relevance and value of our association's work reinforced daily.

For example, while many legal organizations are shrinking everything from partner offices to the footprints of their law libraries, the need for what our members do is growing. The findings of AALL's 2017 Biennial Salary Survey & Organizational Characteristics Study show—across the US—law firms, legal corporations, government agencies and academic law libraries adding to their law library staff as well as increasing law library budgets by significant numbers. This is occurring despite the decrease in physical space and other cost-cutting initiatives.

This evolution is mainly the result of a changed workplace culture, a culture powered by technology and innovative approaches to work and information management. That reality is also the reality of professional service organizations. Issues such as where you work, how you work and with whom you can network have been radically changed by technology and innovative business practices. Professional associations must mirror this reality.

For AALL members—law librarians and other legal information professionals who identify with the ideals of access to justice—the ability to network and disseminate legal information adds immense value. Using today's tools—social media, electronic newsletters, apps and low-and-no-cost collaboration tools—associations can and will enhance their inherent value. Not only that, but applying these tools to traditional association practices helps recruit the next generation of members, ensuring our continued value to our professions. We've seen this unfold at AALL through our use of social media, electronic newsletters, meeting apps and other modern collaboration tools.

What we have always done—our advocacy work at state and federal levels, our educational programming, our sharing of information and resources, our networking opportunities—is now tied to the technology and business innovation practices of today. As such, AALL continues to help shape our industry and communicate our value to members. We advance not only our profession, but our individual members through our collective efforts—something technology alone cannot do.

To other associations my advice is simple: harness the tools of today, as well as those of tomorrow, with an eager earnestness. Questions of relevance and value will quickly begin to answer themselves. ■

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