

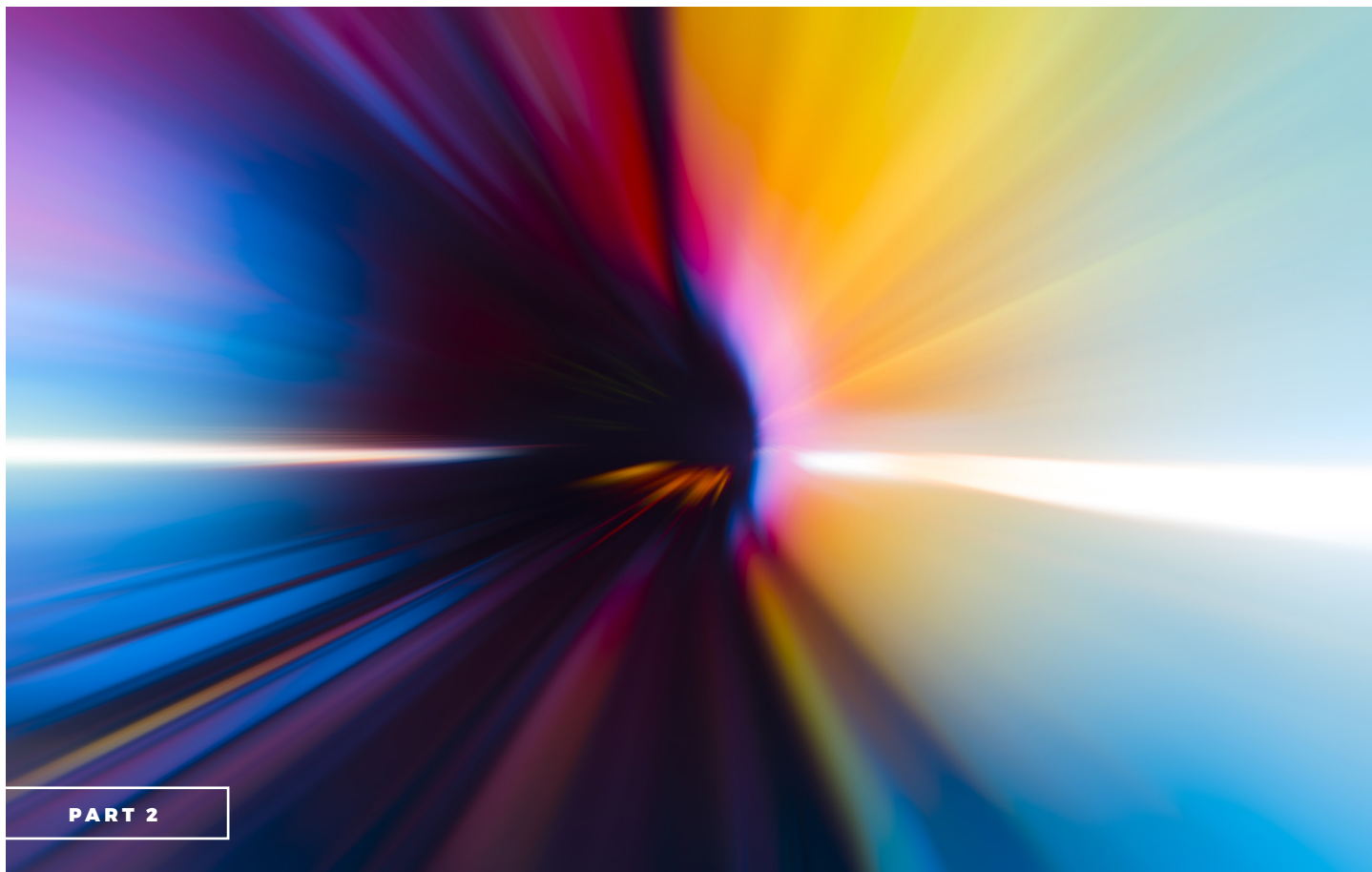
ISSUE #2 | VOL. 37

Peer to Peer

ILTA'S QUARTERLY MAGAZINE

Adapting to Acceleration

TECH CHALLENGES AND CHANGES



PART 2

FROM THE CEO



A handwritten signature of Joy Heath Rush in blue ink, written in a cursive style.

Joy Heath Rush
joy@iltanet.org

Are you ready?! ILTACON is BACK, in PERSON! And we're ready to also mingle in new and exciting ways: digitally!

Years and years ago (too many to mention!) I went to my first 'ILTACON'. Sure, it wasn't called that and we didn't have an app (we have an amazing, new, exciting app this year!) but it was the content, the education, the connections that brought me the first time... and then dozens of times since.

We are a Global organization, and the global pandemic has made it necessary to find new ways to engage our members and valued business partners. If we stayed solely digital, like we did for ILTA>ON, it would be too easy to focus on not being together for another year: we choose to focus, instead, on the opportunities a fully hybrid conference can offer us!

To that end, there are 15 live sessions a day, streaming digitally, for ILTACON. Three session rooms, five sessions a day: coming to you live and in full digital technicolor. You'll be able to ask digital questions and get a live answer. We'll have comedians, in person and digitally, for your laughing pleasure... We could all use a little laughter right now.

We'll gather, at the Mandalay Bay, and across brightly lit screens, watch an All-American Astronaut, Dr. Mae Jemison, take our Monday Keynote into outer space. We'll gather and we'll learn; we'll find new and powerful connections. Our in-person and our digital opportunities will become realities, we can celebrate together: We are peer powered!

Keep safe and well! **ILTA**

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What are you looking forward to most at ILTACON, as we come back in person?

James McKenna: To be able to see/hear/experience people when they share their answers, knowledge, and perspectives. I have found it really hard to “network” via email/text/slack/phone.

Ginevra Saylor: I am most looking forward to the wealth and quality of education I know that I will receive, and bringing that back and applying it to my work.

Chris Hunt: Reconnecting with old friends, meeting and making new friends, and the comradery of being together with my peers! Let's GO!

Angela Dowd: The people! I love the serendipitous connections that you make after sessions, at receptions and in the hallways.

Jack Thompson: I am most looking forward to seeing how my future will look, in person. I have the ability to reconnect and look at all the future tools and technologies I will need to make my business as well as partnerships succeed. While virtual is an excellent means of connecting and being in the know, there is always to opportunity to read the signs of persons and possibilities face to face.

Kara Portwood: I am most looking forward to seeing my friends, colleagues, to learning from great sessions, and to finding new solutions!

Chris Boyd: Reuniting with old friends, making new ones, and learning a ton.

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Season Two of Bleeding Edge is well underway!

We're excited to share brand-new podcasts, content, interviews, and a whole lot of fun!

For our sophomore season, we are led off by Cindy MacBean, Litigation Support Manager at Honigman LLP in Detroit, MI. Cindy is also the Publication liaison and to the ILTA Program Planning Council. Alongside Cindy will be Beth Anne Stuebe, ILTA's Director of Publications and Press, and joining them both will be a rotating cast of characters from the ILTA Business Partner world, along with some fantastic subject matter experts! Tune in now for Season 2, Episode #4, featuring Jeff Pfeifer of LexisNexis, where we sit down and discuss soliciting attorney input and why feedback important in legal tech product design, plus more!

TUNE IN



FROM THE EDITOR

There's a saying.. "Change is inevitable-except from a vending machine."

Well, that certainly sums up all the feelings from the last 18+months. We have not seen our ILTACON family since 2019; we haven't met as colleagues, as friends, as innovators, as learners in what seems like forever. Now, as we plan to pack our bags, or pull up a chair to again login into a hybrid ILTACON, there's a sense of excitement that is palatable between our members, partners, and our ILTA staff.

We are excited to learn, to grow together, to simply come together, onscreen or in person. ILTACON this year will look dramatically different than our virtual event did in 2020 and it will look even more different from the floor of the Mandalay Bay in Las Vegas. Our education, our touchpoint, our North Star, if you will, is stronger and more diverse in scope and formats than ever and it is this education that we are most pleased to share in both hybrid and onsite sessions. Coupled with our education, our Exhibit Hall is busting with new and innovative solutions and ways to find collaboration. We are thrilled for a chance to showcase our partners online and in person.

It has been a difficult 18+months for legal technology, for the world, for us all. I hope that ILTACON helps our members, partners, and the legal world find new ways to carry forward, to continue to innovate. I'll see you there and I'll see you digitally. We can't wait to share our content with you.

We are stronger because we are peer-powered... and this is a special edition, a bonus issue, of *Peer to Peer*. Enjoy the read. **ILTA**



Beth Anne Stuebe

Director of Publications and Press, ILTA

Peer to Peer

ILTA'S QUARTERLY MAGAZINE

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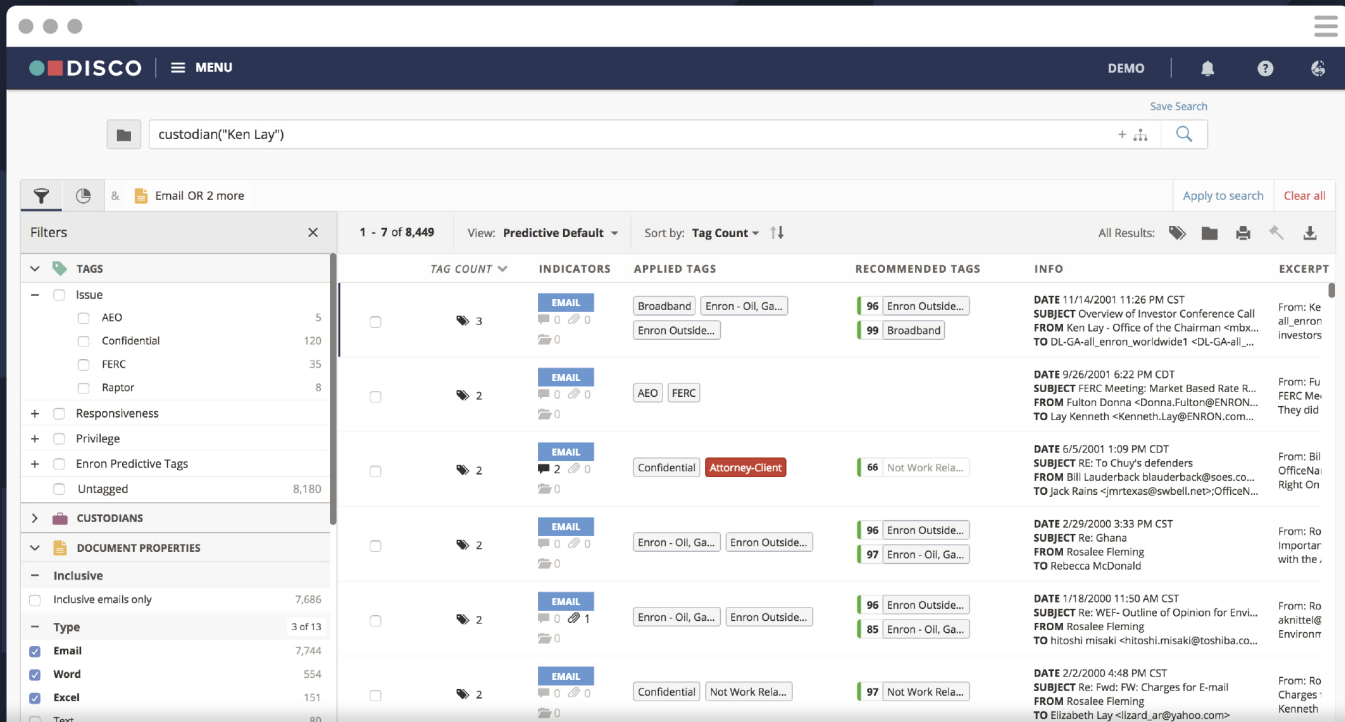
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TECHNOLOGY THAT POWERS LEGAL

Binders and sticky notes, begone!

The screenshot displays the DISCO Case Builder interface. On the left, a video feed shows a man speaking, with a timestamp of FEB 17 2019 10:45:12. Below the video is a 'Tags' section with a table:

Tags			
Air quality	3	2	1
Odor	3		
Water quality	6		2
Inspections	1		
Testing methods			3

Below the tags is a 'Witness' section for Jason Hlavenka, identified as an Expert, President and Senior Expert at Clearview Environmental Services. His party alignment is Defendant, and his case impact is Very helpful.

The main area shows a transcript of a deposition. The transcript is divided into questions (Q) and answers (A). The text is as follows:

11 Q But is there any doubt in your mind that some
12 of the wastewaters that ACME has received historically
13 for treatment in the organics category were -- did have
14 VOCs, or volatile organic compounds, in them?
15 A I'm sure they have VOCs present in them. I
16 know our tap water has VOCs in it. So, I'm sure that
17 some water they received had VOCs in it. It depends on
18 what levels you're talking about.
19 Q And to your knowledge, for metal-containing
20 wastewaters, other than precipitation, what other
21 processes are used?
22 A That's essentially it, is precipitation.
23 Q What about for oily? You separate out in the
24 oil-processing facility.
25 A That's correct.

On the right side of the transcript, there is a note-taking feature. A yellow sticky note is visible with the title 'VOCs typical in tap water' and the text: 'States that VOCs are commonly found in ambient levels throughout the property. May be useful for our MSJ.' Below the note is a text input field labeled 'Write a note...' and buttons for 'Cancel' and 'Add note'.

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Understanding—and Overcoming—Data Security Failures and Insider Threats

BY BEN LIU

Within just the past two years, multiple companies fell victim to high-profile cyberattacks. Businesses such as James Fisher and the Desjardins Group

as well as multiple Asian port cities (including in Japan, Malaysia, Singapore, South Korea, and China), were attacked by hackers around the globe. The results were billions of dollars lost in productivity and other substantial damages. The attacks also compromised sensitive data, eroding trust between the affected businesses and their clients.

Every single business needs to learn how these attacks happen and what they can do to prevent them. With multiple factors involved in why and how these failures unfold, from simple negligence to campus access issues to insider threats, security incidents vary in cost depending on the nature of the flaw that caused them. Businesses may have some control over the outcome—or none at all.

The strongest defense for modern businesses across all industries is a deep understanding of the world's most common security threats and an unwavering commitment to holistic security.

The Three Largest Security Failure Touchpoints

Regardless of sophistication, almost all cybersecurity risks stem from one of the following touchpoints: employee negligence, insider threats, or technology liability.

There are several ways that businesses can address security at each of these points. Every vulnerability requires a distinct solution, but it is possible for savvy businesses to assemble comprehensive defenses.

The Threat of Employee Negligence

In 2018, security incidents caused by negligent employees cost businesses an average of \$283,281. Employees who

are good at their jobs aren't necessarily good at identifying security risks. Workers can easily expose their employers to multiple risks that cost large amounts of money and dedicated productivity to rectify, including by:

- **Downloading malware** - Through email, compromised websites, or embedded code in PDFs.
- **Dictionary passwords** - Creating common passwords that barely meet security requirements.
- **Falling for phishing scams** - Through email, direct communication, or compromised websites.

Dictionary passwords are less common in the modern workplace due to software and network restrictions that demand special characters, numbers, and multiple letter cases in passwords.

Malware and phishing are closely related as both involve unwitting employees actively providing information or downloading files that generate threat.

The results of these errors can be costly, such as the Pemex ransomware attack that shut down its Mexican computer center for several days. While Pemex removed the RYUK ransomware, if it had afflicted more sensitive computers, the company may have been reduced to a single option: paying the money that the hackers demanded in exchange for releasing its computers.

How to Prevent Insider Threats

Insider threats shake down businesses from the inside out through the intentional actions of current or former employees or partners. The average insider security threat is twice as costly as employee negligence: compared to the \$283,281 that negligent employee actions cost businesses in 2018, malicious attacks from insider threats cost

businesses an average of \$607,745. Depending on how skilled the insider is, these incidents may continue for extended periods. Apple has frequently become the target of corporate espionage via Chinese nationals, including intellectual property and photographs of its corporate layout **taken in late 2018**.

There are four categories of data that are vulnerable to this kind of espionage:

- **Intellectual property** - Including research data, product documents, and workplace procedures.
- **Client information** - Including contact information, order history, support logs, and subscription data.
- **Financial information** - Including revenue, expenses, account holdings, and secured login information.
- **Marketing data** - Including demographic reports, advertising expenditures, cooperative ventures with external firms, and marketing collateral.

If a business's competitors gain access to any of this information, they instantly possess sensitive data that can allow them to poach clients, jumpstart R&D, and pinpoint demographic target groups.

There are several ways for businesses to minimize this internal threat:

- 1 **Create standards for employee organization.** These standards should include both maintaining a clean physical workspace and ensuring that each employee's computer only includes approved software and limited access to sites that are not relevant to their work.

- 2 **Limit access to extra recordkeeping.** HD cameras are standard in smartphones, so every company must have a method to control visual access to sensitive documents. Providing employees with company smartphones will allow a business to disable the cameras, and they can also require visitors and contractors to either turn in their phones or cover their cameras with tamper-evident stickers.

- 3 **Institute badge access to each facility on campus.** Employees need to move around, but they do not necessarily need to access all locations on campus. Modern badge-access programs can permit access and monitor usage so that threat investigations are easier to conclude.

- 4 **Improve document handling.** The faster a company can shift to access-managed digital documentation, the more it will be able to do to defend against espionage. Any time when a firm must use physical documents, management should ensure that they have a clear process to shred them when they're no longer necessary.

On their own, each of these methods is insufficient to prevent threat: businesses must take a comprehensive or holistic approach to employee security that addresses their unique corporate structures and campuses.

Overcoming Technology Liability

Technological liabilities are, in some ways, the easiest security threats to overcome. Hardware liabilities include physical network connections, denial-of-service attacks, and internet connectivity. Most of these take place outside of a company's control, except for physical network connections. An IT department can limit the potential for

visitors to gain unwanted access to a network, and even if someone does connect without proper credentials, the network's digital security can provide an effective defense.

Large companies may consider outsourcing their digital security methods, as the most flexible responses in digital technology generally come from firms that are dedicated exclusively to security countermeasures.

While hackers may attempt remote attacks, firms can and should acquire software that has the latest security certifications baked into it. PDF documents have consistently represented a critical vulnerability for firms that use the most common PDF readers, so there are compelling reasons to consider alternative readers. These readers can scan documents in advance to prevent any malicious code embedded in PDFs from activating.

Applying These Lessons to the Modern Security Landscape

Amid rising cyber threat levels, it is still possible for businesses to repel external attacks and avoid internal security failures. This past December, both major political parties in the UK, Labour and the Conservatives, were attacked by hackers using several kinds of digital attacks.

In both instances, the attacks failed to steal any critical data, and the websites remained functional during the election. Not every attack is likely to go as cleanly as these did, but we look to security success stories to highlight the importance of robust and preventative cybersecurity in the 2020s.

For most businesses, the best security measures involve a threefold process: educate current staff on the vigilant habits that limit negligent behavior, deploy modern software with advanced security measures to prevent insider threats, and consider partnering with a cybersecurity firm or contractor that can help protect against technological liabilities.

At the enterprise level, these solutions comprise a substantial budgetary line item—however, this preventative expense is far less than the potential cash, reputation, and credibility losses associated with a significant security failure. **ILTA**



Ben Liu is an experienced ecommerce director from Irvine, California with more than 15 years of experience building brands and refining the development of revenue streams. After generating more than \$100 million of incremental revenue improvements in previous positions for heavy hitters across the tech industry, Ben joined the Kofax team. Now a driving force behind innovative marketing efforts and the growing popularity of Kofax Power PDF with SMBs, he continues to improve outreach via innovative chatbots, data-driven marketing analysis, and a dedication to consumer-first content. By bringing an engineer's eye for detail to Kofax along with a passion for helping brands to reach their potential, Ben hopes to continue charting a course for success with Kofax.



Conflicts and business intake: optimal solutions for a critical law firm function

The evolving face of conflicts and business intake solutions

Law firms are increasingly shifting conflicts and intake responsibilities from partners to designated risk management staff – driving a need for process improvements and team reorganization.

The ongoing impacts of COVID-19 have amplified the need for conflicts and intake software which supports a remote operating model. With teams working in diverse locations with varying cybersecurity protocols, first and third-party risks are escalating.

Existing conflicts and intake technologies are reaching the end of their life cycle, and new technologies are evolving in response. Law firms' organizational structures are not all equipped to accommodate these new technological challenges, limiting return on investment.

Two surveys of law firm general counsels conducted within the last five years list conflicts as a leading risk management concern.

Conflicts and intake procedures are a critical risk management checkpoint. It is imperative that firms regularly reassess their process and respond to any external pressures and changes in their risk profile by identifying and actioning any necessary improvements to their current procedures, and remain proactive by replicating this review process over time.

We will help strengthen your firm's risk management, while simultaneously identifying opportunities to significantly improve agility and efficiency. We do this from an independent viewpoint, as our clients ultimately make the decisions on software and IT providers.



Our solutions include assistance with business process improvement, software selection, department and team reorganization, and M&A conflicts strategies.

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An AI-Powered Chatbot - A Significant step in Digital Transformation of Legal Workspace

BY RAGAV JAGANNATHAN

C OVID-19 outbreak has shifted the working patterns, leading to a significant increase in remote working. Work from home has rapidly become a chosen way of doing business across industries, including the legal industry. A virtual law firm is the next big thing to accomplish law firm administration functions from billing, collections to client assistance.

During times like these where the world is facing lockdown, remote assistance and monitoring services have seen a significant increase in demand. These systems play an important role in ensuring uninterrupted legal services and making informed business decisions.

Pain points of law firms during COVID-19

- Attorneys deal with hundreds of documents that make their task more time-consuming.
- Lack of internal efficiency (around 60% of the law firms are struggling with a lack of internal efficiency).
- A lot of time spent on tedious administrative tasks.
- A new subset of client expectations.
- Lack of digital collaboration tools.
- Compliance remains one of the top challenges for legal firms.
- Ineffective employee communication.

Law Firm's increasing adoption and reliance on technology

The COVID-19 crisis has a profound impact across the legal sector, especially on the traditional law firms, mostly relying on the office model. The current pandemic situation has shown the importance of legal technology to the conventional as well as modern legal firms and the need for these solutions for business continuity in this scenario. The year 2020 has seen a considerable shift in the legal industry in terms of technology adoption and ongoing transformation, which is now amplified due to the global pandemic situation. The current focus towards technology is driving change in the industry and is ensuring that the legal firms survive through this change.



Artificial Intelligence - shifting legal industry toward a tech-savvy future

The use of AI and its applications in the legal industry is moving higher and is becoming the next big thing for legal firms. By 2024 the legal AI software market is expected to reach \$1,236 million and is forecasted to grow at a CAGR of 31.3% during 2019-2024. Incorporating AI into legal practice can augment the workflows and streamline the work processes.

AI-powered chatbots are disrupting the legal industry and are poised to become a preferred mode of communication for internal as well as external users. Leveraging NLP and NLU algorithm power, which are one of the prominent fields in AI, chatbots can understand intents, contexts and further handle end to end human-machine interactions.

Why are legal departments deploying Artificial Intelligence (AI) powered chatbots?

Law firms, as well as corporate legal departments, continue to look for new ways to enhance efficiency and drive productivity. AI-enabled chatbots are one such way that has the potential to revolutionize the law firm operations. These chatbots are a new approach for law firms to imitate human conversations and automatically respond to clients as well as attorneys' queries.

Legal chatbots have the capabilities to make better and quicker decisions when compared to human agents. It reduces the burden on attorneys and paralegals to repetitively answer the same queries, which further brings consistency to users' responses.

The benefits of technology for small, midsized as well as larger law firms can vary substantially, but few of the obvious benefits include:

Law Firm's leveraging automation to operate in the remote scenario

Quick adaptation to change is key to success!

The COVID-19 crisis has put a strain on legal professionals in terms of performance, productivity, and value-driven client delivery while working remotely. Additionally, pressures related to enhancing the ROI and retaining the talent are driving the legal organizations to boost their automation capabilities. Technologies like AI and ML play

an integral role in automating legal business, handling specific tasks, and reducing legal spending. A study estimated that around 23% of an attorney's job could be automated with technology, including chatbots.

Automation provides opportunities for legal firms and in-house legal departments to efficiently handle a massive volume of data sets, reduce costs, and attract new clients. Automation in the legal sector prepares law firms to drive high performance and thrive in the altering legal landscape. Hence the legal organizations are leveraging automation to adapt to a demanding legal market.

Critical resources for law firms running remotely

During the COVID-19 crisis for running and managing the remote staff, a law firm requires a broad range of tools. From task management to client management, from scheduling to invoicing and billing systems, a law firm must have few of the key tools to run remotely. A host of technologies, including chatbots, virtual assistants, legal bots, cloud, and document automation, are enabling legal firms to automate the routine tasks and enhance their attorney's productivity.



Essential tools to operate a remote legal staff

Several companies have already invested in legal technology, and as a next step, they have started hiring candidates with needed technical skills because a dedicated technology talent is a crucial resource for remote working law firms. By 2023 around 33% of the company legal departments are expected to have a committed legal technology expert to support the automation of in-house workflows.

Legal Chatbots - Saving attorney's time

Incorporating chatbots within businesses eliminates the manual processes and aid lawyers and attorneys to work more promptly and efficiently during this work from the home state. Monotonous administrative tasks including, document creation, setting up meetings, gathering client information, and other basic activities, are now being performed by chatbots. These chatbots can directly interact with the clients to update them on case status or any additional information, which saves the legal staff's time and allow them to focus on other crucial issues that entail their expertise.

Integrating chatbots with the internal systems allows lawyers and paralegals to quickly retrieve the case related

information, which further enables them to handle a more significant number of clients and maintain their billable hours. The legal industry is amongst those industries that are investing heavily in chatbots and are being benefitted from chatbots. Chatbots is a solution that can surely bring value to law firms by assisting legal professionals in their

daily firm chores as well as support queries while working remotely.

In addition, a legal chatbot can also enhance accessibility and provide strategic value to the law firms in this time of crisis. Chatbots will further continue to disrupt the legal industry by abetting law firms as well as paralegals to become 24/7 available for clients.

Legal AI-powered Chatbots - the way to support remote employees

The Coronavirus pandemic has accelerated the value of chatbots for law firms, enabling them to streamline internal processes. Many legal organizations are leading the charge in deploying

chatbots for providing the latest firm updates to their employees from a range of devices.

"An internal chatbot can help law firms to keep their employees informed and ensures standard and simple communications reach all employees."

Chatbots act as a single source of truth for all the news and notifications being sent to employees. Legal chatbots

"An internal chatbot can help law firms to keep their employees informed and ensures standard and simple communications reach all employees."

during the Coronavirus crisis empower law firms to instantly respond to employees' questions related to office visits, software purchases, and other HR-related queries.

Law firms are leveraging chatbots as the corporate source of knowledge for their employees, enabling lawyers and attorneys to effectively audit and obtain relevant documents. AI-enabled chatbots make legal firms better equipped to harness the opportunities and gain a competitive edge. These chatbots are the simple and easy way to answer all the questions; the lawyers might have, related to meetings, projects, travel, work from home (WFH), etc.



"Knowledge Managers & Attorneys can build AI Chatbot for your Firm with Machine Learning capabilities and experience a Human-like conversations."

For instance, a lawyer can ask about an event status or in-person meetings, making it easier for law firms to provide updated and revised information. Legal chatbots, offering up-to-date information and proactive delivery updates and alerts to employees, ensure optimal work productivity as well as customer service.

KLoBot- Deriving maximum value for law firms

KLoBot is an AI-powered chatbot builder platform that simplifies human-machine interactions via intuitive conversational user interfaces.

"Knowledge Managers & Attorneys can build AI Chatbot for your Firm with Machine Learning capabilities and experience a Human-like conversations."

Chatbots designed with KLoBot can be created within minutes and can facilitate internal as well as external law firm communications. These chatbots empower attorneys to automate the tedious and time-consuming tasks and streamline the business processes.

KLoBot DIY no-code chatbot builder platform is robust, secure, and incredibly intelligent designed for business users to create chatbots and deploy easily on your favorite channels along with pre-built connectors SharePoint, iManage, NetDocuments, Elite, SQL Server, ServiceNow, Salesforce, and many more. KLoBot Analytics comes with Governance and Monitoring capabilities to gain user insights and evaluate bot performance.

Chatbots built on the KLoBot platform facilitate law firms to better showcase their value proposition and meet the internal as well as external pressures during the current COVID-19 crisis.

KLoBot enables law firms to meet current client demands and competitive challenges. KLoBot also presents an opportunity for legal firms to save time on tedious activities, diversify revenue, and stay ahead of the competition. **ILTA**



Ragav Jagannathan is President & Group CEO, AI/AR Expert at KL Software Technologies (www.klstinc.com). As a globally recognized SharePoint SME, he has been involved with over 110+ SharePoint implementations for Fortune100 and ASX100 companies around the globe. Ragav has completed over 18 Microsoft Certifications and been a featured Microsoft Speaker at various Road shows, Partner Events and Technical Conferences across APAC and AMERICAS. He also had the honor of speaking at ILTACON 2019 related to "Voice-based Virtual Assistants" and prior to that at past ILTA events nationwide.



Instagram Live at ILTACON!

Are you following ILTA on Instagram? If not, open the app, search for **@WeAreILTA**, and hit the "Follow" button. You won't want to miss the behind-the-scenes videos, LIVE attendee perspectives, shared Stories, and everything else we have planned during ILTACON.

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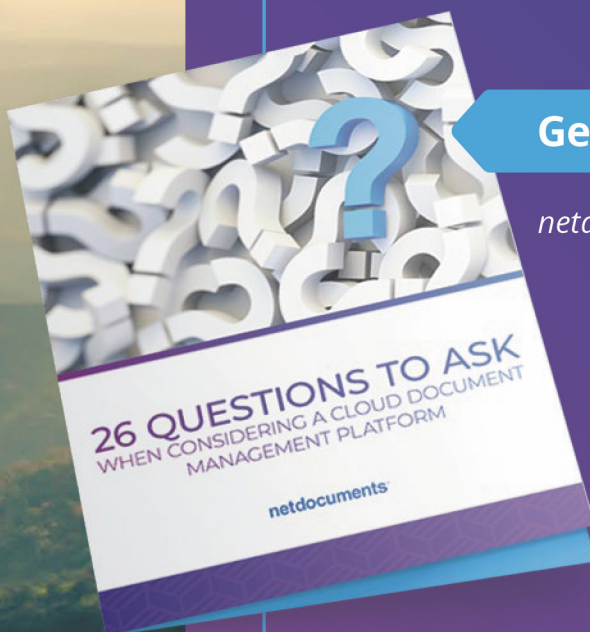
- By sharing your ILTACON experience with #myILTACON and by tagging us (@WeAreILTA) during ILTACON week, you'll be entered into a special giveaway. Details forthcoming!
- Follow #myILTACON now for all things ILTACON
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- Receive reminders about other survey, event, awards, etc. deadlines through posts and stories
- Watch select ILTA TV episodes

The view rewards the challenge.

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CAN LAW FIRM CULTURE SHIFT TO A POST-PANDEMIC MINDSET?

BY LEIGH VICKERY

The global pandemic has come to serve as a punctuation mark in the long sentence of life. As individuals, having spent a year away from the ordinary patterns we found ourselves in before 2020, it's only natural that we are in a continual flux of assessing our priorities.

For law firms, the idea of "connection" had been changing for quite some time and, as with many other industries, the pandemic accelerated trends that were already there. The impact we are seeing is similar to the Global Financial Crisis of 2008-09 that ushered in an era of efficiency for professional services firms, even though many of the ideas around investment, automation, and risk management had been simmering for quite some time.

What about our previous life do we miss? What constraints and inconveniences do we refuse to carry forward into our new normal?

The influence that time away from the office has had on the individual psyche cannot be underestimated. And what is an institution, corporation, or law firm if not a collection of individuals?

This article will discuss the shift in cultural mindset necessary for law firms to become more adaptive, innovative organizations. The article will also address the drivers and methods for firms to adopt nimble, confident attitudes that embrace the new and developing legal tech resilience.

Let's start by examining the American law firm. A singular data point serves well as an indicator of how much they learned from 2020: their workforce strategy.

Every day, another law firm releases its plan to return to the office in some measure. The tone-deaf nature of these plans rings loudly in a world where geography is no longer a constraint for people or productivity. Large, established firms returning to their pre-pandemic business model appear like a horse and buggy competing with Tesla.

At the same time, a new, more interesting pattern is emerging in the legal landscape, one that carries promise for real innovation to take root.

Regional firms and Big Law are competing for the same clients and talent.

Regional firms are welcoming Big Law talent who left the city in haste in March 2020 and discovered the Midwest towns they were bored with in their younger years aren't so bad after all. These bright, ambitious associates have happily traded the rat race for a slower pace, and they are

finding an openness and optimism to their higher-tech ideas. And at the same time, the future-forward, highly adaptive Big Law firms have begun plucking regional talent to help establish their presence in these new markets.

This impetus for change began with a simple appreciation for a changing cultural mindset, and those firms that are powering this shift will be the future of law firm innovation.

*"Regional firms
and Big Law are
competing for the
same clients and
talent."*

A Law Firm

Innovation can be defined a thousand different ways, depending on who you ask. For purposes of this article, the short definition of “staying relevant” works well. And staying relevant first requires a self-awareness that you might not be.

Admitting this requires humility, collaboration, and a willingness to take risks — values not often applauded in a law firm’s mission statement. Lawyers are trained to rely on precedent, sink the competition, and rise to the top alone.

Based on our experience, we’ve seen three primary obstacles that stifle law firm innovation.

1 Legal DNA. From day one, law students face intense pressure in the hyper-competitive, individualistic culture of most law schools. These three years relentlessly shape the student into fearing uncertainty, avoiding risks, and no longer asking questions out of curiosity. The path continues with entry-level lawyers at firms that reward those who follow established practices. Any hope of creating an innovative law firm demands that law schools take the first steps, which actually aren’t that complex. If law schools required students to participate in collaborative projects that are graded interdependently and taught their students how to give and receive feedback in a spirit of generosity, law firms would evolve to a much more collaborative culture. Collaboration is always the precursor to innovation. Also, if law students were given a taste of what it’s like to have a legal career today outside of a

traditional law firm (as is the case with most other business disciplines), we would be a different industry today.

2 Perceived risk. Law firms are managed by lawyers, and lawyers have difficulty separating professional risk from operational risk. Yes, they absolutely must be risk averse when it comes to providing counsel to clients. But while there are countless opportunities to bring their clients better results, many firms don’t pursue them because of the perceived consequences of those risks. For example, openness to a flexible pricing model does not conflict with a firm’s ability to extend legal expertise but leaving behind the billable hour may seem too risky, even if a client is asking for it. This perceived risk stops the firm from providing meaningful value to a client who ends up leaving and going elsewhere anyway.

3 Resistance to new technology. Humans are creatures of routine, especially lawyers. They are under constant pressure to maximize their billable time, and many are wary (and weary) of devoting precious hours to understand new technology when their current processes serve them well individually. Furthermore, most law firms are playing the short game, and the cost of new technology both with time and money does not fit into their business model. Until law firms learn to scale from 1:1 to 1:many and incentivize accordingly, this resistance will only get stronger..

Characteristics of innovative organizations

Innovative organizations foster a curious, learning mindset. Their employees are not afraid of admitting, “I don’t know” if asked a question. They are hungry for staff and market feedback—good or bad. They ask and invite questions and create systems that prove they are open to improvement.

For example, we hold an internal after-action review for every project team at completion. We follow a proven process, gathering specific data points designed to improve. Colleagues give feedback to each other and to their project lead in written and verbal forms, all within the framework of improvement. Our employees are rewarded for their strength as a team, which has contributed to a culture of watching each other’s backs, sharing information rather than hoarding, and cheering on each other’s success.

Innovative cultures also make it clear that they are not afraid to fail. In fact, if you aren’t failing, you’re not playing hard enough. The concept of “fail fast and fix” establishes trust with clients and deepens engagement. Innovative organizations embrace humility, admit mistakes, and act quickly to overcome setbacks. For innovators, the practice of law is an ongoing path to becoming a better advisor to our clients. We believe that pathway includes cultivating a more human approach to our work and adopting a generous attitude.

The path to change

Even for these regional and Big Law firms committed to cultural transformation and

innovation, real change is tough. It just is. And it's exacerbated by the difficulty of establishing mutually agreed-upon metrics to measure the success of new initiatives that may not always be apparent in the immediate bottom line.

When law firm leaders first embark on the path to cultural change, the results will be incremental. There will be difficulties as the culture reshapes for the future. And without a doubt, there will be an exodus of those for whom the new ideas are not a good fit.

But over time, trust builds, new ideas emerge, and an openness grows in how to engage with each other and clients in more transformative ways. There will be more dialogue, more questioning, and more “what if” conversations. The collaborative environment required to fuel these new business methods will stimulate a more engaging internal culture and better talent will seek you out.

In this post-pandemic pattern, these innovative law firms are starting to work with alternative legal service providers (ALSPs) more strategically, leaning on each other's strengths to transform operations. Legacy cost centers have been replaced with specialist external service providers. And well-chosen technology is hailed as a path to well-being, rather than a threat to a person's search for meaning in a billable hour

The game law firms must play now to stay relevant is far past any strategy that requires the players to sit at a desk in a building to win.

Understanding the modern client

The client today experiences life through a much more holistic lens than even five years ago. The interconnectedness between real-time information, instant gratification, and individual choice permeates every decision, regardless of B2B or B2C. We live in a fluid, evolving, information-driven economy, and expectations

of every industry – including legal – must adapt to this new world.

Technology is driving the modern client's buying decisions and will continue to do so. Companies like Amazon have already entered the legal industry, powered with more data to understand how people make buying decisions, more leverage to lower prices, and more incentive to do so than any law firm.

The change is already underway, and the bar for innovation is rising. Those law firms who can stay closely aligned to the values of their clients, and employees, will win.

The time for change is now

There is no question that the professional skills of lawyers are specialized and hard won. But within traditional firms, the environment can be dramatically improved by embracing a cultural shift that focuses on innovation for human benefit. **ILTA**



Leigh Vickery is Chief Strategy and Innovation Officer at Level Legal, a provider of data-driven legal services for law firms and Fortune 1000 companies specializing in compliance, privacy, investigations and litigation.



KEEPING WORK FLOWING WITH A DIGITAL MAILROOM

BY KAREN CUMMINGS

More than a year out from the pandemic, many legal firms have adopted new technology to ensure access to critical communications and documentation, which makes sense since, during 2020, 87% of legal firms were operating remotely—at least in some capacity.¹

As we transition back into more typical working conditions, estimates indicate that a remote workforce is still holding fast at 25% and will continue to grow. Now is the time to ensure that your technology infrastructure positions you to manage work in an unquestionably changed business reality.

When urgency and access to documentation are essential, the most impactful place to kick off digital transformation strategies and processes is where content flows into your firm: the mailroom. Let's discuss four ways digital mailroom processes enhance content-gathering using cloud capture, automated data extraction, document workflow, and cloud fax technologies to ensure secure, universal access to content.

Grab that content faster

Across industries, more than 70% of invoices arrive as paper documents in the mail. And that's just accounting. What about time-sensitive case documentation, client communications, depositions, and beyond? Most legal

firms rely on the mailroom to handle items arriving via USPS, FedEx, UPS, and couriers. The challenge is ensuring timely delivery, and that's where many firms hit a communications snag: mail continues to come in, but without digital processes, it's difficult to reliably get it to attorneys and staff working in various offices or from remote locations.

*"Digitizing
the mailroom
organizes critical
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and quickly sends
it to the right
place."*

Digitizing the mailroom organizes critical content, grabs vital data points, and quickly sends it to the right place. Staff has secure, immediate access to essential documents and communications using authenticated routing. Legal teams can collaborate more efficiently by setting destination rules for multiple recipients based on keywords.

No more "grab and go" mailboxes. They increase the risk of exposing sensitive or confidential content, data loss, and misfiling or misrouting documents or communications. No more tedious "yellow folder" deliveries—just no-nonsense

accessibility. In the end, all of this improves project turnaround times and, in turn, provides your customers with a fantastic experience. You can imagine the benefits here are huge.

Quickly locate the info you need

The volume and velocity of information that flows in and out of legal firms continue to grow. That means that profiling captured content is mission-critical to enable staff

to access current or archived matter-centric case content quickly.

Most legal firms store their information in ECM and DMS systems such as iManage or NetDocuments. However, not all firms can easily search and retrieve content because they don't have the right resources—such as Optical Character Recognition (OCR)—in place to profile captured information effectively.

OCR functionality unlocks the information trapped in paper documents and eliminates the manual process of capturing, profiling, and storing data. Once a document is scanned, it can be automatically classified and associated with relevant files for fast recall. By digitizing at the point of capture, your firm can boost productivity and ensure the integrity of the information you have, which helps you remain competitive and increase billable productivity.

Send it wherever it should go

Digital transformation isn't just about going "paper light" anymore. Our increasingly mobile, remote working reality quickly replaces traditional paper-based document handling with digital capture, access, and collaboration. When accessibility, productivity, and wasted billable hours become issues, business suffers. But more importantly, the burden of paper processes hurts your firm's ability to respond to client needs efficiently.

Digitizing the mailroom gives you flexibility. Documents are immediately accessible by staff within existing applications, systems, or even via email and cloud fax right to their inbox. Digitization means time saved, and expectations exceeded. Reliable access to business-critical documents means faster project turnaround times, more

empowered and productive employees, and an overall better customer experience. Bottom line, increased accessibility gives your staff more time to focus on billable hours and more high-value work.

"The burden of paper processes hurts your firm's ability to respond to client needs efficiently."

Archive and recall, no problem

When it boils down to it, digitizing the content you have is all about ensuring reliable access to your attorneys and legal staff. The digital mailroom creates secure avenues for critical documentation and communications to land right in the hands of the staff members who need it, from their office, home desktop, or even their mobile device. What's more, the

ability to quickly access archived case files, current case supporting documentation, and more with just a few clicks is a massive boon for billable hours and improved service to clients. A digital mailroom can make these capabilities a reality.

2020 pushed many organizations to the brink, but those that adapted well did so because they fast-tracked the implementation of digital transformation technology into

their arsenal to conquer daily tasks and ensure business continuity. If you're one of the firms that still rely on legacy processes and the manual paper shuffle, it's time to ask yourself objectively: how are you and your staff faring in this new business climate? Are you empowered to succeed given the technology you have?

This quote stuck with me this year, "The software that enabled us to survive 2020 was in the cloud, and the software of the future will continue to be in the cloud."² The time to transition is now, but implementing cloud technology is a journey. Start at the inception point—the mailroom— and create realistic goals to expand cloud capabilities to other areas within your firm. By taking on the transition, you will ensure that your technology can meet any challenge, so your firm can continue to thrive in the future. **ILTA**

¹ *Survey Results: Lawyers and Legal Technology in 2020*, by Nicole Black of MyCase blog

² *20 For 2020: The Legal Tech Trends that Defined the Year*, by Bob Ambrogi of LawSites blog



Karen Cummings is EVP & General Manager at Upland Software.

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The Legal Marketing Technology Ecosystem: Identifying Gaps and Opportunities for Firms of All Sizes

BY ALEXANDER KOTLER AND GORDON BRAUN-WOODBURY

In a study conducted by [RubyLaw](#) and [Calibrate Legal](#), we identify gaps and opportunities for firms of all sizes, maturities, and complexities. Compared to other sectors, legal—and specifically the marketing and business development domain—is lagging, as firms fail to invest in critical systems that can drive greater efficiencies and reinforce under-resourced teams.

Our findings reveal a substantial gap in technological adoption between large and small firms, with glaring holes where key systems should be. In places where complementary systems should or could be paired, they are not, suggesting a lack of budget, internal support, or purchasing power. Equally, the use of pre-integrated or modular systems is under-represented, meaning that marketing and business development teams miss out on convenient synergies that can easily propel them forward.

Overview

Success with marketing technology depends on the tools, the purposes for which they're used, the processes for using them, and the people using them—all constrained by time and budget. Few firms operate in an ideal setting, making it challenging for most to optimize for performance.

For two years, RubyLaw, a Content Lifecycle Management platform, has studied the legal marketing technology ecosystem, and we've developed a blueprint to visualize how systems come together to deliver results. This

year, we have partnered with Calibrate Legal, a recruiting and consulting firm specializing in law firms, to update further and evolve the blueprint and answer the question: How are legal marketing and business development teams deploying technology to meet business objectives?

We learned that, whether because of budgetary constraints, alternate strategic priorities, a lack of awareness, or a cultural unwillingness to adopt new systems, law firms are lagging in their adoption of modern marketing technology.

"Our findings reveal a substantial gap in technological adoption between large and small firms."

About the Study

Our study was conducted during the second quarter of 2021. We surveyed a statistically significant number of members of the legal marketing community (n>50), with respondents representing the following segments:

- **Revenue:** Representation from firms across three revenue segments, including <\$100 million (35%), \$100-\$500 million (41%), and \$500 million-plus (24%)
- **Attorneys:** Relatively even distribution by number of lawyers, including 1-500 (55%) and 500-plus (45%)
- **Ranking:** Approximately 70% of respondents represented Am Law-ranked firms, with 27% in the top 50, 18% from 51-100, and 24% from 101-200.

FEATURES

- **Roles:** In terms of roles, nearly 90% of respondents were either marketing executives or senior marketers, with the remainder representing senior and junior marketing and business development roles.

Respondents completed 25 multiple-choice questions about the legal marketing technology ecosystem structures, selecting multiple options (where applicable) to indicate more than one system in use and manually adding unlisted systems or processes (where applicable). Specifically, they were asked to show which system their firm used, with definitions provided to clarify how to interpret “Content Syndication,” “Content Management System,” “Email Marketing,” and so on.

The systems correspond to the RubyLaw Legal Marketing Technology Stack, shown below and [available for download here](#).

Legal marketers and business developers are becoming increasingly reliant on technology. Yet, the time required to become educated, make strategic decisions about particular systems, successfully roll out and adopt software, and leverage it to gain a competitive advantage is as considerable as the amount required to perform general marketing and business development activities. This poses a unique dilemma: when and how can legal marketers keep on the cutting edge of marketing technology?

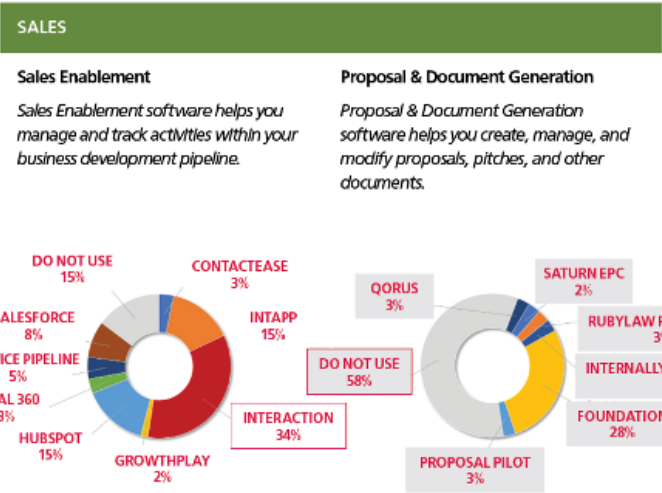
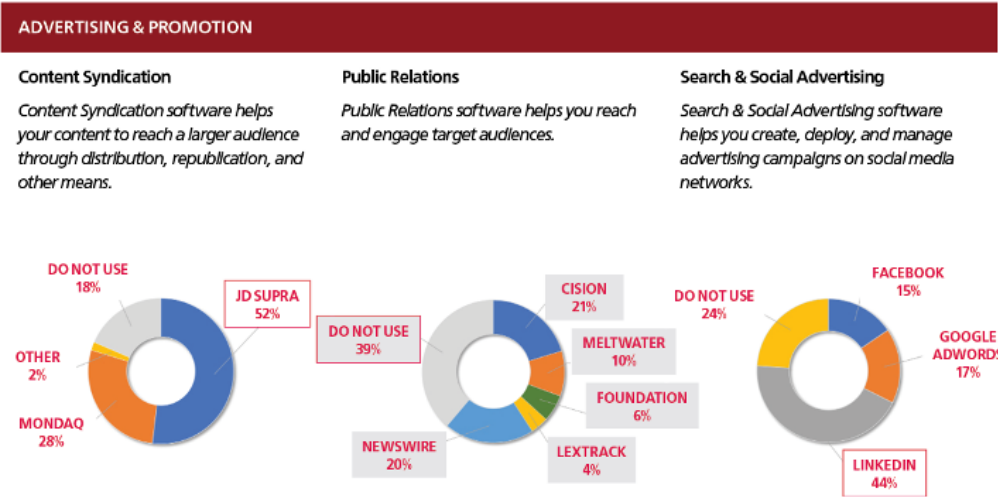
The RubyLaw Legal Marketing Technology Stack provides a visualization of the legal marketing technology ecosystem and articulates our perspective: it’s critical to select appropriate size and power systems while avoiding misfits, taking advantage of pre-integrated products like RubyLaw as needs and objectives become increasingly complex.



Findings

Our findings are organized by system, with each laddering up to a particular category of marketing technology. Definitions are provided for each system, with findings captured in pie charts.

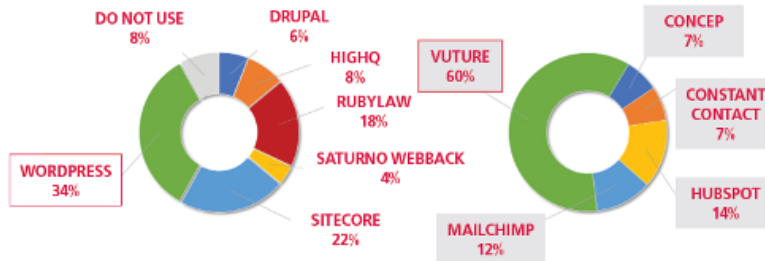
It is also worth noting that, while participants included a larger proportion of RubyLaw and Calibrate Legal clients, respondents represented the broader legal marketing community.



CONTENT & EXPERIENCE

Content Management Systems

Content Management Systems help non-technical users manage, edit, and publish digital content.

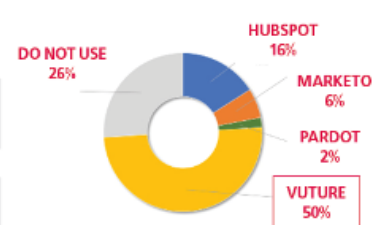


Email Marketing

Email Marketing software helps you create, manage, and deploy email marketing campaigns.

Marketing Automation

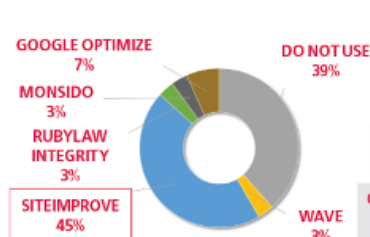
Marketing Automation software helps you substitute manual processes with automated activities to achieve personalized marketing at scale.



CONTENT & EXPERIENCE

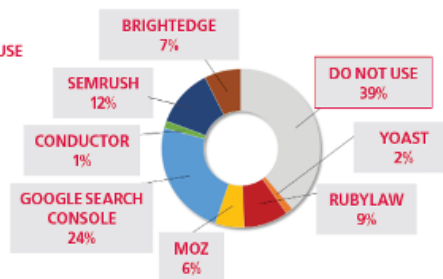
Accessibility, Compliance, & Optimization

Software that helps to minimize errors, while ensuring greater access to content, all while delivering the best experience possible.



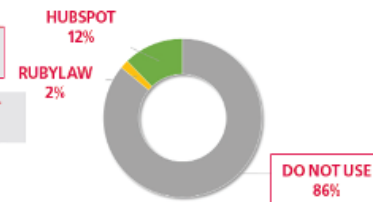
Search Engine Optimization (SEO)

Search Engine Optimization (SEO) software helps you manage and monitor your content's performance on search engines.



Digital Client Engagement

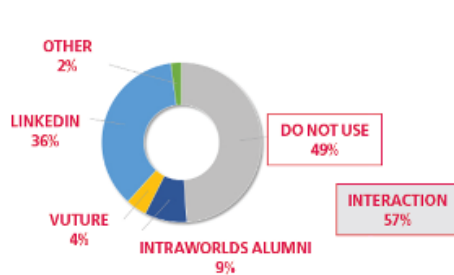
Digital Client Engagement software helps you engage with clients in non-traditional and sometimes automated ways, including bots and notifications.



SOCIAL & RELATIONSHIPS

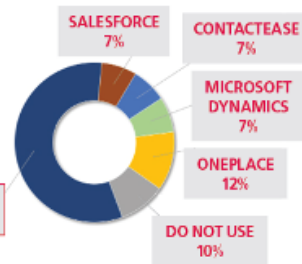
Alumni Portals

Alumni Portals help firms maintain connections with former employees and associates.



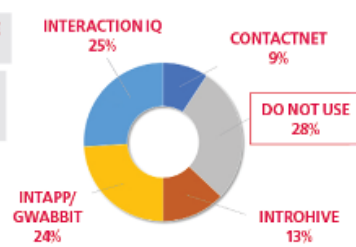
Customer Relationship Management (CRM)

Customer Relationship Management (CRM) software helps you manage and monitor relationships with key stakeholders, both internal and external.



Enterprise Relationship Management (ERM)

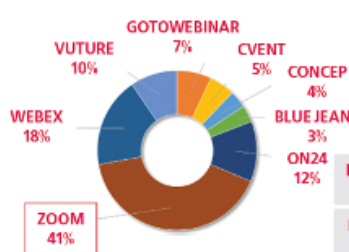
Enterprise Relationship Management (ERM) software helps you identify key relationships and enhance related intelligence.



SOCIAL & RELATIONSHIPS

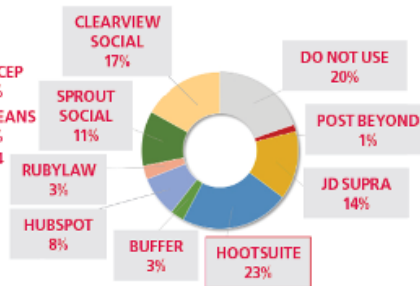
Events & Webinars

Events & Webinars software helps you conduct virtual meetings, webinars, and other events.



Social Media Publishing

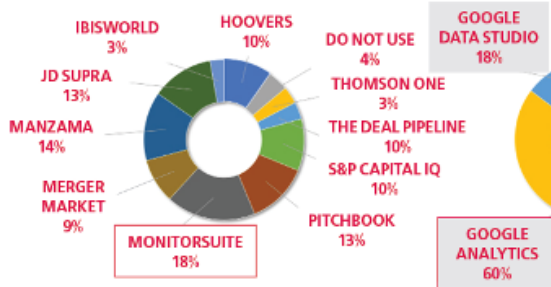
Social Media Publishing software helps you manage and publish content across one or more social media networking platforms.



DATA

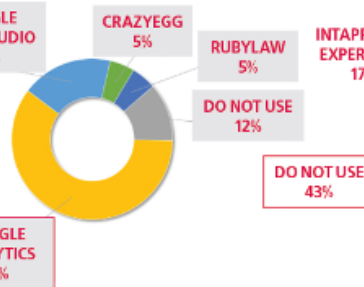
Competitive Intelligence

Competitive Intelligence software provides access to deeper, richer market intelligence than available via publicly-accessible sources.



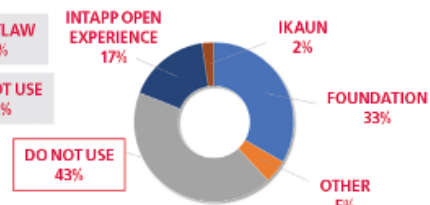
Analytics & Dashboards

Analytics & Dashboards software helps you to visualize data performance from campaigns and other sources.



Experience Management Systems (EMS)

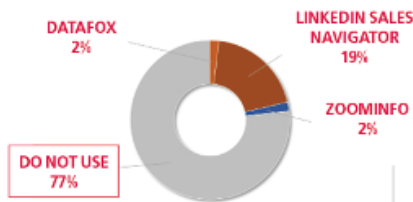
Experience Management Systems (EMS) help you to manage matters and firm experience.



DATA

Data Enrichment

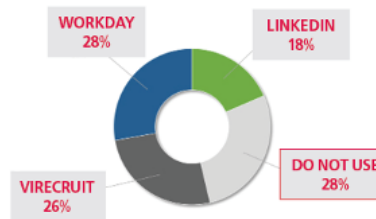
Data Enrichment software helps you view contact and company records more holistically, particularly when the available information is incomplete.



MANAGEMENT

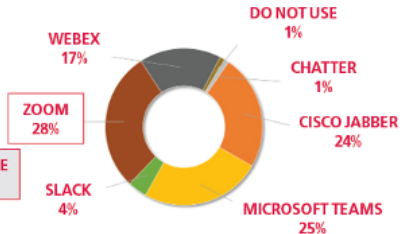
Talent Management

Talent Management software helps you manage the employment candidate pipeline from application through to offer and reporting.



Collaboration

Collaboration software helps you communicate and work together with colleagues, both internally and externally.



Insights

In preparing our insights, we reviewed several sources, including the findings of ILTA's 2020 Technology Survey and related commentary in Law.com, LegalTechnology.com, and Thomson Reuters' Legal Executive Institute.

We also reviewed past editions of the RubyLaw Legal Marketing Technology Stack and Calibrate Legal's most recent survey of law firm departments in North America and the UK. We arrived at the following insights:

1. A sizeable maturity gap exists between large and small firms

Whether because of budget, specialization, human resources, or market dynamics, the larger the law firm—by revenue or number of attorneys—the more mature the marketing technology stack.

On average, 49% of firms with revenues of less than \$100 million stated that they did not use one or more of the six marketing technology categories. By contrast, only 15% of firms with revenues of \$500 million-plus stated that they did not use one or more of the categories.

2. Key systems are absent from firms' marketing tech stacks

Delving deeper into the first insight, we found that key systems widely used in other sectors are not currently in use by law firms. For instance:

- Across all firms, we identified six types of marketing technology that are least widely used, i.e., 40% or more respondents reported that they do not use them. Surprisingly, Search Engine Optimization software, a basic digital marketing tool, falls into the “least widely used” category. Given the importance of search to successful digital marketing, it appears that many law firms are missing a fundamental capability.

- Nearly 90% of respondents are not using any form of Digital Client Engagement software. This type of software includes chatbots and desktop notifications, two tools that enable direct, immediate, and personalized interaction with website visitors and other important stakeholders. We expect that law firms will soon follow other B2B sectors in adopting these tools and learning to apply them.
- More than 75% of respondents stated that they are not enriching their client data using third-party data platforms. This may be due to concerns—rightly or wrongly—about data privacy. We believe, though, that data enrichment is the next frontier in law firm relationship management, and we anticipate that firms will soon recognize the value of enriched data and invest accordingly.

3. 20% of CRM users are not using ERM

A significant portion of respondents (20%) reported that they are using a Customer Relationship Management (CRM) system with no Enterprise Relationship Management (ERM) platform. Most, if not all, modern legal CRM systems have integrated ERM systems, which contribute immense value by automating new and changed contacts. We predict that the ERM-less firms will upgrade their CRM technology within the next two years; that, or they will fall behind their competitors.

4. Law firms are slow to embrace structured business development

While most CRM platforms are designed to facilitate sales enablement, considered in this context as opportunity management, 40% of respondents say they are not using any sales enablement tool. Our observations tell us that law firms using structured opportunity management

processes do so only in niche practices; few, if any, use sales enablement tools on a firmwide basis. Based on entrenched law firm cultures, we predict slow progress in the adoption of sales enablement tools in the industry.

5. Marketing automation is underutilized, particularly given resource constraints

Finally, we noted that 25% of firms are not leveraging marketing automation. Marketing automation is an efficiency driver, enabling teams to automate the sending of marketing content and capture critical information and trigger ongoing processes and workflows. Whether it's to send an automated email to a prospect that has downloaded a gated piece of content or to initiate the start of a workflow to enroll an interested party in a particular offering, marketing automation can help resource-constrained teams to lighten the (manual) load while simultaneously increasing engagement with clients and prospects.

Parting Thoughts

While the legal sector and particularly the marketing and business development area, has traditionally lagged behind other verticals, we believe the issue lies not with talent or awareness. Legal marketers and business developers must be empowered to leverage technology that can accelerate growth and drive efficiencies.

Technology on its own, though, is not the solution. The empowerment of decision-makers, plus prudent decision-making around the right size and fit technology, is the key.

In addition to the findings of this study, which we hope will help legal marketers and business developers to make the cases for crucial mar-tech upgrades, we are pleased to share the 2021 edition of the RubyLaw Legal Marketing Technology Stack. In addition to mapping out the prevalent systems and brands in use by firms, it includes a blank stack for practitioners to visualize their stacks and identify opportunities to plan for enhancement.

As we look to future iterations of this study, we recognize that we have previously solicited input from a select group of third-party experts, mostly marketing leaders at Am Law 200 firms, for feedback on the design and evolution of the legal marketing technology stack. This is the first year that we have conducted our survey; in 2022, we will report a year-over-year change to assess how firms have adjusted.

We will also plan to address how best to distinguish the extent of systems integration in the data. For instance, respondents may be using a single solution for both Customer Relationship Management (CRM) and Sales Enablement or two separate solutions. We currently cannot determine if there is integration between the respective systems, but we will aim to remedy this in 2022.

We hope that legal marketers, and the firms they represent, will utilize this study in conjunction with the 2021 edition of the RubyLaw Legal Marketing Technology Stack. We hope they seize the opportunity to leverage marketing technology to work more efficiently and effectively; create engaging, personalized experiences for key stakeholders; and carry the sector forward into a new era. **ILTA**



Alexander Kotler is the Chief Marketing Officer of RubyApps and is a growth-oriented marketing leader with 20 years' experience building businesses from the ground up. Known for translating strategic objectives into a cohesive, effective, and scalable go-to-market infrastructure, while leveraging expertise in omni-channel marketing, demand generation, marketing automation, and brand management.



Gordon Braun-Woodbury is a Consultant for Calibrate Legal. He is a veteran B2B marketing and communications executive with over 30 years' experience in the professional services sector.

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Lawyer Training
CLE Tracking

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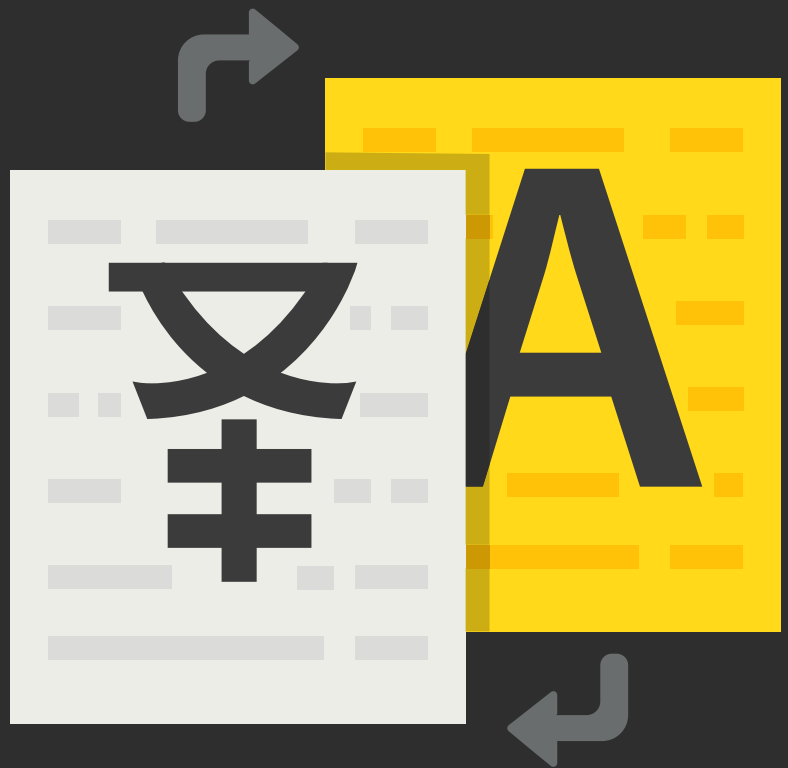
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FOREIGN LANGUAGE LITIGATION SUPPORT FOR CORPORATE LEGAL DOCUMENTS

BY SABRINA PAR



With the trend of global businesses and transactions today, the number of cross-border cases is also increasing. It caused the high demand for multilingual support and document translations in e-discovery litigations, court reporting, and virtual data rooms. Thus, law firms and legal departments are hiring and partnering with reliable legal translators who promise a fast turn-around of projects.

It is mentioned in **Rule 34(a) of the Federal Rules of Civil Procedure** that the documents that will be presented in the court must be in a usable form. Thus, it is only natural for an English-speaking jury to require English translations of the Foreign Language Documents.

Unlike before, the Federal Trade Commission is now refusing foreign documents without any accompaniment of English translations. Even if the documents that a company has been in different languages, they will no longer take the word of the party regarding its relevance to the case. They are adamant about every document translated into the language that the court of justice will understand.

Challenges in multilingual litigations

A lot of issues can arise from cross-border transactions and businesses due to the differences in the legal system of the parties. However, the difficulty in handling the cases doesn't end there. There are several factors to consider when doing foreign language litigation especially when it involves the corporate industry.

Legal system

The first one is the difference in the legal system. Just in different states, there could already be a difference in their rulings about how corporate laws work. What more in different countries? In total, there are five legal systems

that every country is using today and a law firm must understand them when handling these corporate cases. It includes civil law, common law, customary law, religious and mixed legal systems.

A large ratio of the world uses civil law such as South and Central America as well as the entire European countries. This system varies depending on the state or region implementing it which means that handling these cases needs a deeper understanding of specific law systems in the location.

Next to civil law is a common law which is commonly used in the United States. In this system, the court tends to rely on the precedent judicial decisions rather than investigatory. Meanwhile, customary law is used in Asian countries where most of their laws are based on customs or patterns of behavior of its people. This is often affiliated in mixed legal systems with civil or common law in some regions.

Lastly, the religious legal systems are those with laws emanating from religious texts and traditions. You will usually encounter this in many Islamic nations.

Due to these differences in judicial systems, handling cross-borders can be extremely complicated starting from the e-discovery processes. It requires expertise and enough legal researches about the corporate cases of the clients.

Distance and time difference

Aside from that, the long-distance and time difference can also be an issue. Companies can have multiple extensions in different countries with representatives in each of them. In some cases, the court needs to contact them and even had a video call with them. For example, if the parties that will partake are from the US, France, and China, the time difference could be a large issue between them. Moreover, sending original documents from China to another country may take hours or days which adds to the difficulty of gathering pieces of evidence.

Language

One of the requirements of federal court proceedings is to have every document translated into English by the party of litigants. Despite this, it is still unavoidable for international dispute evidence such as emails and business documents to be in foreign languages. Thus, the law firm or government sector needs to make sure that the litigation team and the court will understand them through legal translations. If not, the jury may discount or void the pieces of evidence that you will present despite their relevance to the case.

There is a study by Shiri Lev-Ari and Boaz Keysar explaining the [influence of accent on the credibility of the speaker](#) which is also applicable in the litigation processes. Thus, it is important to have proper consideration when presenting foreign language documents and their English translations.

Moreover, there are a lot of variables that could cause some issues in translating legal, financial, and political documents. A simple misunderstanding or unintentional mistake could wreak havoc in the court and cause the denial of the evidence. Thus, following the right process of legal translations and the proper way of presenting them to the jury.

The process of presenting legal document translation

The reason behind the requirements of federal court proceedings to have all documents translated to English is because the jurors and judges need to understand the evidence. This is why it is vital to find legal document translation

agencies [with experience and expertise in litigation processes](#). Moreover, the judicial proceedings are only allowing translations with affidavits of authenticity.

Even after the translation, the legal agencies and law firms need to review the foreign language documents and their translations before the direct examinations to check if there are any errors. This helps in avoiding misunderstanding the document that the witnesses may claim to be lost in translation.

Moreover, the court needs to identify the authenticity of the witness's claim that he or she is accustomed to using a foreign language for business interactions and communications. This is important to meet the exception to the hearsay rule of the foreign language and translated documents that they will present.

After these, the court will now allow the presentation of the foreign language document with its English translation as evidence. However, it is critical to have it with an accompanying affidavit of authenticity to ensure that the translations are all correct and avoid the risk of reversal on appeal due to failure in offering the evidence in English.

If the document is critical evidence for the case, it is important to advise the jury that it will be in a foreign language and you will present an authenticated translation along with it. You should also submit a proposed jury instruction to consider the certified translations and not discount them merely because they are not originally in English.

How to translate foreign language documents

There are several ways to translate foreign language documents that are needed for judicial proceedings. However, it is important to ensure the authentication of the legal document translation to avoid any issues when presenting it as evidence in court. You should also have a team that will handle the foreign disputes for your law firm or legal agency. Here are the things that you should consider:

Project management

International disputes that cover different languages can be difficult to manage. You need to understand your clients and the evidence that needs to be presented before the trial. In these cases, you will need to have a project manager with expertise in the specific legal system. This will make the processes smoother and more organized.

Legal document translation services

Even if the project manager is multilingual, it may still be difficult for him or her to translate the legal documents. Moreover, the federal court requires an affidavit of authenticity that only certified translators can provide for the legal team. It is important to find reliable legal document translation services that can provide language solutions that you may need.

To minimize the expenses and avoid having unrelated documents translated, you can try using machine translation tools. It will help in categorizing the importance of documents and

sorting those that are critical for the case. Here are some of them:

- Google Translate
- Microsoft Translator
- Reverso Translation
- SDL Free Translation

If you have enough budget and need more accurate translations, you can also use computer-assisted translation (CAT) tools. You may need to pay subscription fees to fully enjoy their privileges but it will still be worth it.

- MemoQ
- MateCat
- POEdit
- SDL Trados Studio

Custodians

One of the important steps in finding relevant documents for the international dispute is interviewing a document custodian. However, contacting them will be a hassle especially if they are speaking foreign languages. Hiring an interpreter to help in the interview process or write a set of translated questions for the team will help.

Cost

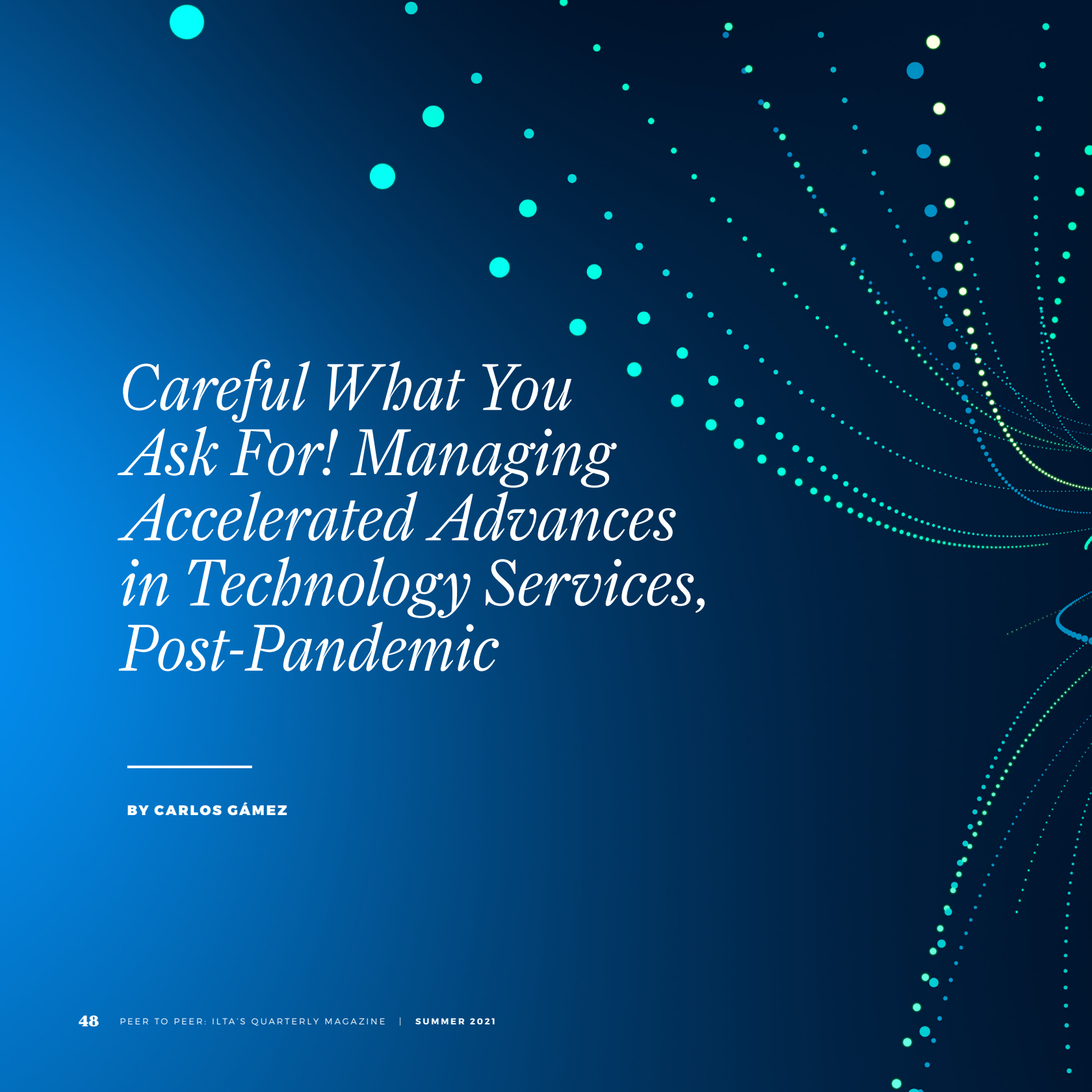
Handling international disputes is difficult and even costs a lot especially when the critical documents are in a foreign language. It is important to invest in quality human translators and machine translation tools to provide excellent legal document translations. There are three ways of compensating a legal translator. It can be hourly, per page, or per word. The cost can be \$20-100 per hour, \$0.07-0.35 per word, or \$20-125 per word depending on the difficulty of the document or the rarity of language.

Conclusion

Due to the globalization trend of businesses, it is only natural for corporate criminal cases to be normal occurrences in the legal department. However, disputes with foreign language documents need support from a reliable law firm and legal sectors. There are also a lot of factors to consider when presenting the case including the difference in languages, culture, and the legal system between the countries. Despite the challenges, helping a client win the case is reassuring for legal firms and promises a great return on investment. **ILTA**



Sabrina Par is a Legal Management Major and a copywriter with a particular interest in the legal industry and languages.



Careful What You Ask For! Managing Accelerated Advances in Technology Services, Post-Pandemic

BY CARLOS GÁMEZ

Sure, the title is tongue-in-cheek, but there's more than a kernel of truth to the sentiment: the legal technology industry faces unprecedented change – and opportunity! – as society moves past the pandemic shutdown.

The evolution of law firm legal services was underway pre-COVID, but the lasting effects of firms' embrace of tech-powered tools across all operations will most certainly accelerate the evolution of the service delivery model for years to come. We will not only see increased investment in technologies to enable this change, but also rightskilling and sizing of operations that can support lawyers' work from wherever they choose to be, with no notice. For firm managers, a wholesale reevaluation of resource deployment (real estate vs. backoffice) is crucial. Special consideration for flexibility and scalability is essential for this evolution to be effective and lasting. These fundamental shifts, long lingering on our collective "to-do" lists, are upon us and present unique challenges – and tremendous opportunity – for law firm technology and operations leaders.

Ready or Not – COVID-19 Forced Change on Us All

In March of 2020, many businesses around the globe went from primarily in-person operations to working

completely virtual, literally overnight. For the legal profession, a storied industry that historically has relied upon face-to-face relationships and resources, the changes were profound. Those firms that had not begun to embrace tech-empowered tools and processes, suddenly found themselves flat-footed, forced to make radical shifts in how they conducted business.

"Client legal teams are under an increasing amount of pressure to deliver."

Indeed, technology leaders who had been advocates of upgrading systems and continually evolving service models, were able to transition their firms quickly and skillfully to remote workforce, client base and vendor pool. "Beyond all the bluster about working remotely, what the pandemic has accelerated is a growing awareness for lawyers to engage more deeply with their clients about their challenges. Client legal teams are under an increasing amount of pressure to deliver. Lawyers are seeing their clients' pain up-close and personal via video and are identifying opportunities

to help clients automate and streamline both legal and operational processes," says Toby Brown, Chief Practice Management Officer at Perkins Coie.

Meredith Williams, Chief Knowledge and Client Value Officer at Shearman & Sterling, said "Prior to COVID adoption of legal technology and innovation was similar to many other places: pulling people along in the journey and getting them to understand why changing the way we work would be positive. After March 2020, the pace

of adoption accelerated to where we were being pushed quickly to implement faster than before,” she said. “Some examples include (1) our implementation of Zoom within 36 hours and (2) the rollout of iManage Work10 in the cloud and Office 365 on schedule during June-August 2020. Our users need the ability to work anywhere, anytime and on any device.”

To paraphrase Jae Um, legal markets strategist and analyst, we can call those firms “resilient firms,” meaning those that continually adapt to changing factors in the business environment. Um points out in her April 20, 2021 Law.com article, “Resilient Firms Outperformed After 2008,” that certain Big Law 100 firms, those that were able to weather the global financial crisis of 2008, were generally the same ones that garnered business share at the end of 2020. Some larger firms, in fact, had record years!

A benchmarking study by Um’s firm, Six Parsecs, based on data compiled by The American Lawyer “shows that 50 outperforming firms accounted for 64% of total revenues and 72% of total profits generated by the 2021 Am Law 100. Further, these 50 firms have grabbed over 76% of all gains in partner compensation since 2015, expanding their collective partner comp pool by \$13.6 billion.”

What does this say about the forced change of the COVID-19 shutdown on the legal profession? For law firms actively engaged in streamlining their back-office operations, and for legal tech leaders advocating change at those firms, the pandemic presented proof this advocacy was correct. The perceived barriers of remote work (and remote relationships) were non-issues. Staff at those firms were easy to train and to hold accountable. Clients, who themselves were under the same pressures, were quick to adapt and find new ways to conduct business. Systems security and access were stress tested, tweaked and geared to handle even greater challenges. And with

no clear, economy-wide, “return to office” mandate, the opportunities and possibilities presented by a suddenly more flexible work environment are here much, much sooner than anticipated.

As COVID Lifts, Now What?

A Google search reveals countless articles on corporations, large professional firms and indeed, the entire commercial real estate industry rethinking the role of the traditional office. This line of thought permeates the legal profession as well. In addition to reducing the amount of leased space, firms have taken a broad look at other permanent operational changes.

According to the “2021 Report on the State of the Legal Market,” issued by the Thomson Reuters Institute and the Center on Ethics and the Legal Profession at Georgetown University Law Center, “the unprecedented events of 2020 could set off a wave of sweeping permanent changes, such as law firm business models, use of technology and more flexible staffing and operations.”

What’s driving this fundamental shift in thinking and resources? The lessons from the COVID crisis, as outlined in the report, hold the answers:

- Firms see the success of working from home, as the transition was less disruptive than expected.
- There is greater acceptance by partners of the role of technology in improving the delivery of legal services and cost reduction.
- Increased consideration of fundamental changes to operations, such as staffing, working patterns and use of office space.
- Greater openness to new practice models, including

collaborations with other firms and new law companies, such as alternative legal service providers.

- More attention to work-life balance, employee mental and physical wellness, and viewing of people as key firm assets.

The clear subtext of these learnings is that the pandemic has flung open the door to re-prioritizing investments in not only real estate, but service delivery to clients. “An overwhelming 84% of firms plan to increase their technology budgets,” the report states. Firms are clearly revisioning their technology suite, as well as how and to whom they outsource services. They are reevaluating how tech applications drive efficiency. For legal technology professionals, this development creates an accelerated reduction in risk aversion, which is astounding! It is overwhelmingly clear that unprecedented change has delivered unprecedented opportunity.

The proof is in the pudding. As Kenneth Jones, Chief Technologist at Tanenbaum Keale, states, “Our longstanding commitment to the use of sophisticated technologies to extend and enhance client service benefited the firm and its clients in three key areas. The first, is legal operations, where our earlier adoption and enhancement of cloud applications allowed our teams to remain highly

productive. Second, our technology subsidiary’s private cloud product delivered uninterrupted access to our complex matter management systems and improved outcomes utilizing the predictive analytics capabilities inherent in the platform. And finally, partnering with a managed services provider and help desk that embraced one of the world’s leading digital workflow platforms was

instrumental in Tanenbaum Keale’s support of our attorneys and professional staff in the unwavering support to our clients throughout the pandemic.”

"Firms are clearly revisioning their technology suite, as well as how and to whom they outsource services."

Grabbing the Bull by the Horns - Navigating Success, Near & Long Term

As we gear up for what could be a wild ride, it’s important to develop a roadmap for success. In doing so, it’s incumbent as firm technology leaders that we ask ourselves some very basic questions: What does change look like? What are the solutions to our process issues? How do we avoid

merely throwing resources (money) at those solutions? What are the most logical, cost effective ways to remove risk? And most importantly, what technology and service elements are at the core of our firm’s operating model? More clearly stated, which elements are at the core of our firm’s business?

In the shift from introspection to operation, firms must create an incremental framework that allows for achievable

successes. A detailed plan outlining responsibilities, expectations, process, deliverables and desired outcomes is essential. It must include measurable KPIs. Incentives should be built-in and shared with all stakeholders. The roadmap helps align all efforts and creates an invaluable sense of team investment and ownership.

As we develop our roadmap and ask ourselves these very key questions, we must realize that we have a dual opportunity: 1) to educate our firm colleagues on our level of expertise, and 2) establish true partnerships with outside managed services providers. I would argue that successful CTOs and Managing Partners have proven the first point over these past 18-months. The second opportunity, however, will require a shift in thinking of managed service providers as “vendor” to “partner.” Framing that decision in terms of how a provider can impact profit makes the opportunity much clearer.

Education and Introspection – The Hard Work Begins

Realizing these opportunities is a two-phase process. The first phase is relatively easy: firms can lower risk by embracing the possibilities of best-in-class managed services. Most firm leaders are aware that basic IT functions and several billing services can be outsourced. Many are familiar with help desk and document storage and retrieval services. It is incumbent on firm technologists to educate themselves and their colleagues on the full range of professional managed services – from client intake to conflict checking to accounts receivable to ebilling to cybersecurity to network monitoring and app development. Then, from education, firm technology leaders must align the vast array of available services in terms of how best to serve clients. Full awareness of the available array of managed services directly impacts firm's ability to improve the service model.

This alignment process leads directly to a second phase of opportunity realization: an industry-wide redefining and elevation of service delivery. In order to best serve clients (and ultimately the bottom line), we must rethink not just the technologies we use, but the processes we implement. Reimagining the client workflow should work something like this:

- Look inward at what the firm does well in terms of service delivery.
- Conversely, what are the current and potential service delivery pain points?
- What's the firm's “adoption journey?” How adroit is the firm at achieving change? Does it learn from its mistakes? Is it resilient?
- Repeat bullets two and three, this time from the client's perspective.
- Give careful consideration to the client's culture. Take time to learn and adapt. Ensure teams understand and are fully integrated into those cultures.
- Construct an agreed-upon, incremental, achievable roadmap for implementation.
- Build true partnerships with managed service providers. Remember, they will often act as the face and voice of the firm.

It's All Just History Repeating

As the legal technology industry rockets into the future on this wave of unexpected, unprecedented opportunity, remembering those agile, resilient firms of the late aughts

and early teens is essential. They were able to adapt to the Global Financial Crises because they had incorporated an ethos of change in their firm's culture. By placing careful and considerable emphasis on streamlining the change journey, firms were able to adjust, adapt and prosper in the face of dire economic circumstance. We've seen the same thing these past 18-months.

Remaining Agile, Becoming Resilient

Affecting change is not about outsourcing it; rather it's about co-managing it with trusted partners. We should consider three groups of trusted partners essential to this streamlining journey: colleagues, clients and outside providers:

1. Creating a culture of change begins with colleagues. Hiring and training with the expectation that change is inevitable and indeed welcome, makes jettisoning outdated or inefficient processes easier and even expected.
2. Understanding and actively listening to client needs and challenges feeds our ability to change and makes us more efficient in our response. Clients begin to rely on us for our ability to adapt our efforts to solve their problems.
3. An honest analysis of and thorough rightskilling of back office operations with best-in-class managed service providers can provide significant cost efficiencies and the ability to scale without huge capital outlays.

The "streamlining journey" is crucial because it lowers risk, improves relationships, makes firms more responsive, increases knowledge of client issues and, importantly, boosts revenue.

Onward, Together

While the novel coronavirus pandemic has exacerbated many societal and economic woes, it has also had, in great measure, the opposite effect. It has shown us the great advantage in addressing our collectively challenges together. The COVID-19 shutdown has significantly highlighted that a collaborative mindset helps individuals, and ultimately organizations such as law firms, embrace change. A shared plan, common goals and a well-designed process create an atmosphere of possibility. Teams, whether internal or external, thrive when they work together to achieve mutual goals. Firm leadership, in tandem with clients and managed service partners, must strive to nurture and maintain this culture. Our long-term success depends upon it. **ILTA**



Carlos Gámez, an attorney and legal technology innovation leader, is Chief Revenue Officer at Frontline Managed Services, the leading provider of administrative, financial and IT managed services to the legal industry.

How to Involve Shareholders in IT Decision Making

by Jim Campbell



IT professionals across industries have a notoriously difficult time getting top management to approve decisions. In return, executive teams have a hard time understanding IT requests and how they'll impact teams across the company. It's counterintuitive to suggest that adding more internal decision makers could help this dilemma, but Robinson Bradshaw's distinct structure has done just that. The law firm has established an IT decision making process that involves more employees than most companies but with less waste and confusion.

Headquartered in Charlotte, North Carolina, Robinson Bradshaw is a full-service regional corporate law firm with national capabilities. With over 150 attorneys and 46 practice areas, its 15-person IT team stays busy.

"These days our employees need more technical support than administrative support. I've been here 30 years and our employees are more tech-savvy than ever, they want the tools to do things themselves," shared Geoff Rhodes, Director of IT and Security at Robinson Bradshaw. "Well, they're technically not all employees, many of the attorneys are shareholders," he clarified.

Our firm, Opkalla, started working with Robinson Bradshaw in 2019. As consultants and advisors, we help IT leaders research and identify IT solutions that will make their lives (and budgeting process) easier through a vendor-agnostic approach. We noticed two things pretty quickly that made Geoff's IT team unique from our other clients.

First, Geoff has been with Robinson Bradshaw for 30 years. The continuity, knowledge and trust he has built within the company is something other IT leaders dream of. Second, the firm has figured out an IT decision making process, over years of iteration, that proves sharing equity doesn't have to mean the death of efficient decision making.

How Not to Structure IT Decision Making

"It took us time to get to the structure that's working today. We definitely didn't just stumble upon it," shared Geoff.

Thirty years ago, when Geoff started at Robinson Bradshaw, there was an Office Automation Committee. Before IT objectives became mobile device management, cloud storage and work from home, IT professionals had their sights on automation - making computers the backbone of office workflows. Geoff and his team would present to the committee with ideas and opportunities for automation. This worked well until those who had formed the committee retired or left the company and didn't fully pass the baton. The committee dwindled until an IP attorney requested to bring it back and lead the charge. He led an effective effort - but the effort was focused on IP-related IT decisions.

To even out the issues and solutions discussed, Robinson Bradshaw opened the committee up again for membership and had 15-18 attorneys join. While this started promising, the size proved too large. During busy seasons, half of the meeting attendees could be found doing their client work during the meeting. This means that as decisions bubbled up to the Board of Directors, and ultimately all shareholders, those on the committee didn't always remember their role in the decision.

Finally, three years ago, Robinson Bradshaw identified a structure that has been working since.

How to Qualify IT Decisions

"You can divide up how we now make IT decisions first by cost then by impact," Geoff explained.

For most IT solutions under \$20,000 in annual cost, the Director of IT has full discretion to purchase and implement. For solutions over \$20,000 it comes down to impact - impact on operations and impact on Robinson Bradshaw's global team.

"If the IT solution is needed to keep the lights on, operationally, like renewing our colocation facilities, upgrading our phone systems, renewing our document management licenses, the shareholders want to see the numbers to make sure we're not going crazy, but they don't need to be involved in the selection and decision," Geoff elaborates.

If the IT solution in question or consideration goes beyond day-to-day operations, and affects their global clientele or workforce in a substantial way, a more structured decision making process begins.

"For example, if a healthcare industry client needs us to use a secure email service to comply with their industry regulations, this type of request turns into a top priority at our Committee Meeting."

The Technology Committee

Today, Robinson Bradshaw's Technology and Innovations Committee is made up of attorneys representing each of the firm's practices and office locations, the COO as overseer, Geoff and a Committee Chair selected by Robinson Bradshaw's Board of Directors. You do not have to be a shareholder to be on the committee.

The committee meets quarterly - with additional meetings as needed for specific solution requests, troubleshooting or evaluations. The committee is the

first line of review on any IT investments that will impact Robinson Bradshaw's global team and budget. The meeting is structured around the IT requests and challenges the team has faced over the previous quarter. Topics range from client requests, employee requests, IT-team requests and any requests the committee members bring from their respective practice groups.

"Everyone on the committee volunteered to be there and cares about our technology's impact on their work. This makes for very productive meetings with a lot of mutual respect," noted Geoff.

Decisions made during the meeting are brought to the Board of Directors next. Once approved there, they are communicated to shareholders for final approval.

"By the time decisions get to the broader shareholders, they've been discussed, analyzed and boiled down to exactly what people want to know. This means the committee rarely has a decision come back for re-evaluation."

The only downside to this process, Geoff admitted, is that other companies with a

handful of condensed decision makers at the top can often make broad, big impact decisions quickly. "It takes a little longer to get things rolling with our structure - but in the end we never hear, 'I can't believe we did this' or 'I don't understand where this money went' and that's pretty rare."

*"The committee
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team and budget."*

How Other Industries Compare

Opkalla consults most often with companies up to 1,000 employees, with IT teams of 1-20 staff members, and in a variety of industries - from healthcare to manufacturing to SaaS to construction. Very few have a streamlined decision making process that isn't frustrating for IT staff and those who approve their budget.

Luckily, more industries are appointing dedicated CIOs and CTOs, but still many IT teams are reporting to CFOs and COOs without IT experience. Decisions are heavily influenced by dollar signs, making IT a highly scrutinized cost center rather than viewing IT as an investment in revenue-optimizing activities.

At our largest clients, we see IT decision-making separated out into purchasing departments. Decisions are thoughtful and planned out - but they can often be vendor-biased instead of needs focused. At newly merged or acquired companies, IT decisions can be made by people who don't work in IT and are only concerned with their bottom line. At manufacturing companies, IT systems are embedded through every step of the product lifecycle - so IT budget is spent on heavy enterprise systems that don't adapt quickly to an expanding or contracting workforce and eat any other available budget. At companies in the healthcare industry, decisions are led by compliance teams focused on limiting lawsuits, not optimizing IT systems. And at some of our smallest clients, IT decisions are left to their 1-2 IT professionals, but are criticized heavily when something goes wrong.

It's incredibly rare for companies to make IT decisions that are 1) led by experienced IT professionals 2) presented to all internal shareholders and 3) happen at a reasonable and efficient rate of change.

Adopting a shareholder focused mindset

Not all companies have the desire or ability to offer shareholder status to their employees. They do, however, have the ability to build an internal structure that fosters innovation, supports an experienced IT team, and guides IT decisions in a way that benefits not only all employees, but all clients as well.

"There's often a very direct correlation between an IT solution and the impact it will have on clients," Geoff explained. Showing that client-focused link to internal stakeholders, whether they are actual shareholders, an executive team, or just the end users you're trying to get on board, can help tie that solution to revenue in their minds.

Companies don't need a Board of Directors nor Shareholder Meeting to justify an internal Technology Committee. They need an engaged IT leader and volunteers from each department who see the value of IT and want to be involved in making it better. **ILTA**



Jim Campbell has spent over ten years helping companies navigate, select and implement IT solutions. As a Managing Partner at Opkalla, he works with IT professionals across industries to help them achieve more. From unbiased IT procurement to managed IT services, he leads a team of Opkalla consultants to help clients identify the best IT solutions in a transparent and unbiased way.

Diversity, Equity, and Inclusion Offer Benefits for Businesses, but also for Society at Large

by Jaclyn Walkins and Jay Parekh



Welcome to the first in a series of articles on Diversity, Equity, and Inclusion from the ILTA DEI Taskforce! Over the next year, our Taskforce will be bringing ILTAns new, fresh, and innovative articles on DEI. We hope that you will take the time to learn, grow, and continue the forward-march of Progress! Enjoy the Read!

Diversity in the workplace is not a new topic, but especially since the murder of George Floyd last summer and ensuing protests against racial inequality, diversity has become imperative for businesses to address. Since last year, many organizations issued press releases and posted statements on social media in support of racial equality; however, words mean little without action. Businesses must truly invest in furthering diversity, equity, and inclusion (DEI) internally, both for their own bottom line and the good of society.

Business leaders are likely familiar with the concept of corporate social responsibility (CSR), which suggests that "companies integrate social and environmental concerns in their business operations and interactions with their stakeholders" as a way to achieve "a balance of economic, environmental and social imperatives... while at the same time addressing the expectations of shareholders and stakeholders" (UNIDO). CSR is not charity; it is a recognition that factors outside of the work environment directly impact a business's profitability. By investing in DEI, an organization can begin to counter the history of injustice that has resulted in underrepresentation of groups in the workplace, which progresses society and ultimately the business's profitability.

A social commitment to DEI has a strong return on investment for the business. McKinsey conducted a series of studies following hundreds of companies and

the impact of diversity on their profitability. The 2019 report found companies in the top quartile of racial diversity on executive teams were 36 percent more likely to have above-average profitability, with a similar series of increases over the years (Dixon-Fyle). In fact, racial and ethnic diversity had a stronger impact on profitability than gender diversity, with a linear relationship between this diversity and improved performance: "[F]or every 10 percent increase in racial and ethnic diversity on the senior-executive team, earnings before interest and taxes (EBIT) rise 0.8 percent" (Hunt). However, companies with more gender diversity in their executive teams also consistently outperformed their competitors: "Our 2019 analysis finds that companies in the top quartile for gender diversity on executive teams were 25 percent more likely to have above-average profitability than companies in the fourth quartile—up from 21 percent in 2017 and 15 percent in 2014." The magnitude of representation matters as well: the greater the number of women executives, the more the business outperformed other businesses with fewer or no women executives (Dixon-Fyle). These findings are in keeping with a study by HBR which concluded that "firms with more women in senior positions are more profitable, more socially responsible, and provide safer, higher-quality customer experiences" (Reynolds).

The increase in profitability for these businesses is almost certainly due to the varied perspectives and ideas offered by a diverse group; the HBR study found that

adding women to the leadership team made organizations “more open to change and less risk-seeking” (Reynolds), meaning that they chased new opportunities while reducing the associated risks. This is not a surprising finding – it logically follows that more ideas and perspectives will result in a better product. In fact, a report from Deloitte determined that “cognitively and demographically diverse teams can enhance innovation by 20% and identify/reduce risks by up to 30%” (Man). Compared to a non-diverse team, bringing together people with varying life experiences and skill sets can refine and enhance processes (Heinz), increase the chances of solving a problem (Reynolds), and quicken and improve decision-making (PM Editorial). Recognizing, respecting, and including the differing perspectives of team members is crucial to fully realizing the benefits of a diverse team, however. Simply increasing numbers of historically underrepresented group members does not mean that they are truly included in the organization.

Achieving inclusion has additional benefits in terms of employee morale. Diverse organizations show more job satisfaction among employees, increased levels of trust in the organization, and the opportunity for employees to be themselves without fear of backlash or exclusion (Kaul).

By creating a culture that values DEI, businesses

can better hire and retain talent. Broadening the pool of candidates provides the business with more choices (Man) and increases the odds of finding the best person for the job (Hunt). In addition, investments in DEI may also reduce the amount of recruiting required for open positions. Diverse candidates may be more likely to actively seek out firms that show true investment in DEI: “When talents

[sic] search for a job, many consider the level of diversity and inclusion an important factor... A diverse and inclusive company has many advantages over companies that do not advertise their diversity and inclusion policies” (Man). An inclusive culture will also better retain talent; after all, “inclusion is what maintains diversity” (Heinz). If an employee feels respected and included, they may be less likely to leave (Man) and more engaged. In a survey by Deloitte, “83% of millennials reported higher levels of engagement when they believed their company fosters an inclusive culture” (Purdue University Global). On the other hand, if an organization speaks about a commitment to DEI

but does not follow it up with concrete action, employees may question the authenticity of that commitment and decide to leave (Heinz). In a 2019 Yello survey, 70% of respondents said they would “consider looking for a new job if their employer didn’t demonstrate [emphasis added] a commitment to diversity.”

"Simply increasing numbers of historically underrepresented group members does not mean that they are truly included in the organization."

Customers similarly prefer brands with authentic commitments to and demonstrations of diversity. Recent surveys found that “consumers are prepared to walk away from dishonest and inauthentic online brands that don’t play fair” (Fair Play Talks), and “74% of consumers said the recent Black Lives Matter protests have made it more important to support businesses that work to improve diversity and inclusion” (Christie). A true commitment to and investment in DEI has a direct impact on a business’ image and reputation, even more so following the events of last summer. Deloitte-owned agency Heat conducted a study that found brands with high diversity scores were preferred by consumers by 83% and if they showed diversity in advertising, they reaped “improved perception among consumers and stock market gains” (Christie). In the legal industries, customers are increasingly holding firms accountable for diversity standards: In 2019, 170 general counsel and corporate legal officers signed an open letter to law firms insisting on more diverse representation (Simmons). Customers should not need to force such changes; firms should be leading the charge. As McKinsey summarizes, “Given the higher returns that diversity is expected to bring, we believe it is better to invest now, since winners will pull further ahead and laggards will fall further behind” (Hunt).

"DEI is a solid return on investment from a financial perspective in terms of profitability, innovation, and talent acquisition."

DEI is a solid return on investment from a financial perspective in terms of profitability, innovation, and talent acquisition. But beyond the business case, DEI presents the opportunity for a business to change the world for the better. When people see more diversity around them, it becomes more normal and they may accept different viewpoints, improve cultural competency, and reduce extremist views (Man). To realize this goal, firms will need to make real, sustained investments and efforts in DEI with resources like time and money to change their cultures, educate their employees, incorporate DEI into every aspect of the business model, and so much more (Kaul). There is no quick fix. Each element of DEI builds upon the others, and they must all be deliberately fostered to achieve recognition, respect, and inclusion for all. Future Peer to Peer articles will provide more concrete steps, but businesses may start their DEI journey by communicating to employees the importance of and need for DEI in the workplace. DEI should become a core value demonstrated by employees at every level and in every department. Raise awareness of unconscious bias and work to diminish it (Kaul). Change takes time, so why wait? **ILTA**

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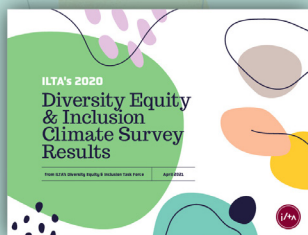
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Jaclyn Walkins is a Knowledge Management Technology Project Manager at Sidley Austin LLP. Jaclyn is an information hub, connecting technical folks with lawyers and other staff to capture knowledge and enhance our experience management platform. She translates user needs into technical requirements and train end users how to contribute information to the platform. She is a member of the ILTA DEITF and a fierce advocate for equity and inclusion.



Jay Parekh is the Vice President, Strategic Alliance, at Netrix LLC. For over 20 years, he has been helping clients transform using technology and strategy that allows for maximum user productivity. Jay is a member of the ILTA DEITF, a long time ILTA volunteer, and a trusted technologist and SME.



We are pleased and proud to deliver the results of ILTA's first DEI Climate Survey! It was designed to assess whether members of the ILTA community perceive ILTA as being true to its values. The good news – both members and business partners see ILTA as accepting of people as their authentic selves.

READ ONLINE »

Women Who Lead: Crystal Kelley

**IT USER SUPPORT MANAGER
TROUTMAN PEPPER**



ILTA's Women Who Lead Advisory Committee put out a call for names earlier this year to identify women who have recently experienced a job transition into their first management role. WWL will be profiling four new women leaders in Peer to Peer, one profile in each of the next four issues. WWL will also will do an interview with them as part of our podcast series throughout the next year, so stay tuned!

How did you get interested in the field you are currently in?

I've always been very analytical and eager to learn new things. IT always intrigued me since it encompasses so many fields, so I started learning about different operating systems and programming languages.

What led you to your career? Was there a defining moment?

I was working as a 911 operator and ready for a change. I landed my first IT job as an analyst for a legal helpdesk, and that allowed me to start building the skills I needed to advance my career.

What is one of your greatest career accomplishments?

I think I'm most proud of the fact that I was able to become a manager within a short time of starting my career. I started my career in IT 8 years ago, with very little knowledge, and worked hard to develop my

skills as a software engineer. Being promoted to manager has been a great next step in my career growth.

What life lessons has your work taught you?

Most every problem has a solution. Always be prepared for the unexpected.

What qualities makes a good leader?

Passion, great communication, and empathy. I feel that a leader that is passionate about their job is not only more effective but also inspires passion in their employees. A clear and consistent line of communication allows employees to stay informed, gives them what they need to perform well, and permits them to give open and honest feedback. Lastly, I believe having empathy is good so that the manager can understand the employee's viewpoint and maybe pick up on issues that could be personally affecting the employee.

Do you have a life philosophy? Where does it originate and how does it shape who you are?

My life philosophy: Always strive to do better. Since I was a child, I've always tried to be the best at anything I did. Now that I'm an adult, I put that same energy into my career; I want to do what I need to grow as an engineer and as a manager.

What advice would you give to your younger self?

Mistakes are always bound to happen. Don't dwell on them, and instead use that energy to learn and grow from them. **ILTA**



**AND FROM PART 1,
CHECK OUT THE
PODCAST WITH
LISA MECONI**

 **LISTEN TO PODCAST**



ILTA has partnered with Shy Alter of ii3, to create an ongoing series of video interviews with ILTAns, technologists, and legal-tangential guests. These engaging, short interviews, hosted via YouTube, showcase new perspectives and topics vital to our ever-changing world.

This series, entitled LawFirmWeekly, is a firm management focused news media outlet. Our joint mandate is to create relevant, compelling and instructive - expert driven rich media programming. We produce weekly interview and editorial video programs that are delivered through Youtube and podcast platforms.



TUNE IN HERE

The Law Firm of the Future: What's on the CIO's Agenda? (Part 2)

by Jae Um and Brad Blickstein



Editor's note: In Part 1 of this series, Brad and Jae exchanged thoughts in an informal dialogue on the most pressing priorities for law firm CIOs in a post-Covid market. In Part 2, they provide a roadmap on how CIOs can lead within their organizations to successfully navigate an increasingly complex legal market in the digital era.

A mara's Law — as summed up most famously by Bill Gates — tells us that we tend to overestimate the change that will happen in the next two years but underestimate the change that will happen in the next ten.

2020 put these words to the test. As the global pandemic applied sudden and intense pressure on the business environment, the legal industry challenged age-old critiques about its unwillingness and/or inability to change. As the entire world mobilized rapidly to create a new fundamentally digital paradigm, legal teams all over the world exceeded expectations in adapting to remote work. While the “future of work” has long remained a conceptual discussion, we have unique opportunities right now to shape the next step change for work and life in very concrete ways.

This is doubly true within the legal industry. The best performing law firms aren't wondering how to “get back to normal”— they're actively rethinking long-held assumptions about the practice and business of law to architect and engineer new and enduring competitive advantages.

Amidst the Fourth Industrial Revolution, many of those competitive advantages derive from technology. In Part 1 of this article, we identified four priorities for the CIO's strategic agenda:

- 1 Evolving enterprise environment for law firm operations and management
- 2 Practitioner toolbox for modern legal practice (lawyers and paraprofessional as users)
- 3 Builder toolbox to digitize services (clients as end users and a multidisciplinary team of makers that includes lawyers)
- 4 Tech as key enabler or constraint in service and business model transformation, practice by practice

In this Part 2, we take a deeper dive into five critical success factors for the strategic CIO, with commentary and advice from seasoned innovators and business leaders across the industry.

Customer Orientation: Listen To Your Users

It may not seem this way to most lawyers, but we are already living in the era of the bionic organization, where human expertise and artificial intelligence meld together to form new value propositions with completely different cost structures and unprecedented potential for scale. This means law firm CIOs have a once-in-a-lifetime opportunity to participate actively in the organization's long-range

thinking about what it is they sell in the marketplace, from the means of production to how it is packaged and sold.

In the post-Covid reset, strategic CIOs will align every aspect of the IT function to reshape and transform – for the better – both the practitioner experience as well as the client experience.

But as with all righteously ambitious goals, this one says real easy and does real hard. Even the most committed and driven CIO faces many perennial – and seemingly insurmountable – barriers in leading change.

The most successful CIOs will exercise mental agility and dexterity in thinking deeply about both old and new roles, such as technology, analytics, and pricing, within the legal ecosystem. The rise of multidisciplinary teams are to the good, but they do add complexity to the CIO's mandate. In too many law firms, new or emergent capabilities comprised of a few specialists get short shrift in technology support and guidance from IT departments that are overwhelmed with the mechanics of keeping lawyers productive. In a recent Legal Value Network survey of law firm pricing and project management professionals – a group we believe are critical to firms' ability to stake out competitive advantage – only 57% feel they have access to the right technology to do their jobs.

Discussions about technology adoption aren't new, and they tend to myopically focus (and blame!) on the technology-shy lawyer. For a fresher perspective, we ventured beyond the law firm landscape for actionable advice from the vantage point of ALSPs, where technology enablement is part and parcel of a holistic value proposition. Ed Sohn, head of solutions and product

for Factor, has amassed deep experience integrating technology into legal workflows, and he offers two pieces of advice, and both are interestingly counterintuitive:

Sohn advises early, active, and sustained engagement with users to articulate and adapt those priorities. "To put it simply, give the people what they want, because success begets success. One deployment with enthusiastic uptake can create the right momentum toward a virtuous cycle that helps the entire organization build the necessary muscles to lean into change."

That leads to the second piece of advice from Sohn: "Think creatively about your user groups. We're used to

thinking about the user as the endpoint or destination, but some users are actually critical assets that accelerate and amplify adoption efforts." The search for adoption champions isn't new, but Sohn challenges law firm CIOs to think more laterally about user groups, both within and outside the walls of the firm.

*"Discussions
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lawyer."*

We tend to agree with Sohn. Allied professionals like project managers are often power users and enabling champions. Many law firms achieve quicker tech adoption in their captive ALSPs, which are fit-for-purpose centers of excellence around a specific practice area, like transactions, litigation, and contracting. As legal supply chains become more diverse, more law firms are also open to partnering with outside ALSPs to secure tranches of work that require technology enablement. These variations in service models offer interesting opportunities for CIOs to think creatively about adoption in ways that weren't available ten or even five years ago, lending new importance to the age-old imperative to know your users.

Data Focus: One Of Many Endgames For Cloud And Ai Tooling

It's been 15 years since someone first said that "data is the new oil." Like oil, data has the potential to be valuable but remains useless if unrefined. Perennially data-rich but insight poor, most legal teams are still unable to extract meaning from even small data sets.

What's an enterprising CIO to do? Despite all the sexy hype around data science, unravelling the data conundrum likely requires organizational alignment around a pair of historically unsexy IT topics: infrastructure and process.

The legal industry's journey to the cloud has been slow for good reasons: the stakes around data security couldn't be higher, while developing and deploying a governance framework that survives contact with reality remains a complex endeavor. Every CIO in Big Law faces a unique set of cultural, organizational, and technical constraints, and each will need to manage the when and the how of their organization's unique path to cloud readiness.

One key to accelerate the organization's journey to the cloud is to create excitement around the destination. Cloud infrastructure underpins so many critical imperatives for

the law firm of the future, but access to next-level analytics capabilities is a pretty compelling story to tell any executive committee.

For now, the technology edge belongs to legal teams that can buy – and use – the best available tooling in an increasingly crowded legal tech marketplace. We are living through a Cambrian explosion in the growth and diversification of legal tech with creation and proliferation of entirely new categories, many of which delve much deeper into specific areas of legal practice. AI-based diligence for M&A will be market standard within the decade, and we see more and more technology applications that are tightly coupled to very specific legal workflows in specialized practices across capital markets, securities, trademarks and patents, among others.

A critical second-order implication of the expanding practitioner toolbox is that many of these tools offer the ability to capture even more data that can generate even more new insights about legal risks and decision-making. The flip side is that many of these tools also create net-new security and governance risks by establishing more data silos, often beyond the CIO's sphere of control.

Process discipline offers an obvious response to these problems, but most law firms operate under heavy process debt. Adding more process in isolated improvement projects can often add sufficient friction and drag to the firm's operating model – and still leave the organization without access to meaningful data-driven insights.

To get a sense of how some of the most prestigious global law firms are approaching these challenges, we talked to Christian Lang, head of strategy at Reynen Court, a next-generation infrastructure and marketplace platform for cloud-based technologies backed by a consortium that includes the likes of Clifford Chance, Latham & Watkins, Paul Weiss, Davis Polk, Cravath, Freshfields, and Linklaters.

Even for some of the richest firms in the world, Lang says, “It’s hard to overstate just how much friction there is today in the world of enterprise legal technology. It’s hard to match needs with tools. It’s next to impossible to move quickly to test them — particularly when there’s sensitive data involved — thanks to security reviews, onerous contracting processes and other requirements. CIOs tell us they don’t even dream of integrating new tools into the existing operational ecosystem without massive headaches.”

The intel from the ground confirms that law firm CIOs face systemic challenges that require paradigm-shifting thinking. So what do the leading firms want and need? Lang says Reynen Court’s mission is co-created with their consortium partners: “They’re looking for a way to find, test, and manage new tools quickly — and to do that at scale. Most importantly, they cannot compromise their historical commitments around control, security, and data protection.”

Lang adds that leading CIOs recognize the interconnected nature of these challenges but also the vast promise of the future: “this standardization of infrastructure and application delivery is a key that unlocks massive opportunities around interoperability, data management, and value-driven technology consumption.” This suggests to us that the forward-thinking CIO will take a holistic view of IT transformation strategy across infrastructure, data and practitioner tooling.

Skills Inventory: A Brave New World Needs New And Different Capabilities

As Tim Cook of Apple once said, “there is more noise in the world than change.” As the pace of actual change in the broader world accelerates more and more, the level of noise around us is increasing exponentially too. As a result, competing in an increasingly complex legal market can be disorienting.

As we noted in Part 1, modern legal business is a team sport, one that requires an increasing number of skills. The successful CIO will need to tap into a broader skill base within and adjacent to the IT function, thinking flexibly beyond the annual budgeting and headcount planning exercise.

Our advice is to first get a handle on the firm’s overall competitive strategy, then take an inventory of the skills required to execute on that strategy. Particularly for law firms experimenting with service and business model transformation, CIOs must establish clarity on just how

far they are being asked to stretch the capabilities of the IT function, how best to create synergies with new-breed capabilities across KM and innovation and how best to manage a growing portfolio of strategic technology initiatives while maintaining alignment with core functions.

Nicola Shaver, managing director of innovation and knowledge at Paul Hastings, offered some insight on the

"The intel from the ground confirms that law firm CIOs face systemic challenges that require paradigm-shifting thinking."

specific skills needed to harness the power of emergent technologies: “I hire for creativity. People aren’t used to thinking that way in law firms, but we really need people who can problem-solve creatively. We need people who come from product development, product design, and product development, and ideally some with specialization in automation, both document automation and workflow automation. We need deep understanding of process so that business analysts stop to evaluate and improve the underlying process before opting for a technology skin on the status quo, so you’re not speeding up a bad process. We need people who are familiar with data who can work with data in an integral manner across the firm.”

Whether or not these new skills fall under the remit of the CIO or under some other umbrella in a quickly diversifying law firm environment, CIOs will benefit from embracing a more integrated view of technology ownership across the firm.

Shaver adds that “too many IT departments work in a vacuum, and that leads to massive failures in understanding the end-user. It’s critical to have people within IT that have very strong connection to KM and to people with practice experience so that you can tap into those close relationships. That’s what gives IT and innovation teams with the access and visibility to understand the pain points of the firm and to spot opportunities to leverage technology.”

“I hire for creativity. People aren’t used to thinking that way in law firms, but we really need people who can problem-solve creatively.”

Commitment To Collaboration: Avengers Assemble

In technical terms, collaboration often refers to specific features that help people and teams share information and files or to coordinate handoffs and communicate status.

Out in the broader world, collaboration evokes many messier and stickier feelings in people who aren’t particularly technical. This is particularly true within the context of knowledge work among teams of multidisciplinary experts that cut across organizational boundaries, for lawyers who project their sense of self-worth and competence onto client-facing interactions.

The psychological and dispositional idiosyncrasies will be familiar to most law firm CIOs, but we stress this point because we believe collaboration is difficult for all humans, not just lawyers and we think it’s safe to say we are heading into an environment of increasing pressure, with rising

expectations for more change, more innovation, more disruption — all of it faster.

Against that backdrop, the mandate of the CIO is best described as a moving target. The most successful CIOs will be those who bring a genuine appreciation for the power of collaboration and who can think creatively to assemble unlikely and non-obvious allies from within and around their organizations.

Both Shaver and Factor's Sohn stress that the new competitive realities of the legal market offer hidden opportunities for those willing to look with fresh eyes. Prevailing narratives around the many insurgent forces in the legal market are often pithy and convenient but also reductive. Are ALSPs and legal tech companies simply barbarians at the gate waiting to eat Big Law's lunch? We think the reality is more complicated. And better.

The law firm model originated as a vehicle to house specialized expertise. Current market forces are stretching that model to the point of breaking, and it is critical for law firms to evolve and expand. But the HOW of that evolution doesn't mean that law firms have to go to war with everyone. CIOs who can leverage strategic partnerships outside the firm can field a stronger and more diverse team to tackle broader and more strategic briefs with greater confidence. They can do it faster, too.

Buy-To-Build: Not Your Father's Buy Vs. Build Business Case

In an extreme example of such a mandate, a few law firms are shifting portions of their services business to a product-centric business model. We see exponential growth among low-code platforms as law firms experiment with the productization of legal expertise and automation of legal workflows.

For some firms, this will mean building lightweight apps to facilitate back-office operations. Others are investing serious time, effort, and money into market- or client-facing products – which require a paradigm shift in thinking about technology and revenue models.

This naturally raises questions about how the CIO can best enable these efforts. To help make sense of the low-

code trend and tease out some of the implications, we turned to Rob Saccone, a seasoned legal tech entrepreneur and market expert: “Low-code platforms reduce the build time for software and shift the skills required to less expensive resources. Practically speaking, however, there is no zero-cost software, so what's needed is planning for new risks and accounting properly for new categories of costs.”

Whether it's a good idea for law firms to reimagine themselves as technology companies is questionable, but either way we agree with Saccone that the endeavor should be undertaken with a high level of financial rigor in measuring the size of the

prize, the total investments implied and the expected return to the partnership. (Just like any new business initiative.) We believe the law firm structure, however, requires specialized attention to a governance framework that helps the firm manage the entire portfolio of innovation projects.

"The new competitive realities of the legal market offer hidden opportunities for those willing to look with fresh eyes."

Saccone adds that “low-code platforms do enable faster turnaround and handling for a greater volume of ideas and experimental apps but that creates greater need to control and vetting in order to ensure apps meet enterprise standards for security, design and more. Always bear in mind that internal operational apps and revenue-generating tech products carry different burdens and different ROI.”

For CIOs exploring service and business model innovation, we recommend an open-minded approach that leaves sufficient white space to rethink the procurement and deployment of technologies. This is especially important when considering the intended role of practicing attorneys who remain measured, compensated and incentivized by revenue targets. The opportunity cost of fee-earner time is often the largest hidden cost in ill-considered or poorly planned innovation initiatives, and also one of the largest impediments to success. Saccone sums it up: “Building products with input from lawyers is a very different proposition than asking them to learn new skills and build their own.”

A New Hope, Always

Most of us are making our way through 2021 with some combination of exhilaration and trepidation. Within the legal market, we face widespread fatigue at the same time we need to ramp up the pace and extent of change and stress.

Amidst the turbulence, however, we see immense opportunity for the enterprise legal market to emerge stronger and better prepared for the world as it will be. Technology is a critical component of the evolutionary march of progress, and CIOs can and will serve as stewards and leaders of that change. **ILTA**



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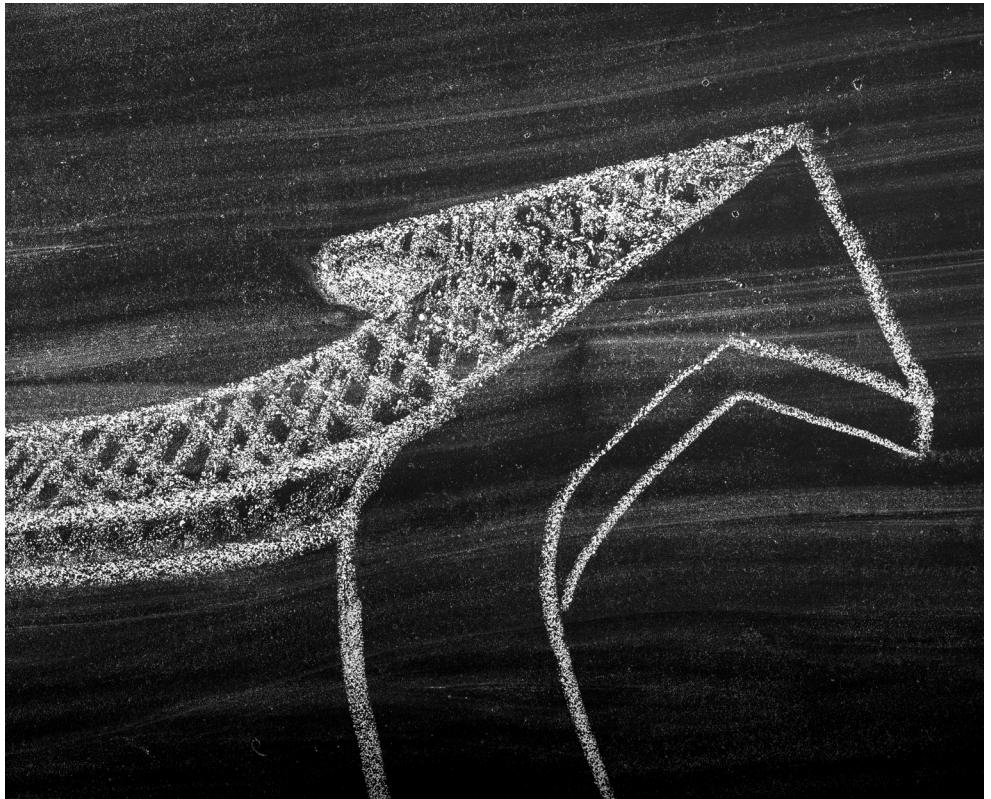
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Olenick to Qualitest - An Acquisition Story

by TJ Johnson



TJ Johnson is AVP, Legal Sector Strategist at Qualitest (www.qualitestgroup.com). She has great fun focusing on “StrategicIT” – looking at innovation, internally and for clients, and thought leadership around new ways to help clients deliver successful projects. TJ has deep experience in legal technology. A familiar and well-respected figure in the legal technology industry, TJ worked in various capacities for law firms and legal departments. Most known for her recent role on the executive team of ILTA (International Legal Technology Association) where she led the strategy development and execution of ILTA’s global portfolio of events, was instrumental in growing their premier conference, ILTACON, and was responsible for the vision and execution of many strategic projects.



When we at “Olenick” are now “Olenick, a Qualitest Company” and soon will be completely “Qualitest”. That one sentence changes everything for us, for our clients and for Qualitest (in a good way, let’s start with that!). The journey has many questions and lessons for us all, in this merger-crazy industry?

Law firms continue to merge and that trend is unlikely to change with all the economic pressures and the ongoing evolution of legal services. I’m intrigued by the variance between publicized reasons for mergers and the unspoken or whispered realities.

Legal product and services companies are also merging as fewer stand-alone companies can compete with those who provide suites of applications and services. And sometimes the writing is on the wall and an acquisition is the best way out.

There are as many opinions as there are law firms on whether the market consolidation of legal vendors is good for law firms. From the consumer perspective, does having a large number of companies providing document template software, as an example, make for better success for law firms? I think that depends on how well the software from the myriad companies integrates with other legal software and the increasingly complex legal desktop, how well they keep up with operating system upgrades, and how customizable they are to specific law firm needs. Is the flexibility of the small company balanced with the needed expertise? Only you can decide.

Back to Olenick and the developing story of our acquisition:

Tom Olenick spent 20 years building a small and mighty quality assurance company in Chicago, focusing on financial institutions and public utilities, who have major compliance and testing requirements. **Bill Mertes** joined

Tom 12 years ago, recognizing that the legal industry was very immature in ensuring the success of its software projects. Bill built the Olenick legal practice, adding **Scott Christensen** and then me to the practice. Combined we have over 100 years of experience in legal IT leadership (yes, we’ve all three been around awhile). We’ve executed quality, testing and engineering engagements for 100+ law firms and a few legal departments. And we’ve helped mature the legal industry in QA, testing and automation. We’ve twice won ILTA’s Consultant of the year award, because of the thought leadership and dedication to advancing legal technology and strategy across the industry. We have been the little company that could... and yet many of you have never really heard of us.

Our thought leadership campaign hit a few bumps when COVID hit, cutting our education roadshow to two cities. We continued with education webinars, writing blogs and articles, and speaking at conferences.

In the meantime, shortly before COVID hit, there were rumors that Olenick might be sold. Tom was looking for a company with a common vision to provide the most innovative and customer-centric software testing capabilities available in the world. He was looking for a similar culture of people first.

Tom found **Qualitest**, or they found him, not sure if he used Tinder or Bumble. Through the pandemic, progression toward an acquisition continued slowly to the point of an announcement to staff in early March 2021. Qualitest and Olenick formed a joint integration team to help bring the businesses together when the transaction closed in mid-April. Tom remained as part of that transition team to work alongside Olenick employees and Qualitest leaders to ensure a seamless integration experience for employees and clients.

We learned what we could about Qualitest to see where the acquisition might benefit our clients and the

legal industry. Qualitest designs and delivers cutting-edge testing technology with a wide range of personalized testing solutions in technology, telecom, healthcare, finance, defense, media, utilities, and retail industries. They have offices in the U.S., U.K., Israel, and India, serves over 500 customer companies and employs more than 4,000 people worldwide, so a bit bigger than Olenick with much broader capabilities.

Who hasn't been through a merger or acquisition where the vision of smooth sailing, simple and straightforward systems integration and minimal business disruption, is not quite realized. There were good intentions and Qualitest is quite proficient at acquisitions but.... we are special, and by special, I mean we are not cookie-cutter. We certainly didn't hit the depths of despair that have come out about some law firm mergers but we did have some very interesting times. And most of that was happening under the water, while the ducks swam along smoothly on the surface!!

I have to admit to a little resistance to change (some might argue I resisted a lot), and I would certainly do things differently another time. Being open to the possibilities and trusting in the process are key to reduce the frustrations. And remembering to follow a good change management process is a big help. Funnily enough, looking back on what Tom told us about Qualitest, it is coming true. By joining forces, we have been able to leverage our expertise to assure the quality of our client's deployments and operational readiness on a bigger scale. Combining the forces of our legal industry expertise with a larger QA organization who have done bigger quality assessments who have expertise in AI-powered quality engineering and testing solutions, we have even more ways to help our clients mitigate business risk associated with software releases. We will continue doing what we do best, partnering with and advising law firms to mature their

quality assurance, focusing on the critical legal business context as well as the obvious technical risks of software projects. We always look at the interrelationship between software testing, engineering and business risks, to protect investments and keep attorneys billing. And now, we can help clients create an "automation first" mindset.

Anbu Muppudathi, Qualitest President and CEO (Designate) said "We are delighted to welcome Olenick's legal practice into the Qualitest group. With this acquisition, we broaden our focus of quality engineering and digital engineering excellence across the legal industry. The Olenick team brings deep relationships and expertise in legal, which partnered with Qualitest's suite of AI-powered software testing tools, will help us reach our ultimate vision to become the preferred quality orchestrator for the legal industry."

Sounds like a marriage made in heaven, or at least a partnership ironing out the kinks and finding some really great synergies for the legal industry. All mergers and acquisitions should be so well-matched.

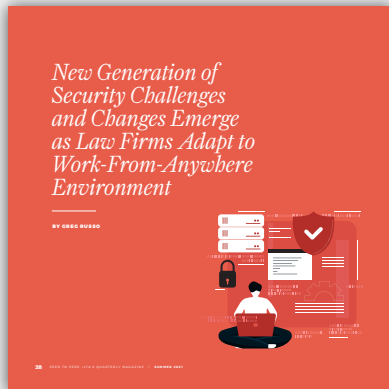
We are three months into the transition, looking forward to talking with everyone at ILTACON about our broader capabilities, and hopefully we can make a bigger noise now, so everyone will know who we are.

If you are facing a merger or acquisition, I'm happy to listen and share your concerns, any time. **ILTA**

TUNE IN TO HEAR MORE FROM TJ



LISTEN TO PODCAST



ARE YOU INTERESTED IN SECURITY AND BUSINESS DECISIONS?

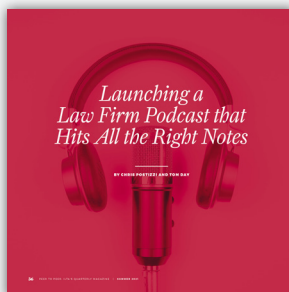
From the Part 1 Summer issue, “New Generation of Security Challenges and Changes Emerge as Law Firms Adapt to Work-From-Anywhere Environments” we have a Podcast to compliment the Part 1 article!



LISTEN TO PODCAST

A PODCAST ABOUT AN ARTICLE.... ABOUT A PODCAST? WHAT? HOW META.

From the Part 1 Summer issue, “Launching a Law Firm Podcast that Hits All the Right Notes”



LISTEN TO PODCAST

PODCAST TO HELP YOU TRUST, LOVE, AND WELCOME LEGAL TECH START-UPS TO YOUR FIRM!

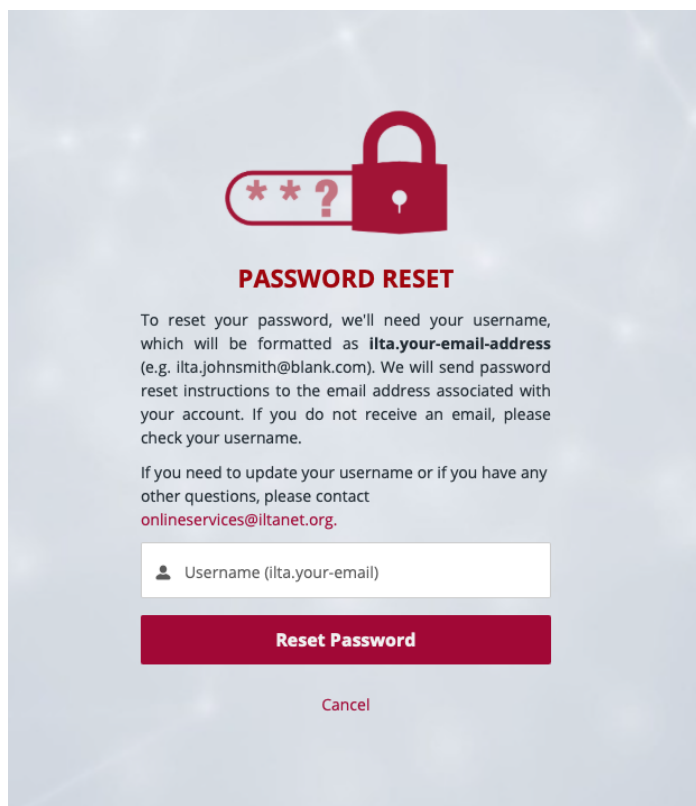
From the Part 1 Summer issue, “Legal Tech Startups: The Rewards of Being a Super-Early Adopter”



LISTEN TO PODCAST

Online Benefits and the Post Migration Checklist

by Jeanne Martinez



PASSWORD RESET

To reset your password, we'll need your username, which will be formatted as **ilta.your-email-address** (e.g. **ilta.johnsmith@blank.com**). We will send password reset instructions to the email address associated with your account. If you do not receive an email, please check your username.

If you need to update your username or if you have any other questions, please contact onlineservices@iltanet.org.

Username (ilta.your-email)

Reset Password

[Cancel](#)

In May we made the cutover of our back-office systems, and we are now live on Salesforce! We have sent out several pre- and post-migration messages to all of our members, but here is a recap of a few things you should do to make sure you and your fellow employees can continue to access all of your Online Benefits.

(1) Update your login credentials.

For security purposes - all usernames and passwords would have changed with the migration. ILTA has standardized all usernames to now be in the format of: **ilta.your-email-address**. To reset your password, visit our website and click on the SIGN IN button and then the link for "Forgot Your Password."

- Fill in your USERNAME and press the reset password and an email will be sent to you.
- Remember to use the username format mentioned above for your username.
- If you do not receive the email - please check your junk and spam folders.

If your organization has had mergers and acquisitions over the years or a change in domain names and you are not sure what your current email address is on your account, reach out to us at onlineservices@iltanet.org and we will be more than happy to assist you.

(2) Update spam products at the enterprise.

If you are a Mimecast shop - please have your organization's IT department add the following IP Address Range to the Allow List in Mimecast: 13.110.78.224 - 239 and 52.20.14.238 This will ensure your employees receive the password reset emails as well as event registration confirmation emails.

A complete list of IP addresses is listed out here:

13.110.78.224
13.110.78.225
13.110.78.226
13.110.78.227
13.110.78.228
13.110.78.229
13.110.78.230
13.110.78.231
13.110.78.232
13.110.78.233
13.110.78.234
13.110.78.235
13.110.78.236
13.110.78.237
13.110.78.238
13.110.78.239
52.20.14.238

How do I know if my organization has been affected? Check to see if any of the above Relay IP Addresses have received any Error 451 Log Entries on your side.

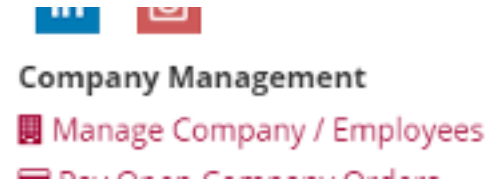
If your organization uses a different spam filtering product and has a setting for whitelisting of IPs, please use the above list to make your updates.

(3) Update your time zone

With the move to Salesforce, you can now specify your time zone so that when registering for virtual events it will display correctly for you. Once you've logged in, visit your Preferences page <https://ilta-connect.force.com/s/mypreferences> and make sure the time zone is correct for yourself.

(4) Primary contacts - review and update your employee roster.

On your profile page - primary contacts have a link to manage their company and employees



From the Organization Management page - you can click the link to View All employees we have in our system for your organization. To request an ex-employee be removed, click on their name to be brought to their detail page and then the button for Remove Contact. This will send an email to our support team, and we will complete the removal.

Likewise, if you have an employee you'd like added, from the Organization Management page - click on the Add Contact button - fill out the form completely and submit. This will route to our support team to complete their setup and send them a Welcome to ILTA email with a link to set their password.

We look forward to rolling out and highlighting more features and functionality in the near future **ILTA**



Jeanne Martinez
Online Services Administrator
ILTA

Membership Matters

ILTA Unlocked

See how legal technologists are using the various resources, opportunities, and benefits from ILTA...

We're rounding up on the third quarter of the calendar year which means another area of ILTA Unlocked has been opened! Within the first quarter of 2021, we focused on the varying peer-powered benefits ILTA offers you. The second quarter of 2021 focused on opportunities available to ILTAns to grow their leadership skills. This quarter will be all about Content! Podcasts, Blogs, Webinars, Roundtables...you name it, ILTA's got it.

Each month, specific ILTA benefits are highlighted through the eyes of members, business partners, and participants. Check out the ILTA Unlocked webpage regularly to learn how you can use ILTA resources and tools to help you do your job better, expand your network, and grow professionally. See how others are making the most of their connection with ILTA!

Key into ILTA's Peer Power, Leadership, and Content Unlocked:

<https://www.iltanet.org/about/unlocked>

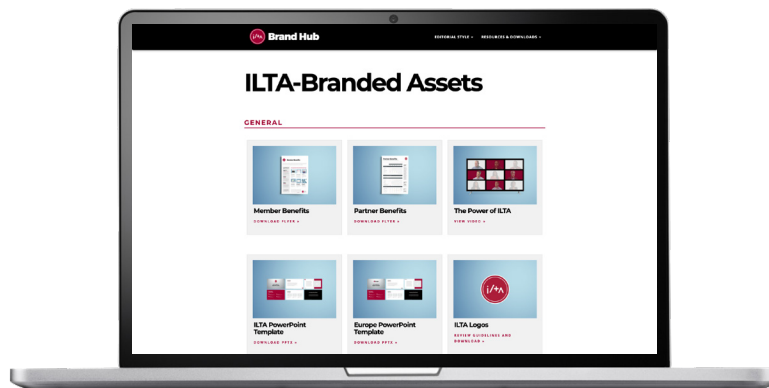
Join Us at the ILTA Hub during ILTACON!

From formal to informal roundtables, storytelling, to fun duck hunts – you'll surely not want to miss out on being a part of the action!

Whether you're planning on attending ILTACON in-person or digitally, ILTA will have a space for you to network and connect with peers. The ILTA Hub will be the place to rub elbows with thought leaders, talk about your challenges or new ideas, and learn how to make the most of the resources ILTA offers.

Interested in Volunteering On-site at ILTACON?

Contact ssurillo@iltanet.org



In Case You Missed It...

Earlier this year, we launched an **ILTA Brand Hub**! Interested in telling a friend, colleague, or peer about all that ILTA has to offer? Download our flyers, assets, or informative collateral. Looking to better understand your ILTA benefits? Browse the ILTA Welcome Guide, Benefits flyer, or How To Videos. Excited to attend one of our events? Use some of our social media templates or event materials to tell others about your professional development plans!



Samantha Surillo

Director of Member & Volunteer Operations
ILTA

Interested in getting an overview of ILTA Benefits?

Contact membership@iltanet.org to schedule your virtual tour today!

July 21, 2021

ILTA SmartBrief



News for tech professionals supporting the practice of law

SIGN UP · SHARE

TOP STORY

Remote document review could have staying power

Remote document review came to the fore during the early days of the pandemic and isn't going away anytime soon, as it cuts stress on personnel and offers cost savings. Clients could be the sticking point for sustained remote document review adoption because some have "a great level of uncertainty about it," says John Davis of Crowell & Moring.

Full Story: [Legaltech News](#) (7/20)



APPLICATIONS

MercusCase adds tools from court tracker CalendarRules

MercusCase's cloud-based platform for practice management is now linked to CalendarRules, which tracks deadlines for more than 1,800 rule sets linked to state and federal courts in the US. MerusCase clients must have a subscription to CalendarRules to take advantage of the integration.

Full Story: [LawSites blog](#) (7/20)



We know that the news cycle never stops and that's why we've designed ILTA SmartBrief to deliver you snapshots of the need-to-know news affecting tech professionals supporting the practice of law.

Here's what else you receive with your subscription:

- Reliable insights from the industry's leading resources, curated and summarized by our expert editorial team.
- Easy to read newsletter designed for a two-minute read.
- A simplified way to keep track of fact-based news.

Industry trends are changing every day, but as part of your ILTA membership, we'll provide you with the news to stay ahead.

SIGN UP FOR OUR ILTA SMARTBRIEF



WELCOME BACK TO A FRESH SUMMER 2021 EDITION OF THE ILTA PODCAST "HOPS-CAST!!"

Our guest today is Joe Hoegler, Chief Technology Innovation Officer, and he is he's joining us today from Port Washington, New York, and we'll be talking all things tech, innovation, and of course, about baseball and hops.

LISTEN TO PODCAST

Have you checked out our newest Recordings?

View recordings from our latest one day events: **Leadership Summit** and **Compliance** recordings.

ILTACON is Education AND Networking! We have it ALL!

by Dawn Hudgins

Peer Powered Education is what ILTACON is all about, or is it??

Yes, ILTA is known for its unique, volunteer -ed, stellar education... however there is more to ILTACON than education. What? Might you ask? Networking.

The stories are many and often of how the relationships cultivated at ILTACON stretch far beyond the conference, to assist in elevating careers, knowledge, mentor ship, and life long friendships. ILTANs are a unique group of people, unlike what you might find at other conferences. Having said that, what activities and opportunities are available to strengthen old relationships and spark new ones?

Beginning Sunday at ILTACON, you will find Community of Interests groups gathering in the afternoon to meet, greet, and discuss similar topics of interest, this will turn its way toward the orientation and then to our opening reception where you will have an opportunity to see and greet friends old and new alike. We've waited a long time for this. The background music of a Vegas Jazz trio will liven the evening and create an enjoyable atmosphere for everyone.

Monday morning, Dr. Mae Jemison will kick us off as our Keynote speaker; this Keynote is sponsored by Disco. If you aren't familiar with

Dr. Jemison, I recommend you learn more about this driven, intelligent woman who has inspired many throughout her career. If you are a fan of Star Trek you'll even recognize her from a cameo appearance from the original series.

On Thursday, the G100 will wrap up our week with a moderated keynote discussing the "Strategic and Predictive Outcomes: What G100 Firms Are Talking About".

Although there will not be an exhibit hall grand opening in 2021, the Business Partners have several activities going on each evening, so I encourage you to step out and get to know them well. We have a great group of industry thought leaders who have insights to future trends and market changes that will assist each of you as you make decisions in your firms.

Throughout the week you can find digital comedic fun for those attending from the digital side, and Thursday we will stream the live performance of Comedian Andy Forrester. He entertained us digitally at ILTA>ON, so we thought we'd bring him live and in person so that you can experience all that is Big A.

There will be multiple opportunities for 'like minded' discussions for our in person and digital attendees, including our Wednesday night speed networking event. This is the first time we have tried this and we are truly looking forward to the possibilities, so stay tuned for more information on this one.

Although the past couple of years have proven to be, well... not normal, we are ready to get back to being together, experiencing stellar education, and reenergizing our lasting relationships. **ILTA**



Dawn Hudgins

VP of Service Delivery
ILTA

Why attend ILTACON 2021

#myILTACON

- +

Network with your peers!
 Build relationships with people in-person or online with various skill sets that can help you in your day-to-day and your career. Perhaps you will meet your next mentor!
- +

Learn valuable insights from peer-powered education
 Nearly 40 of your peers have planned 65+ sessions based on your past feedback and their current business opportunities, professional needs, trends, and innovations. There will be something for everyone in your organization!
- +

Talk with thought leaders
 With attendees from across the globe and various organizations attending, you will have access to influential individuals in the legal space. You will have opportunities to network with thought leaders in sessions, during social events, and within the Ask the Expert booths for our business partner thought leaders.
- +

Participate in creative session formats
 Sessions will be presented in numerous formats to reach a wide variety of learning styles. From panel discussions to workshops, and hands-on training to attendee-driven sessions, the variety of sessions will unlock new learnings and provide opportunities to connect with people in a different ways.
- +

Engage in face-to-face time with business partners
 Meet with your current or new providers in the exhibit hall, demo rooms, Ask the Expert booths, in the hallways, and during socials. This is the perfect time to chat with providers, to learn about new services, ask questions, budget for new solutions, and see what's in the works. NEW 2021 FEATURE: Neighborhoods in the Exhibit Hall – Business Partners will have signage related to the solutions they provide, making it easier for attendees to know their offerings at a glance.
- +

Hear from Dr. Mae Jemison, the world's first woman of color in space
 Did you know Dr. Mae Jemison started a technology consulting firm integrating critical socio-cultural issues into the design of engineering and science projects? She has so many things in common with ILTAns – learn from her lessons!

LEARN MORE AND REGISTER

New and not so new technology at ILTACON 2021

by Corey Simpson

From being able to use your phone as a room key to ILTACON Zoom backgrounds, ILTACON 2021 promises a whole lot of advancements in both emerging and simple uses of technology. Here is a preview of some of the technology present at conference this year.

Hybrid Conference platform

2021 offers another first for ILTACON, as we will provide attendees the option to participate both in-person and digitally. We have combined our member app, our business partner app, and our website to create a unified platform that allows attendees to actively participate in all aspects of the conference. Attendees can engage both during and between sessions, ask questions live, participate in polling, and interact with sponsors; all within a unified platform that acts as a bridge between our in-person and digital audience.

Multiple new ways to connect with new colleagues

- Safely connect with new colleagues using vCard distribution.
- Easily find business partners using products and services as search categories that are matched to the business partners who offer

them. A quick thanks to the Partner Advocacy Council and their Neighborhood Initiative which made that possible.

- Calendaring functionality allows attendees to schedule meetings within the mobile app and conference site, saving time and the hassle of coordinating post conference.
- Direct Video Conferencing available for all attendees and exhibitors.

Fully immersive online chat capabilities

For those of you at ILTACON 2020, you experienced the twitter-esque conversation occurring during educational sessions and in pop-up chats. This year, we have combined the chat and video capabilities so messages can be sent regardless of whether you are attending in-person or digitally. Whether you meet someone in the hallways or during an online networking session, you can instant message with them -- anytime, anywhere.

Access to sessions post conference

The addition of streaming sessions for digital attendees allows us to capture presentations. Every session will be recorded, and the audio, presentations, and takeaways will be made available for viewing after the conference is over.

These are just a few of the ways ILTACON 2021 has been designed to enhance what has been at the core of every ILTACON: networking with your peers, learning valuable insights from peer-powered education, and engaging with business partners. We look forward to seeing you this August, both in-person and online! **ILTA**



Corey Simpson
Chief Operating Officer
ILTA

Join the ILTA Technology Survey volunteer team and staff as we take a dive into preliminary 2021 data, review trends, and break down new and interesting parts of the Survey during a FREE ILTACON Preview webinar!

The ILTA Technology Survey is ILTA's most prestigious publication each year and, with over 500 firms providing annual input, and with our analysis by entity size, it provides substantive data so you can benchmark your organization's technology implementations and plans. We look forward to sharing an overview of the upcoming 2021 survey and reviewing the technology landscape!

Any ILTAn is welcome to join the webinar on **Tuesday, August 17, 12pm ET**. Register today and check out all our other ILTA events!"

<https://www.iltanet.org/live-events/calendar>

Breaking ILTA News! We're Changing Up the ILTA Distinguished Peer Awards

NEW DATES AND NEW AWARDS TO BE ANNOUNCED SOON!

Starting this year, we are giving the ILTA Distinguished Peer Awards their own time to shine, apart from the wonderful, but oh so busy, ILTACON conference. Why? With so much going on at the conference, it was hard to give our community's amazing achievements the attention that they deserve. This year, we'll be presenting the awards in December in an online format. We're planning to introduce some new and updated awards as well. Stay tuned for an announcement and the opening of nominations after ILTACON!