



## **Legal Tech Roadmap: Where to Start Your Technology Journey**

**Technology, Privacy, and eCommerce**



There is currently no shortage of hype regarding the benefits of legal technology for in-house teams. In fact, it seems impossible to escape, with vendors and lawyers alike waxing lyrical about the positive impact technology can have for corporate legal departments.

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This article will be the first in a series of three that discuss the various benefits of legal technology for in-house teams, where to start in your technology journey, what to focus on, and how to make it a success.

Admittedly, “hype” may be an unfair description. There are some fantastic tech tools on the market right now that can have a huge impact on the performance, efficiency, and value of legal teams. These tools include:

- E-signature platforms like [DocuSign](#);
- Contract review and analysis platforms like [Kira](#), [LEVERTON](#), and [Eigen](#);
- eDiscovery platforms like [Relativity](#); and
- Spend and matter management platforms like LexisNexis [CounselLink](#) or Thomson Reuters’ [Legal Tracker](#).

It may be more accurate to describe the legal technology excitement as “noise” that is preventing in-house lawyers from focusing on what really matters — the problems they need to solve.

A quick discussion with any GC or in-house counsel will uncover similar challenges and pain points:

- **Efficiency:** Legal functions are under constant pressure to be cost-effective and deliver more value to the business. After all, the legal team exists to help the business achieve its desired outcomes.
- **Workload:** It’s clear that corporate legal teams are servicing ever-growing amounts of work in-house; however, they often lack the tools and resources to meet this growing demand.
- **Regulation:** Rising regulation and uncertainty across the globe means in-house teams are under increasing pressure to manage and mitigate the constantly shifting risk landscape.
- **Strategy:** There is a growing requirement for in-house lawyers to become strategic business partners and trusted advisers, rather than servicers of low-value, routine work.
- **Value:** There is a persistent perception that the legal team is a cost center and not a net contributor to the business, meaning legal departments often feel undervalued by their organization.

## Technology isn’t where you should start

With so many challenges putting legal departments under pressure, it’s easy to see why GCs and legal operations professionals may turn to technology for a quick fix. According to recent research, 45 percent of legal departments are increasing their use of technology.

However, it’s critical to remember that technology is merely an enabler — not a solution in its own right. I’m still trying to find any technology that can immediately overcome bad process, bad practice and bad planning. Technology will merely turn a bad process into a digitally bad process. Interestingly, 20 percent of GCs can point to a workplace technology that has had low or zero usage.

## Be curious about technology

While technology shouldn’t be your first step, it definitely pays to be curious and knowledgeable about systems and applications that may be able to improve and streamline your department. One

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way to avoid getting distracted by the noise is to become familiar with the legal technology market.

Attend relevant events and conferences like ILTA, Legalweek and CLOC. For daily or weekly updates, read legal technology publications and blogs like Artificial Lawyer, Prism Legal, Evolve the Law, and 3 Geeks and a Law Blog. Following influencers on Twitter or LinkedIn can give you a behind-the-scenes look at how these tech trends are impacting legal departments. The biggest thought leaders in this space include:

- Jason Barnwell, assistant GC of legal business, operations, and strategy at Microsoft ([@smuckwell](#));
- Andrew Baker, senior director at HBR Consulting ([@AndrewMBaker](#));
- Ron Friedmann, chief knowledge and information officer at LAC Group ([@ronfriedmann](#)); and
- Richard Tromans, editor of Artificial Lawyer ([@ArtificialLawya](#)).

Finally, don't forget to ask what your peers are doing in this space.

## **Start with high-priority, persistent problems**

Legal departments looking to harness technology should start with an analysis of the problems they need to solve. What is negatively impacting the operational performance and efficiency of the team? Chaotic legal intake, too much time on low-value work, poor insight and analysis of performance metrics, missed contract value, persistent legal overspend, or low visibility over legal work in progress?

It may be tempting to try and solve everything at once, but try to prioritize the problems. Start by solving smaller, manageable challenges that will deliver quick wins to your department and wider organization.

I've seen too many ambitious legal teams attempt to improve everything at once with technology. Given the scale of change this normally entails, this kind of approach is almost always doomed to fail. You should plan to build lasting change for your team and business, which means tackling the most important problems and then building on the initial success.

## **Map existing process and record metrics**

Once you have identified what problems you want to solve first, it's a matter of analyzing existing processes and determining how they can be improved through a combination of process improvement, smarter resourcing and intelligent use of technology.

Work with business analysts in your organization, alongside your legal operations professionals, to create a process map that describes the flow of the current process (e.g., legal service requests, contract approvals, invoice management) and show who and what are involved at each step of the way. This process map will help you identify areas where the process can be improved using technology.

Alongside mapping the process, it is also critical that you record benchmarking metrics. For example, if you want to improve the legal department's speed of response to the business, you need to know what the current average response time is for different types of matters. This way, you can determine if any process improvement and/or technology deployment has moved the needle.



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## Change is a team sport — be inclusive!

During the process analysis and mapping exercise, it will be critical to involve a broad group of stakeholders from across the business. Legal departments are a key component of the commercial organization — they work hand in hand with other functions across the business, from sales and procurement to marketing and HR.

Any technology that is deployed by the legal team will likely need to be used by other teams across the organization. Therefore, it's vital that representatives from these teams are involved in any process mapping, requirement gathering and procurement process.

Involving other business stakeholders also has a deferred benefit in that it helps ensure a successful deployment of technology down the line. There's no better way to ensure that a technology rollout fails than to choose and implement it in a silo.

## Clearly identify your requirements

Once you know how you want technology to help improve the process, it's time to record your specific requirements. Everything needs to be anchored in these requirements; they should be your lodestar in the process.

When documenting your requirements, make sure you focus on what your department and business needs from the technology, versus what it may want. Think about what critical functionality the technology tool needs to have, and what it may need to integrate with. To record your requirements, use the MoSCoW method:

- **M**ust haves
- **S**hould haves
- **C**ould haves
- **W**on't haves or **W**ould haves
- The **O**'s are thrown in for fun.

When documenting requirements, it's important to be as specific as possible. Don't leave room for interpretation, and don't be led by the technology itself.

Hype surrounding legal technology may seem impossible to escape. For this reason, it is important for GCs, legal operations leads, and other in-house professionals to gather all of the information needed to educate themselves and help identify their team's challenges and requirements before making a technology decision.

In [the next article](#), we will examine six in-house technology trends I'm seeing regularly when working with corporate legal teams.

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