Briefing
SMARTER LEGAL BUSINESS MANAGEMENT
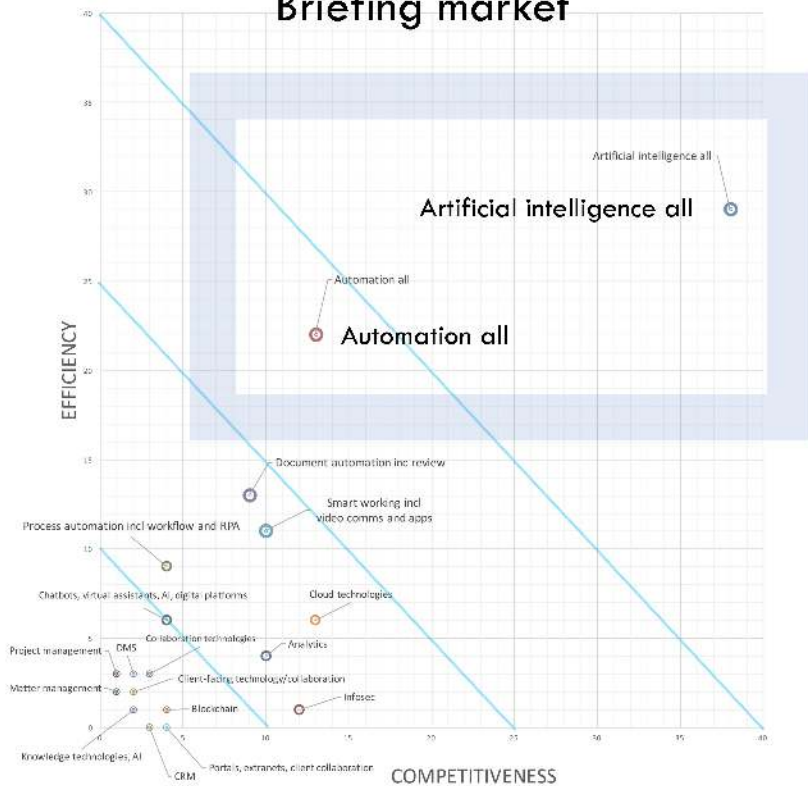
Legal IT landscapes 2018

Drivers, trends and insight into attitudes to legal tech

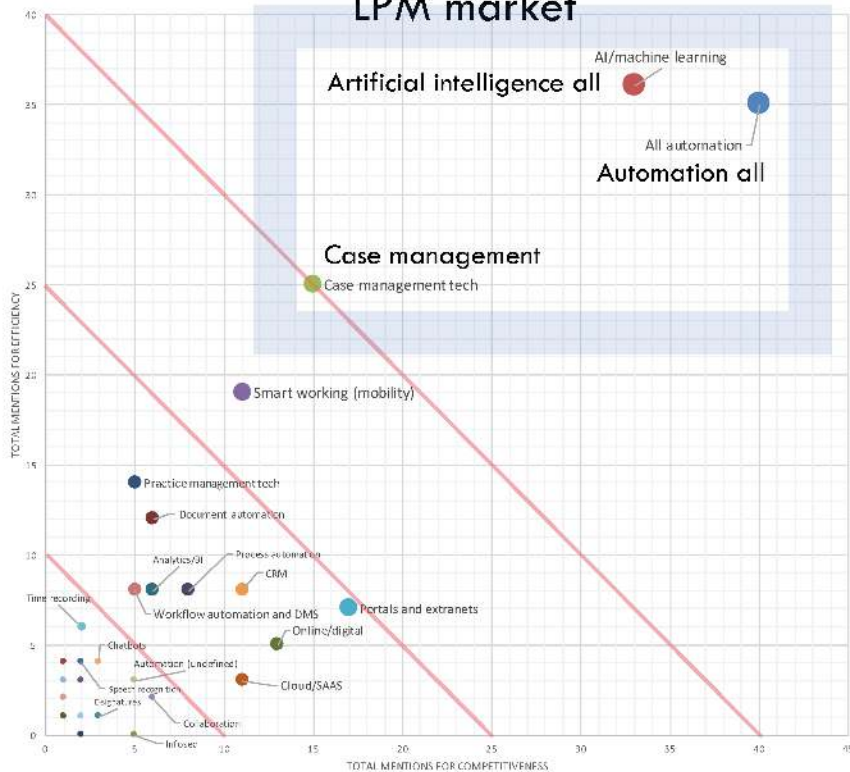Rupert Collins-White, Burlington Media

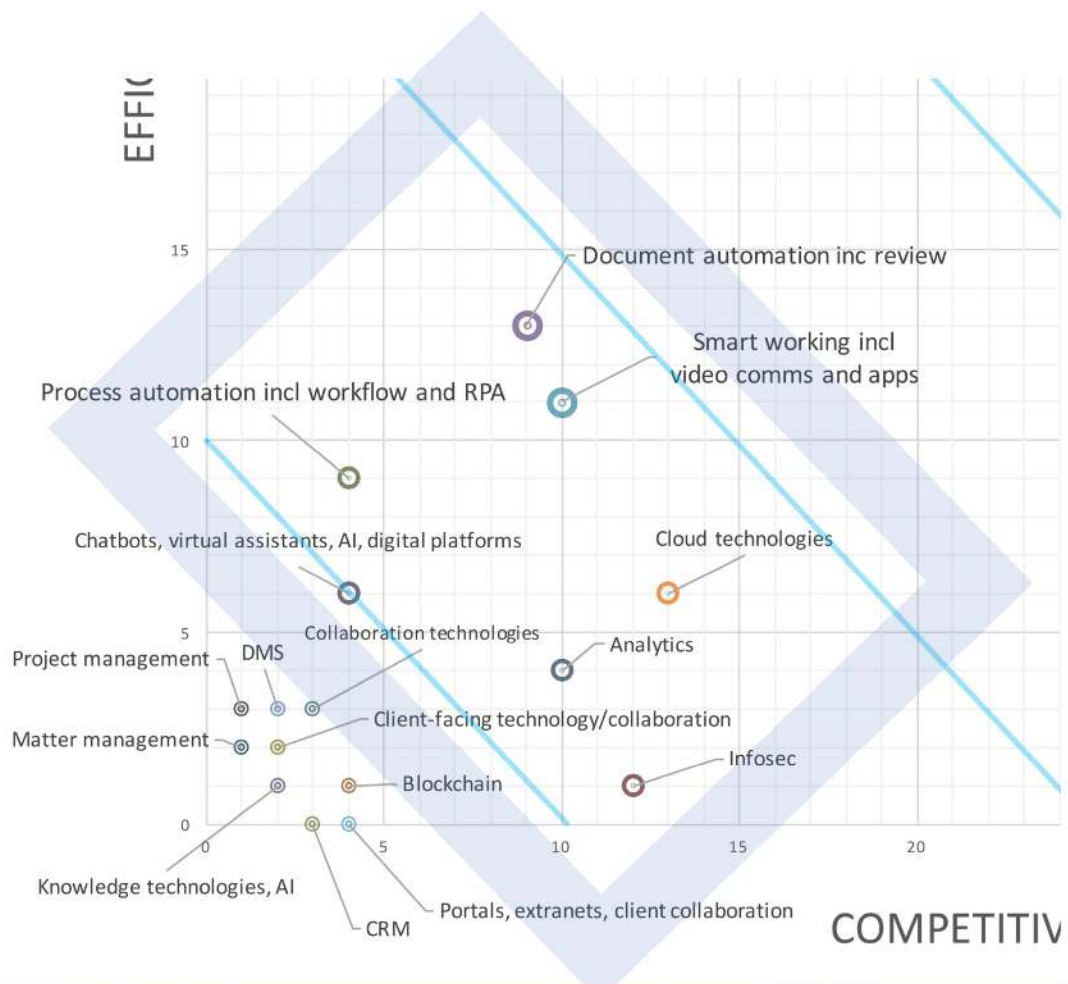# The only whole-market research of attitudes to IT in legal

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The Big Questions – hot/hype zone

Briefing market

LPM market

EFFICIENCY / COMPETITIVENESS

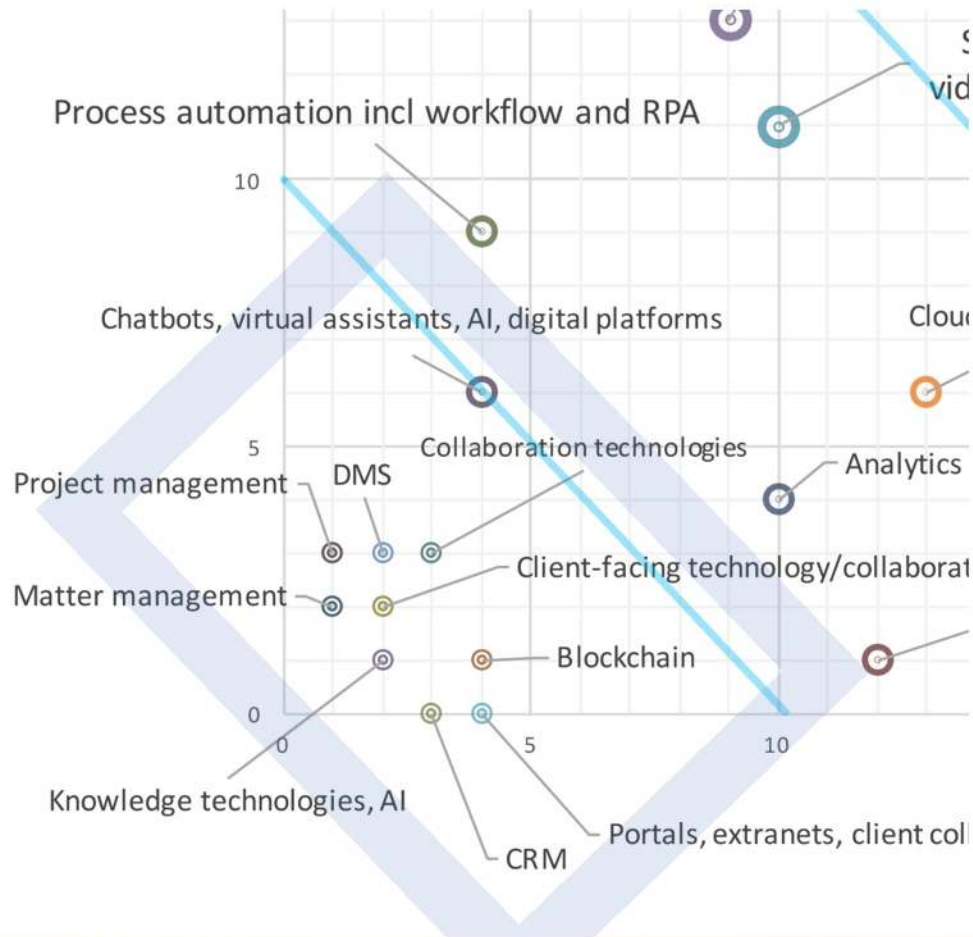TOTAL MENTIONS FOR EFFICIENCY / TOTAL MENTIONS FOR COMPETITIVENESS

The big questions

The important things – the 'live' area

Document automation, smart working/mobility, cloud tech, infosec, process automation/workflow, chatbots, virtual assistants etc ... and analytics.
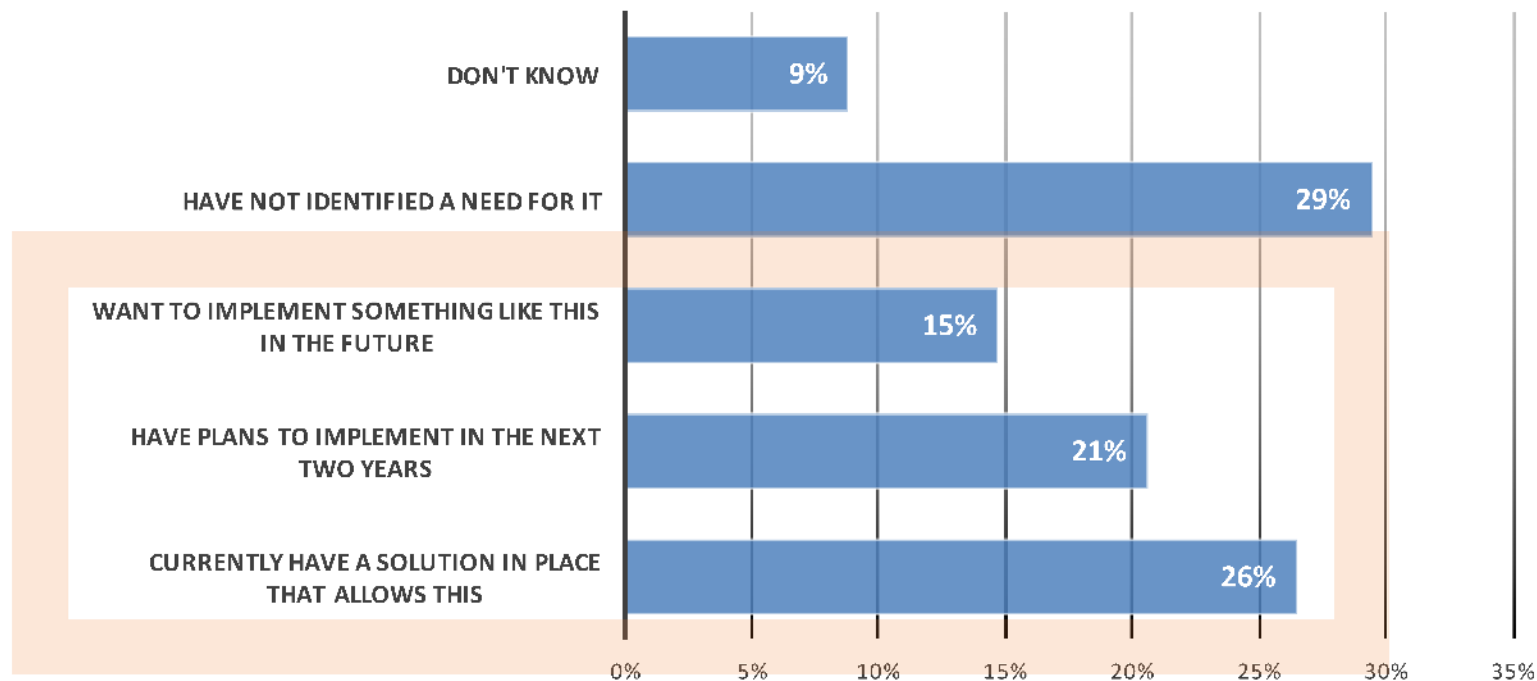
The big questions

The nascent or inbound/outbound area

Knowledge techs, project management, matter management, CRM, portals/extranet, client-facing tech, collaboration, DM techs, blockchain.

Interesting stuff: everything's about internal efficiency or client connections.

Over the horizon – client connection technologies

Thinking about technology that allows clients to start/
re-scope/amend work directly within your firm – do you ...

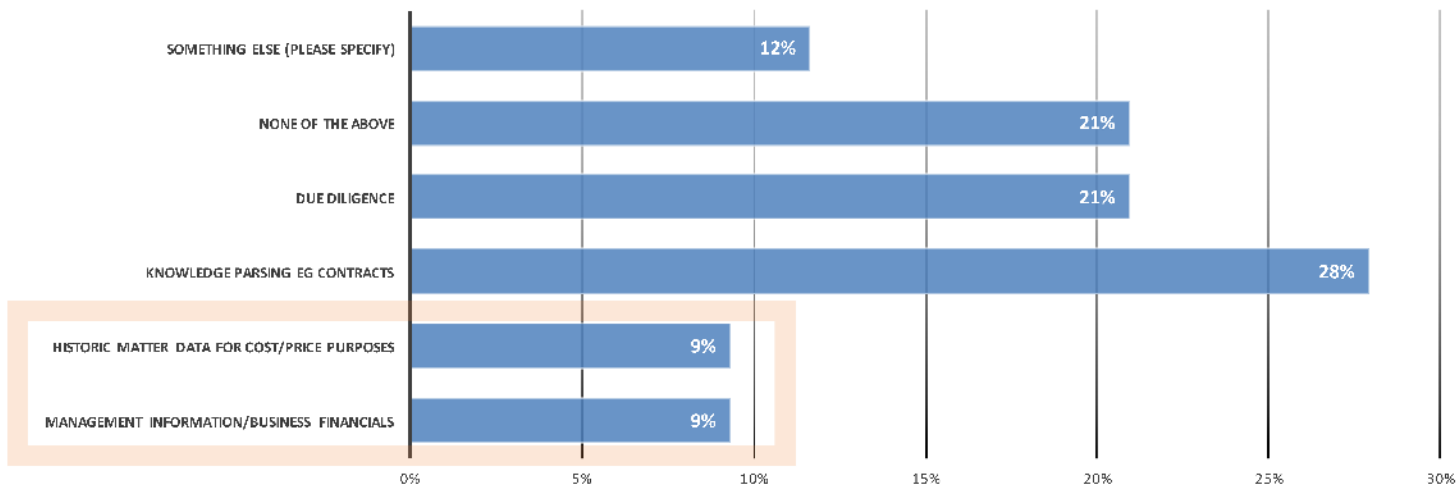| Category	Percentage
DON'T KNOW	9%
HAVE NOT IDENTIFIED A NEED FOR IT	29%
WANT TO IMPLEMENT SOMETHING LIKE THIS IN THE FUTURE	15%
HAVE PLANS TO IMPLEMENT IN THE NEXT TWO YEARS	21%
CURRENTLY HAVE A SOLUTION IN PLACE THAT ALLOWS THIS	26%

0%   5%   10%   15%   20%   25%   30%   35%

AI/MACHINE LEARNING

A little less talk, a little more action please

AI – how are firms using it?*

Which areas of data is your firm applying machine learning/AI software to? (multi-answer)

Category	Percentage
SOMETHING ELSE (PLEASE SPECIFY)	12%
NONE OF THE ABOVE	21%
DUE DILIGENCE	21%
KNOWLEDGE PARSING EG CONTRACTS	28%
HISTORIC MATTER DATA FOR COST/PRICE PURPOSES	9%
MANAGEMENT INFORMATION/BUSINESS FINANCIALS	9%

Axis: 0% 5% 10% 15% 20% 25% 30%

Something else?

- Document formatting
- Not in use at present but actively engaged in this area
- Regulatory review inc Brexit; expert systems for process and knowledge automation
- (a) Contract reviews (not DD); and (b) investigations (ie competition, fraud, regulatory etc)
- Disclosure review

So they say …

AUTOMATION

The Big Kahuna of legal business efficiency

Business efficiency across legal could be revolutionised
by automation ... but when will it happen?

Automation in top-end legal services

How automated is legal work in your firm (try to think about the business overall)?

3.2/10

0 is low, 10 is high

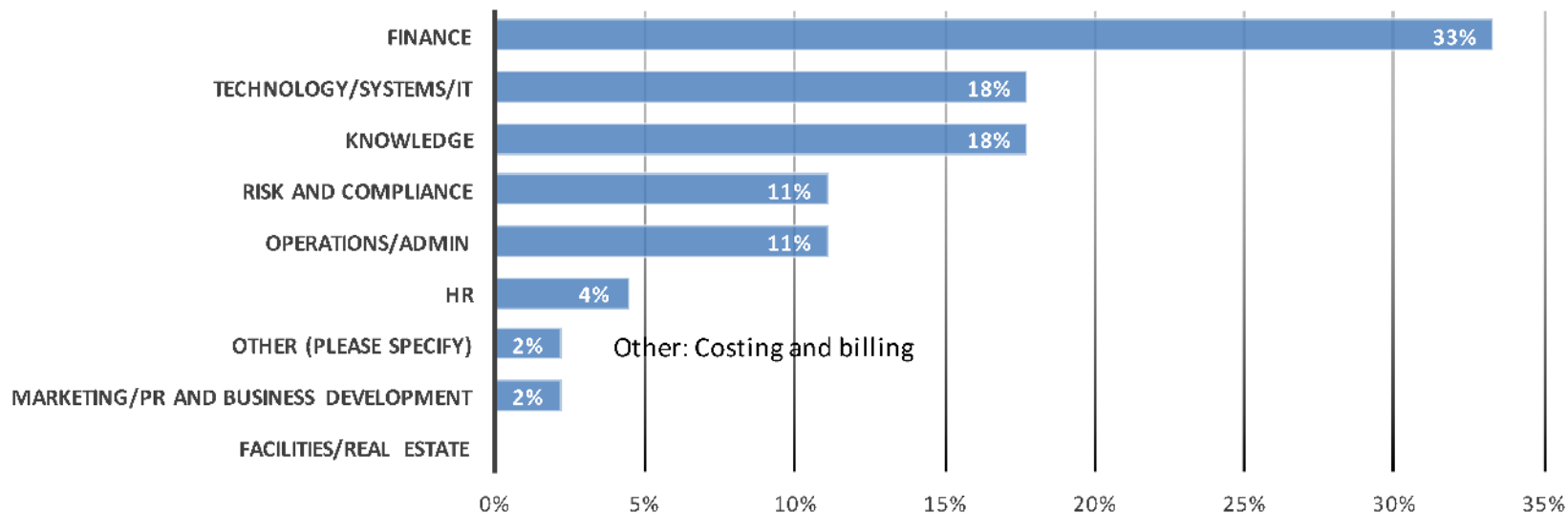Could legal services be a LOT more automated than it is?

And how automated do you think legal work COULD be in your firm (try to think about the business overall) with technologies currently on the market?

6.9/10

Yes – twice as much

Finance is the function most ripe for automation – an IT opportunity

Which support/business services area in your firm could benefit most from more automation?

Category	Percentage
FINANCE	33%
TECHNOLOGY/SYSTEMS/IT	18%
KNOWLEDGE	18%
RISK AND COMPLIANCE	11%
OPERATIONS/ADMIN	11%
HR	4%
OTHER (PLEASE SPECIFY)	2%
MARKETING/PR AND BUSINESS DEVELOPMENT	2%
FACILITIES/REAL ESTATE	

Other: Costing and billing

BECOMING DESK-AVERSE

Smart working, off-site/agile and mobile

Core drivers: office space cost, need for mobility and flexible working, cloud's final widespread adoption
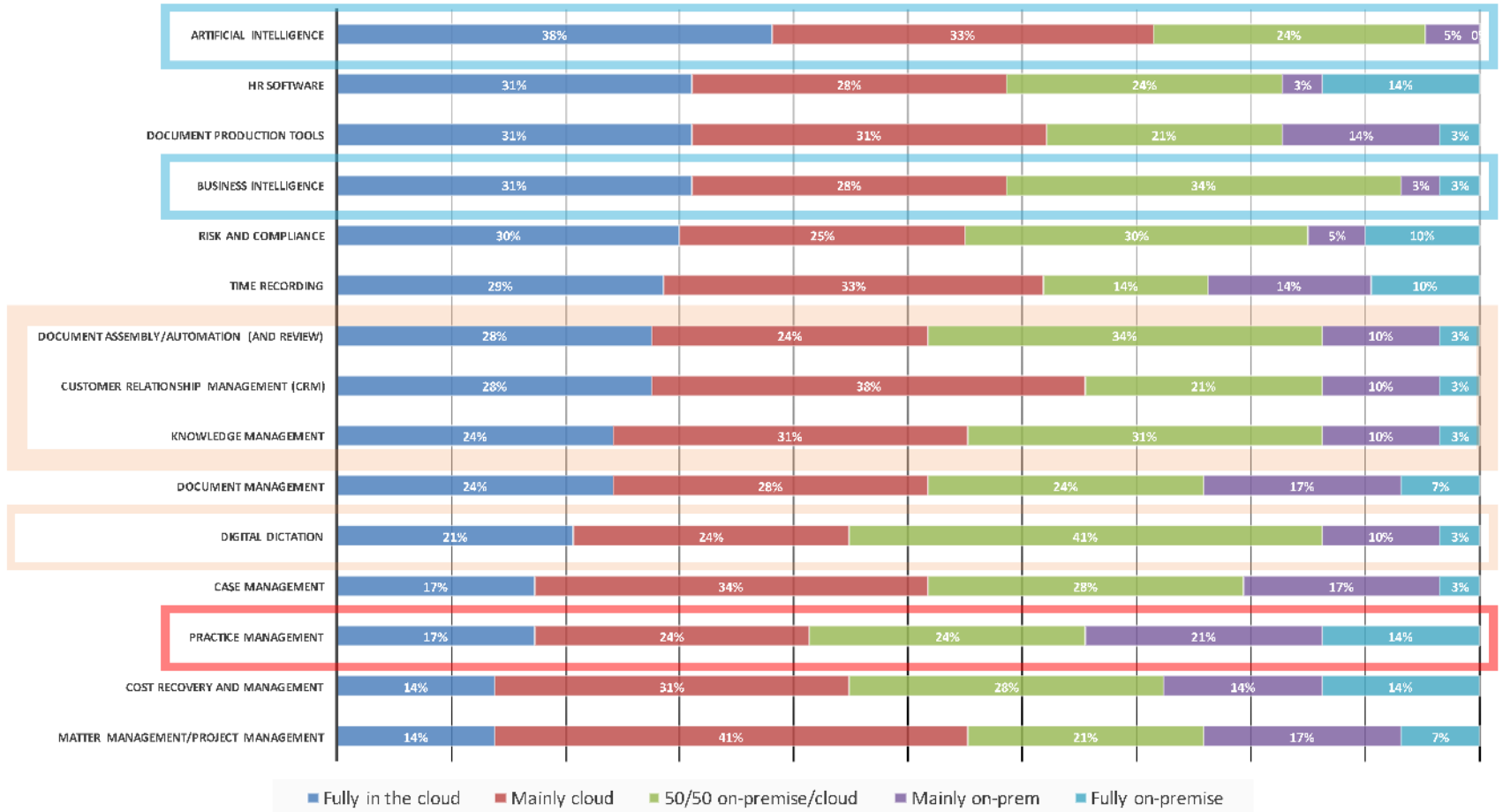
How smart is legal working?

What percentage of your legal professionals would you classify as a truly enabled mobile workforce?

*(By which we mean the ability to work on any device, any time, anywhere on their main work tasks.)*

54.9%

In five years' time, how do you think these systems will be used by your firm?

System	Fully in the cloud	Mainly cloud	50/50 on-premise/cloud	Mainly on-prem	Fully on-premise
ARTIFICIAL INTELLIGENCE	38%	33%	24%	5%	0
HR SOFTWARE	31%	28%	24%	3%	14%
DOCUMENT PRODUCTION TOOLS	31%	31%	21%	14%	3%
BUSINESS INTELLIGENCE	31%	28%	34%	3%	3%
RISK AND COMPLIANCE	30%	25%	30%	5%	10%
TIME RECORDING	29%	33%	14%	14%	10%
DOCUMENT ASSEMBLY/AUTOMATION (AND REVIEW)	28%	24%	34%	10%	3%
CUSTOMER RELATIONSHIP MANAGEMENT (CRM)	28%	38%	21%	10%	3%
KNOWLEDGE MANAGEMENT	24%	31%	31%	10%	3%
DOCUMENT MANAGEMENT	24%	28%	24%	17%	7%
DIGITAL DICTATION	21%	24%	41%	10%	3%
CASE MANAGEMENT	17%	34%	28%	17%	3%
PRACTICE MANAGEMENT	17%	24%	24%	21%	14%
COST RECOVERY AND MANAGEMENT	14%	31%	28%	14%	14%
MATTER MANAGEMENT/PROJECT MANAGEMENT	14%	41%	21%	17%	7%

Legend: ■ Fully in the cloud ■ Mainly cloud ■ 50/50 on-premise/cloud ■ Mainly on-prem ■ Fully on-premise
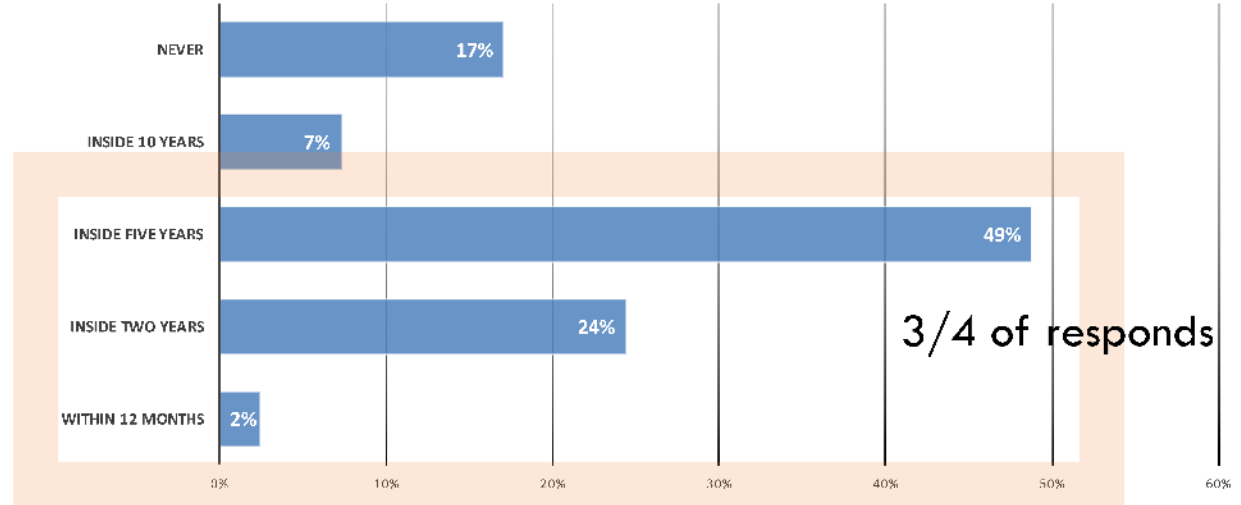
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Key drivers for moves to smart working in legal: £

Does your firm currently have significantly (>10%) more people than it has desks for them all to sit at?
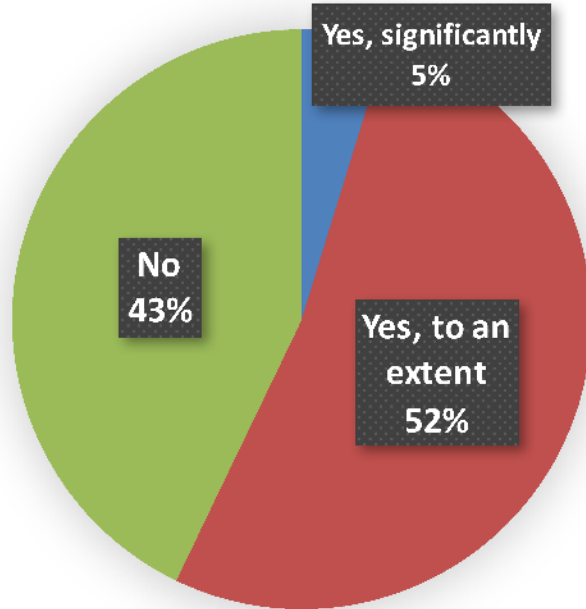

- Don't know 9%
- Yes 13%
- No 78%
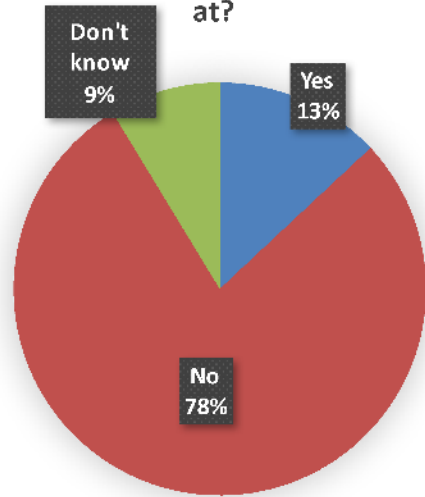
Over what timescale will your firm move to a point when it employs significantly (>10%) more people than it has desks for them all to sit at?

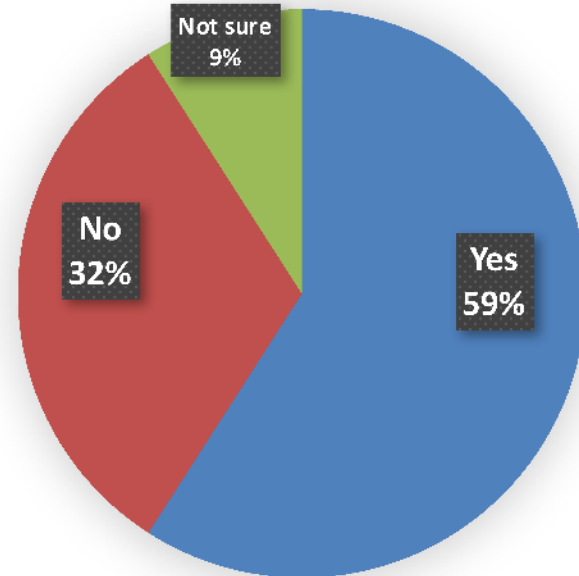- NEVER 17%
- INSIDE 10 YEARS 7%
- INSIDE FIVE YEARS 49%
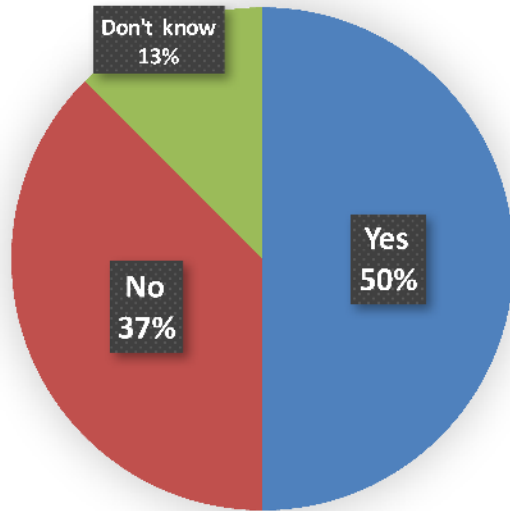- INSIDE TWO YEARS 24%
- WITHIN 12 MONTHS 2%

3/4 of responds

How influential are IT leaders in legal?

Tell us whether you agree or disagree:"The IT leader's role in top-tier UK/international law firms has the same level of executive/decision-making power as IT leaders in other sectors."
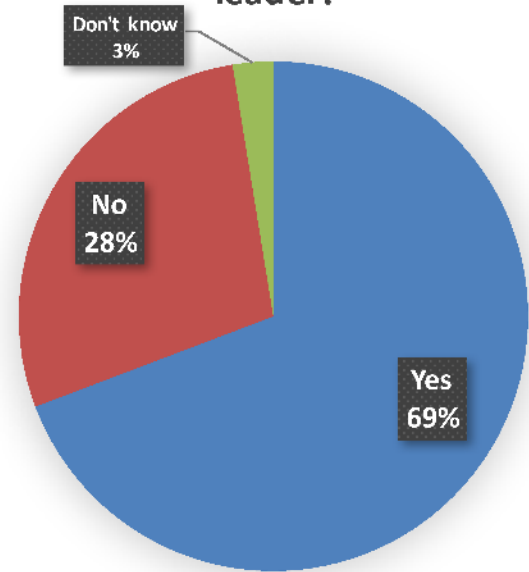
Strongly agree
0%

Strongly disagree
9%

Disagree
35%

Agree
30%

Neutral
26%
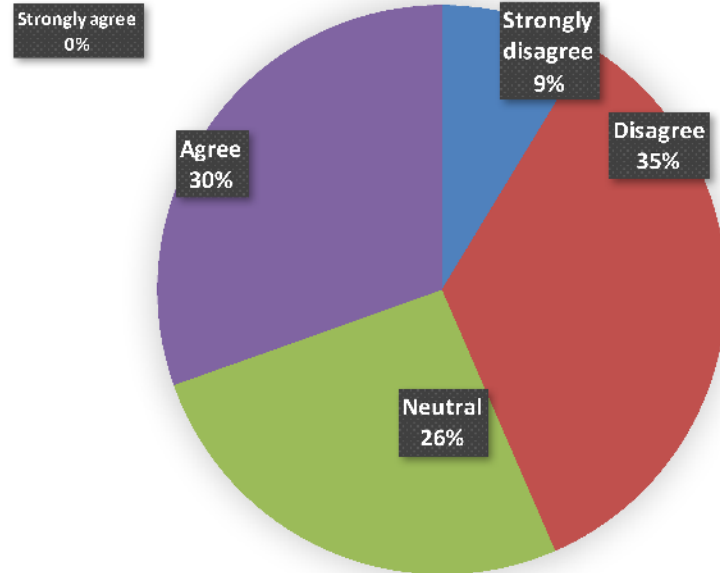
Are they innovating hard enough?

Does your firm have an innovation/R&D budget?

- Yes 50%
- No 37%
- Don't know 13%

Does your firm have an innovation leader?

- Yes 69%
- No 28%
- Don't know 3%
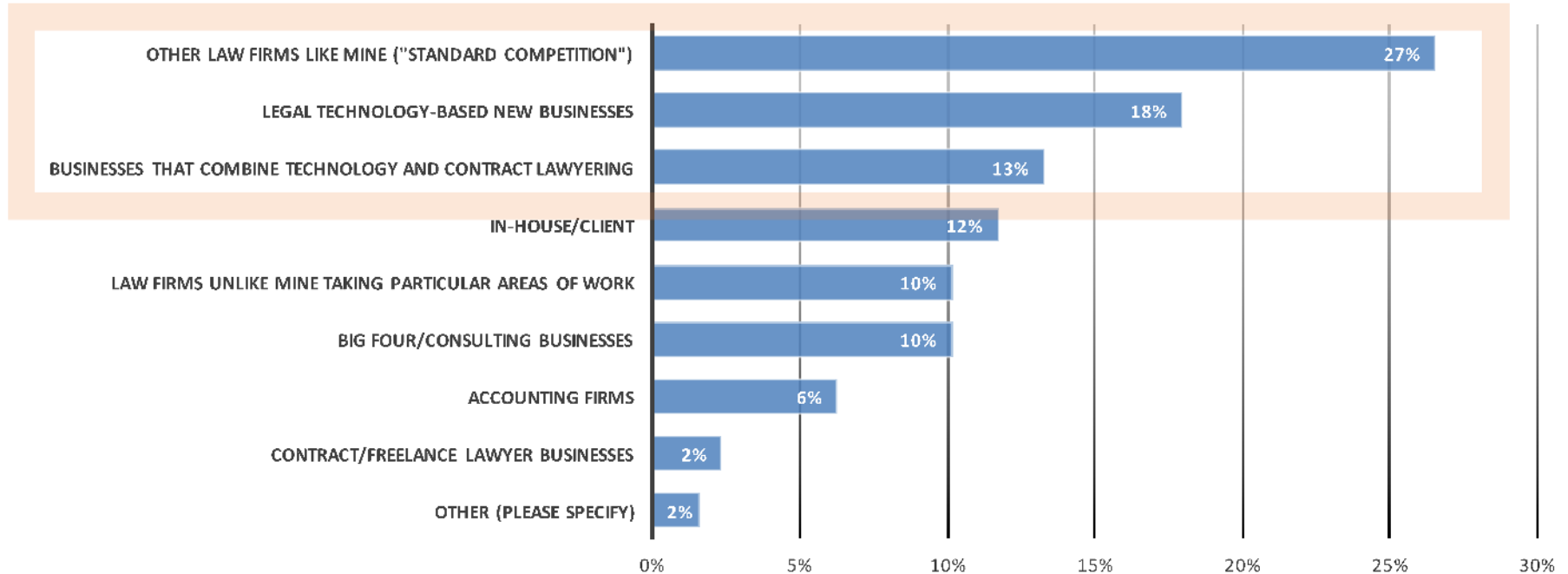
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BEHAVIOURAL THEORY 101

How you behave depends on how you perceive threat

Briefing LITL results

What kind of business are most threatening to your firm's future?

OTHER LAW FIRMS LIKE MINE ("STANDARD COMPETITION")	27%
LEGAL TECHNOLOGY-BASED NEW BUSINESSES	18%
BUSINESSES THAT COMBINE TECHNOLOGY AND CONTRACT LAWYERING	13%
IN-HOUSE/CLIENT	12%
LAW FIRMS UNLIKE MINE TAKING PARTICULAR AREAS OF WORK	10%
BIG FOUR/CONSULTING BUSINESSES	10%
ACCOUNTING FIRMS	6%
CONTRACT/FREELANCE LAWYER BUSINESSES	2%
OTHER (PLEASE SPECIFY)	2%