

# Briefing

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## MOVING ONLINE

Where do law firms see the most need and greatest potential for further digital transformation across processes, lifecycles and client journeys?

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# DIGITAL JOURNEYS

Is there still space for law firms to double down on further transformation?

# Charting digital transformation

The last two years have been a challenging journey across much of the business world. The legal sector has certainly seen plenty of transformation in that time, much of it focused around the adoption of new, digital technologies and methodologies.

But, for anyone hoping law firms had progressed almost to the end of the digital journey by now, all signs across the market in the early part of 2022 suggest there's potentially much further still to go. Those indicators were present in our Frontiers report this year as well, which found "investment in client-facing technology and/or interfaces with firm data/documents" joint first-place on the register of legal businesses' organisational challenges.

So, it seems time for **Briefing** to take a look at how far law firms have journeyed towards meaningful digital transformation, where digitalisation has overtaken the mere digitisation of existing, manual processes, and where potential still exists for digital interaction with clients to flourish and expand in future.

Not only do we ask legal leaders for their perspectives on their digital journeys, in this special **Briefing** spotlight we also have case studies and other stories from legal sector partners supporting law firms in their quest to cross the boundless sea of change on the route to substantive transformation, namely **File Trail**, **Salesforce**, **ScribeStar**, **NetDocuments** and **Thomson Reuters** – so read on and compare your own progress along the path.

JOSH ADCOCK **EDITOR**

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FEATURE

# Where next on the digital journey?

Although legal has been on a digital journey for at least a decade, the Covid-19 pandemic has provided both a short cut and a diversion. The challenge now is to ride the culture change and explore new propositions that enhance the client experience. Joanna Goodman finds some larger firms are using sophisticated technology to partner with client organisations, discovering new ways to identify and meet specific challenges and needs

**L**aw firms remained busy and profitable throughout the pandemic, and lawyers and their clients were forced to rely on online tools and platforms, from initial instruction through to closing and sign off – even e-signatures became legally binding and widely adopted.

However, does bringing existing processes and systems online count as digital transformation? The broad consensus is that it doesn't – but for legal it's still a big step in the right direction.

## Sweating the digital assets

Emma Sorrell, innovation manager at Burges Salmon, highlights some of the benefits of a hybrid, human-digital approach: “The time-cost saving associated with increased hybrid and digital working is invaluable to clients and lawyers who are typically short of time. It also fits in with wider considerations such as sustainability and environmental, social, and governance (ESG) agendas by reducing paper and fuel.”

While the pandemic forced recognition of the

important role of tech in legal services delivery, it also provided an opportunity to evaluate and streamline IT resources over and above investing in new ones – not least because it’s more challenging to roll out new systems and applications to a fully remote user base. “An increasing number of clients now appreciate that they can get more out of their existing tools – which are often more powerful than they thought,” observes Peter Lee, CEO of Simmons Wavelength. “A lot of our legal operations consultancy work in the last couple of years has involved helping to redesign processes and support training to take advantage of existing technology tools,” he adds.

Indeed, Anthony Vigneron, director, legal technology solutions at Clifford Chance, has seen limited additional technology adoption since the pandemic. The most significant change is that client meetings have become easier and more efficient. “It used to be difficult to get the right people in the room in one location. Online client discussions are shorter, fairer, and more diverse. In terms of tech adoption, people have become comfortable with e-signatures and video calls – the conference call is dead. But the data on digital workflows is counterintuitive and doesn’t indicate increased adoption. It may be that, for most people, working remotely and using more tech is not the most attractive thing to do.”

“Clients’ expectations around legal services delivery have been shifting, but that shift started before the pandemic,” adds April Brousseau, head of research and development at the firm. “They still need the core legal advice from expert advisers, but they want to receive that in ways that fit better into their own decision-making processes and work practices.” She echoes Lee’s experience at Simmons Wavelength, saying that it’s not all about innovation. “A lot of existing tech stacks have

significant untapped potential.”

Although clients are looking for more digital interaction with their law firms, this reflects the general shift towards more online interaction in our personal and professional lives. And although it was accelerated briefly at the start of the pandemic, without a concerted effort, the pace is likely to slow down again.

### Digital evolution, not revolution?

Progressing the journey towards digital transformation, larger law firms – and the legal arms of the Big Four – are certainly working with developers, vendors and client organisations to co-create solutions that are specifically designed to streamline services, solve specific problems, and build and maintain powerful working relationships between the firm and its key clients, sectors, and markets.

At Deloitte Legal, chief technology officer Bruce Braude considers the three key themes of legal digital evolution to be data analytics, collaboration platforms and self-service portals, with each presenting ongoing challenges. “There’s still a long way to go in terms of leveraging data to present

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*Peter Lee, CEO, Simmons Wavelength*



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better insights in an online, interactive way, which clients can access, analyse and query. When it comes to transactional work, clients want more collaboration with external counsel, moving beyond emailing documents back and forth. We're also seeing an increase in on-demand, self-service solutions, which allow clients to access advice and guidance via online, intelligent, interactive portals."

Braude further explains Deloitte Legal benefits from the work of Deloitte Ventures, a dedicated innovation group that has developed a methodology for product design and development, from strategic foresight to proposition design and research, through to prototyping and full-scale tech development.

He and his team also incorporate multiple skills and disciplines to offer comprehensive managed legal services, which are aligned with other Deloitte practices, such as risk and financial advisory. "We're building out this multidisciplinary approach into different propositions, such as a signatories' management solution for large organisations, and a director's training portal. This month we're launching Compliance Capture – a tool that allows pension fund trustees to do their own risk assessment around compliance with the new code of practice," he explains.

Over at Clifford Chance, Vigneron and

Brousseau are creating client-facing products to solve specific challenges. "We are not here to be a development house – we focus much more on the clients' needs and expectations," explains Brousseau. "They're looking for tools that fit within the way that they work – their systems and processes – and help them to do their jobs more seamlessly. For example, our CC Dr@ft service provides a combination of expert legal drafting plus automation and configuration to the clients' specific needs."

Identifying the right approach for each client and instruction is key to client engagement. Vigneron reports 93% of RFPs for panel appointments allocate points to service delivery, where technology, innovation, research and development, legal project management and continuous improvement are all key differentiators. "When it comes to matter engagement, we start with a scoping and planning phase to establish the right solution. We have 320 people globally who work on scoping and planning, advising clients on the most efficient solutions."

### Involving people and products

Sorrell at Burges Salmon also highlights the importance of involving the right people. "Another consideration for law firms is the need to resource good talent, in order to deal with the demands that effective digital transformation poses." She also highlights the perennial 'build or buy' conundrum. "With an array of no-code solutions now available within the market, decisions have to be made around whether to upskill and build solutions internally or hire and/or outsource to ensure digital initiatives move forward as intended."

Rather than the tech itself enhancing the relationship between firms and their clients, it seems that a strong relationship between the law

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*April Brousseau, head of research and development,  
Clifford Chance*

firm and the client organisation requires investing in people, and a defined ideation and development methodology underpins successful innovation partnerships.

Putting those people in the right places is also crucial. Stuart Whittle, chief technology and innovation officer at Weightmans, is working to productise client-facing technology solutions and customise them in ways that strengthen relationships between the firm and its clients. Hiring a dedicated product manager produced positive results, but the challenge of getting partners to provide the legal input remained. Partners, he says, are generally rewarded based on the legal business they bring in and delivering on the instructions they receive – making participation in innovation initiatives feel like something outside their remit.

Whittle's solution was to restructure the innovation function to designate a group of partners to work specifically on product development. There will be six product and innovation partners, each aligned to one of the firm's core segments. "Their role is to understand their clients, understand the markets in which those clients work and effectively place bets on products and services that we think we can develop and sell, because they will have revenue targets," he explains. "This is about developing creative lawyers who 'get technology' into product management roles, which combine legal knowledge with tech, project management, communication and legal design." The original product manager role will be broadened to include coaching the product and innovation partners and supporting their work.

### Intelligent automation

Firms commonly deploy emerging tech like artificial intelligence (AI) and robotic process

automation (RPA) to boost efficiency and cost-effectiveness, expediting information management and administration tasks like invoice processing. While these back-office tasks don't tend to affect client relationships, some firms are using emerging tech as a differentiator. Deloitte Legal's Dupe Killer, which uses AI for IP protection, takes a novel approach to the perennial problem of identifying counterfeit goods. Weightman's PREDiCT, launched in 2021, uses a meta model trained on significant data to help large insurance companies calculate optimum reserves against large loss claims.

Simmons & Simmons is also focusing on digitalising end-to-end processes – but, as Lee explains: "This requires time and monetary investment, so there needs to be a viable and feasible business case. One example of Simmons & Simmons seeking to combine legal expertise with data, systems and processes is with our securities and financial derivatives (SFD) and banking clients. One digitally-enhanced process extracts data from documents and other unstructured sources, allows us to curate and manage the data and then use it to complete tasks, create documents and provide client insights."

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*Stuart Whittle, chief technology and innovation officer, Weightmans*



Nakhoda, Linklaters' dedicated tech/innovation arm, was launched in 2015 to create bespoke solutions for the firm's banking and financial services clients. Shilpa Bhandarkar, previously the firm's global head of innovation, took over as CEO during the pandemic, leading digital initiatives like Create IQ, which uses blockchain technology to reimagine contracting for financial services organisations. While Create IQ builds proprietary technology, Nakhoda also collaborates with third-party tech businesses to create client-facing technology. Again, the impetus may come either from clients or from within the firm. "We don't take a standardised approach, because we're not building a portfolio," explains Bhandarkar. Since the pandemic, she has seen "less resistance to digital solutions, especially in the contracting/contract lifecycle management space, together with greater appreciation for how digital solutions can minimise risk".

There is also a strong focus on co-creation emerging among many law firms, including close collaboration with financial services clients to build out transformative applications. One such example is ISDA Create, a digital platform for the electronic

negotiation of derivatives documents, built in collaboration with the International Swaps and Derivatives Association. This digitalises and automates the negotiation process – each clause is a digitally defined data point – enabling real-time collaboration and automation, and the output plugs into Microsoft and other mainstream enterprise systems, so the final agreement can be shared as a pdf or Word document. In 2021, ISDA Create added integration with the Common Domain Model, contributing to a broad initiative by ISDA to standardise and digitise its definitions and legal documentation. However, this too is an iteration of an initiative that started before the Covid-19 pandemic.

### The road goes ever on

Although digital transformation is happening, and to some extent has been accelerated by the pandemic, the practical efforts in terms of pushing legal services over the adoption barrier are still present – and developing.

As Brousseau observes: "There is still a lack of understanding around digital transformation. Digital can enable transformation but there is a lot more to it, particularly around change management and behaviour. Investing in digital will not in and of itself ensure transformation – nor will the journey be a short one!"

While we've highlighted some examples here of real creativity and innovation, most are building on concepts and propositions that were at least ideated before 2020. We have yet to see the effects of the culture change forced by the pandemic: legal is still playing catch up with other (regulated) industries in terms of really leveraging client data and securely applying sophisticated technology that is already available to create valuable insights, broaden opportunities and strengthen client relationships. ▀

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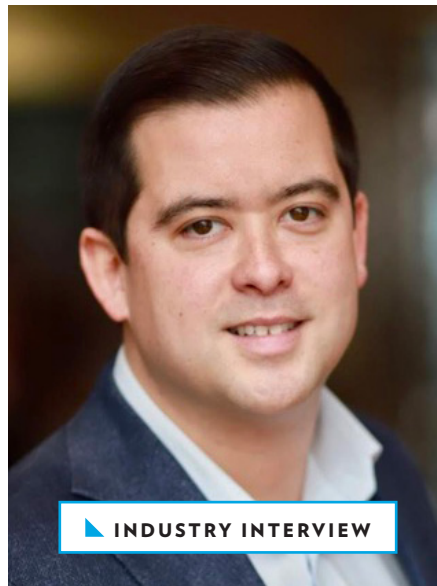


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# Pointing the way to transformation

Law firms have embraced many digital technologies over the years, but they still have much to learn from other sectors when it comes to joining up information and creating a unified client view. Vincent Perrin, regional vice president at Salesforce, describes the steps towards more meaningful digital transformation

**H**ow far have law firms progressed with digital transformation in the last few years? “In certain aspects, you can say law firms have come a long way over a short period of time.” That’s the opinion of Vincent Perrin, regional vice president, professional services UK at Salesforce, who says he’s seen firms embrace point solutions such as e-signatures, videoconferencing and data rooms.

But, in truth, he says these efforts have been piecemeal: “A lot of that is just automation, rather than actual digital transformation.”

Instead, he says, it’s time for firms to think about digital transformation through the lens of engagement with clients first and foremost. “It’s not limited to finding ways of automating an existing process or moving a spreadsheet to an app – it’s much more fundamental than that,” he explains.

## Thinking transformed

Though many firms have adopted client portals and other technologies in recent years to bolster

the client experience, Perrin says bolting on separate technologies, all ultimately owned by different parts of the firm, fails to deliver on the potential of real transformation. “A lot of firms looked at problems in isolation over the last decade and addressed them with point solutions – that’s led to a fragmented client experience because you’ve got multiple tools or processes that address, or were created for, one thing.”

Embracing digital should focus on making something more valuable than the existing processes, he says, adding that will necessarily mean developing a single source of truth. The obvious place to begin building that, he explains, is a firm’s client relationship management (CRM) system, often underutilised or poorly connected to the firm’s other systems and processes.

Perrin says the goal should be to make sure everyone in the firm is able to summon up accurate information about a client, and to enable lawyers in meetings to surface data from a single platform. “Once firms have that view, the marketing and BD function and lawyers know everything that’s gone

into that client experience as well. It's about making use of tools like the firm's CRM ubiquitous across the firm, including among lawyers, not just the marketing and BD team. When you get everybody involved, you start to see real digital transformation."

There are multiple routes to this goal, he adds: "Salesforce is a platform that can replace a lot of these point solutions but, at the same time, can coexist with back-office systems and just represent the unified client view – it's not about replacing everything with Salesforce. However it's achieved, the focus should be on making something tangible and joined-up," he stresses.

### Future hurdles

Of course, Perrin is aware law firms can be change-resistant organisations, making transformation a challenge at many. Though some law firms believe they're achieving digital transformation by simply moving processes and documents from analogue to digital, Perrin says, many of the tools commonly adopted in legal currently would hardly seem innovative in other sectors: "Every other industry has long adopted e-signatures, CRM, portals, and so on, as standard. In banking, if they're not doing that, they don't exist anymore."

One of the key barriers to overcome now, he believes, is the tendency among lawyers to see their client information as proprietary and key to their personal success – something other industries have had to overcome as well. "Real estate is another industry we've worked with where everyone was protective of their data. They thought it was their IP and didn't want to share."

Having worked with the sector, he says it's been possible to overcome that issue, and that legal remains one of the remaining markets to resist sharing information – but that's beginning to change. "The next generation of legal professionals are likely already expecting to work in a way that pools and shares information – they're looking to other sectors and wondering why things aren't being done in the more modern way that clients are

managing their business."

### Change expectations

And firms should be concerned about what clients are expecting, as a fragmented experience will increasingly become a liability – regardless of how successful legal businesses have been in the past. "Firms need to realise – and many in the upper echelons of leadership often do, but need to do more to encourage holistic change across the firm – that they need to embrace technology. Although a firm might be hugely profitable now, your clients' expectations have changed."

Clients want more user-friendly experiences, Perrin says, citing examples like Amazon from civilian life, and noting how Blockbuster gave way to Netflix, as user behaviours both influenced and were influenced by new, digital technologies. "Netflix recommends things to you – all the content and analytics are in one platform, so it can recommend the next best action. Transitioning from a spreadsheet and analogue way of thinking into a digital one means thinking more like Netflix and less like Blockbuster.

"The pandemic has really changed clients' expectations around legal services. They want to engage with legal services through a portal, and they want everyone at that law firm to know who they're speaking to. Client-centricity is no longer a 'nice-to-have' – it's a must-have," he adds.

Client-centricity in the banking sector, he says, has already proved its power to enable cross-selling and up-selling efforts: "Once you know a client has a mortgage and a current account, you know enough to suggest savings, for instance. It can have the same effect within law firms."

So, if firms are willing to embrace transformation and put their client relationships at the heart of all their systems, the future could be a very bright one indeed – firms need only a little imagination and inspiration from other sectors. Or, as Perrin puts it: "Who would have thought 10 years ago that some of Netflix's movies would have budgets bigger than Hollywood blockbusters?"

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# Transformative teamwork

All parties collaborating on a client's prospectus documentation can cut swathes through the time it takes to draft and annotate with the process automation power of ScribeStar, says Leon Miller, partner overseeing the work for international law firm Womble Bond Dickinson

**T**he shift to hybrid working – people often being in the office for perhaps just a couple of days each week – has focused much business attention on tools that might improve a project team's overall productivity as they continue to complete complex tasks to tight deadlines, but from multiple locations.

A case in point is the cloud-based platform ScribeStar, for example – which digitises and automates the journey of the highly detailed documentation needed for capital markets transactions such as listings, rights issues, loan facilities, and indeed mergers. Applying process automation to a deal's structured data and due diligence, it enables collaborative document templating and drafting, 'checklisting and verification' for regulatory purposes (explained later), negotiating, revisioning – and even private messaging between the relevant collaborators about all these processes – right up to the point of

regulatory submission.

Leon Miller, a partner at law firm Womble Bond Dickinson who specialises in UK equity capital markets and M&A transactions, is one of several key stakeholders currently in the midst of collaboratively using ScribeStar to produce a prospectus for one client's readmission to the main market's standard list.

## The ability to change

Miller explains the key differences this makes to how work progresses. "First, all the supporting documentation accompanying the prospectus, such as the checklisting and lists of verification notes for sourced materials that are needed, is integrated within the one platform," he says. "This has been particularly helpful as many have been working from home at different times over the past year – as has the presence of a continually updated single master version of the document.

“The accountants, us lawyers, financial advisers, and also the client – all parties that are granted access – can view this latest version all the time to stay updated, and we’ve found that to be really useful.”

While different people involved in the work can also be logged in and working on different parts of the document simultaneously – clearly speeding up parts of the process – Miller says it’s the automation introduced to the organisation of checklisting that really stands out as an efficiency gain. He explains: “This is usually a very labour-intensive process. You’re cross-referring content from the prospectus with the rules so you can satisfy the Financial Conduct Authority or nominated adviser.” Before bringing in ScribeStar, this would have meant building a separate document with annotations to accompany the main one. “However, the really clever thing here is that where you need to move sections of text around as you draft, the cross-referencing automatically follows the text.”

It’s the same with verification of facts, which is another regulatory requirement – there is no need to update these sets of notes manually with subsequent drafts. The evidence remains linked to the relevant parts as any changes are made. “The page-numbering references are all automatically updated,” Miller explains. At the end, you are presented with a complete set of notes and the materials they refer to.

### Print’s out

Another aspect of working differently is then the communication between all the parties about exactly what’s changing. “There are fewer emails with proof attachments for the whole team to open and check,” Miller says – which is the way that this would have been handled in the past. “The document is moving in real-time all the time – a continuous work in progress – and you can potentially allow anybody to make amendments during that time.

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“There is the ability to limit authorisation, however, giving some individuals limited editing rights. In this case any amendments they make are then visible to somebody with more control, who can either approve or reject the changes.” There’s also no risk of losing a detail from a previous version in the drafting process, with a full audit trail.

And for law firms committed to either improving or preserving their ‘paper-light’ credentials – an area of change that has clearly benefited from more homeworking and digitisation in general – there is no need to send multiple rounds of markups off to a printer and waste time waiting for their return in order to correct and move on. “We’re not quite at that stage of our transaction yet, but it ought to be an immediate turnaround – it’s clear you can turn your documents into a pdf and typeset within the system very quickly,” says Miller.

Finally, it’s not just the tool supporting the work – the overseeing team at ScribeStar have themselves been very supportive on this particular transaction to date, he says. “They’re very responsive with any troubleshooting and resolving formatting challenges for us as they arise – even accessing the document in their own time to address something if needed.

“ScribeStar has been highly attentive throughout, and it’s a very good productivity tool – it’s definitely the future.” ▲

**“The document is moving in real-time all the time – a continuous work in progress – and you can potentially allow anybody to make amendments during that time.”**

*Leon Miller, partner, Womble Bond Dickinson*



## Transparency

### The Key to Better Data Management

Effective data governance begins with having a clear view of all of your data across multiple repositories. This applies to both physical and electronic records. Modern records and information management systems provide the transparency required to see what data you have and enables automation workflows and other efficiencies to **reduce risk and save money**.

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## INDUSTRY ANALYSIS

# Modernising physical records management

Jump-start digital transformation and reduce the costs and risks of physical records retention, says Jon Roscow, commercial director, ROW, at FileTrail

**T**he shift to remote work in 2020 advanced the digital transformation efforts of organisations worldwide. In law firms and corporate environments alike, the migration from paper-based processes to electronic files, online applications and digital workflows is happening faster than ever before.

Yet, while remote work is driving more digital transformation and electronic records management, that does not alleviate the need to store physical files. Many organisations still hold large volumes of physical records onsite and in offsite storage, without any insights around where they are in their lifecycles – including when they're due for destruction – hampering efforts to go truly digital. Often accumulated over decades, these records are expensive to store and manage and expose the firm to security, litigation and compliance risks, as nobody knows exactly what the firm has.

To accelerate their digital transformations, firms can move towards a more paperless future by dealing with that backlog of ageing paper records. Getting started involves establishing protocols both to deal with old records and to automate workflows for retention and destruction on an ongoing basis – preventing the backlog from ever growing back.

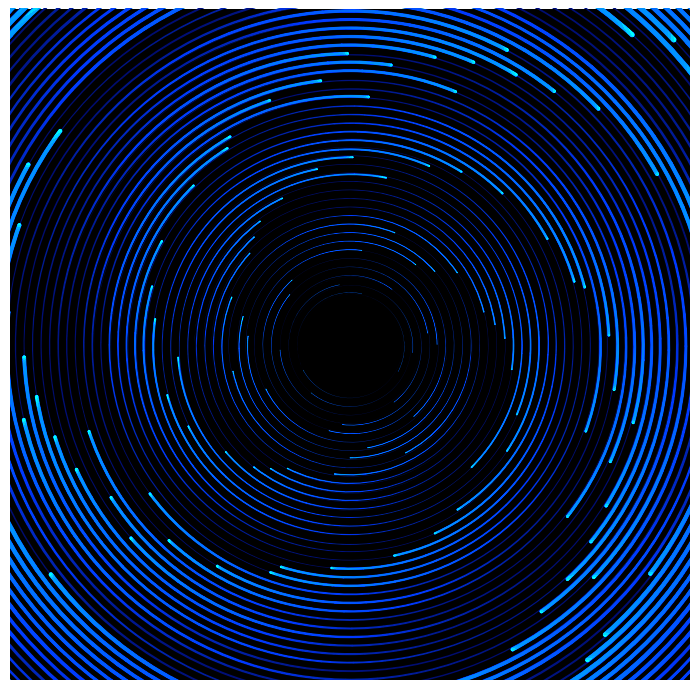
## Keep or destroy?

Firms looking to go paperless may be tempted to digitise everything, but converting several decades-worth of physical records has proven cost-

prohibitive for most organisations. Before taking that route, use a newer records management (RM) system to work out what you have and where it is – then determine whether your firm really needs to keep everything.

## Moving away from physical storage

Some firms may find it easiest to cull large batches of ageing records and scan the rest only as needed. For others, scanning everything may be a viable solution if the type of work they do requires records



to be kept for long periods of time. Once records are scanned and the paper copies destroyed, storage costs are significantly reduced – just be sure to have a system in place to track the scanned records, preferably with a unified view of all records across all repositories.

Rather than postponing the day of reckoning through mass digitisation, many organisations find it best to begin dealing with the backlog of records now.

### Reviewing best practice

Firms with large volumes of physical records to dispose of may need to approach the process in phases. Modern RM systems can help to quickly determine who the main reviewers are – but, the older the matter the less likely it is that the responsible party is still with the firm, so limit the review to a small group with the knowledge to quickly confirm whether there is reason to keep records beyond a certain age and give blanket approval for destruction.

With a modern RM system, the entire process is in the cloud, making it less cumbersome and more transparent than legacy systems. They also make it easier to break up a large disposition (destruction) review into a series of smaller reviews for a more manageable workload for the responsible parties involved. Today's RM systems enable frequent

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reviews – quarterly or even monthly – imposing a lesser burden on those involved than reviews conducted annually. By presenting shorter lists of records for destruction more frequently, the process is easier, which results in significant cost savings.

Forecasting ongoing costs for physical records storage and destruction, combined with expected savings on future storage, also helps in planning the approach to destruction. Firms that successfully implement a regular disposition practice factor in the costs to destroy large volumes of files, but also create a destruction timeline for when those costs will be recouped through savings on offsite storage.

Getting rid of files that are no longer necessary not only saves money in storage costs but also reduces the risk of those records being subject to discovery at some point. When questions arise, firms can justify no longer holding onto records by demonstrating consistent, thorough deletion of files subject to disposition according to their retention policies.

### Digital files forward

Once you've dealt with a stockpile of paper records, make sure a new one doesn't take its place.

As more legal documents are signed electronically, the need to circulate printed documents is declining, and this reality became clear during pandemic-induced remote work. Now, as offices reopen, firms are starting to adopt more digital processes on a permanent basis, implementing new applications that enable paperless workflows and phasing out paper wherever possible.

No digital transformation initiative is complete without dealing with physical records. By reducing the costs and risks of allowing records to continue to accumulate unchecked, risk and governance leaders can help their firms operate more efficiently and sustainably, adapt more quickly to future disruptions and position themselves for success. ▀

**With a modern RM system, the entire process is in the cloud, making it less cumbersome and more transparent than legacy systems. They also make it easier to break up a large disposition review into a series of smaller reviews for a more manageable workload**



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## INDUSTRY ANALYSIS

# Clear communication priorities

Digitising systems is no new feat – but the focus for future transformation should be around the client experience at the end of every legal journey, says Andy Baldin, vice president of international business at NetDocuments. A clear priority list of digitisation will help firms on their way

**F**or law firms looking to improve productivity, save time and streamline collaboration between both internal and external stakeholders, there are countless benefits to digitising most day-to-day operations. From secure document management and storage to robust email tools and increased automation, there have been many case studies about how cloud-based solutions have significantly improved the way lawyers work together. But how do these digital advancements affect the client experience?

While it's true that solving operational challenges within a firm is the first step towards providing the top-tier legal services clients expect, equal attention should also be paid to how the technologies used to solve said challenges will impact the client experience at all stages of their legal journey. Here are some ways that law firms can use cloud-based digital collaboration tools to improve one of the most important aspects of the lawyer-client relationship: communication.

## How the lawyer-client relationship is changing

Traditionally, the lawyer-client relationship has been plagued by a dramatic power imbalance. As the sole providers of legal expertise, lawyers were previously seen by their clients as holding the proverbial 'keys to the kingdom' on all material aspects of an engagement. Clients were billed by the hour with little to no insight into the value they were receiving beyond the end result.

Today's clients expect full transparency and new

billing concepts from their law firms, allowing them to choose where and how they require legal action, while focusing more on the value of each deliverable – rather than simply hours logged. A few examples of how law firms are responding to this need for transparency include:

- Offering pre-paid segments of time, along with a detailed estimated cost of specific services.
- Providing set days of work, capping hours, and stabilising prices.
- Using machine learning capabilities to estimate the average cost of particular legal services, providing clients with a more accurate estimated price range.
- Leveraging technology to quickly extract all related case information and details to minimise time spent on low-value tasks.

Fortunately, this level of transparency and detailed insight into all steps of a legal engagement is often made possible through the same robust digital collaboration tools law firms use to streamline their internal operations.

## Improving communications in six steps

Law firms can use digital collaboration tools to build client trust and strengthen their relationships in the following ways:

### 1 Provide a detailed explanation of services

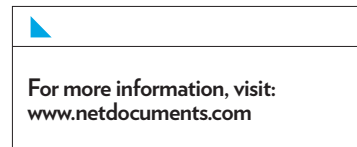
There can be a lot of moving parts within any legal proceeding, which can lead to client frustration if they're not fully informed every step of the way. Having a clear and easily accessible

breakdown of services and associated costs can give clients a clear definition of the amount of work and effort, based on their objectives and goals.

**2 Define a strategy** It's important to remember that what lawyers consider to be routine concepts and processes are often new and unfamiliar territory to clients, who need transparency around the work their firms are doing for them – which is why it's critical to clearly document discovery and other case items related to a case.

**3 Provide consistent and accurate updates** Legal teams must share documents and provide feedback to clients in a timely manner. When providing these updates, cloud-based document management tools can be used to track versions and any changes so that both clients and lawyers can rest assured that they are all viewing the most current version of any given document.

**4 Allow collaboration from anywhere** Even before the unique workplace challenges brought on by Covid-19, there was a growing shift toward technology that allows for safe and secure remote collaboration. This enables lawyers and their clients to organise, package, and share content with one another, outside counsel, or other groups through shareable digital workspaces that they can access from anywhere, on any device.



**5 Ensure security** Law firms have an obligation to protect sensitive client information and uphold the highest standards of security in both traditional and digital spaces. That's why it's essential for firms to select a cloud-based collaboration tool that provides a secure portal for sharing documents and other uploads, while also keeping information organised.

**6 Create a centralised location** Document management systems can be used to bring all documents together into a single location, as well as provide clients with a dedicated place to send and store all emails pertaining to their case, a secure messaging service, and instructions on where to comment on documents.

Communication can make or break a client relationship. By demonstrating strong organisation, transparency, and the willingness to listen and quickly adapt to client needs at every point in a client's legal journey, law firms can earn their trust and secure future business.

While documentation is a core aspect of most legal work, successful collaboration requires more than just an easy way to share documents. That's why NetDocuments combines world-class enterprise security and compliance infrastructure with the personal productivity tools that allow law firms to collaborate with their colleagues and clients anytime, anywhere, and across any device. ▲

## INDUSTRY ANALYSIS

# Going for extra time

The old adage – that time is money – is still true today in legal, say Elisabet Hardy, vice president of product, legaltech and Chris Jeffery, vice president of product marketing, legaltech, at Thomson Reuters. They offer six top tips for using legaltech to make more time

**T**ime is the biggest investment you can make for stronger client relationships. Clients have their own responsibilities to handle, and they don't want to spend an inordinate amount of time trying to surface information about their legal matters. Likewise, lawyers don't want to spend their time preparing reports and chasing down status updates.

Below, we've briefly outlined six ways that using legaltech can save time for you and your clients:

- 1 Simplified interactions** Few would have considered buying groceries on an app before the pandemic. Now many can't imagine going back to the grocery store. By providing client portals that deliver frequently requested information, you can save time for yourself and your clients.
- 2 Proactive status updates** Among the most frequent requests from clients are matter statuses. Use push notifications to provide proactive access to the information they need.
- 3 Up-to-the-minute budgets and forecasting** Sophisticated financial solutions enable your clients to see budget and spend data in near-real-time. With enough historical data, you can also provide forecasting that helps both sides to manage their spend.
- 4 Automation** Clients want to get things done quickly, and without complex processes. The more you can use legaltech to automate routine tasks, like document signing and review, the less

time you will need to spend managing the related manual processes.

- 5 Easier billing** The day is coming when invoices will no longer exist, and many companies are turning to paperless billing systems. They will expect their law firms to follow suit sooner rather than later – implementing an automated billing solution gets everyone what they want, as law firms are paid quicker and clients spend less of their time checking for accuracy and approving payments.
- 6 Stronger client relationships** Everything else on this list leads to the biggest client demand, and likely the thing most lawyers want to focus on themselves. The personal connection between client and lawyer is the heart of every relationship, and it requires a conscious time commitment. Having the right tech stack in place enables the kind of relationship both you and your clients want.

With an integrated platform that can connect firm and client systems, open APIs, and a cloud-first strategy, Thomson Reuters helps to make your legal tech connected, open and smart – freeing you and your clients up to do what's most important. ▶

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