



WHITE PAPER

STOP GRINDING THE GEARS

How to Make Legal Technology Adoption Work at Your Firm



THOMSON REUTERS®

Open the box to your first smartphone.

What if there were no instructions, nobody to go to for help, just a piece of technology? How would you know the best way to get started?

You might turn on your smartphone without directions and fumble your way through the interface, or you might set it up wrong. Then what? Is it worth the time, money and effort only to get it wrong? Does the struggle make you reluctant to buy your next phone?

A struggle. That's what investing in legal technology can feel like without the right onboarding process. There's a world of innovation waiting in front of you, but how can you access it? Legal technology has become a problem-solving and efficiency-sparking fulcrum of practicing law. But efficacy doesn't mean it's always easy to understand, nor that the right resources are in place to make onboarding a simple process.

On top of the access challenges, many firms feel wary of investing in new technology because the onboarding process can be such a headache. Their ways of working are typically ingrained, and

each new tool brings with it a disruption to the status quo.

In a profession predicated on knowledge and stability, that's a scary thought. Attorneys and support staff will need to dedicate time to learning a new way of working, because the reward means greater efficiency and accuracy.

In addition, firms believe the price tag doesn't always mesh with the difficult legal marketplace. Most attorneys know they need to expand their book of business and keep clients happy, but there's only so many hours in the day. That means fitting the onboarding process, business development and practice of law into too few hours.

Despite the difficulties, attorneys at all levels know legal technology is no longer a necessary evil, it's just a necessity.

“I think lawyers are embracing that they need to understand legal technology solutions in order to get ahead,” said Colleen Scimeca, a senior product strategist with Thomson Reuters who has spent 17 years as a consultant helping law firms through new technology adoption. “Otherwise, they’ll get left behind.”

The market is calling for it. Modern clients aren’t willing to wait around or interact without modern technology. In fact, 14 percent of firms see the increasing complexity of technology as a significant challenge, and 41 percent see it as a moderate challenge. These findings come from the [Thomson Reuters Legal Executive Institute’s 2019 State of Small Law Report](#), a study of more than 300 small law participants, practicing in a wide range of areas.

“The new technology conversation was driven by clients because clients have legal technology,” said Scimeca. “Now, partners have to help upgrade their firms because we’re in a different age.”

Indeed, it is encouraging to see so many firms willing to adopt new technology even in the face of concerns over its complexity. Twenty-six percent of firms surveyed said they implemented changes to invest in newer/modern technology and better internal controls. These investments can lead to efficiency, which means more business, better client service and improved work/life balance.

Want to learn more about how technological investments can lead to *efficiency*, *better client service* and *improved work/life balance*?

Read the White Papers.



“What you are losing out on by not implementing up-to-date technology ... is really business,” said Cherri Peterson, a marketing manager with Thomson Reuters who works with small law firms on onboarding and retaining new legal technology. “You’re losing out on the ability to take on additional clients, because you’re spending too much time in manual processes and running the day-to-day of the business and not enough time practicing law and serving your clients.”

But it doesn’t need to be so hard. This playbook aims to show you how to make the adoption of new technology a smoother process, and one that will help bolster the areas where your firm is struggling.

CLIENTS: “WE WANT TECH”

Let’s get this out of the way: Implementing new technology at a law firm can seem like an unsurmountable task. While the numbers have shrunk in recent years, 64 percent of law firms are still not addressing the challenge of technological complexity, and 74 percent haven’t invested in updated technology in the last two years.

However, the lack of a plan, and the ensuing onboarding process, is causing some clients to get fed up—or call for something better in the market. The areas where clients show the least satisfaction are technology and electronic communications, according to the Thomson Reuters Consumer and Business Client Experience surveys.

On the consumer client side, only 72 percent are satisfied with lawyers’ use of electronic communications, and only 69 percent show satisfaction with lawyers’ use of technology to make a client’s experience easier, two of the lowest numbers on the survey. The same is true of business clients, where only 74 percent are satisfied with lawyers’ use of technology.

Both surveys show this problem as a fixable issue. For those firms willing to implement client portals, online document review/mark-up and electronic-signature software, the results are striking. There's unanimous satisfaction with client portals, 96 percent satisfaction with online document review/mark-up and 97 percent satisfaction with e-signature for consumers. For business clients, more than 90 percent feel satisfied with the updated tools used.

The obstacles preventing adoption boil down to three key challenges.

Concerns about time

It's well known that attorneys don't have a lot of uncommitted time. Work/life balance is already an issue, so they want to spend their time doing billable activities rather than sitting and learning something new. Many feel it's not their job to spend the time on learning new technology or being part of onboarding a new tool. So, when an implementation process is set in motion, that time investment takes away from attorneys' ability to learn about the law, practice the law or spend time with clients.

"Some of it is that [partners] don't feel like they can control whether attorneys use the new technology, meaning that they don't want to invest in something and then people aren't using it," Scimeca said.

Concerns about cost

As expected, some fear comes from the price tag associated with implementing new technology. This can impact both the decision to invest and the ability to do so cost effectively. But a hesitant firm can't stop its clientele from wanting their legal issues solved faster for less money. According to the consumer survey, four of the five top factors for

clients' dissatisfaction center on issues related to speed, price and the use of technology.

For most firms, investing in new technology is predicated on whether it can help grow immediate revenue. If it doesn't, they shy away from tools that could solve their long-term business development problems.

Concerns about speed

When your livelihood depends on staying on top of legal changes, keeping clients happy and finding new business, it can be difficult to make the case for investing the time and money necessary to learn a new product. The perceived lag time from the beginning of implementation to the point when it becomes second nature causes frustration.

"Some of it is that they're so tied up with the problems in their existing systems," Scimeca said. "The thought of ever going on a new technology is scary."

THE RIGHT APPROACH

So, what are the best ways to approach an investment in legal technology? Commit to the onboarding experience, fully prepare for a technological investment, and don't do it alone.

1 **Go all in** First off, support the process. Communicate, communicate, communicate. Lawyers must commit time to it, which won't be billable, but will pay off in the long run. At the beginning, get the entire firm bought in and willing to use the tools so they don't feel like it's been dropped on them saying, "you are all going to use this, good luck."

For most firms, getting started is the most difficult task. Despite only 36 percent of surveyed firms setting as their goal leveraging technology to improve firm operations, nevertheless, efficiency and investments in infrastructure and technology made a positive impact on firms in the same survey. Efficiency was the most important factor in performance for 12 percent of firms, while investments in infrastructure and technology came in at 11 percent, making them the second and third highest-selected issues impacting performance within the survey.

As stated before, most firms know investing in new technology is a necessity, but they're still ignoring it. That means your decision to support investment gives you a leg up over much of the competition. And an active champion leads to successful onboarding. The more buy-in happening from the top, the more likely the entire firm will support the process.

Be clear about expectations for yourself and for the firm about usage. It won't be worth the investment if everyone isn't prepared to dive in, said Peterson. Approach it by clearly identifying what could go wrong. "If you set those expectations, I think that would definitely be viewed as a positive, because I don't think that there's anybody out there who's going to believe you can implement some new system firm-wide and not run into a bump or two in the road."

If your firm is large enough, formally survey attorneys about their willingness to engage with new technology. Compile the biggest headaches they're facing that technology can remedy and the time and ways they're most likely to engage with learning.

Training and implementing doesn't need to happen at the same time, if that's not feasible. It's OK to

train certain groups of the firm to learn before everyone else. That often helps you identify internal champions and empower them to lead the charge. Peer-to-peer learning by training the trainer is often the best way to ensure a successful onboarding experience. Because they're being trained by colleagues, attorneys will be more likely to identify with the efficiencies inherent with the new technology.

2 Discover your firm

The second important step is to do the internal legwork necessary to make an onboarding process go smoothly. That means researching needs, finances and timeframes.

"Law firm hesitation for implementation can hinge on resources," Scimeca said. "They don't feel like they have the resources for putting something in."

By doing the necessary exploration to identify the needs, soft spots and strengths of your firm, you'll have a better grasp of how technology can help you.

Do you need a full system upgrade or online billing software? Does every single document need to move to the cloud, or are you looking to speed up your discovery process with an e-discovery tool? Again, don't feel like you need to move from zero to 100 immediately.

You may have the people and money, but do you have the time to devote to onboarding correctly? You can't always ask your attorneys to stay late to work on technology adoption. It's going to take a significant effort. Make sure to count the cost: Is gaining new business and efficiency worth the up-front spend?

If you're listening to your clients, you'll know the answer. They're using technology at rapid rates,

and they want their attorneys to do the same. “Everything changed after the recession, where suddenly attorneys couldn’t keep raising their fees,” Scimeca said. “Now, clients are much more demanding because they have data ... and can figure out which law firm better meets their needs.”

Now that you’ve gotten a better grasp of how updated technology could help your business, find the best timeframe in your firm’s rhythms to make the change. Make sure you’re not scheduling a new tech integration during the busiest season of the year. If the goal is to have the new technology become a regular part of daily life at the firm, installing it while people are at their most stressed is a recipe for failure. Not only will learning not take place, the added weight could cause outright rejection of the new product.

Resourcing, timing and preparedness research is crucial to make sure the skillsets are in place to implement a new system. But don’t wait for perfection. You probably won’t know all the technical language. That’s not a problem. Be prepared to work together and with your vendor to better access their expertise for a smoother onboarding process that fits your needs.

3 Find some help Finally, you need to pick the right company to partner with during your implementation.

“You want to make sure that you choose a company that has a long history and a reputation you can trust. You want to make sure that if you have any problems, that company is still there in two years, in five years,” said Scimeca. Entrust your business to a partner that’s the best and the brightest, committed to legal innovation, and one

that’s available when you need help. Because of all the money flooding into the legal technology sector, it’s a gamble to trust every startup and their viability into the future.

Investing with an established company gives you both the resources and track record of innovation to provide assurance your money won’t be wasted.

Your vendor should provide you with reasonable expectations. No, they won’t have all the answers, but they should be honest with you. Exact ROI isn’t always possible. Yet, a clear picture of where the implementation is going should be a given.

“It’s about setting expectations then managing through those expectations,” Peterson said. “Companies should be able to provide areas where a law firm can measure on the other side of an implementation, saying, ‘Yep, you told me this story. It worked the way you said it was going to, and we are seeing these improvements or these benefits.’”

Those well-established businesses should also provide 24/7 service. Having a contact available and able to help when you have a problem, or when the process isn’t working how you imagined, can solve a lot of technology adoption problems. It doesn’t matter if it’s midnight and you’re stuck, that company can help you find a solution.

“With a new product, you don’t really know exactly how to use it yet,” Peterson said. “It can be invaluable to have a team of people whose sole job is to reach out to you once you’ve gotten onboarded and trained to ensure you know how to use the product correctly and are maximizing your investment.”

While you should hold your onboarding partner accountable about getting everyone up and running, it's just as important to hold yourself and your firm accountable for fully using the new technology.

"The technology installation can go brilliantly, but if you don't use it, there will be no value added to the firm at all," Peterson said. "And the further away from that implementation to actual usage ... the harder it gets for people to re-engage."

MAKE YOUR LIFE EASIER

A successful technology onboarding is an investment in the future of the firm. Because of the efficiencies they can provide and their ability to meet the needs of tech-savvy modern clients, these problem-solving tools are now essential for your toolbox. It can be intimidating to undertake, but a harried or uncommitted adoption process only leads to more pain.

It must be planned out, communicated within the firm and meshed with current processes, all with the assistance of a trusted partner. You'll notice the marker of success when employees are consistently using the new technology: immediately after adoption, six months later, a year out and beyond. The goal at the outset should be for the technology investment to become an integral part of the ongoing workflow of the firm. In other words, it should be as routine as turning on your smartphone every day.

legal.thomsonreuters.com

For more information, contact
Thomson Reuters at **1-888-728-7677**