WORKING TOGETHER:

How digital integration can optimize the practice of law

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The successful practice of law requires communication. That's not breaking news of course. Contracts, lawsuits, and all other types of legal documents are built using carefully chosen and properly ordered words. There is also the crucial importance of verbal communication between lawyers and clients, and within the firm or legal department itself.

In the past few decades, more and more of that communication has shifted from phone calls and face-to-face meetings to online platforms. Legal documents of all kinds have been converted from paper to pixels. In other words, legal communications are becoming data. And that has provided some real advantages. Digitization can allow lawyers and law firm staffers to quickly share information, both between themselves and with clients, without requiring in-person or telephone interaction.

But, too often, online communication breaks down. We all have had the experience of an email whose tone is misunderstood. (Irony and humor often are lost in translation, so to speak.) Extend that example to any point within the legal realm where

communication can falter. Those big breakdowns are easy to see: For instance, language barriers can create awkward social moments that sink an international deal. Decades of miscommunication and resentment can result in a costly divorce proceeding. Those types of breakdowns prevent people from sharing information or even understanding what is being "said."

The tech industry has generated numerous software platforms designed to make digital business communications and collaboration more efficient. And legal practitioners have benefited. These point solutions have remarkable capabilities. But they're called "point solutions" because they typically address just one aspect of legal practice — e-discovery,

say, or analytics. In the vast majority of cases, these platforms don't communicate with each other. And that means lawyers often find themselves switching from one piece of software to another in order to complete their work. Sometimes it can seem as though the information superhighway is always under construction, and that "drivers" are constantly confronting bottlenecks, wrong turns, slowdowns, and frustration.

You have undoubtedly experienced this problem yourself. You know that communication breakdowns like these reduce your productivity. Meanwhile, law firms and legal departments like yours are under constant pressure from clients to be more responsive and transparent – while also keeping costs down and delivering high-quality work. That expectation requires legal organizations to operate as efficiently as possible.

clients, and internally. In addition, HighQ allows users to easily link to external platforms, such as Salesforce, Office 365, or an ERP application, that a legal organization needs in order to function as a business. It also streamlines workflows through tools that automate essential but often-tedious tasks such as document comparison.

Integrated technologies can simplify communication, so work becomes more efficient and the goals and responsibilities of everyone involved in a legal proceeding are more clearly understood.

To demonstrate how integration – another term for it is "interoperability" – can optimize legal processes, let's start by establishing a clear understanding of the term itself.

A 2019 Ernst & Young survey[1] of 1,058 senior legal practitioners from companies worldwide reported the following:

On average, respondents said that more than a quarter of total hours were spent on routine or low-value tasks.

What the practice of law needs more than ever is integration, the ability to communicate – and indeed work – across different platforms.

As the digital tools available to lawyers continue to evolve, software developers are starting to address the needs of legal practitioners' for this kind of integration. A case in point is HighQ, a software-as-a-service offering that provides cloud-based file sharing, team collaboration, document management, and client engagement software for legal practitioners. HighQ provides a single platform so that firms and departments can collaborate more easily with

COMMUNICATING INTEGRATION

Spoken communication has two components: the act of communicating itself (speaking and hearing), and a shared language. Both components need to work together for communication to be effective. Even between just two people, if one cannot hear, or the other speaks a different language, the communication breaks down, or never begins. But once these aspects are aligned, the possibilities of what can be achieved are almost endless.

When moving from the "real" world of face-to-face interaction to the realm of cyberspace, words become data, and language becomes a form of structured data. We're borrowing the term "structured data" from the world of computer science. Very simply, it refers to data organized for usefulness. Your firm's website designer structures the site's data to make the site more easily "found" by search engines like Google and Bing. Techies use a technology called SQL, or structured query language to organize and manage the data used in building databases.

As noted earlier, lawyers work with a shared set of data that can include pleadings, case law, research, forms, and so on. Firms employ a variety of systems that use their data sets for different functions, including filing rules, business processes, litigation workflows, and court proceedings. Similar to two human beings communicating, there are ways of "making it work" that can overcome breakdowns or incompatibilities within digital legal processes. When the systems and data work together more seamlessly, the opportunities for greater achievement begin to skyrocket. It all depends on how well those elements interact, and how well that data is structured. In other words, it depends on how well digital legal processes are integrated.
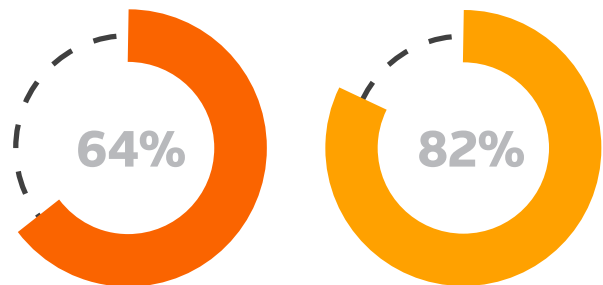
But not all forms of integration are created equal.

THE TWO TYPES OF INTEGRATION

Twenty years ago, much of the talk in the tech industry centered on "convergence" — the capability of digital platforms of all kinds merging to create a common communications system. (Back then, the next big thing was being able to use your television as a computer and a telephone.) In fact, examples of this convergence operate today. Smartphones

are a prime example. These devices aren't simply telephones, of course. They're also cameras, music players, GPS systems, and web browsers (among many other capabilities).

In that same Ernst & Young survey, 64% of respondents felt that the legal function has not benefited from innovation as much as other functions in the company. Meanwhile, 82% of respondents' companies plan to reduce legal function costs during the next 24 months.

64%   **82%**

Despite notable success stories like the smartphone, the development of integrated systems also has a long history of unmet expectations. Much was promised, but what actually arrived tended to be less than astonishing, though (usually) still useful. It wasn't so long ago that if you wanted to listen to your MP3 collection in your car, the best you could hope for was attaching an RF transmitter to broadcast music through the vehicle's stereo system.

Convergence is an example of what might be called "light integration." These simple bridges between different technologies were helpful at the

time. Many still are: In the legal realm, one such bridge built within the past decade allows lawyers working within Westlaw Edge, Thomson Reuters' AI-driven research platform, to easily access the company's Practical Law legal information and guidance tool.

By and large, convergence and light integration didn't allow their users to achieve much more than a minor reduction in time spent moving from one application to another. But as the internet became more and more integral to our work and personal lives, software tools called "application programming interfaces," or APIs, began offering channels that allow digital solutions to better work together – to become solutions to productivity challenges.

APIs AND THE AGE OF TRUE INTEGRATION

Anyone who has ever been online has used an API, even if that person isn't familiar with the term. Very simply, an API is a piece of software that serves as an intermediary or bridge between software programs, allowing the programs to interact with each other. Whenever you sign in to Pinterest or The New York Times using your Facebook account credentials, you're using an API. An API also lets you pay for goods and services using your PayPal account across a variety of unaffiliated websites. These are just a few of the innumerable ways in which APIs are allowing digital spaces to communicate.

API implementations have become quite sophisticated and effective, too. For instance, the API Apple CarPlay allows drivers to control their iPhones through their car's interface, accessing the device's music, podcasts, contacts, and maps applications. Another

example: Within Microsoft Word, you can click on the mail icon and create a new email in Outlook with the Word document as an attachment. And you can include inside of that .docx file an editable spreadsheet you constructed in Excel.

So, what does all this software integration capacity mean for the practice of law? What could it mean?

With APIs, you're not building just a single bridge. You have the capability to build several, which in turn can construct multiple interconnections. APIs allow systems already in use in the legal field to begin working together, at least to a certain degree. For instance, API technology allows a practice to display litigation analytics data from Westlaw Edge inside of its own client portal. This connection lets a firm take advantage of the strategic data that can guide its next action.

Another example specific to the legal profession is Thomson Reuters Contract Express document automation, which is designed to allow legal practitioners to create templates and produce documents using their organization's own work. Contract Express, as a point solution, can integrate with HighQ and several other solutions in wide use among legal practitioners, including SharePoint, NetDocs, and DocuSign. The objective here is to simplify document drafting so lawyers can spend more of their time on higher-value work.

Until quite recently, the integration between Contract Express and HighQ required two separate logins – the two platforms couldn't share documents and data. Now, there's a true integration between them, producing a new capability: HighQ Document Automation powered by Contract Express. Within the single interface of HighQ, you can

seamlessly access Contract Express templates to generate documents. These documents and related data – such as names, addresses, and phone numbers of the parties involved – are stored in HighQ, meaning that the functionality of automated workflow, document collaboration, data visualization, and other HighQ capabilities can be activated all within one system.

In addition, file and document sharing allows firms to build and automate their own workflows. For instance, once a lawyer generates a document with a Contract Express template within HighQ, the document automatically moves through the next stage of the workflow while retaining its proper permissions and alerting the relevant parties of its status or their next steps within HighQ. In short, these two legal technology solutions are operating together as one.

As more and more of the digital platforms that lawyers rely upon are able to interconnect through true integration, the more legal practitioners will realize the long-promised benefits of digital technology to their practices.

BENEFITS

As you read this paper, you're very likely imagining the ways in which true digital integration can improve how your firm operates and collaborates, internally and externally. Most, undoubtedly, include increased efficiency. A couple of notable examples:

+ Less time clicking between multiple applications

Nobody entered the practice of law because they were inspired by the idea of sending email attachments or dropping files into virtual boxes. Yet, this tedious task has become a minor but constant part of "the work" for many lawyers.

What true integration promises, and what it has begun to deliver, is deliverance from these kinds of necessary but unprofitable chores. Interoperability between applications can allow you to start and finish your work in one place, without having to constantly press "alt+tab" in order to move from one platform to another. You can shift easily from document drafting to contract review and execution without the time-consuming tedium and gear grinding that comes from launching multiple applications or sending files from one system to another. You can get these tasks done quickly and move on to work that is more crucial and far more intellectually engaging, such as fine-tuning your case strategy against your opponents or crafting a compelling argument for your client. With integrated systems that allow data to be shared more easily, legal work can truly flow.

HighQ's capabilities offer an illustration. To create a process or workflow that works across the entire firm and department, an administrator within HighQ needs to be fluent only in the standard commands of copy, paste, and share. No coding expertise is required. This simplifies the process of gathering together all of the tasks, documents, and other work associated with a legal matter or specific client, and replicating that work for other lawyers or future clients to access and customize.

+ Less time refitting data

With clean, structured data that is specific to the legal industry, the need to adapt and adjust data in order to move work from one application to another all but disappears. Structure involves more than just Word documents and text tags, and clean goes far beyond reformatting columns into rows. This is legal-specific metadata that is recognizable and actionable by the software and AI engine driving it. Think of how great musicians work together. They build upon each other's abilities and ideas because they have a shared understanding of the elements,

theory, and application of music. The same can be accomplished in the legal space with systems that have visibility into rich, structured data and knowledge of what to do with it.

For example, a litigation management portal can streamline a manual process in order to increase efficiency. Instead of lawyers or staffers having to manually review and input subpoena information into a spreadsheet, this often tedious process can be automated as soon as the client loads the subpoena into your organization's online portal. Once loaded, the information within the subpoena is reviewed and captured in a structured format for use across your matter, without the need for repetitive data entry. Deadlines for the subpoena can then be automatically calculated and reminders

some data in a spreadsheet-like document. This is impressive enough when it involves initiating a single document, but the real power of automated workflows comes from automating bulk documents, or when a large number of documents need to be repapered.

+ Less time building from scratch

Site templating is another example of implementing efficiencies that build upon previous work. With site templating, you can establish the site structure, then reuse the framework for other clients. In other words, you need to build the functionality of a site only once. This matters because, by building and rebuilding one-off work from the ground up, firms

> *In Altman Weil's 2019 Law Firms in Transition report,[2] which surveyed managing partners and chairs at 362 U.S. firms, 48.3% of respondents reported that their firms were using technology tools to take on functions previously handled by employees. And 63.6% of firms with more than 250 lawyers said they had incorporated digital solutions and platforms for those tasks.*

added to the lawyer's calendar. Tasks can be quickly assigned to the proper professional, and the process can be easily monitored. All this makes sharing consistent and accurate updates with the client simpler and more efficient.

Similarly, document automation can reduce the time needed to draft documents that are largely standardized. With automated workflows and structured data, you can trigger the generation of single and bulk documents, save them to a folder, and email relevant parties requesting their review. Many more steps can be incorporated into an automated workflow that initiates when a user simply enters

miss out on the benefits of iterating and improving processes over time. With HighQ's easy-to-customize templates, for instance, you can build upon the efficiencies and experience of your firm. Your colleagues can create best practices that can easily scale across the business. And you can perform all this without having a degree in computer science or a working knowledge of complex data-structuring tools such as SQL.

In other words, one of the essential virtues of true integration is simplification. As we've seen, the HighQ platform simplifies many of the processes involved with legal practice. Using HighQ workflow

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[2] http://www.altmanweil.com//dir_docs/resource/C5CD91E8-0715-4686-A4B4-CCD69AE9D2BF_document.pdf

automation, document automation, and the platform's other capabilities, you can elevate the delivery of your legal services and thus create a more productive and satisfying experience for your clients. HighQ can't simplify the law, but it can simplify the work that goes into your practice.

BUT HOW SECURE IS IT?

Security is a crucial consideration. Again, when sensitive legal documents and client information are placed in a digital space, they become data. And there are plenty of bad actors out there who covet that data. That's particularly true with data that can be monetized, such as Social Security numbers and digital payment information. For law firms, another worry is that sensitive client data might be purloined by someone inside or outside the firm to use for their own nefarious purposes.

When online systems are interconnected, they can become more vulnerable to security breaches. More connections mean more windows and doorways for hackers to enter a system. In the legal space, the implications of a breach can be devastating to far more people than a single instance of identity theft. Think of a secret. The more people you tell, the less of a secret it is. Similarly, while interfacing across different applications or even entire platforms is valuable, each new connection creates another point of entry for malicious actors. A law firm's system is only as strong as its weakest link.

Given that concern, a platform like HighQ with numerous interconnections might appear to be particularly susceptible to cyberattacks. In fact, a well-designed, well-maintained single platform can actually reduce those risks, in large part by regulating access. Within HighQ, firms and legal departments can create a secure environment where they can store associated documents within

a legal deal. In establishing this online space, a legal organization can define what individuals and groups can be allowed access, and the administrator can limit what documents they are allowed to see. The contents of this space are tied to automated workflows, which allows legal processes to move quickly as relevant parties take action and legal teams work together. Think of it as reducing the number of gates in your village walls, with an honest sheriff keeping things safe on the inside.

CONCLUSION: PUTTING IT ALL TOGETHER

Failures to communicate fully and clearly are often small, and they can be difficult to identify. But identify them you must. Small failures can accumulate and aggregate into large failures, becoming major stumbling blocks that slow a legal practice down.

Sometimes, these breakdowns are caused by an absence of specifics. There are the dreaded and unhelpful "I put the file in Teams" replies that offer clues rather than answers. Then there are the lengthy strings of "click," "copy," "paste," "save as," and "move to" – those numerous small, rote actions that lawyers are forced to execute just to advance the job on to the next phase. Other times, the breakdowns occur between technology tools that don't integrate with each other.

Thankfully, technology is evolving. In the legal space, it's developing new ways for all of the digital tools that lawyers use to work together more fluidly, flexibly, and efficiently. This integration is optimizing the ways legal practitioners communicate – with each other, with their clients, and within their own workflows.

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