



# Biggest IT Issues and Solutions

If you're in the Information Technology (IT) department at a law firm—large or small—you probably feel like a unicorn. You're that rare IT person who's serving a tough need. You're pivoting and shifting to changes in the legal environment as well as staying on top of technology.

## Small firms

You're probably wearing multiple hats and responsible for what probably feels like everything. Those at the firm are probably trying to get you to help contribute to revenue. You may be helping with e-discovery or acting as a consultant for cases.

Small firms need to be flexible and nimble, that's their strength. You may have remote working policies, even if there's no official policy from HR.

## Large firms

Larger law firms -- or Big Law -- are most likely understaffed. You may be helping your firm to compete against international companies. Maybe your firm is thinking internationally anyway. To compete internationally, you need a flexible workforce who can work where they need to. The workforce demands it anyway.

You may be considering the cloud, but are concerned about the steps needed to take the IT team there.

## Your issues and your solutions

No matter how large or small you are, some of the biggest issues these days are around:

- Demand for your services
- Moving to the cloud
- Helping to create revenue, not just reduce operating expense
- Cybersecurity
- Mergers and acquisitions (M&A) - combining law firms to compete

# Demand for services



Unfortunately, the range of how they want your time is increasingly varied. Some partners might be asking you for help with e-discovery while others are requesting more security even though they want the flexibility needed with the cloud. Occasionally, you might even be working with clients on format types to provide information.

## Prioritizing time—use a scorecard

There are urgent matters that need to be addressed quickly in order to get work done. There are less urgent matters that you can respond to later.

If you're having trouble telling between the two and partners aren't giving you much help, scorecards may be the best way forward.

Use a score of 1 (low) to 5 (high). The higher the score, the higher the priority. Obviously, things that comply with the law should be done anyway.

People impacted, internally	
People impacted, externally	
Positive impact on revenue	
Easy	
Cheap	
Won't take many resources	

# Demand for services



## Come up with alternatives

Talking with people can slow down the progress, but it can also ensure you're doing the right thing for the business. After you've attached numbers to the scorecard, talk with your stakeholders about the impacts. Discuss what you've assessed and if it's urgent, but you don't have enough budget, explain why you need more budget.

Come up with alternatives or another way to implement it. You can't always do this, but when you can—do. Having multiple ways of solving the problem, including in installments, helps.

If you can't implement a solution in stages, is there anything else you can do? Can you engage with a third party?

In project management, there's the Euler diagram where there's a trade off needed in order to deliver a product. People are asked to pick two—good, fast or cheap.

Quality, speed of launching the technology, and money (as well as resources) need to all factor into which one to choose. Although project management has other models, this one has lasted the test of time.

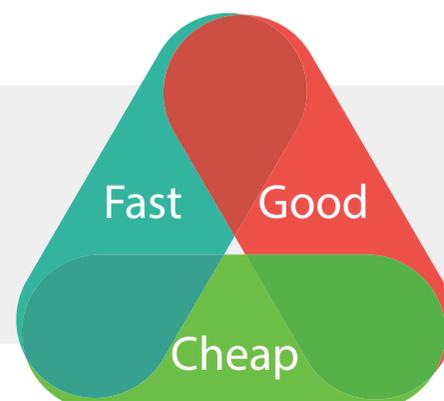
## Meet the changing demands of the workforce

Remote working and flexibility are not just a pipedream. More and more people want these -- and not just Millennials. Gen X and Baby Boomers are caregivers and want the same flexibility. Even if they aren't taking care of parents and children, they may need to work from home for appointments -- doctor, dentist, etc.

In fact, the modern workforce is turning more toward technology to solve issues like flexibility in time and place. People want to work where and when they want.

There are communication tools that make this easier—from webcasts to webinars.

Pick any two:





# Move to the cloud

The cloud is a great way to share information and use as storage space, but there can be issues.

## 1. Identify what needs to be moved (and why).

It's important to determine which services need to be moved and what the purpose is. Is it vital to move to the cloud? What benefit will you, users, or clients have in these services?

## 2. Determine risks and weigh whether it's worth the move.

Really, the biggest question to ask is: Does it need to be moved? What's the advantage and the risks associated with that move. Again, the above scorecard can be used, with your criteria, to determine whether it's worth moving to the cloud or not.

## 3. Review security needed.

Besides the public cloud, there's a private cloud. Even some of the "usual" players in the cloud arena have additional security layers for companies and individuals who need it.

## 4. Identify budget.

Your budget helps determine your ability to move to the cloud or not. Also, you should weigh the costs and benefits of everything you move. How much money and time will you save in the long run, even if you have to spend more money upfront?

## 5. Create a project plan and identify communication opportunities, especially for users and stakeholders.

Your priorities should figure into this. Create a roll-out plan and work resources into this.

## 6. Review potential vendors.

There are a great many vendors these days that can provide cloud services for a range of things. These services are often subscription based -- where you'll pay monthly -- and have typically better customer service plans included. Review them carefully before making a decision.

## 7. Scrub your data.

Lastly, review your data and ensure it's clean before moving it. Bad data is bad data no matter where it is.

# Drive revenue



These days, IT doesn't just improve productivity and reduce costs, they're sometimes asked to contribute to revenue. For law firms, partners are asking IT departments for ways to bill clients better and more accurately.

## Get paid for your legal consulting services—billable down to the minute

There are ways, other than using timesheets, to ensure revenue is going to the right place and you're able to accurately bill clients. Your audio systems should be able to enable accurate billing. According to the American Bar Association (ABA), nearly half of every business hour each day isn't billed by the working attorney. In other words, your company could be losing half of the expected revenue.

What many lawyers don't understand is that the teleconferencing technology used to facilitate a multiparty conference can also add the extra benefit of accurately and comprehensively track billing for the call. Today's technology can capture each minute for subsequent billing, reducing the percentage of billable hours that might otherwise be lost.

## Audio and video conferencing technology should ensure:

- A clear communication channel where each call participant hears each word accurately.
- Secure client and case confidentiality.
- An accurate billing record for each participating firm attorney and supporting staff, whether it's one person or a dozen.

## Improve revenue tied to prospects

### Content marketing

One easy way to get more leads is to offer content. This can be done in a myriad of ways—from offering webinars to offering blog content on your website.

What kind of content? What helps your potential customers such as answers to legal questions. What IT can do is provide a platform for this and help enable the marketing personnel to do this work seamlessly without you. WordPress works well and is usually easy for non-technical people to update. Various webinars, like ReadyTalk, work well, too. You'll also want to make sure you can capture leads in a system that can be looked up later. This lead-capturing may also need a landing page or form associated with it. Tools like Salesforce—a customer relationship management tool—can do this and many marketing automation systems work with it.

# Drive revenue



## Websites

Acquiring customers through technology probably falls on your department. Inbound Marketing indicates that about 40% of small law firms don't have a website at all. Even larger law firms may not be using them to their fullest advantage.

### Consider:

- Usability. Can your potential customers navigate your site? Do they understand the words used and is it avoiding jargon?
- Mobility and responsive design. These days, more and more consumers are using smartphones to look up services. Is your website responsive—meaning available and usable for multiple sized screens from desktops to smaller smartphones?
- Search engine optimization. Are you using terms people would use when writing copy for your website?
- Purpose of the page and one strong calls to action. Can people take an action quickly from your site while you collect data you may need from them? Is the page serving the purpose identified?
- Contact. Can people call in, email and fill out a form to be contacted? Is it easy for them to leave information even on their smartphone?
- Supporting information and price. Often times, you can use testimonials and quotes to show your firm is superior. Are those available? Do you have a price—if that's your niche—available?
- Share-ability. Is it easy to share your website? Are you using social media to expand your potential customers?
- Sales process. If you're a larger law firm, are your marketing and sales people engaged in the next steps?

Improving customer service through technology

Although you can't do everything to improve customer service, you can fix some things using technology.

### Consider:

- Easy to contact your organization and the people who answer are friendly
- Easy to get issues resolved or questions answered
- Easy to pay you
- Easy to get recommendations from your firm for legal advice you don't give, like specializations
- Easy to stay connected to you, where you're offering them something they need such as content
- Easy to see you as an advocate

What's IT's role here? Probably help fix some process issues and ensure whichever system needs to capture data can.



# Security

Big Law or small firm, security is one of the biggest issues you face. In the Move to the Cloud section, we addressed some of it, but not all of it.

## Confidentiality

What clients say to partners should be protected. In fact, clients count on confidentiality. It's frightening to imagine what could happen if their information isn't secure. Protection of client confidentiality is the highest priority, along with the protection of the proprietary and confidential case details. Leaked information can cripple agreements and have big consequences for your clients.

In the U.S. District Court, attention to detail, even technical detail, assures that justice is served. The sophistication of today's audio conferencing technology gives you the tools necessary to achieve justice, conclude agreements, keep client information secure and accurately bill your time.

## Scams and internal security procedures

Chances are good your partners are experts in law, but may not be as technically savvy as you. Scams, like phishing, put your office in jeopardy. The wide variety of issues make it more difficult to control and yet need to be addressed. After all, exposure on security can cause brand issues for your company and serious problems for clients who may be exposed.

Ensure you have decent security at your firm and work with partners to understand the issues as well as how to avoid them. Larger firms can -- or should be able to afford -- decent training to improve security overall.



# Mergers & Acquisitions

One of the biggest trends of the past seven years according to Bloomberg Law is mergers and acquisitions. That trends looks to continue. As attorneys, your company has probably refined the M&A process. However, what some legal professionals may not understand is how IT plays into the overall merger or acquisition.

## When you're merging or acquiring

According to legal trends, more law firms are merging, acquiring or getting acquired. IT has an important role -- one that partners may not understand. Be at the table when discussing mergers and acquisitions. Technology -- hardware and software -- are large capital investments and you should be reviewing the difficulty of merging these systems with your companies. For example, if the acquired or merged law firm has a superior billing system, you'll need to know how to leverage it successfully. Don't be afraid to ask for an inventory of systems and hardware your company will be receiving.

## As you consider merging or acquiring, you'll need to help you:

- An enterprise architect or the person who created your infrastructure to see what's possible based on due diligence.
- A few systems engineers and operations engineers -- the people who monitor and keep up your servers and data -- could be beneficial.
- The people who cross Marketing and IT as they determine branding used for various work you do from invoices to websites to emails. Rebranding is typically one of the most expensive costs when acquiring or merging.
- Someone from Customer Experience, which sometimes falls in IT, to ensure the customer process is seamless even during the move

As you look through the current systems and platforms, think internally, too. What systems and platforms should employees use. Just because you're acquiring doesn't mean you have the best system. Now might be the perfect time to change.

## When you're hoping to be acquired

Sometimes your company is being acquired or is reviewing its options by looking for a buyer. You should already have your inventory put together to provide to the potential acquiring company.

Also, think in marketing terms -- what makes your company's systems and platform's special? That should be part of the documents you put together.