



## OM Feature

OPERATIONS MANAGEMENT

# Tech Wonders You Won't Want to Miss

Find out what new solutions are poised to help the legal industry automate processes, increase efficiency, and enhance the employee and client experience.

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*Firm tech spending is up: Almost half of The American Lawyer annual technology survey respondents said their tech capital expenses budget increased last year.*

In 2013, spending was flat — or down — for more than half of law firms, according to a recent survey from legal industry consultant Altman Weil.

And yet, firm tech spending is up: Almost half of *The American Lawyer* annual technology survey respondents said their tech capital expenses budget increased last year. A fifth of the respondents saw more than a 10 percent jump in technology-related spending.

Wondering what to spend your firm's digital-budget dollars on next year? Technology experts and legal industry members predict these tech trends will take center stage in 2015.

### **CLOUD-BASED DOCUMENT MANAGEMENT SYSTEMS**

Tools that help lawyers work better wherever they are, so they don't have to use one product at home, one at the office and one on a specific device, will be in high demand, some legal tech sources say. "Attorneys want the same uniform solution, wherever they are, with the same performance," says Skip Lohmeyer, Chief Information Officer at Jackson Kelly PLLC.

Cloud-based systems and other data storage tools can also provide a bonus environmental effect by helping law firms become more environmentally friendly in how they operate. Nearly a quarter of firms said they had formal paperless office programs in place as of 2012, according to Altman Weil.

**Up-and-coming product contenders:** Legal case management software provider [Clio](#) — which designed its flagship product to offer solo practitioners and small- to mid-sized firms billing, practice management and collaboration capabilities — premiered a system redesign in 2014 that made the platform look uniform on different devices. An Android-compatible app was scheduled for a September 2014 release; Clio will also be launching the next generation of its desktop application, which it has dubbed Clio Next, by the end of 2014, featuring a more streamlined user interface.

Cloud-based document management software company [docSTAR](#) continues to release monthly updates, including enhanced intelligent data capture, workflow and versioning capabilities, to the cloud-based Eclipse product it launched in 2013. The company plans to add solution enhancements and roll out a case management system in the next nine months.

### APPLICATIONS THAT PROVIDE PRIVACY AND SECURITY

A few years ago, Lohmeyer says many legal industry members held off on using cloud storage because they were worried about remote access security risks — until a number of Am Law 100 firms moved document management systems to the cloud, increasing other firms' comfort level.

Programs that let attorneys save and share items on several devices remain a concern. But as more applications place a stronger emphasis on security, their use is becoming more common — 87 percent of law firms currently employ mobile device management systems, according to *The American Lawyer's* 18th annual technology survey.

**Up-and-coming product contender:** [Viivo](#), produced by security and performance solutions provider PKWARE, encrypts files before they sync to your cloud storage provider. Attorneys are, by far its biggest user group, according to Viivo Vice President of Product Development Matt Little. Viivo hopes to add Microsoft Outlook email integration, which will provide automatic protection for plain text data and attachments, by December 2014. The company plans to offer full encryption for conversations and chats through a new, secure Viivo chat tool by early 2015.



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**SKIP LOHMEYER**  
Chief Information  
Officer, Jackson Kelly  
PLLC.



### DOCUMENT DRAFTING SOFTWARE

Firms that handle transactional law are looking at how they can draft documents more efficiently, instead of making changes to the most recent manuscript version, says Barron Henley, Partner at law firm efficiency and software consultancy Affinity Consulting Group. This is because making changes to existing documents leaves room for error.

**Up-and-coming product contender:** Bob Christensen, Chief Executive Officer of [TheFormTool](#), says the company's recent research found that 56 percent of law firm-created documents are repetitive items. The company released document creation product TheFormTool PRO in 2012 and document automation/creation tool Doxserá, which lets attorneys create multiple documents simultaneously and enable documents to find, select and add external text, in December 2013. The new 3.0 Doxserá version was scheduled for release sometime in 2014, and should feature database integration, designed to assist large firms that use SQL, Access, Excel or a similar information management system.

### TOOLS THAT MEASURE TECH COMPETENCY

As part of the legal industry's ongoing effort to reduce costs and maximize the value of the work

attorneys perform, some firms are developing systems to review and rate how work is being executed.

**Up-and-coming product contender:** D. Casey Flaherty, Corporate Counsel for Kia Motors America, and Professor Andrew Perlman, Director of Suffolk University's Institute on Law Practice Technology and Innovation, have developed a firm and attorney audit platform. Flaherty created the initial version to measure the basic tech literacy possessed by outside counsel with whom he was working. "Lawyers were not using technology efficiently, which was costing the firm money," Perlman says. "[Flaherty] came up with a way of measuring the inefficiencies and partnered with the law school to automate the audit."

The Suffolk/Flaherty Legal Tech Audit can be used to identify areas where technology use is somewhat weak or underperforming — which can, in theory, help firms and corporate counsel departments reduce the amount of time they spend on legal matters and reduce expenses. The audit creators were aiming to make the measurement tool available by the end of August 2014; roll-out and promotional efforts will continue into 2015.

### PRODUCTS THAT PROVIDE BUSINESS INTELLIGENCE METRICS

Lohmeyer predicts law firms will use business intelligence software more frequently to help calculate how much typical cases cost. "I see some growth in the use of delivering more focused reports or reporting metrics so they can better estimate bids for clients," he says.

**Up-and-coming product contender:** In May 2014, legal software company Aderant acquired LexisNexis' Redwood Analytics business intelligence software company, which supports more than 170 large law firms worldwide. Currently, Aderant is integrating Redwood's capabilities with its Expert ClearView business intelligence system. It enables real-time analysis of performance measures, matter data and other metrics that relate to executive, billing timekeeper, finance and other roles to help improve operations. It also offers its customers "a more robust analytics platform," according to Deane Price, Aderant's Chief Operating Officer.

### CLIENT COLLABORATION TOOLS

Some firms are investing in customized tech solutions that can help them better correspond with — and serve — clients. "Certain kinds of practice areas can be suitably enhanced through document automation or expert systems that help clients find answers to common legal questions, rather than using outside counsel," Perlman says. "Some firms are building those systems for clients."

**Up-and-coming product contenders:** Expect more firms to invest in building knowledge management and contact tools like Seyfarth Shaw's SeyfarthLink, Perlman says. The 800-attorney firm's client collaboration platform, designed to help clients and firm members easily communicate, officially debuted in March 2013. Andrew Baker, Global Director of Seyfarth's Legal Technology Innovations Office, describes it as the firm's attempt to "apply Six Sigma principles to the practice of law." The system helps track data and produces analytic visuals, including graphs, charts and reports; clients can view their composite risk level by state and other information, including budget metrics, which Baker says provides a feeling of transparency. Clients can also access key firm contacts, upcoming tasks and upload document revisions through SeyfarthLink.

LawPal's founders were working on a legal marketplace to match prospective clients and attorneys in 2013 when they decided to transform their offering into a legal project management tool attorneys could use to communicate with each other and clients. As of mid-August 2014, more than 700

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**PROFESSOR ANDREW PERLMAN**  
Director, Suffolk University's Institute on Law Practice



attorneys had signed up to use LawPal, which was introduced in March 2014 at ABA's Tech Show. LawPal Co-Founder Yael Citro says the next big features will be client intake capabilities, helping with the pre-document draft information gathering process, and an automation function that will populate documents with information culled from clients' responses to questions. The company hopes to add both features by the end of 2014. LawPal also plans to add branded capabilities that will let firms include their logo and customize client notification e-mails in early 2015.

## ULTRABOOKS

Smaller and lighter than tablets, ultrabook devices could potentially eclipse tablets this year, according to Henley.

**Up-and-coming product contender:** Ultrabooks are made by various manufacturers, including Acer, Dell, Lenovo and Toshiba; the next ultrabook generation stands to benefit from the upcoming release of **Intel's Broadwell processor**, a highly touted new version of the microarchitecture Intel designed specifically for ultrabook use. Broadwell will reportedly provide faster speeds and better battery life — making ultrabooks a true contender against tablets and compact computers. Intel's Chief Executive Officer told Reuters in May that the company was trying to have the Broadwell processor available in tech products by the 2014 holiday season.

## MOBILE TIME ENTRY TOOLS

Some firms have, for simplicity's sake, maintained an almost archaic timekeeping and billing system; which, according to Henley, often isn't all that simple. Having to manually re-enter costs like filing fees into a billing program can eat up a significant amount of time. Firms may also end up overstaffing their accounting department to carry out tasks using outdated systems.

"Someone will call us and say they employ three full-time people for only 12 timekeepers — when it should have been a part-time job for one person," Henley says. To increase efficiency, some firms are automating the billing and time tracking process.

**Up-and-coming product contenders:** Business management software provider Sage North America, a subsidiary of The Sage Group, recently released the 2015 version of its [Sage Timeslips](#) time and billing solution, which includes voice-to-text capabilities and the ability to email payment receipts and add a watermark to drafts. The 2016 version of Sage Timeslips will be built on a client-server database platform, which Product Manager James Reese says will give the solution more scalability and make it better suited for large firms.

[CosmoLex](#), the cloud-based billing and accounting platform that debuted at the 2014 ABA Tech Show, currently includes a comprehensive time-tracking and billing system with functionality like fully integrated trust-accounting management, including check printing and bank reconciliation. CosmoLex plans to add several practice management tools before the end of 2014, including calendar functions, docket management and additional internal reminders and task management features.

## WHY DO ANY OF THESE TOOLS MATTER?

In recent years, successful law firms have started to view technology as a tool they can leverage, according to Lohmeyer, who also serves as Educational Co-Chair for the International Legal Technology Association's annual conference. Law firms that want to remain a competitive force in the industry recognize that utilizing the right technology can help them stay nimble, better serve clients, make employees' jobs easier and potentially realize greater profits. "If you don't invest in technology and learn to produce services in more efficient ways, you're going to lose clients and business,"

Lohmeyer says. "It's not a luxury; it's a necessity." ■

### **ABOUT THE AUTHOR**

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