OM31
How to Assess and Select Legal Technology
Nimble Services LLC

Quick Survey of Legal Tech

- Practice management (ex. Clio)
- Matter management ex. (Clio)
- Client relationship management (ex. Clio Grow or Hubspot)
- Drafting (ex. LexCheck)
- Contract management (ex. Concord)
- Analytics (ex. Brightflag)
- Prediction (ex. LexMachina)
- Research (ex. Ross)
- Contract Due Diligence (ex. Kira)
- Contract Review (ex. LegalSifter)
- Automation (ex. Neota Logic)
- IP – Patents (Turbopatent)
- IP - TMs (ex. TrademarkNow)
- Brand protection (ex. Red Points)
- E-Discovery (ex. Relativity)
Objectives

- Evaluate key considerations when deciding whether to implement new technology.
- Describe the steps in assessing and selecting new software.
- Predict challenges specific to implementing technology for legal operations.
- Explore how organizational change management can help improve user adoption.
Key Considerations

Objective: Evaluate key considerations when deciding whether to implement new technology.
Selecting a Solution

Objective: Describe the steps in assessing and selecting new software.
Step 1: Define Requirements

**Start with your current state**
- Map how the work is currently done
- Make sure you know who does what
- Capture pain points
Step 1: Define Requirements

| Functionality | • List what the technology must do  
|               | • Clarify must-haves and wish-list items  
|               | • Write “use cases”  

| Integration   | • No system is an island  
|               | • Capture the existing systems it must integrate with and what data must be shared  

| Users & Security | • Be clear about who will use the system  
|                 | • Will there be different levels of access  
|                 | • Who will administer the system  

| Implementation | • What services (if any) will the vendor provide  
|               | • What resources or training is available  
|               | • What escalation options exist if something goes wrong  

| Support       | • How are upgrades handled  
|               | • If users need support who do they call  
|               | • If the system breaks who do you call  

Step 2: Survey the Market

• Do some research – the market changes quickly
• Consider systems you already have – there may be functionality or versions you’re not using
• Connect with vendor sales organization
• Research resources:
  • Legal Tech News
  • The Artificial Lawyer
  • Legal IT Insider
  • Gartner – Magic Quadrant Research
Step 3: Conduct an RFP

- Create RFP: Create a Request for Proposal (RFP) document
- Publish: Publish to potential vendors with set timeline for responses
- Conduct Q & A: Have a process for vendor Q & A
- Hold Demos: Conduct vendor demonstrations with use cases you define conducted by the actual team who would work on your implementation
- Responses: Gather RFP responses from vendors
- Analyze and compare: Analyze and compare responses

Step 4: Select a Partner

- Price
- Fit to requirements
- Cultural alignment
- Profile of other clients (big/little fish)
- Flexibility
Challenges

Objective: Predict challenges specific to implementing technology for legal operations.
Brainstorm

• Brainstorm ways to address the top obstacle?
• Who is the stakeholder who needs to be influenced?
• What are his/her biggest priorities?
• How can s/he be influenced?

Common Challenges

• Not user friendly
• Failing to plan
• Initial decrease in productivity
• Push back from users
• Technology doesn’t solve all problems
  • Might identify others that were laying in the weeds
• New Tech overpromised and underdelivered
• New workflows
• Not enough time to train and adopt. Workarounds are created
• Data clean up - What do you do with old data in legacy systems?
• Resources: Sponsor, Champion, Project Manager, and integrator
• Team feels new tech was forced on them
  • Involve users in review, selection, customization, and roll-out
• Forgetting the human touch
Driving Adoption

Objective: Explore how organizational change management can help improve user adoption.
Organizational Change Management

• Plans for the people (and EMOTIONAL) side of change
• Includes the following:
  • Readiness assessments
  • Communication and communication planning
  • Sponsor activities and sponsor roadmaps
  • Helping managers understand how to support the change
  • Training employees on new skills
  • Resistance management

• Models: Lewin’s Change Management Model, McKinsey 7 S Model,
  Kotter’s change management theory, Nudge Theory, ADKAR model,
  Bridges’ Transition Model, Kübler-Ross Five Stage Model
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Co-Founder

Jeff Barlow  
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