

Bridging the Law Firm Experience Gap



A conversation with the Presidents of NDA, AALL, IPMA, and PacerPro CEO.
Moderated by Bob Ambrogi

The practice of law is a crucible

You don't survive if you can't take the heat. The work product created in this environment - the combined efforts of legal professionals committed to the zealous representation of their clients, no matter the hour, the deadline, or the difficulty of the questions at play - has extraordinary value.

But at most firms, that value is quickly buried in antiquated IT systems and share drives - making it impossible to find and re-use.

Wouldn't it be nice if that weren't the case?



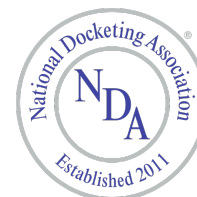
Bob Ambrogi, J.D.
nationally recognized and award winning legal technology expert



Meet the Panel



Elaine Screechfield
President of the National Docketing Association
Firmwide Litigation Docket Manager, Morrison & Foerster



Greg Lambert, J.D.
President of the American Association of Law Librarians
Chief Knowledge Services Officer, Jackson Walker



Gary Melhuish
President of the International Practice Management Association
Manager of Litigation Support Services, Ballard Spahr



Gavin McGrane, J.D.
ABA Journal Legal Rebel
CEO of PacerPro



Your team expertise

Law firms have a wealth of experience across departments. Who's on your team?

Librarians are taking on more of the business side of our firms. We're really looking at, how do we make everyone more efficient? How do we get the right information without duplication? How do we create budgets?

— **Greg**

Our job is to understand a myriad of changing rules and procedures and then communicate with the lawyers about what those rules say and don't say, and how to follow them.

— **Elaine**

The core skill is thinking about how to use technology. This doesn't mean building a solution, but looking at what our technology does, and finding any holes, and figuring out how we can plug them. — **Gary**

The core skill? Probably humility: right now in the industry there's a lot of pressure to offer simple, sweeping solutions. But most of those technologies are just not there yet. If you want to really add value, you need to stay laser focused on your core competencies. — **Gavin**

Why experience capture?

People sell their firms as having collective experience. But they need to make sure that the back office can support the promises being made. — **Gary**

In today's market, business development teams often advertise the strength of their firm's collective experience. But that collective experience is often difficult to access either because it has not been captured or because it is stored across a variety of outdated IT platforms that were not designed to integrate with other systems.

In order to remain relevant, firms need to improve their experience capture.

I can't tell you the number of times at different firms where you know, your website says that you've handled X number of dollars on deals or you've handled these types of litigation matters, and when you're actually put to the test of, ok, who exactly worked on that, when did you work on it, what was involved, how little of that information is actually there.

— **Greg**

Without experience capture, you're put in a position where you're being expected to produce something that isn't feasible.

— **Elaine**

Getting started: Communicate

How do you get started collecting information? The answer's pretty simple: start talking.

It's incumbent on us to take the initiative, nobody is going to ask you for something if they don't know you have it. — **Gary**

I know that I still get surprised responses from finance or marketing of "Oh! We can get that from docketing?!" — **Elaine**

Next step: Narrow scope

Experience initiatives are a major undertaking - particularly given that the data must be constantly updated over time. What are the pitfalls to avoid?

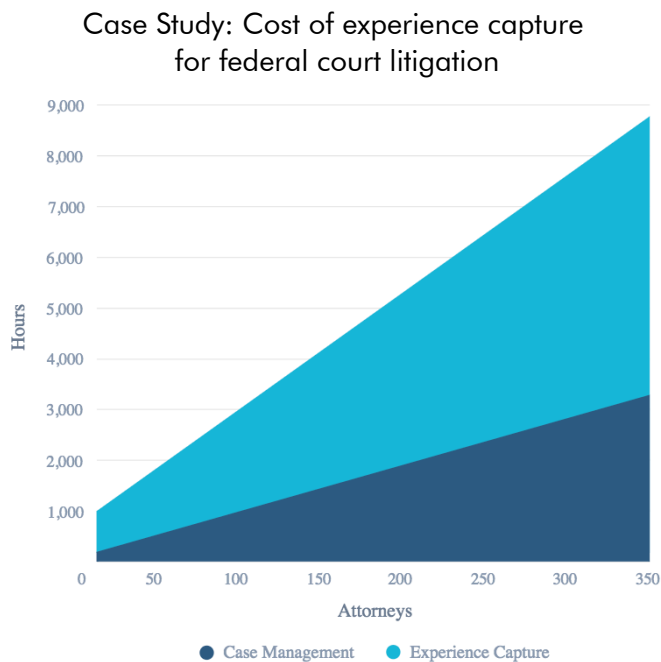
[The question] with data collection is - do you take it one bite at a time, or do you eat the whole elephant at once? A lot of firms have failed by trying to do too much - if you're going to do this, do it one little bite at a time. — **Greg**

It's sort of like writing your journal the night before the paper is due, right? It doesn't work that way. — Bob

Automation is critical

Relying on individuals to send you information doesn't give you the best capture rate. We need to see everything, so automating is a huge benefit. — Elaine

It can be pretty counter-intuitive that a lawyer who put weeks into crafting a motion won't spend 5 minutes to file it for later use. But when you start looking at the aggregate tax of manual data capture at a firmwide level, the lack of compliance starts to make sense. — Gavin



Graph based on the PacerPro PDF2Go service, which processes 200K filings monthly. Estimated time per document to download, label, and distribute via email + profile and store in DMS : 6 minutes.

Technology is the primary way to reduce the amount of information we're asking people to enter manually. — Greg

High quality data is key

Firms have large stores of data and access to numerous analytics platforms. But is more better?

Anyone who has worked with a group of attorneys understands that these people are trained issue spotters, and the very first thing they're going to do when you give them a product is some kind of test, and if they don't find something, then you have to fight that battle of 'oh, it didn't have this one piece, therefore it's totally worthless.' — Greg

Once you're getting into big data, small errors add up fast, so you've got to be more careful than ever before. — Gavin

Getting buy-in

There was a saying a friend of mine used to use a lot when it came to knowledge management and that was 'enterprise search never kept any partner up at night.' — Greg

Firms are notorious for consensus driven decision making by decentralized management. How do you get buy-in? Again, it comes down to communication.

It's a great point about 'enterprise search not keeping partners up at night'. Because it's true - but what can keep a lawyer up is not being able to find a document they drafted previously, and having to do the work all over again. And if stakeholders understand enterprise search or experience capture can help solve that problem - then you're aligned, you've got budget - you can drive value, both for the firm and the client. — Gavin

Orienting for the future

Final thoughts: as we look to the future, the keys are communication, collaboration, strategic alignment, and process.

*We all have all these pieces of data that nobody necessarily thinks we keep. The more we can be out there with the right people and telling them we have stuff, the more useful we can become. — **Greg***

*Collaboration is key. Identify resources, talk to them, figure out what they have, what their pain points are. And then really question and get after those issues. That's what's really going to drive the change in law firms. — **Gavin***

*You have to understand what the strategy and the goals are for the firm. Because our job is not to primarily solve our department's problems, but rather setup the department to solve the problems of our attorneys. — **Gary***

*A custom response to a request is not always the best response, meaning, just because that one attorney needs X, does not mean that you look to create something unique. We need to look at the broader picture, to try and continuously present a more unified, well thought out and purposeful approach to what automation we have available. — **Elaine***

