# How to Link Technology Acquisition to the CLO's Vision

Technology has become the central nervous system of global business, the central connection between knowledge (facts and context) and action (legal advice, strategies and support).

While the right technologies can streamline and enhance the working relationships between legal staff and clients, it is also true that an outdated or incorrectly configured platform can create frustrating barriers that prevent efficient case management and team communications. These barriers erode morale, waste time and increase risks that project goals will not be met on deadline.

Ultimately, the best results are gained when the technology-acquisition process links very directly to the strategic vision of the CLO and management team. The key questions are:

- What outcomes do clients expect and need the law department to achieve?
- What are the workflows needed to produce these outcomes?
- How must the systems accommodate habits and time problems of the users?
- How will these requirements change over the next few years?

In some companies, the IT team does not fully understand the CLO's vision and the specific ways technology should be tasked to support the legal team - client collaboration. Sometimes, delegating the supervision of technology to a senior lawyer is not an adequate way to bridge this gulf if the senior lawyer is not fully conversant with the vision and strategies for the department.

**Key Steps the CLO Can Take**

There are several steps a CLO can take to ensure that the technology acquisition and management process yield significant benefits. For example, a CLO can ensure that the department identifies the outcomes it needs to achieve, presumably in collaboration with clients and outside counsel. Then (and only then), the CLO can task the technology-acquisition team with the responsibility to buy systems that absolutely, positively map directly to the work processes necessary for the legal team and clients to achieve the required outcomes.

- **Example**: suppose that some group of clients needs an online resource for agreements. If the desired outcome is to enable clients to be self-sufficient and distance lawyers from the need to get involved with standard agreements used in routine situations, then clients can be given online access to unalterable standard agreements, or be given limited modification rights.

However, if the desired outcome is to enable contract managers to make some judgments but involve lawyers when appropriate, then the contract managers can be given a system in which they provide input to survey-like questions. Based on the answers, the computer can be programmed to either assemble appropriate document parts into a custom agreement or, if some questions are answered in a predetermined way, abort the document-assembly process and immediately notify the right lawyer via e-mail or beeper that his or her assistance is required and by whom.

- **Example**: Perhaps another needed outcome is that the law department automatically notifies clients when key events in the contract—such as the renewal or expiration dates—are coming up in 30 days so the client can take action in a timely way.

Not all systems on the market can support such outcome requirements. Buying the wrong system may be more trouble than it is worth and severely limit the CLO to deliver on the vision.

The CLO can address this problem by requiring each practice group to develop a list (with explanations) of the outcomes the practice group needs to be able to serve their clients effectively, now and in the future. These lists can be cross-checked with the department's plan. Most importantly, the CLO can require that these lists be included in any RFP and that the vendors being considered have a full opportunity to become familiar with these outcome requirements and have the chance to talk about them with the practice groups that identified them.

**Other Key Steps for the CLO**

- **Require that technology platforms must support real-time, real-life collaboration among legal staff, outside counsel and clients, eliminating the barriers of distance and time zones.** This collaboration must wraparound the team culture and not subordinate the team culture to the vendors' vision of how the team should work. Users should be able to instantly tailor the system without the need for programmers; after all, as teams improve, they want to change the way their systems work.

- **Meet with the lawyers, operations and systems people who constitute the acquisition team to talk about the role that technology should play in achieving the CLO's vision for the law department.** This discussion should cover the identified outcomes, the plan for workflows to support the legal team and clients, and the steps to be taken to ensure that users are not flooded with features which will confuse and overwhelm them. The CLO can also insist that pilot implementations be set up before final purchases are made. These pilots should involve users who are not just the enthusiasts but also those who sometimes have trouble using technology or who are skeptical.

- **Meet with the CEO of the finalist vendor.** It is important that the vendor's vision as to how the systems will work and evolve be consistent with the vision the CEO has of how the systems should support the legal-client collaboration now and in the future. Vendors do not often have access to CLOs to hear first-hand what the CLO expects from the technology, and thus are often not in sync with the CLO's vision. The CLO can keep this conversation focused on how he or she wants the legal staff, outside counsel and clients to work together and what they have to produce without getting into a discussion of technology per se. When the vendor CEO is clear on expectations, this helps to ensure that he or she will take steps to make sure the vendor team delivers.

- **Require that the company acquisition team visit with rank-and-file legal staff in law firms or other companies who have experience using the proposed system.** Remarkably, some law departments barely check references at all. This step typically reveals several points of concern that can be addressed in the acquisition agreement.

- **Ensure there is an annual user survey to identify current training needs and provide feedback on the adequacy of the technology in helping them produce needed results.** The CLO can then look to the training team to develop a plan for the next year that targets the right training to the right people and periodically review the training results.

***The investment of the CLO's time and leadership is crucial to the achievement of departmental results.*** Without an airtight linkage between the CLO's vision and the technology platform, the danger is that the legal team will not be able to produce promised results. This would be damaging to morale in the law department and credibility with clients.

**Questions to Ask:**

- Does the team managing technology for the law department understand the CLO's vision for the law department?

- Have the practice groups identified the specific outcomes for clients that they need to achieve? Have these descriptions of needed outcomes been shared with the tech team and with prospective vendors?

- Have we challenged ourselves to create a written explanation of the linkage between the CLO's vision and the technology we are considering so that we are confident we have addressed all the appropriate considerations before making final decisions?

- To facilitate the buy-in of the legal staff, have we communicated with them about our assessment of the technology we need and various options we are considering? Have we asked for their input on the features and capabilities they need to accomplish their objectives?

- Have we visited other law departments using the same vendors we are considering to ensure that the vendors' forecasts of utilization and benefits are reliable?