How to improve law department efficiency and effectiveness:
Use a legal technology roadmap

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Companies often press their legal departments to be more efficient and 'do more with less,' but how can your department deliver at least the same level of service with fewer resources? The departments who have made that shift uniformly credit a purposeful use of technology and data, to help the department work better and ultimately demonstrate the value of the legal department. A clearly defined legal technology roadmap aligned with business strategy is a critical tool to help your department control cost, drive efficiency and effectiveness, and ultimately demonstrate value by acting as a business enabler.

The 2020 Thomson Reuters Legal Technology in Europe Survey identified that, first and foremost, greater efficiency and speed lay behind the adoption of legal technology.

When asked about the main drivers for adopting legal technology…

62% **Greater client pressure on cost and speed**

64% **Meeting client expectations on speed alone**

So why does the legal department need to deploy a technology roadmap and potentially procure more technology? Technology can help reduce overall legal costs and deliver a competitive edge, freeing up investment in other areas of the business. By deploying technology, the legal department can better control costs and free up lawyer's time to focus on strategic, higher value work. Respondents in the 2020 Thomson Reuters Legal Technology in Europe Survey were asked what the operational goals of legal technology adoption for their company had been so far. Close to two-thirds (61 percent) cited cost reduction as an important goal; the next largest group (52 percent) cited client acquisition/retention as a primary reason; risk management featured third on the list (50 percent); and increased speed mattered to 48 percent of respondents.

We can expect continued growth of technology alongside the evolution of legal department processes.The 2020 State of European Corporate Legal Departments report by Thomson Reuters notes that by leveraging technology for more commoditised work, legal departments are then able to shift their attention to the goal of effectiveness.
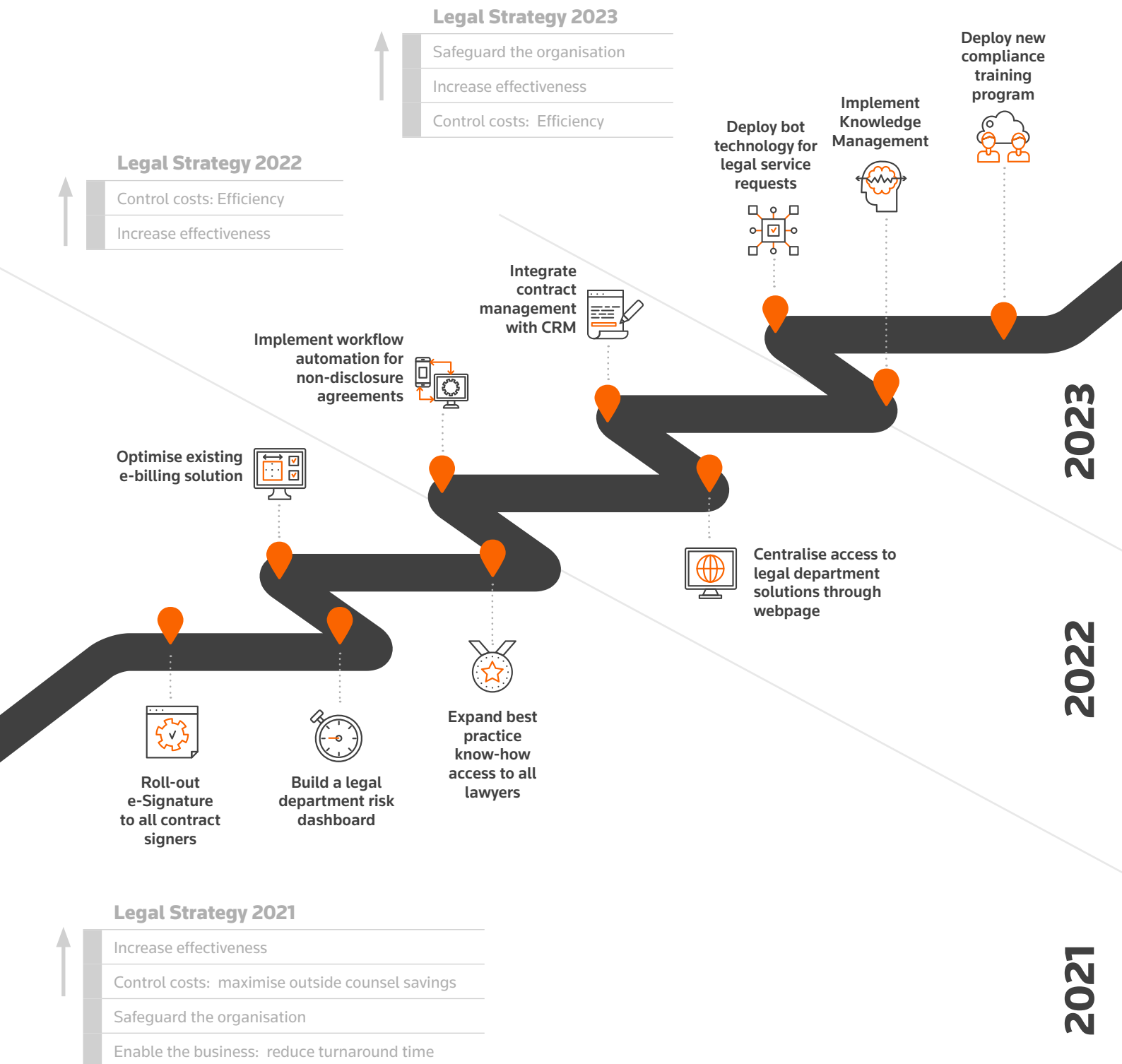
To help your department stay ahead of the pack and develop your own technology roadmap, this report provides background on:

- What a legal technology roadmap is
- A simple strategy for building a roadmap
- The risks of not having a roadmap
- The trends of what technologies legal departments are deploying and when

What is a legal technology roadmap?

A legal technology roadmap is best defined as a plan that identifies the specifics on how technology can support the legal business strategy and priorities over a period of time, typically three years.

Basic legal technology roadmap example:

Legal Strategy 2023

Safeguard the organisation

Increase effectiveness

Control costs: Efficiency

Legal Strategy 2022

Control costs: Efficiency

Increase effectiveness

Deploy new compliance training program

Implement Knowledge Management

Deploy bot technology for legal service requests

Integrate contract management with CRM

Implement workflow automation for non-disclosure agreements

Optimise existing e-billing solution

Centralise access to legal department solutions through webpage

2023

Roll-out e-Signature to all contract signers

Build a legal department risk dashboard

Expand best practice know-how access to all lawyers

2022

Legal Strategy 2021

Increase effectiveness

Control costs: maximise outside counsel savings

Safeguard the organisation

Enable the business: reduce turnaround time

2021

How to start building a roadmap

1. Prioritise

When putting your technology roadmap into place, it is critical to remember that technology is merely an enabler, not a solution in its own right. To be truly effective, technology should align with your legal department strategy and priorities over a period of time. Legal departments looking to harness technology should start with an analysis of the problems they need to solve. Once you have identified and prioritised the problems you want to address first, it's time to start building your technology roadmap.

Common strategic priority examples:

Control costs	Operate efficiently	Increase department effectiveness	Proactively monitor risk	Act as business enabler	Demonstrate value of legal department

If you don't have clear strategic priorities for the legal department, you can start with surveying the legal department and/or business stakeholders that regularly interact with legal on areas of greatest need.

2. Process map

Before building a plan, you must understand the current people, processes, and systems in place. You can start by listing out current systems used by the legal department and by looking at the common legal department responsibilities, or the most common business requests. A great way to identify where process re-engineering or new technology is required is to look specifically at processes that are high-cost, difficult, cumbersome, time-consuming, repetitive, high-volume, and/or low-value. As you go a level deeper and map processes that lead to a need for technological improvements, be sure to define requirements and success measures along the way.

3. Plan for implementation and/or procure solution

Technology roadmaps don't always have to result in the addition of new technology – you may have a system in place that needs an update based on business changes. With a map of priorities and processes, don't do it all at once. Instead, ensure success in one area, then build on that success. Look for solutions that can deliver cost savings, be sure to report up the cost savings procured, and then re-allocate to procure additional technologies or resources to tackle the next priority on your list.

What are the risks in not having a technology roadmap?

1	**Lack of buy-in from the legal department or leadership when attempting a change**	An approved and communicated roadmap will make the change management journey simpler.
2	**More difficult to secure budget when you find a needed solution**	A clear legal roadmap builds a better internal relationship with IT/Finance/Procurement for faster purchase.
3	**Ending up with the wrong technology at the wrong time**	As an example, you may not want to deploy a contract review AI tool before you have contracts in a central repository.
4	**Not considering interconnectivity and overall simplification of tools**	Danger in procuring too much technology that doesn't work together.
5	**Lack of resources to ensure technology success**	Consider as part of your roadmap legal department staff to support implementation efforts and gain better partnership with IT for support if you need it.
6	**Competitive disadvantage for your organisation**	When your competitor's legal departments are deploying technology to more effectively control costs and do more with less – operating at lower levels of effectiveness could result in your company having less funds to deploy to other more strategic priorities.

How do I ensure I select the right solution for the needs of the legal department?

Identifying the right technologies begins with identifying your priorities. It can be helpful when comparing technology solutions to rank the features that are most important to your legal team. You may choose to consider the following:

Relevant and easy to use

In order to get users on board with any new solution, it needs to be easy to use. Software works well when it's focused on the user's priorities, goals and challenges. When a product has been rigorously developed with the end-user in mind and road-tested with clients, it's more likely to be a usable and useful tool.

Secure

This is fundamental for all legal departments. Information and data within your organisation are valuable business assets. Because data breaches could have significant business and reputational costs, the role of the legal department in protecting sensitive information is vital.

Quick to deploy and scalable

Once you have gathered insight on challenges and priorities from stakeholders in your department, you want to ensure that the solution you choose to meet those challenges can be deployed sooner rather than later. Further, if your chosen solution can be integrated with other parts of the business across multiple sites, it will enable deeper collaboration and deliver even more value to your organisation.

Measurable ROI

Ultimately your legal technology roadmap, and any resulting solutions identified, are aimed at creating cost savings and making sure that your department is more efficient and effective. Many technology solutions provide cost and time savings, which both contribute to demonstrating ROI. If your solution assists with workflow management, your lawyers save time, and are able to focus more on value-add tasks. Similarly, a solution may help you streamline your outside counsel costs, providing a boost to your bottom line.

This is not an exhaustive list, and there are many other considerations to take into account. For example, you may want to think about whether you'll want to integrate your chosen solution with other technologies, whether it's cloud-based and what the implications of that might be, or you may want to consider whether data visualisation and reporting is important to your team. Compare and contrast these considerations by adopting a simple scoring system.

Improving legal operations, efficiency and effectiveness, and adopting the right solutions is a journey. Building your legal technology roadmap helps you get there with clarity, and strategic vision.
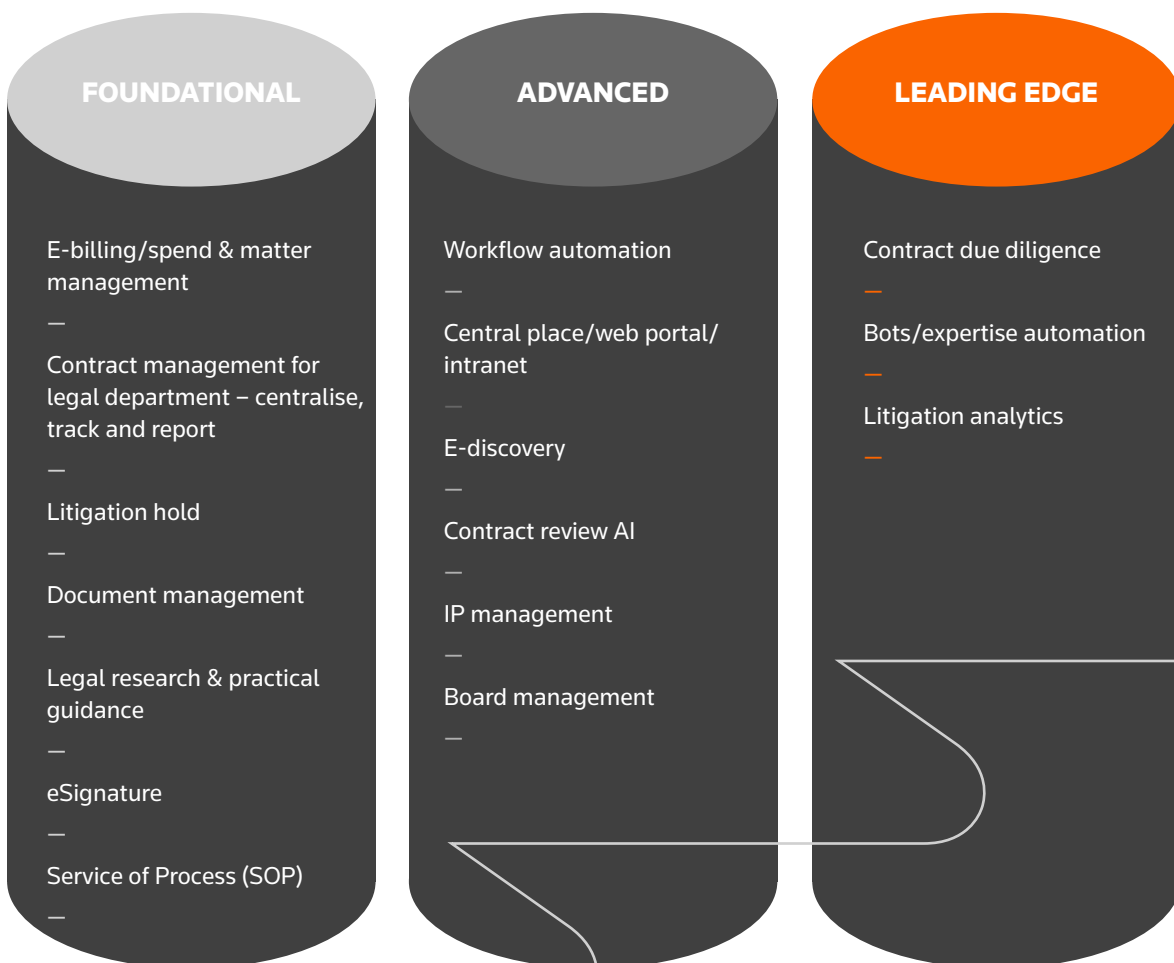
My legal department doesn't have any technology outside of Word and Outlook – where do I start?

When considering core solutions for your legal department:

- Focus on your area of greatest need
- Consider what solutions are:
  - Foundational,
  - Demonstrate a clear return on investment and
  - Help your organisation minimise risk

In several surveys including the annual CLOC survey and the LDO index, eBilling and matter management are the most widely adopted technologies for corporate legal departments. While some technology delivers a broad-based approach to helping manage your legal operations, other simple tools like eSignature can yield significant benefits to drive efficiency within your business processes.

The sample list below provides common legal department technologies in terms of what is foundational, advanced, and leading edge depending on the sophistication of the department. Ultimately, for your department you should focus on the areas of biggest need based on your prioritised roadmap.

FOUNDATIONAL

E-billing/spend & matter management
—

Contract management for legal department – centralise, track and report
—

Litigation hold
—

Document management
—

Legal research & practical guidance
—

eSignature
—

Service of Process (SOP)
—

ADVANCED

Workflow automation
—

Central place/web portal/intranet
—

E-discovery
—

Contract review AI
—

IP management
—

Board management
—

LEADING EDGE

Contract due diligence
—

Bots/expertise automation
—

Litigation analytics
—

Conclusion

If you're on a journey to improve your legal operations technology, the best place to start is with a technology roadmap. It is through this process and the resulting documentation that you'll more clearly understand what you have, what you need, and how to get there. That way, you are more likely to succeed in controlling cost, driving efficiency, improving effectiveness and mitigating risk.

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