

Smart data, intelligently delivered.

How Corporate Legal is rethinking data and boosting legal performance.



A Case in Point

“For Corporate Legal, the challenge is to fundamentally transform how we access, analyze, and apply broad-ranging matter and spend-management data. We need to build intelligent, meaningful experiential models that inform every-day decision making and tell better stories about the value we deliver.”

— Eyal Iffergan, Managing Principal, Hyperion Research Group

Data proliferation. Legal analytics. Data-driven everything.

Corporate Legal faces growing business challenges. On one hand, there's so much more data, in more formats, from more sources. This adds complexity to how you analyze data and handle compliance and security risks. On the other hand, there's pressure to do more with less, requiring better tracking and transparency into expenses. This comes as departments are managing new and different sources of legal services, which adds even more complexity.

This heightened demand for information requires data, and lots of it. The need to access and analyze rapidly increasing volumes of data isn't new. It has always been at the heart of how law is practiced. But with so much data now available, the risk of making decisions based on incomplete information continues to rise.

In many ways, an inability to harness data for decision making can quickly become a legal liability. What's the risk? Should you litigate? Can you improve your business performance? Is it worth it? Corporate Legal needs to reconsider what data can do for their business — and how legal analytics hold the key to achieving much-needed collaboration, clarity, and compliance in a more cost-focused world.

Effective data use will make the difference.

According to Gartner, “Legal departments that use analytics to inform their decision making exhibit higher work quality, reduced litigation cost, and lower spending.”¹ Yet, most of today's Corporate Legal departments still employ myriad manual processes and disparate data solutions. Few use legal analytics and most utilize only a fraction of their data.

Effective legal departments think beyond today's processes and their limitations. They're moving toward real-time access to the insights that drive successful outcomes. You must demand more of your data and the tools you use to manage it. How do you get there? It helps to frame your approach in terms of getting to “yes” on two key questions:

1. **Is my data smart?**
2. **Is it intelligently delivered?**

OPPORTUNITIES TO DRIVE VALUE.

Law departments can significantly improve the value of their investment in collecting and analyzing data by leveraging technology and addressing the associated learning curves.



Altman Weil, 2016

What makes data “smart”?

Data becomes smart when it’s transformed into the insights required to propel a business forward. For Corporate Legal, this means quick access to everything from high-level summaries to granular details on open matters; even financial reporting, like aging reports on open invoices. When your data is smart, it supports and informs your decisions. It gives your team more control over cases and costs. This is what we call “Smart data.”

Rather than the bits and bytes trapped in different applications and documents, smart data provides a single reference point, making it easy to analyze and share information securely—across the entire legal team, in-house staff, business-unit reps, and outside counsel. The result: Greater transparency, efficiency, and insight.

“Intelligent delivery” makes smart data actionable.

Having access to smart data is only half the battle. You also must make the smart data available to everyone on the team, where they are, when they need it, in the optimal format for their individual needs.

Intelligent delivery makes smart data comprehensive, accurate, and actionable. It’s time for a mind shift: You shouldn’t have to change the way you work in order to create and use your smart data. Although you may already rely on a legal information-management solution, it may not accommodate the ways your department needs to work.

Truly intelligent delivery enables any user to determine what smart data they need and how they will receive it — all within access parameters you specify. In other words, intelligent delivery serves up timely information related to all matters in one place, so teams can quickly compare matter, spend, and

SMART DATA IS:

Available	Offering actionable, real-time access to every element, from one source
Adjustable	Easily accessed and utilized to support new workflows and requirements
Relevant	Informing business decisions now and in the future
Secure	Aligned with compliance requirements and protected from threats

INTELLIGENT DELIVERY IS:

Content-driven	Allows any user to determine what smart data they will receive and how they will receive it
Configurable	Enables focused access to the data legal teams need to see
Collaborative	Facilitates work across business units, providing real-time access to the unique view best-suited to each collaborator’s needs



Achieve the promise of smart data, intelligently delivered.

The best enterprise legal management technologies can automate and optimize your internal processes, enabling you to see a complete view of your business — all in one place. They’ll make it simple to quickly reconfigure data structures, user-interface workflows, 3rd-party integrations, reporting, and access as your department grows and changes. Best-of-breed offerings cover the widest range of Corporate Legal spend and matter-management tasks, helping you avoid extensive, ongoing integrations as your business needs evolve.

CONSIDER YOUR COMPETENCIES.

The Corporate Legal Operations Consortium (CLOC) recently laid out a series of core competencies to help gauge the maturity of a legal department and its operations. These offer a valuable framework for building the efficiencies and insights you need to drive change in your legal department. At every level, there's a benefit to thinking/rethinking your objectives through the lens of "smart data, intelligently delivered": starting with what you ultimately want to achieve — and building the path that will get you there.

CLOC's instruction for competency in Foundational Level's **Technology and Process Support** provides a good focal point place to start. It requires you to create a long-term technology roadmap that encompasses tools such as e-billing/matter management, contract management, content management, IP management, business process management, e-signature, board management, compliance management, legal hold, subsidiary management, and more.



Plan for the long-term.

Whether you're revisiting a current roadmap or developing a new one, be sure to consider all the competencies that comprise or contribute to spend and matter management:

- Your platform should allow you to continually integrate new capabilities.
- Your tools should work together and use the same data.
- You should be able to adjust your plan, tools and platform as your needs evolve.
- The solution you choose today should ultimately support legal analytics, litigation support, knowledge management, and more.

CASE IN POINT: Corporate legal department saves 15-20 hours per attorney per month.



THE CHALLENGE:

The corporate legal department of a large, health insurance company was frustrated with the number of people involved in managing matters, invoicing, and billing. Attorneys had to download PDF invoice files, review the total, and validate each line item with their paralegals.

THE SOLUTION:

By implementing enterprise legal management technology with smart data, intelligently delivered as its foundation, their corporate legal department of 100+ attorneys has:

- **Improved efficiency by 80%** across supported processes
- **Reduced paralegals' workloads by 50%**, re-deploying them to more strategic tasks
- **Saved 15-20 hours per attorney per month** by reducing the time and effort involved in reviewing and approving invoices

Now attorneys see invoices on their personally-configured dashboards, with items outside normal parameters highlighted for them. Attorneys are thrilled that they can do this securely from their phones no matter where they are.

Recognize the possibilities.

Look for the flexibility your department requires today and in the future. There can be huge economies and efficiencies to employing an enterprise legal management solution that provides broad-based capabilities around smart data, intelligently delivered. Time and dollars spent on lengthy

integrations, manual workarounds, and duplicative efforts add up. Often, the better option is to work with a single Enterprise Legal Management platform built to grow and change with you. What should that platform solution look like? Below are six key considerations to keep top of mind.

	System architecture	Multi-tenant architectures are built around the general needs of a more generic Corporate Legal population. Choose a single-instance architecture built to your unique needs and configurable as your business develops and evolves. And, your cloud-based instance should never be hosted in third-party data centers.
	User interface	Look for the ability to configure on departmental, group, and individual user levels. At a minimum, your system should allow configuration of navigation tabs, dashboards, saved searches, report layouts and filters, and data-input forms.
	Workflows	Strive for maximum flexibility. If your workflows aren't completely configurable, you'll be stuck with someone else's ideas of how your processes should work.
	3rd-party integrations	Better integration means smarter data. Look for simple two-way integration with your accounts payable and general ledger, intellectual property, document management, claims, legal hold, human resources, and internal legacy software.
	Dashboards and analytics	Develop and interact with the information you need, when you need it, in the format you prefer. Don't settle for others' formats or delayed batch processing. Choose real-time, fully configurable formatting.
	Domestic support	Choose service and support provided by domestic resources who know your business issues and implemented processes.

Secure your performance.

Data breaches and privacy concerns have become everyday news. New legislation such as the recently enacted General Data Protection Regulation (GDPR) underlines the importance of data management and control. Progress necessitates careful use of more data, in more ways.



As you look at solutions to accommodate, you'll want to weigh:

- **Reliability:** Look for a strong track record. How will any issues with SaaS or API access potentially affect performance?
- **Redundancy:** Accept nothing short of full redundancy, including hot data-recovery sites.
- **Scalability:** Data volumes overall are on the rise; a single merger or acquisition can cause a quick and dramatic increase. You'll want a solution that can flex to your needs.
- **Support:** Who's going to answer your calls? Will they know your specific solution? How fast can they make configuration changes as needed?



“Being well-prepared for 2017’s data volumes won’t be enough for 2018 and beyond. Corporate Legal will need to constantly leverage new tools internally and externally to stay ahead of expanding data volumes and protect their employees from getting bogged down by them.”³



Embrace the future.

Research from Gartner shows that nearly 50% of legal departments intend to use analytics for process improvement, and more than a third for legal analysis.⁴

Drive your team forward by implementing the processes and technologies that enable smart data, intelligently delivered. Develop a comprehensive, practical long-term plan beginning with your end goals in mind. Align your technology and process choices around your objectives. Ensure that your providers offer the flexibility you need to support your business as it changes and grows. These strategies will lay the foundation for process improvements, powerful legal analysis, and maturing your legal department across the full range of CLOC competencies.

ABOUT doeLEGAL

doeLEGAL is built on a promise to provide “Smart data, intelligently delivered.” Our software and services help corporate legal departments and law firms efficiently manage operations with up-to-date, insightful data that helps teams make confident decisions. We facilitate anytime, anywhere control over cases and costs with advanced management tools and elevated support to generate insights and drive successful outcomes.

**For more information, contact
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email info@doelegal.com.**

¹ <https://www.gartner.com/smarterwithgartner/3-steps-to-turn-legal-data-into-insights/>

² <https://cloc.org/>

³ Security and Compliance 2018: Five Factors that Will Affect Your Firm

⁴ <https://www.gartner.com/smarterwithgartner/3-steps-to-turn-legal-data-into-insights/>