



# Built on a Foundation of Collaboration

***Promoting  
Shared  
Responsibility,  
Workload,  
and Success***



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*It is the long history of humankind: those who learned to collaborate and improvise most effectively have prevailed. — Charles Darwin*

Regardless of technical solutions, business type, or department size, the most successful legal departments share a common trait: They operate collaboratively as a team, both internally and with external counsel. Effective teamwork begins with communication and the exchange of information, fostering collaboration.

In the legal industry, collaboration can be challenging due to the volume of information being processed and the complexity of managing various components. Your Legal Management Software (LMS) system should be the hub of a collaborative legal department. However, while most LMS systems offer some collaborative features, not all systems were designed to be collaboration platforms. To be sure your chosen LMS system will give your department the collaborative environment you need, it's important to understand what challenges the software will have to surmount and how it should best be built to help.

## COMMUNICATE

Effective collaboration hinges on communication, and technology should facilitate streamlined communication processes.

## CONDENSE

Remove unnecessary data silos so that all matter-related information is available to everyone, at any time.

## IMPLEMENT

Legal management software needs to be designed from the bottom-up to promote collaboration.

## COLLABORATE

Information is distributed automatically through shared files, calendars, notes and rolodexes.



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## The Challenge of Legal Collaboration

Collaboration between legal departments and their outside counsel is made more difficult because of multiple individual data silos (information kept in one person's files that is unavailable for other team members to see or use). Originally, these silos were unavoidable as the paperwork for a matter was created in one place, shipped to another, and copied for all relevant parties. The file on an attorney's desk, with their notes on it, was not easily available for anyone else to see or edit. Even though the Internet and other technologies, like email, have made it easier to distribute documents, they did not make it easier to collaborate. Instead of a file living on an attorney's desk (that no one else could see), now it lived in their inbox (and still no one else could see it). Even the growth of internal networks wasn't a complete solution – your internal team may be able to share documents, but outside counsel still works in their own silo.

## A Single Silo Approach

Having multiple individual data silos hinders your team's ability to work together. The information in these silos isn't easily shared and critical updates aren't available to everyone who needs them. The right solution is a single, secure silo that everyone shares, ensuring that everyone has access to all the relevant matter information within a single platform.



Your LMS system should be the heart of your collaborative environment. But, it can only do so if it's been designed that way from the ground up. Specifically, a collaborative LMS system will have both an infrastructure that supports collaboration and some specific key features that will allow your team to work together smoothly.

## A Collaborative Environment

The infrastructure of an LMS is the foundation that the software is built on. If that foundation isn't built with collaboration in mind, the software built on it will be limited. There are two primary environment structures you'll see in use by LMS providers:

Behind the firewall on your internal network – This infrastructure supports internal collaboration. But, while collaboration with outside counsel is possible, it typically requires that you provide them with access to your internal network. The inherent security risks and additional ongoing network management will be the responsibility of your own IT team to manage.



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### COLLABORATION STARTS WITH COMMUNICATION

*In my almost 40 years in the industry, the most critical part of building a successful legal team is communication.*

*While there are many great minds in our industry, the true success stories come from a strong team that has collaborated and innovated using a foundation of clear and frequent communications.*

*Good communication isn't just keeping everyone updated. It is the shared thought process of a team... collaborating towards a focused single set of goals. Like any great relationship, it takes hard work and strong skills to make it successful. Good communication continually advances the process much closer to a 100% successful outcome. Communicate, Collaborate, Innovate.*

*Tom Russo*

**Hosted external environment** – A hosted solution supports both internal and external collaboration easily, allowing you to control access to your LMS independent of your network.

While both environments support collaboration in their own way, an external hosted environment makes interfacing with your outside counsel much easier and eliminates extra work for your IT department.

#### Collaborative Features

During the evaluation of most LMS systems, you are certain to hear and see the word “collaborative” quite often. Labelling a system as collaborative does not mean that it has all the features necessary to support collaboration across all aspects of a matter. Watch for these features when evaluating a collaborative LMS system:

**Document Storage** – The amount of documents accumulated during a matter can be overwhelming, not just to create, but to distribute, catalog, find and edit. Your LMS system should eliminate this problem by providing a single position where all participants in the matter can add, view and edit documents as needed.

**Matter Notes/Status Updates** – As a matter is worked by your team, events like a discussion with opposing counsel are important for all team members to know about. With an LMS system that has integrated note and status features, you avoid the confusion and miscommunication that can occur by distributing those updates via email (or not distributing them at all).







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**Event Calendaring** – A matter calendar is an ever-changing thing; depositions, hearings and meetings have their dates changed or their locations altered. Collaborative LMS systems offer a shared calendar that gives everyone involved in the matter a single place to see the matter schedule at a glance.

**Task Calendaring** – In addition to the events that require attendance, all matters have their share of due-dates and deadlines. By offering a task calendar in addition to an event calendar, collaborative LMS systems keep everyone working under the same expectations.

**Matter-Specific Rolodexing** – Time spent finding the contact information for someone related to a matter is time not spent actually working on the matter itself. Select an LMS system with a matter-specific Rolodex to keep everyone up-to-date on who to contact and how to reach them.

## Collaborative Systems Are More than Software

Your LMS may be the most advanced collaborative platform ever designed, but if everyone isn't using it properly, your collaboration will suffer. A software partner that is focused on promoting collaboration will go beyond simply providing the tools you need. Look for a provider that provides support to all members of your team (both internal and external) without charging extra. What's more, the best LMS providers should provide support that goes beyond telling users what to click and when. Instead, they should innately understand how your processes are designed to work and should be able to coach your team on how to use the existing workflows to ensure that collaboration is as easy as possible.

## Conclusion

The terms "collaboration" and "collaborative" are used so often that they border on losing their impact (like "synergy" or "data-driven"). Of course, that doesn't mean that collaboration isn't important (it is a crucial part of a smooth-running legal department). Instead, you must know what is important when it comes to using your LMS to foster a collaborative environment, and find the system that meets your team's needs.