

**SKILLS 2023 Session Transcriptions**

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## STATE OF THE MARKET | INNOVATION BENCHMARKING



### STATE OF THE MARKET

#### Innovation Benchmarking

*Firms expend valuable resources tracking the market for innovation progress, which is problematic and time-consuming. Legaltech Hub has developed a framework for innovation benchmarking to track the data on innovation in the market so that firms no longer need to.*



**NIKKI SHAVER**  
CEO & Co-Founder  
*Legaltech Hub*



**JEROEN PLINK**  
Co-Founder  
*Legaltech Hub*



**ANDREA ALLISTON**  
Partner, Knowledge & Innovation  
*Fasken*

March 9, 2023  
10:50 am ET

Watch live at  
[www.skills.law](http://www.skills.law)

Nikki Shaver 0:02

Hello, everyone. We're here today to talk about innovation benchmarking and an exciting project that Legaltech Hub undertook with Fasken.

Andrea Alliston 0:11

Thank you Nikki. Fasken is one of Canada's largest law firms with over 800 lawyers located across nine offices in Canada and internationally. We have a broad corporate advocacy and regulatory practice. I joined the firm in 2021, to lead our knowledge and practice innovation functions, and then took responsibility for our client facing innovation program in 2022. Fasken start started investing in innovation along with all the other law firms in North America. And we have a number of really interesting client facing programs, offerings and initiatives underway. Having been at it for a number of years, we thought it was time to take stock of what we've accomplished, and what we wanted to be focused on in the future. We were also experiencing something that I'm sure is familiar to many of you. The ideas and demands for new solutions and products was starting to outstrip the internal resources we had to build and maintain them. So prioritizing was becoming increasingly important. As part of our evaluation, we wanted to understand how we compared to other firms in the market. Public Information, while valuable was not going to cut it. What we really wanted was an expert opinion that would help us and firm leadership form of view about how we should move forward, I reached out to Nicki and Jeroen because I thought he would have a really good pulse on what everyone is doing, given their dealings with both vendors and law firms.

Jeroen Plink 1:43

In our opinion, tracking the market and comparing where one firm stands in comparison to the market is important for three reasons. Firstly, identifying gaps, in one's innovation and legal tech program. How are we doing on adoption of a certain tool versus our peers? Secondly, justifying existing investments and proposals for new projects. For example, investment in an automated contract review tool is in line with what the market is doing. 90% of our peers who use these to be more efficient, we run the risk of being behind. Thirdly, client's communication. You want to be able to say we're on top of the latest technology, in line and in many cases ahead of the markets. The projects with Fasken was great. We ran an RFP, a series of interviews, to figure out where the firm stands on the number of topics, from product development to custom software development. We then compare it our findings against our benchmark review of both the Canadian and global competitors. The deliverable in short was: Here's what you told us you were doing. Here's how that stacks up against local and global peers.

Nikki Shaver 2:55

As you said, tracking the market for innovation is something we've been thinking about anyway, because our research for Legaltech Hub, conversations in the market, and law firm backgrounds position as well for this. When Andrea reached out, we agreed it would be useful to develop a framework for measuring law firm innovation. We looked at all the ways firms approach innovation, and all the facets of innovation programs and grouped those facets thematically to develop a robust framework that distinguishes between internal indicators for initiatives inside of firm and external indicators for client facing initiatives. As you can see on screen, our framework defines 10 indicators for each category. We conducted significant market research to find the public data available and determined an average innovation score for each indicator. We enrich the objective data with our anonymized personal insights. We issued a detailed RFI and held meetings with the Fasken's team, allowing us to do a deep dive on the Fasken portfolio. And we're then able to benchmark the firm against both global and regional scores in relation to each innovation indicator and provide targeted recommendations for improvement.


Andrea Alliston 4:08

The process Nikki and yarn suggested was really easy from our perspective, we did have to complete that fairly detailed RFI, but it was all about us and information we knew about ourselves, and then have those meetings with the team members to gather additional information. We've really gotten more out of the report than I had anticipated. It provided valuable insights into ourselves and our market as we anticipated, but they also provided us with some recommendations on opportunities that were particular to us and that we have. And then they also provided some very blunt advice on things that we should really think about changing. The fact is that any work we've done in the past to gather information and benchmark ourselves has really paled in comparison to what we got from the report. It also enabled us to validate for leadership using an external voice that continued investment in innovation, and also how we were going to structure our priorities going forward. Law firms engage other professionals for benchmarking purposes on functions such as technology, HR, marketing, and I'm just really glad that we can now do the same with the Legaltech Hub on the innovation front, and it's something we can come back to and revisit in the future.

Jeroen Plink 5:25

Our analysis and benchmark framework, and we'll be updating it and continuing to track the market providing an annual objective reports will be innovation and legal tech in the global markets. Firms that want to obtain an individual benchmark reports can reach out to us.

## ZERO TO SIXTY | STARTING A LAW FIRM DATA TEAM



**skills.law**  
Strategic Knowledge & Innovation Legal Leaders Summit

### ZERO TO SIXTY

#### Starting a Law Firm Data Team

*A case study on how Frost Brown Todd started a new Data team- how they set their priorities, what change management was needed, what they accomplished, and their road ahead.*

**CINDY BARE**  
Chief Data & Innovation Officer  
Frost Brown Todd

**PAUL CASEY**  
Data Operations and Analytics Manager  
Frost Brown Todd

March 9, 2023  
11:00 am ET

Watch live at  
[www.skills.law](http://www.skills.law)

Cindy Bare 0:03

Hi, I'm Cindy Bare.

Paul Casey 0:05

Hi, I'm Paul Casey.

Cindy Bare 0:07

And we are here to tell you the story of Zero to 60. Starting a law firm data team. The story of our team starts with a chairman, who was convinced that data would be valuable to the firm's new strategic plan. We hired some outside consultants who worked with Paul to start some initial projects. And then about a year ago, I was added as the firm's first Chief Data and Innovation Officer. Paul and I got to work identifying our top three critical priorities. The first one was experience. In 53 days we implemented Foundation started gathering rich descriptions of our work and information about the firm's strength in litigation. The firm must have been quite hungry for this information. There have been almost 9,000 searches just within the last six months. And that doesn't include the data team. We have seven legal teams that are starting to

work with us on matter profiling, and Foundation has really become the first window to our data, it is a place to view and search all of our firm intelligence.

Paul Casey 1:23

We've implemented Snowflake as our data platform where we have centralized one and a half terabytes of firm data that we can now analyze, use for dash boarding and share with other firms systems. We've upgraded our data pipelines to efficiently integrate data from more API's and more data sources into our newly built firm data model. Using Snowflake, we've integrated almost 105,000 parties your recent merger in less than 40 days. Allowing our team to search and clear potential conflicts, and accept new business quickly, all without having to search multiple sources. We reviewed our matter types, and identified that 10% of revenue came from general matter types. We then reassigned almost 2,600 matters, representing \$67 million in revenue since 2015. However, that won't solve the problem. So to better find the work, we created a new matter type list reducing our current list of 287 to 125. We job matter types such as non-hospital health providers in general business, not classified elsewhere. But we couldn't stop there. Next, we tackled our industry list, we took our current flat list of 30 industries and created a hierarchy of 150 industries. You know Cindy, a lot can change in a year.

Cindy Bare 2:40

Absolutely, Paul, but it definitely takes some good change management. Now as a new team, it was really important for us to establish why the firm was had invested in data strategy and what we were hoping to accomplish, and what's in it for me. So we have worked to build a data culture that helps people understand these five goals, but also that each one of us has a role to play in the firm's data. It's not just the data team who's responsible. We have executed multiple marketing campaigns. And we've repeated these messages so large that we're starting to hear them echoed back to us. And that's how we know it's starting to sink in. And finally, we're really focused on adoption. We're checking metrics and making sure that we are on track with all of our new initiatives.

Paul Casey 3:32

We executed these projects while growing the team from one to nine and under year, starting with yours truly, then Cindy, we followed up by folding in our existing library and LPM teams. Then we started adding. First a data intern who has a Master's in Business Analytics in his in his second year of law school. Next, we establish our experience team. Adding two new team members and follow up most recently with a data analyst. But we aren't done yet. We still have one more role to add in 2023.

Cindy Bare 4:06

It's been really fun creating this team and working together. And I would say that we both been surprised though and have ripple effects throughout the rest of the firm. We knew that we were going to try to conquer data silos. But what we've also found is that in broken down silos of people and our administrative teams are collaborating more than ever before. We've seen the rise of several new roles, more formal project management support that started with the data team and has grown exponentially. Internal Communications team has doubled and new roles

have been added and operational departments that are very much related to data. All of those new positions came in handy when we created our new data governance team to support our recent merger. Now we're all collaborating on all of the changes that impact us all. As we look ahead to this coming year, we're excited because we have positioned our team to deliver greater value and greater insight than ever before. Our reports will be expanded to be visual and interactive. And we're really excited about starting some interesting projects with predictive analytics. Finally, we want to make sure that our projects can be client facing, and we will work hard to look for those opportunities. Paul, it's been a heck of a journey, and it's full speed ahead.

## MODERN DATA ARCHITECTURE



### MODERN DATA ARCHITECTURE

#### Surfacing Data for Operations and Analytics

*Sourcing, normalizing, and brokering the right data in the right way is now a priority for law firms. We will profile Simpson Thacher's new data hub, allowing the Firm to progress in data analytics, data management, and data governance.*



**ANDREW BAKER**  
Director, Data Analytics  
*Simpson Thacher*

March 9, 2023  
11:10 am ET

Watch live at  
[www.skills.law](http://www.skills.law)

Andrew Baker 0:01

Hi there, my name is Andrew Baker, Director of Data Analytics Simpson and Thatcher. My guess is this may be the last video in the skills catalog that you've watched. And I make that assumption on the fact that few things probably sound as dry and perhaps as geeky as data architecture. I promise it will just be micro-dosing, six minutes, and we're done. So bear with me, and hopefully, it's not too painful.

First, I think we can all acknowledge the fact that data analytics has a tremendous amount of potential in the legal market. But doing more than just spot projects requires us to rethink what we're doing organizationally within this space. In fact, we have to update our skills, underlying technology, processes our understanding of our data, there's a lot to do. And part of the challenge is that we're really not solving for a single thing. We're solving for thematically, two different things, operational use cases, analytics use cases. These are complementary, but they are different.

And when you think about some of the best work that's done in the analytic space, it's really at the intersection of multiple different data sources. And similarly, many of the applications that we bring on within a law firm now require data from all corners of the organization. So being able to fluidly mix and match becomes very important.

For us, going into this part of our challenges that we had a number of different ways that we broker data within the firm, different pipelines, if you will, that helped serve different purposes. And when you looked across applications and different types of reports, reconciliation was a challenge, sometimes trying to figure out what numbers were there and why, it could be a bit of a task. And then generally, you know, spread that broadly, management was challenging. So we need to do is collapse all this down, and ensure that we have the right operational stability and data quality, while also unlocking analytics capabilities going forward.

There are a few caveats before we dive in. First, what we have here is not perfect, we readily acknowledged that. Also, what we have here is not done, this continues to grow and expand, and we have a lot of plans for what's coming next. But we have clearly as at an endpoint at this stage. Also, this is not the only version of this of its kind. Other firms have done things in a similar zip code. We think what we put together as dramatically right, and hopefully helpful to others. So let's dive into the firm data environment.

So this all really starts with the fact that we have a lot of applications both consume and produce data, we need to be able to use that data in a variety of creative ways. We want to move that out of those applications into what we call the raw zone, which allows us to manipulate it without impacting the application itself. But it's not just the data that we have from our applications that we need to worry about. We also have external data. So we have a containerized environment that allows us the API to reach out and bring in specific data and other assets, and then move that into the raw zone for processing.

The next step is quite hard. We take all of that data, and then normalize consolidate it into a single schema that we call the operational data store. And really, at this point, everything is sorted. It's organized, and it's mastered, and made available as our single source of truth on a go forward basis.

On top of that, we have a data catalog. And this catalog provides definitions and rules of the road, if you will, for what you can or can't do with any particular data element. It's from this point that we're then able to serve data up into our applications and do so in consistent and thoughtful way. But in addition to that, we also then feed a data warehouse that takes that data, structures it differently to enable interactive reporting at scale. And then from that, we're also conducting other types of analysis and exploratory work that draws from data in the Data Warehouse and data that's in the in the operational data server.

Now, what is this resulted in? Well, first, we've been able to source data for applications in a much more effective way than we could in the past. Recently, we had a new application come on that we were able to source data for in just about a couple of weeks, where in the past would have taken much longer. Second, we'd be able to do more dash boarding and interactive reporting work than we had before and to do so in a much quicker pace. And then third, we've

been able to unlock some capabilities that we've wanted to go after for a while, in particular in the text processing space.

Now, approximately this is not done by a single person. This is really a byproduct of very close collaboration between our knowledge department and our IT department. And with that, I want to say definitely a thank you to Mike Koehler and Deborah Sarma for being fantastic partners along this journey.

So as far as Lessons Learned go first, as mentioned earlier, can take your hands off the wheel. This is something that does not end and it needs, you know, the right kind of staffing, support and oversight going forward. Secondly, many of the steps within this environment are simple in isolation, but there are so many that an aggregation of comes complex pretty quickly. So you really have to manage complexity right from the from the jump. And then third, the importance of the data catalog. We don't want to undersell, we think that's huge for our ability to govern and manage on a going forward basis in a way that provides the right reliability that we're looking for. And so with that, that's a general overview of the firm data environment at Simpson Thatcher. If you've made it this far. I give you very much a hearty thank you. Take care.

## TURNING DATA INTO INSIGHTS

**skills.law**  
Strategic Knowledge & Innovation Legal Leaders Summit

### TURNING DATA INTO INSIGHTS

#### Solving Goodwin's Growing Data Needs

*Goodwin's Foundation and FoundationNext projects are a journey of discipline, creativity, and teamwork to respond to the challenges of meeting client demands in the new data-driven economy.*



**PATRICIA JOHANSEN**  
Counsel & Director,  
Knowledge Management  
(Business Law)  
*Goodwin*



**ANNE STEMLAR**  
Managing Director,  
Knowledge  
Management  
*Goodwin*

**March 9, 2023**  
**11:20 am ET**

Watch live at  
[www.skills.law](http://www.skills.law)

Anne Stemlar 0:00

Hi everyone, it's Anne Stemlar here with Patty Johansen. We are honored today to share our lessons learn from our four year journey to develop Goodwin's next generation deep deal intelligence platform. Since 1998, Goodwin has systematically collected core deal points relating to the firm's transactional work, resulting in a massive data set. To leverage this data,



Goodwin built and launched an in house experience management system using Interaction's matters module, combined with custom SQL reporting.

Patty Johansen 0:33

Our problem. Despite its innovative origins, our once industry leading system was no longer scalable, and our users found the reporting interface, clunky and unintuitive. Most importantly, the system was not meeting the business needs of the firm. Our challenge was to find a solution that would best showcase our matters database and supercharged Goodwin's strategy to be a leader in data driven law.

Anne Stemlar 1:00

Our solution? Goodwin's deep deal platform transforms Goodwin's negotiated deal documents into actionable data through a systematized process that ultimately results in real time market intelligence and insights. By utilizing a traditional combination of people, process, and technology, Goodwin's deep deal platform combines three separate pieces of technology.

Patty Johansen 1:24

Foundation allows for significant scaling in terms of fielded data and provides advanced functionality and robust searching and reporting. From Foundation our survey data flows nightly into Goodwin's enterprise data warehouse, combining with the firm's financial, time, billing, and client matter information. Lastly, Tableau is used to develop and facilitate dynamic interactive visual representations of this data.

Anne Stemlar 1:53

The process and the people. Goodwin attorneys are required to complete a deal term survey within 10 days of closing their deal. Foundation surveys are configured for seven different transaction types comprising over 600 custom fields with conditional logic to allow for seamless entry of data. And yes, Goodwin believes their attorneys are the best source of quality deal term information, and their participation in the process serves as a means to institutionalize the firm's commitment to its data strategy.

Patty Johansen 2:27

Leveraging the data. The survey data is immediately searchable within Foundation. However, you're not leveraging your data if you're not visualizing it.

Anne Stemlar 2:37

Goodwin's deep deal data is actionable. Goodwin attorneys use the data insights from the platform in real time when advising and pitching clients. Armed with this information, they can now advise clients on what Goodwin is seeing in the market based on hard data, rather than based on anecdotes gleaned from their experience.

Patty Johansen 3:02

To keep the data at the forefront of everyone's minds, we regularly pushed insights from our deep deal platform internally. We also publish client facing insights externally to showcase Goodwin's experience and expertise.

Anne Stemlar 3:20

Our takeaways, this four year project included hundreds of decision points and 1,000s of small details. Our lessons learned are not revelations. Rather they reflect the basics when solving business problems of this type.

Patty Johansen 3:36

Lesson number one. A big data project can't be successful without the hard work of developing logical taxonomies, data harmonization, and other basics of data hygiene. If you haven't started with these tasks, start now.

Anne Stemlar 3:51

Lesson number two, we suggest bifurcating large projects into distinct phases with clear objectives and goals for each phase. For example, this project had three significant distinct phases with those phases overlapping.

Patty Johansen 4:06

Lesson number three, there will always be setbacks and distraction, be responsive and willing to be flexible. This platform was developed and built during an unprecedented stretch of time, where emerging technology and the lure of AI dominated headlines. Our response was to take a disciplined approach to regularly scanning the market for alternative approaches, and to continuously assess, reassess, and revalidate our technology choices and project assumptions.

Anne Stemlar 4:36

Lesson four, you might have a great idea and you build it. That doesn't mean they'll come. A heavy focus on change management is required. Integrate the new process into attorneys existing workflows. Encourage participation by offering billable credit, and publicly recognized top contributors, as well as planned for negative consequences for those not willing to comply. And have a continual awareness campaign to keep the data front of mind.

Patty Johansen 5:05

Lesson number five, the journey is never over. There will always be more to do. As technology evolves, Goodwin's data collection continues to grow, and we constantly look for creative ways and more advanced technologies to help us collect, leverage, and showcase Goodwin's data.

## THE DARK ARTS OF CHANGE MANAGEMENT



### THE DARK ARTS OF CHANGE MANAGEMENT

*How can you calculate the cost of failure? How can you use the frameworks and tools of change management to increase the prospects of success for your initiative? We have begun to explicitly price change management efforts into project commitments from the outset, and use that discipline to reduce the potential for acquiring shelf-ware.*



**NICK PRYOR**  
 Director of Knowledge Management & Innovation  
 Freeths

March 9, 2023  
 12:00 pm ET

Watch live at  
[www.skills.law](http://www.skills.law)

Nick Pryor 0:03

Hi there SKILLS. My name is Nick Pryor. At the time of preparing this presentation, I was the Global Director of Practice Innovation at BCLP. As by the time we meet for SKILLS, I'll start an exciting new role as the Director of Knowledge and Innovation at Freeths, one of the UK is leading law firms.

The topic I propose to present for the SKILLS communities on the Dark Arts of Change Management. All of us have got experience of shelf ware. So those are KM and practice innovation technologies or tools that never really lived up to what we believed was their full potential. In this session, I'll briefly outline some of the change management frameworks and techniques which I have found useful to increasing buy in and adoption, and how we tried to more thoroughly pressed them in when scoping and settling our commitments and the outset of a new initiative.

Just to reassure you, this is not going to be a rehash of Kotter's Eight Step Change Model. Kotter is about how you fundamentally remodel behaviors on an organizational level. But in law firms, you aren't probably going to be wanting to change the cultural practices on quite such a deep rooted identity level. Some of that may be going on to a degree but for the most part, the goals are slightly more pragmatic. You're trying to nudge certain behaviors and a particular way. Whether that's about adoption of new legal tech or driving engagement in your new km systems and processes or otherwise. It's about refinement and redirection rather than systemically remodeling.

So in this session, we're going to compare and contrast the different ways my teams are approached change management in relation to two different law tech products, Product Green,

and Product Blue. I've intentionally anonymized the product for two reasons. Firstly, because I hope that the points made in the session are a generalized relevance and value and not specific to any one practice group or product or geography, or anything that might otherwise be inferred if I discuss them by name. And secondly, because I wouldn't want to create any unintended inferences about the quality or efficacy of either of these products that will completely miss the point. I continue to be of the view that both products are broadly equivalent potential value to the business. The difference in outcomes is far more to do with how we approach our change management and adoption techniques rather than anything to do with the individual products merits.

But let's start with Product Green, which got off to a very robust start. We undertook an excellent and disciplined thorough procurement exercise supported by considered business case. And this was done with a very strong cross functional cohorts capturing all the critical perspectives and project risks. We even figured out what business problems would be solved by the technology, which is not always a given in legal tech. But not only that we had pressed in the activities that we felt would need to be done after deployment in order to drive adoption. We thought about evangelism, training, and sponsorship, everything like that.

And why are we doing all this? Because we know that this most inspiring line, "If you build it, they will come," from one of the best films of the 1980s is absolute rubbish. Change management is not only essential, it is far more demanding difficult to price than the project management work that goes into building or creating a new tool or technology in the first place. Our business case and strategy with Product Green understood that.

Then how do we get on? Well, during the early energy of focus on Product Green, we naturally achieved some compliance level change. These were specific projects where our sponsors or evangelists insisted that the teams try it out. And some really useful case studies emerged proving the fundamental value of the technology. But we didn't get further than forced adherence. We didn't start to achieve the sort of middle level of change management success, which where we achieved degrees of identification change. That's where as buy-in beyond the original compliance stage, individuals start to personally identify and initiate usage of their own volition.

But we never really managed the Product Green was to break into the long term enduring stage of change. There was no ultimate habituation in the way that we've seen for other products. In some ways, our early successes flattered to see because they indicated more successful and smooth change outcomes than was actually happening beneath the surface. Which in turn meant that we under appreciated the very high risk of regression. We did do an awful lot of work to try and counteract that issue. But ultimately, it felt like we were in a loop of constantly restarting the change effort.

So where are we falling short? Well, our business case had captured the change effort in aggregate. This is the pseudo mathematical change equation that was created by Richard Becker and Ruben T. Harris, to describe the essential conditions for successful change. It didn't feature explicitly in our business case or project plan, of course, but this was essentially the lens that we were applying to our analysis. It is good so far as it goes, it's designed to help you establish essentially, the juice is worth the squeeze. Yes, the product may improve your processes, but

you don't immediately flip from the before state to the after state. And the switching costs may not always be worth it. The delta between A and B you need to be big enough and the practicality manageable enough, that they offset the cost of a change. The product green the sums definitely did add up.

The trouble is that the change impact was not evenly distributed. Even if this equation was objectively true, and the  $A - B$  Delta is greater than  $x$  for the organization as a whole. It's kind of hard to win people over on the appeal to that objective greater good. There will always be some people who disagree with the math. They may not be remotely dissatisfied with the status quo and may disagree with your calculation around A. Some people may agree with that fact that there's a problem but don't endorse the fundamental desirability of your particular proposed solution, that's B. And some people may have particularly acute practical concerns about the transition process, and that's D. Plus, you can get some people who just disagree with your math overall and build a somehow  $x$  is less than A, B, D, in which case, we'd understand which part of the equation isn't adding up for them.

Now, none of this had profound or original insight into human behavior. We all know this stuff implicitly. But for us, on a practical level or change efforts in relation to Product Green, nevertheless thought about the overall opportunity in case for change. And essentially, we were appealing to the collective benefit. The true cost of change management exercises however, never priced in specific tactical activities needed to win over what I will appear call the A challenges, the B challenges, and the D challenges. In order to get us to a point where we had enough momentum to sustain the change.

Compliance level change can focus on the equation in aggregate, because skeptics are dragged into line anyway. But to actually normalize the change in behavior for everyone, you need to make it add up on an individual level.

And to now Product Blue. This legal tech product came to us in the way these always seem to do we had an enthusiastic partner who was willing to act as a sponsor. And we felt there was a clear opportunity here. So we began by formalizing the business case and articulating the functional requirements and looking at the market to make sure that we were pursuing the right product. And we then established the fundamental change effort as we had done before. But then we went much further, recognizing that we needed to think about individual change requirements as well.

And we did this by reference to what's known as the Change Manager's Principles of Stakeholder Engagement.

Principle 1: Managers should acknowledge and actively monitor the concerns of all legitimate stakeholders, and should take their interests appropriately into account in decision-making and operations.

Principle Managers should listen to and openly communicate with stakeholders about their respective concerns and contributions, and about the risks that they assume because of their involvement with the corporation.

Principle 3: Managers should adopt processes and modes of behavior that are sensitive to the concerns and capabilities of each stakeholder constituency.

Principle 4: Managers should recognize the interdependence of efforts and rewards among stakeholders, and should attempt to achieve a fair distribution of the benefits and burdens of corporate activity among them, taking into account their respective risks and vulnerabilities.

Principle 5: Managers should work cooperatively with other entities, both public and private, to insure that risks and harms arising from corporate activities are minimized and, where they cannot be avoided, appropriately compensated.

Principle 6: Managers should avoid altogether activities that might jeopardize inalienable human rights (e.g., the right to life) or give rise to risks which, if clearly understood, would be patently unacceptable to relevant stakeholders.

Principle 7: Managers should acknowledge the potential conflicts between (a) their own role as corporate stakeholders, and (b) their legal and moral responsibilities for the interests of all stakeholders, and should address such conflicts through open communication, appropriate reporting and incentive systems and, where necessary, third party review.

There are seven principles. I like all of them. I particularly like the first one, about how you can always forget about particular key stakeholders, but bear in mind that will never forget about you. But for the purposes of today's presentation, we're going to focus on three in particular highlighted in red, because I think these align particularly well to our A, B and D challenges.

Let's start with our A challenges. Again, these are the people who don't accept that the status quo is unsatisfactory. To these people, you really need them to feel the heat of the burning platform. And principle six applies here and emotional case will often be more effective than a purely rational one.

I have to adhere to the SKILLS book club, which is currently deep diving on how and why our emotional side overrides our rational side. But we don't have time to expand on elephants and riders and carving a path here. Suffice to say, we recognize this dynamic at play when rolling out Product Blue. A small number of fairly senior stakeholders were classic A challenges despite an object you strong business case. So to counteract this, we prepared vibrant anecdotes and emotive quotes from members of their team who were usually frustrated but the existing process.

There was a risk in doing it this way, the potential for sounding hyperbolic, or presenting the current work being done by the team in an unreasonably harsh light. And it was a huge amount of additional work largely unseen in order to validate a case a business case that frankly had already been approved. But it was important to get the A challengers to emotionally buy into the change imperative, and to see the change equation in the way that we'd assessed it in the aggregate, and it was essential to our ultimate goal.

Secondly, let's think about our B challenges. These are the people who are ambivalent or perhaps they acknowledged the unsustainability of the status quo, but don't necessarily buy into your choice of solution. For Product Blue, we had several individuals for whom this applied one example was an important stakeholder who was an elite recent lateral hire. Their previous firm had adopted a competitor to the product that we're onboarding, Product Blue. So they instinctively supported the case for change and introduction of legal tech, but took a different view on the desirable end state. The B challenges principle four particularly applies, some stakeholders are best engaged by others.

Now, as a central function within the firm, we knew that there were limits to our credibility and influence as change agents. This is a common challenge for km and innovation teams in general, we're trying to shape behaviors operate outside of service delivery. In relation to Product Blue, we certainly had considered the B challenges preferred alternative product as part of our procurement analysis. But we couldn't profess to have the deep practical experience with it that they did. So to compensate for this challenge, we had spent a huge amount of time back channeling and building support from the line managers and the change targets within the delivery stream. We needed their support. We also facilitated a blind AB testing exercise run by neutral members of the change target cohort in order to validate our original assessment.

And ultimately, we want the support that we required. In fact, overall, we took a far less visible role for Product Blue than we have for Product Green precisely for this reason, my natural instinct is to try and drive from the front and to be a vocal Champion of Change. And there's a place for that, but we recognize that in order for this change, to be truly accepted and sustained broadly, we had to empower the line manager to visibly own the process. This meant we were actually doing far more legwork to enable the success but in a much less visible way. But in reality, this was a much smarter way of influencing behaviors and overcoming resistance from people before into B challenger Category.

B challenges can be highly disruptive to change goals and require very close individualized attention. When you're preparing the overall change equation. Consider the possibility that you will incur have a large number of Bs and make sure that you budgeted your time accordingly.

Turning thirdly to those people who are skeptical about the practicality of a change. For them. Principle seven is particularly resonant. For Product Green, much of our change has been on training and evangelism and technical support, we kind of tried to stay as far out of the legal service delivery loop as possible. That's not fundamentally our jobs. But for Product Blue, we decided we should get much more willing to roll up our sleeves and get involved in live client projects.

It is a tricky balance because non chargeable support from an innovation team doing work on behalf of the legal team, it's not particularly sustainable, long term model either from a capacity or an economic perspective. But we needed to prove the point make the benefits real and help smooth the transition. This is particularly useful in contexts in which there was a compelling use case under time pressure.


Advocacy is pointless in that sort of situation. It is far better to demonstrate and support, and let the results do the hard work for you. As with the previous principle, this is often much less

visible work since you want your change job target to reap the benefits of your efforts, and will want to downplay your contribution to that end.

So in conclusion, Kevin Costner is a liar, building or deploying isn't enough, and the change effort needs to be intentionally priced into every new KM or practice Innovation Initiative. And change occurs by degrees and be wary of early wins that can give you false confidence that it's betting in.

Bear in mind that your business case will look at the case for change in aggregate and that's important. For your individual change targets may not price the calculation in the same way as the organization. Recognize that you'll need to tell your change management tactics accordingly. This is hugely time consuming work and often somewhat thankless, to be honest, but without it, your change efforts will stall. This approach served us incredibly well for Product Blue and added up to achieving a lasting change as the product truly embedded itself within the attorneys working practices. Thank you so much for your time.

## IMPROVE YOUR PERFORMANCE



**skills.law**  
Strategic Knowledge & Innovation Legal Leaders Summit


### IMPROVE YOUR PERFORMANCE

#### Give Your AI Tools a Makeover

*A data-backed crash course on how every law firm can make better use of their existing AI tools- including common machine-learning technologies to classify/extract data, tips on how to organize your data according to KM principles, and how to futureproof your work.*



**CATHERINE GOODMAN**  
Practice Innovation &  
KM Counsel  
*Paul Hastings*



**HORACE WU**  
Founder & CEO  
*Syntheia*

March 9, 2023  
12:15 pm ET

Watch live at  
[www.skills.law](http://www.skills.law)

Catherine Goodman 0:00

Hi, I'm Cathy Goodman. I'm a Practice Innovation and Knowledge Counsel at Paul Hastings.

Horace Wu 0:06

And I am Horace Wu, the CEO of Syntheia.



Catherine Goodman 0:08

Over the last decade, most law firms have adopted AI technologies to help improve the efficiency and throughput of legal work. We're looking to capture more concepts, those that come pre trained out of the box. So we need to use AI software that enables learning. And training AIs takes a lot of time, or it can take a lot of time. So it's important to decide how we, in our project teams in our law firms spend that time, the team at Syntheia conducted experiments to find out.

Horace Wu 0:41

So we ran a series of experiments to find out how firms should be spending their time based on a variety of parameters. What we did was we trained 448 separate models using different combinations of factorizes, classifiers, data size, and noise ratio. We measure the accuracy of every model for performance to classification. This is the first of four slides, I'll be showing you with the results on them. Count Vectorizer is the oldest technique you can be using, it counts the number of words that have been used and the specific words that are used. You will see in every one of these charts, it's measuring different classification techniques at different levels of training points and noise levels. What you should be expecting from the reading from the left to the right, is a graph that has four separate steps. Our plateaus, reflecting 10 data points, 25, 100, and 250 data points, and each of those plateaus should descend just slightly, because as you step through the four columns, each column increases the noise levels. So now if you look at this, you'll find that for the count Vectorizer, certain models work better than others. TFIDF gives you these results. Word to Veck gives you these results. And Transformers, the latest whiz bang models give you these results. Now, we don't have enough time to go through all of this in detail. So here's some takeaways. First, picking the right model matters a lot. Same dataset if you're using TFIDF with Stochastic gradient descent, this is the performance. Ssing XG boost your performance goes way, way up. Large Language Models has a really small impact on accuracy, which is really surprising, you're not getting that much improvement, provided you're using the right classifiers. The dataset size does improve accuracy, but it only does so if you have more than approximately 100 data points. The quality of data matters a lot when you have a small data set. Even a 5% noise ratio has a significant drop off in your performance. So make sure you are getting the best quality data for your training. Although that said, some models are really robust to noise. These models for example, even if there's a lot of noise, it doesn't seem to deteriorate performance very much. So what's the takeaway? From our experimentation, we want to find out how you can best spend your time? And the answer is, it depends on your software's configuration. There are so many variables that you need to first find out what you're working with to determine how you should spend your time. Now, all of this is very useful to inform you of what to do, but the important parts are actually people and process. So Cathy handing back to you.

Catherine Goodman 3:55

We've been working on AI contracts analysis projects for a few years now. So here are just a few practical project team tips. Firstly, understand the challenge and the documents. What's the use case, the use case workflow, map it out? What precisely do you want for your dataset? Why? What's the format of your documents? How are they similar? Different? What is the

language and the drafting? Like, use your lawyer SMEs (Subject Matter Experts). What do you expect to get from the AI? What do you need? How will you deal with unexpected results because you will get some in the different stages of a project? Be flexible and be prepared to rethink your approach. Sometimes you even need to rethink what your output should be, and or what it should look like. Secondly, understand the capability of your software. All the complicated stuff that Horace just said, use your tech experts. Third, use a playbook to ensure a cohesive approach from your project team. A playbook, so a set of instructions will really put everyone on the same page. If you're training an AI have clause interpretation discussion Send your project group. This is why you need the techies and the lawyer SMEs. Four, build trust to motivate your lawyers to engage. And by engaged I mean, give their time for Discovery sessions or the use case to hand over documents, to help you finesse the solution. Hold workshops, explain how the tool works, show the metrics with lawyers, we like evidence. And the final tip here, although it's not the last, but we've just got not very much time. So save the data in a safe place for future reuse it. You know, it sounds obvious, but I treat our tech projects like our matters. So save the data set contracts in in your DMS, save the related documents, so any playbook, team meeting notes, FAQs, research, outputs, and spreadsheets save all in the same place. Often the output will be something that grows over time as you look to enhance underlying models as your datasets grow. And if it's a long term project, so you need everything easily accessible in the same place.

## CUSTOM KM PLATFORMS- INSIDE MCKINSEY'S LEGAL PLAYBOOK



### CUSTOM KM PLATFORMS

#### Inside McKinsey's Legal Knowledge

*Easily accessing vital knowledge and information, all in the same place within a global legal department, is possible with the right KM platform. This session will cover the behind-the-scenes efforts to develop, implement, and maintain McKinsey Legal's comprehensive knowledge management platform, the "Legal Playbook."*



**MICHAEL KORN**  
Manager of Legal Knowledge  
*McKinsey Legal*

**March 9, 2023**  
**12:25 pm ET**

Watch live at  
[www.skills.law](http://www.skills.law)

Michael Korn 0:01

Hi, my name is Michael Korn, the Manager of Legal Knowledge here at McKinsey and Company. And this is my SKILLS 2023 presentation. Just a quick intro. Again, my name is Michael. I am a former practicing attorney. I was litigator in New York City for about eight

years, and then moved on to kind of the business and operational side of law at Bloomberg at some larger law firms and other organizations. And so I just have that approach the approach that I take in developing this legal playbook. And also how I work day to day with attorneys is thinking about it from their perspective, put myself in the attorney shoes, and try to work from there to try to create the best solutions.

So the problem we were trying to solve with the legal playbook is how do we consolidate knowledge across a global department and provide central access and also allow the attorneys to know who are their expert colleagues in different subject areas?

The solution we came up with was the legal playbook. It's a singular platform with an intuitive user friendly navigation. It's audited on a biannual basis. It was created with a collaborative process among a number of stakeholders across the department. And it specifically cites the author and contributor of all the different content that's displayed there.

Some of the key takeaways are that it's cut down on search time. It's created a great process for developing pieces and phases. It's not done all at once. But it's an iterative process. The leadership at McKinsey legal have empowered me to really manage it and work with across the department with a number of the key stakeholders. And it's really held people in department accountable. If they use something outside of the legal playbook that isn't on the legal playbook. They're accountable for that.

Some of the key design features that I'm going to show you in a minute, is that it's the starting point for your legal research. It has an outward focus, how would it help somebody who isn't an expert in a particular subject. The layout expands, and you don't lose your starting point on if you're looking for things. It has an expand has an expansive layout to allow you to keep where you are and not lose where you started from. And all of the content is curated.

So let's go right into looking at the legal playbook. So here is the legal playbook, here is the main page. It has a search bar at the top, I'll get to that in a minute. But there are some key blocks that kind of organizes everything. And every one of these lines that you see here have different subject areas. Those are clickable and expandable. So I'm going to do that in just a minute here as an example.

So let's say you're going in here and you want to learn something about SKILLS. So you go here to key legal resources, click on SKILLS, and that menu is going to expand. And now you have everything in SKILLS. And you're going to click here on these subsections. And you would see the different materials within the skill subsections.

And now here are the different documents that would be in these subsections. As you see, as I scroll over it, hover over it, you're going to see a little tooltip that gives you a description of what these documents may be. Now, you were came in to look for material on SKILLS, but you may also your research may take you in a different direction, you may want to see something else. So as I have that open, I can also look perhaps in intellectual property. So I click on that. And now, I have what I originally opened up here. But I also have this other menu, where I can look in and see what's available in intellectual property. Again, a key design feature is that I

haven't lost my place. I'm still where I started. And until I'm really ready to click into something, everything's out here laid out in front of me.

What I'd like to do now in the limited time we have, I would just like to show you an actual document that we have here. There's three different types that I'm hopefully going to get to. First I clicked on this one document where you can create embedded text. So this document has text that's actually here that you can see you can create a brand new document that actually lives on the legal playbook. And as you can see here, I'm the point of contact. Here's the team, the Legal Operations team that's associated with it. And here's some key metadata on the side.

If I go back and I click on this next document, you can see that there are a PDF can be embedded in here. So here's an example of a PDF as part of the document, again, with the same metadata. And then third, up can create a document with a web link attached to it. So I have that web link. And here, it brings me to the SKILLS law site, so I can get to that really easily from this document.

The last thing is, we can run a search for SKILLS. I click on that and it gives me the various search, display and options. And I can explore that.


## [TRAINING FOR DIFFERENT PREFERENCES](#)




# TRAINING FOR DIFFERENT PREFERENCES

## DLA Piper Customizes User Experience


*Attorneys have different preferences for how content is presented and a range of time limitations. Using different training approaches to showcase our KM tools and resources allows us to engage with, and appeal to, more attorneys.*



**ELISABETH CAPPUYNS**  
Director of KM  
*DLA Piper*



**SEA GILBERT**  
KM Counsel  
*DLA Piper*



**DHARMA FREDERICK**  
KM Counsel  
*DLA Piper*



**ALEX KREONIDIS**  
KM Counsel  
*DLA Piper*

**March 9, 2023**  
**12:35 pm ET**

Watch live at  
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Elisabeth Cappuyns 0:04

Hello, everyone. I'm Elisabeth Cappuyns. And we're excited to tell you about our differentiated training approach for showcasing our KM tools and resources. The problem is well known, attorneys need different training formats for various purposes that fit within their schedules. Sometimes they want a quick overview, and sometimes they need a hands on workshop to show them how to tools fit into their practice. And as a cherry on top, it's nice to be able to offer

prizes and CLE credit. So as a solution, we offer a range of tailored training options, including BYO brief sessions, speed dating overviews, lifecycle of a deal demos, gamification with prizes, and deep dives, to accommodate different needs and to engage our attorneys. One way we confirm the usefulness of this approach is with the results of a short "Would You Rather" survey we did last summer, where we asked her attorneys about their preferences on topics ranging from trainings to KM resources. For the training questions, we asked them how they wanted to learn about KM topics, how they prefer to register for the trainings, who they want the communications to come from, and how often to be reminded of those trainings. And not really surprisingly, in almost all the cases, the results were split, usually pretty evenly between the various options. So with that background, our KM Counsel will each give more details, but the tailored training types that we have used so far. Over to you Dharma.

Dharma Frederick 1:28

In 2022, we experienced great success and engaging our attorneys with two initiatives geared toward our disputes practice areas. The gamification of our CaseText training program, and our BYO Briefs workshops focused on underutilized drafting tools. The knowledge management team partnered with CaseText to develop a game to increase our firm's use of its legal research and online drafting tools. We offered weekly prizes and a grand prize on completion of self-paced guided exercises, featuring key tool functionality, including a two week focus on Compose, which offers motion specific arguments with relevant legal support. During the game, our firm's use specifically of Compose rose by 478% and for CaseText more generally, it rose by 32% and continue to trend upward during the year after the game. Our increased use of AI drafting tools can also be attributed to our BYO Briefs workshops, which showed how to integrate AI and other legal research writing technology into the drafting process. We offered group sessions with use cases and guided exercises that attorneys could follow from their desks, including for CLE credit. These group sessions were very often followed by one on one extensive substantive collaborations with attorneys as we explored which of these tools generated the most useful reports for their particular situation. By embedding our training into the attorney's workflows, these offerings allowed us to show how our tools can impact real work product better to impact long term adoption. Over to you Alex.

Alex Kreonidis 3:05

We implemented lifecycle of a deal trainings to show how km resources could help attorneys throughout the deals they work on. We also rolled out deep dives on hot topics like the Inflation Reduction Act and on internal and external km tools like Intelligize. And these types of trainings lend themselves to CLE accreditation, which we did, and it appeared to boost participation. One example of a lifecycle we presented was an M&A going private transaction. The training took you through staffing the team using an internal experience database. Creating a working group list using Litera Transact or another deal management tool. Understanding and structuring the deal using internal and external resources. Creating a signing or closing checklist using a deal management tool again. Drafting, negotiating and finalizing the agreements using our forms library. Contract Express and proofing tools as well as Lexis Search Advantage to find documents and clauses in our DMS. Then complying with SEC requirements using Intelligize and finally closing the deal. Using a deal management tool again, can send out and collect signatures and create cleansing books. We also rolled out deep dives into hot topics like the Inflation Reduction Act, showing how to access the Act as well as guidance materials on

various platforms. We also did deep dives on internal and external tools like Lexis Search Advantage and Intelligize. Now over to you Sea.

Sea Gilbert 4:35

Working with our real estate group, I get to put our tailor training a purchase into action with a targeted group of legal professionals. For instance, while we found that office hour style trainees work well for our real estate paralegals and assistants, it wasn't getting the engagement that we wanted among our attorneys. This was confirmed at a conference last year when an attorney challenged me to do trainings in 10 minutes or less. From that challenge the idea of Speed Dating for Knowledge Management was born. One or two times per month we do a 10 minute or less demo of our knowledge management tools geared for real estate. We've seen increased attendance and engagement in the sessions and an increase in requests for deeper dive demos and trainings such as for our purchase and sale survey. And for Litera Transact. All of our KM Ferrari speed dating demos and deeper dive training sessions are recorded and made available in multiple locations, including our knowledge management platform, and on the practice group's team site. We want to be sure that for those who are not able to attend live, they still have the opportunity to learn about our tools. Everyone learns differently, and that goes for attorneys and legal professionals too. We hope these examples of our tailored and incentivize training approaches sparked some ideas for how to engage folks that your firms and all that KM has to offer.

## [MATTER METRICS AND GO! TEAM DATA LITERACY](#)

**skills.law**  
Strategic Knowledge & Innovation Legal Leaders Summit

## MATTER METRICS

### And GO! Team Data Literacy

*Our project provides key information about Goodwin's transactions, cases, matters, clients, and industries to the GO! Team (Goodwin administrative team), in order to improve their data literacy, knowledge of the legal practice, and their understanding of the business of law.*

**DAVID HOBBIÉ**  
Director, Knowledge Management (Litigation)  
Goodwin

**SARA ELEVONS**  
Manager, Knowledge Management Systems & Applications  
Goodwin

March 9, 2023  
12:45 pm ET

Watch live at  
[www.skills.law](http://www.skills.law)

David Hobbie 0:00

Good afternoon, everyone. I'm David Hobbie, Director of Knowledge management for litigation here at Goodwin.

Sara Elevons 0:04

And I'm Sara elevons, manager for KM Systems and Applications.

David Hobbie 0:09

Today we'd like to talk about matter of metrics and go to data literacy. The Go! Team is a critical part of Goodwin. The GO! stands for Global Operations and represents our allied professionals who support our clients with their business of law Legal Operations needs.

Sara Elevons 0:24

In addition to supporting the internal practice of law, they install and assist law departments with IT, Diversity, Knowledge Management, Pro Bono, Legal Operations, and other law department issues. So it's essential that they understand the legal business.

David Hobbie 0:40

And that's why in December 2021 during an internal presentation on our Deep Deal Dashboards, our Chief Operating Officer asked the question, is there something like this for the GO! Team?

Sara Elevons 0:51

Our KM Team had already developed visualizations for litigation, transactional matters, client and industry data and trends. So we spun up a brand new dashboard for the GO! Team called Business EQ Matter Metrics dashboard or the Metrics Dashboard.

David Hobbie 1:07

Metrics Dashboard provides a friendly branded overview of five areas, including business law metrics, litigation metrics, new matters, client metrics, and industry metrics. Each section provides a small taste of the data while also leveraging and tying into existing dashboards and reports.

Sara Elevons 1:25

The metric dashboard was built in Tableau on top of our enterprise data warehouse with information flowing from Foundation. One example we can show you is the public M&A deals closed dashboard from September 2021 to August 2022, which shows the deals of this type closed portal.

David Hobbie 1:44

Litigation Dashboard shows metrics around pop forums, types of litigation, legal services, case, dispositions and industry served by litigation. The matter opening dashboard shows trends in matter opening per week with detailed analysis available and a breakdown of the trends depending on the average value of the legal work involved. And in addition, there's detail available with the department, office or business unit levels.

Sara Elevons 2:11

The client metric shows clients opened by quarter with breakdowns by business unit, along with trends and work for top clients. And the industry metric shows the top client industry served for the last few years a put a bubble graph showing compound annual growth in specific industries over the last four fiscal years.

David Hobbie 2:32

So what were the metrics for the metrics dashboard? It was launched with accompanying online trading with 485. Go! Team participants. It is received more than 2,000 views by 254 unique users with the greatest interest shown in the underlying deal dashboard and the new matters dashboard.

Sara Elevons 2:51

Internal feedback has been uniformly positive with GO! Team people appreciate the improvement and transparency of our key data, as well as the links into more detailed resources.

David Hobbie 3:02

We've learned that teasing some aspects of your key operational metrics is a useful way to engage people inside the firm with Goodwin's data and knowledge management efforts. And finally, we would like to thank ChatGPT for helping us write the script for this presentation.

## [A NEW PARADIGM IN STRATEGIC PLANNING](#)



**skills.law**  
Strategic Knowledge & Innovation Legal Leaders Summit

## A NEW PARADIGM IN STRATEGIC PLANNING

### Practice Strategy as Firm Strategy

*A new approach where strategic practice group plans drive the firm's overall strategy. Focusing on market demand, competitor analysis, alternative service delivery, talent capacity, and a strategic mindset, knowledge and innovation professionals can drive this effort and establish a new paradigm for strategic planning.*



**BOBBI BASILE**  
Managing Director, Advisory  
HBR Consulting

March 9, 2023  
1:45 pm ET

Watch live at  
[www.skills.law](http://www.skills.law)

Bobbi Basile 0:01

A New Paradigm and law firms strategic planning. Industry analysts believe that we've entered into a new cycle in the evolution of the legal services industry, one that it will likely be characterized by challenges to growth. Typical law firm growth strategy involves consolidation, lateral acquisition, and increasing rates. Those tactics pose challenges in 2023 and beyond. We posit that modern era law firm strategy requires a new paradigm focused on enhancing capabilities that drive top line growth by empowering legal professionals to provide services in ways that are strategic and differentiating in the eyes of their clients, while also meeting



financial contribution expectations the bottom line of their firm through optimizing the way those services are delivered.

As a backdrop, law firms have achieved extraordinary financial results in 2020 through 2022, buoyed by circumstances attributable to unique and historical time and place. Unprecedented transaction and deal volumes, material reduction and overhead expenses due to COVID. Speaking of COVID the urgency of stabilizing delivery and a fully remote workplace overnight, commanded the attention of leaders and equipped the focus on long term strategic planning to sustain the positive finance trajectory of the past couple of years.

In the latter part of 2022 and continuing into this year, multiple challenges have emerged to threaten law firm profitability. Falling demand, especially in certain practices with a lull, and an uptick in other practices that are typically counter cyclical. Higher than normal expenses in large part due to the talent war during the pandemic. Reduce productivity of timekeepers. Changing client service delivery preferences. Resistance to significant rate increases from clients.

And these challenges have already begun to manifest themselves in fourth quarter metrics which revealed that Profits per Equity partner, PPEP, also known as law firm shareholder value, is down for the first time since 2009.

I'm going to share with you some empirical data gathered from HBR a long standing law department survey from over 160 companies that was gathered in the back half of 2022. With a view towards 2023.

There's some good news to share. 85% of the companies participating indicate that they anticipate increases and the demand for legal services in 2023. The vast majority, 71%, anticipate an increase in internal spend. And it's noteworthy that that percentage is up from only 55%. Last year.

Over half of the responding companies anticipate increasing internal headcount, which indicates that they're planning to meet at least some of the increase in legal demand by expanding internal law department teams.

As it relates to rates 74% indicated that they either have or plan to implement a structured and formalized rate review process. With 44%, indicating that they plan to put limitations on the types of rate increases that they will accept from their outside counsel.

79% of corporate law departments indicated that corporate mandates for cost reduction are the top challenge facing their law department heading into 2023. And given that the majority of the end for law departments is on outside counsel that put outside counsel cost control measures squarely in the focus of corporate law departments.

As you can see, the focus is on market set to use of budgeting and planning, tougher enforcement of outside counsel billing guidelines and the use of data and analytics to inform business decisions

As we look at client delivery preferences, and changes year over year, it's noteworthy that the criteria for selecting outside counsel in what has been elevating in importance year over year is transforming how the work is delivered, and the perceived value of what's being delivered to clients. This is showing up in the uptick in the importance and the creative solutions to the delivery and legal services, as well as private management capabilities and value added offering. And while the expertise of a particular lawyer's knowledge of the client's organization, and the firm's reputation in the market have always been the top considerations for selecting criteria. It's interesting to note that year over year, those have been declining in the percentage reflecting very important year over year.

So what's emerging is a clearer picture that depicts the need for law firm leaders to unlock a different mindset that focused on enhancing those capabilities that demonstrate a commitment to improving how the work is delivered. The value perceived for that work.

Establishing a law firm strategy for a business entity that is, in essence, a federation of separate practices and more separate businesses is challenging at best. And at the core of every law firm is growth.

The contributors for strategy and growth, as I said a few moments ago are consolidation, recruiting laterals and increasing rating and those are all challenged in this present market. The firm's strategy has typically been devised through a top down approach with input from practices and formed by market drivers and then rolled out to the practices to align with that firm's strategy.

We suggest that the modern era law firm strategy requires leaders to identify and invest in creating strategic differentiation if they are going to achieve growth. And that needs to happen at the practice group level. To do this, they need to unlock a different mindset and reimagine the future by separating themselves through greater specialization in each of the areas that they practice that are aligned with emerging and expanding market needs.

To do this and necessitate approaching the firm's strategy from a new angle. One that begins with the practices to create strategic differentiation that enables them to capture greater client and market share and informed, of course, by market needs, and growth in certain areas. And then aggregating the needs of the practices, market demand, competitor analysis, optimizing service delivery, and talent needs in a way to optimize the productivity across the practices and to inform the firm strategy of how the firm can support the practice group strategy to differentiate and capture the market share.

You may be thinking what does this have to do with me and my team as knowledge and innovation professional, I'm getting to that. Law firms have historically organized themselves around the front office, the practice of law, attorneys and practice groups, and back office, which is the business of law and budget services professionals. The back office function processes include things like HR, data center, IT environment, Word Processing Admin, Library, Finance, and Help Desk. Those back office functions span across firm operations to provide the core support services that cut across the firm.

Progressive firms are partnering with service providers to deliver some of these functions at scale with greater efficiency, to analyze and lower costs, remove distractions for internal law firm personnel and leaders, and to enable investment elsewhere at the firm.

The front office, practice group, require greater specialization and differentiation and to demonstrate what is unique about their practices and their expertise that they offer to clients. We suggest that law firm leaders evolve their thinking around the emergence of what we're calling a middle office, which in essence is enabling enterprise capabilities that make a firm unique and differentiated in the eyes of their client, and enable the attorneys to deliver services in ways that enhance perceived value to the client.

This will enable the firm to enhance their strategic focus and investment on those front office and front office enabling capabilities. The middle office is the domain of knowledge and innovation professional. Enhancing significant focus and investment in the middle office enabled that front office to truly successfully differentiate their practice in the eyes of their client and to attract new talent.

The next stage in the evolution of legal service industry will require law firms to reinvent themselves for the future to successfully compete in a new legal services environment. And necessitates focusing those valuable firm resources on enhancing capabilities that directly support and advance the practice of law and enable the front office to capture a greater market share. We suggest a new paradigm for law firm strategy where knowledge and innovation professionals are core to creating those distinctive client value and enabling capabilities through a new paradigm for strategic planning. Thank you.

## [AI IN PRACTICE MANAGEMENT](#)

# AI IN PRACTICE MANAGEMENT



Strategic Knowledge & Innovation Legal Leaders Summit

## Machine Learning at Ballard Spahr

The complexity of Ballard's profitability reporting made it the perfect use case for AI in practice management. Machine learning can be used in many areas and we will share the pros and cons of doing it yourself vs. working with vendors.



MELISSA PRINCE

Chief Client Value and Innovation Officer

Ballard Spahr



LISA MAYO

Director of Data and Analytics

Ballard Spahr



JOE HARRIS

Senior Strategic Pricing Manager

Ballard Spahr



SEAN MONAHAN

Director of Legal Transformation and Innovation

HBR Consulting

March 9, 2023

2:00 pm ET

Watch live at

[www.skills.law](http://www.skills.law)

Joe Harris 0:00

Hi, everybody. This is AI in practice management, machine learning at Ballard Spahr. I'm Joe Harris, and I'm going to talk about our first project here.

So the problem we were trying to solve on the CDI team was in use of data analytics or profitability model. Our project was to redesign the first profitability model. We maintained our old model in house. Partners and our lawyers complained that the data was stale as it was reported on a three month lag, and it was hard to understand. They needed a timelier timeframe, the reporting solution that demystified the accounting speak, and made it easier to understand. Our solution. So we partnering with our CFO, Iridium, and HBR. We built a model that updates on a daily basis, and reports one number and took the focus away from PPP and boiled it down to just the profitability score, you can see in the middle of your screen there. What this does is convert with the PPP into an index score, which was like a FICO or credit score, which is much easier for partners to get takeaways and understand. The scorecard analyzes reports on specific clients that should be targeted for growth opportunities, rate revaluation and alternative staffing models. It calls out any unplanned losses, and any opportunities to focus on rate negotiations and staffing. It highlight specific associates and lawyers who are producing below or at profit margin. It has made it easier for barbers to interpret the results and take immediate action steps. Melissa, if you want to talk about some of our key takeaways from this project.

Melissa Prince 1:45

The complexity of our profitability model made this a perfect use case for us at Ballard to foray into AI. The problem was that we worked with a vendor where it made it really difficult when there were changes that needed to take place. And it was also really costly. So ultimately, the vendor ended up training us on basically how to fish and we now can run the model on our own, which has been really, really helpful. And the big, big win for us at Ballard has been that we've seen a 20% increase in profitability over the last couple of years. And it's largely attributable to tools like this that help us to focus on business discipline. And so we just see this as a really good thing going forward.

Lisa Mayo 2:30

We also needed a way to use prior work product, financial data and more accurate matter categorizations in order to price new matters and alternative fee arrangements appropriately to drive firm revenue and profitability. During our file opening process, lawyers often pick incorrect areas of law designations under the false assumption that they're giving their department credit. Similarly, matter names did not always accurately reflect the engagement. We needed a modern and sustainable solution that was not dependent on lawyer input, and instead use pre synthesized data that was timely, relevant, accurate and complete, in order to focus on advanced analytics such as predictive and prescriptive analysis that helped firm management makes strategic decisions.

Sean Monahan 3:22

So based on the success of using AI and ML to develop the profitability scorecard, Ballard contacted HBR to use the same tools in order to develop an initial matter classification

taxonomy based on historical matter data, such as meta description and existing categorizations, as well as third party taxonomy such as those from SALI Alliance in which Ballard is a member. As part of this we also created a list of key words and identification strategy based on past timecard narratives. Once the classifications schema was in place, we applied the taxonomy to a historic and historical data sample in order to train that AI model and later trained it on the first set of matters. The result of this is a perpetual AI model and categorization process that auto classifies new matters, continuously checks timecard narratives and tag the appropriate keywords according to the taxonomy structure. We also built the results of the process in the enterprise data warehouse and it can be exposed in Power BI, where stakeholders can search for like matters and have confidence that the results sets are based on a really accurate taxonomy.

Lisa Mayo 4:39

Key takeaways are that you will need to retrain your model occasionally. That is just the nature of artificial intelligence and machine learning. You'll also need to build in a recurring audit process to ensure that your initial assumptions and taxonomy categorizations are still working as you expected them. You might get some pushback also, from time to time from lawyers who feel the matter should have been classified in a different way. Try to just strike a balance in your classification strategy. So it's not too limited but also not too overly broad. And finally, if you don't have a data scientist on staff, partner with an experienced vendor, such as HBR, similar to what we did in building out this solution.

## [CULTURE EATS STRATEGY FOR BREAKFAST](#)

Presented by William Dougherty, Christy Farrer, and Joshua Fireman

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Strategic Knowledge & Innovation Legal Leaders Summit

## CULTURE EATS STRATEGY FOR BREAKFAST

### Lessons Learned at CMS

*Learn from CMS, one of the earliest adopters of work allocation technology, how they worked with Capacity to enhance firm culture by leveraging strategic work allocation.*



**CHRISTY FARRER**  
Director of Practice  
Management  
*CMS*



**WILLIAM DOUGHERTY**  
Co-Founder  
*Capacity*



**JOSHUA FIREMAN**  
President  
*Fireman & Company*

March 9, 2023  
2:10 pm ET

Watch live at  
[www.skills.law](http://www.skills.law)

William Dougherty 0:02

Hi everyone, we're here today to learn about CMS has experience with their latest work allocation program from Christy Farrer. CMS has over 5,000 lawyers in 80 offices, and in 40 countries around the world. Firstly, CMS was one of the earliest adopters of work allocation technology. So why is this latest program have such strategic importance to the firm?

Christy Farrer 0:26

Thanks, William. So I think for us, if we think about our strategy, as a firm, it's really one with people at the heart at the center of it. And so for us, collaboration, and using the benefits of our network across the globe, and really connecting people, is really important. As well as sort of developing a really inclusive culture in which everybody has the opportunity for great work, for career development. And actually, for us, resource management is a connector so it helps kind of enable all of those different things. And I think from that, then there are a number of strategic goals or objectives or projects that can really be loaded into it. So it's sort of like the foundation for us. And really connects us across all those different channels.

Joshua Fireman 1:09

So Christy, all those objectives and the benefits to the firm are clear. That's often not enough to change behavior, especially when we're talking about partners who are used to a process that is subjective, and which many of them are probably very comfortable. How do you overcome that obstacle, the sense that you're taking something away from me that's important to how I serve my clients? How do you focus them on those benefits and make that change?

Christy Farrer 1:39

So I think for us, there are probably three things that have helped with the change management approach. So the first thing is leadership. So as I mentioned earlier, it's really important that the leaders of the firm, the practice group leaders, the team leaders, are really bought into this and really helping to drive the change within their barriers. That won't be enough on its own there, because this affects every single partner. So I think the second thing that's really important is flexibility. So I think for us, we've approached it on the basis that the system can do what we need it to do. So it can be flexible, it can be adapted, it can be adjusted. And actually how we implemented a process that we use, you know, that can be flexible. So if a partner feels that they need to have more control over the decision in terms of where their work goes, that's absolutely fine. And they can do all of that. And because the third part for us is really that accountability. So it's saying, Well, look, you can make the choices you want to make in the same way as you currently make them, but using the system as well. And provided that you can justify them, really all we're asking you to do is just have additional information to have when you're making that decision. And just challenge your own thinking, you really think about what you're doing, and are you making the right choices with the additional information that you've been given. So it's really saying we're not taking that away, we're just asking you to be accountable for your decision, whilst giving you additional information. So it's really pointing those things out, in addition to linking it to strategy.

Joshua Fireman 3:11

I love the focus on accountability. And I think honestly, that's the secret sauce for this. Telling people to do something not going to work as your measurable accountability. I think that's a great change driver.

William Dougherty 3:25

So it'd be great Christy to hear with such lofty objectives, such challenging goals here as living your strategy, and all the things that that means for our law firm. Why was it that CMS chose to partner with Capacity for this program?

Christy Farrer 3:42

Thanks. Sure. So we did look at lots of different providers for us. And the important thing for us was that we found a partner that we could work with, with a system really, that was simple and easy to use. We didn't want something that lawyers were going to say, Oh, this is another thing that I have to do on top of my day job, because we know, there's a lot of demands on lawyers already. So it was something easy, simple, as fast as it is for them to send an email or fill in a spreadsheet, which is probably the current way they do it. So it was fast as that, wouldn't take any more time, that actually would give them extra benefits. So it would give them analysis. And crucially, I think for all of the lawyers, and would give them transparency, because that's really key to our culture, collaboration, transparency, adding inclusiveness, opportunities, wherever you are. So that's something I know lots of law firms are striving to achieve. For us, this is an enabler for that. And actually, again, we also wanted to find a partner that had built it and look at it and could see it from a lawyer's point of view, which we felt Capacity had all of that for us. And that's why we partnered with Capacity.

Joshua Fireman 4:50

Thank you very much.

William Dougherty 4:52

So any other firms, Christy, who are watching this and thinking, yes, we also struggle to embed our strategy into our business, what advice would you give them when they're looking at a program like this to ensure the maximum chance of success?

Christy Farrer 5:07


So, I think it's, it's really got to be something which is, as I said earlier, sort of led from the top of the firm. I think there's a lot of communication and consultation required with this. And there is, you know, you are asking people to change their behavior. So I think I wouldn't underestimate the number of discussions, the support the ongoing support that you need to put in place for something like this. But I do think that if you can get this going, and we can get some of those behavior changes that we're seeking, that is just going to make such a fundamental difference to the way we operate and the way we collaborate.

William Dougherty 5:47

Fantastic. Thank you so much, Christy for taking the time to share this with everyone and to Joshua as well for sharing from your perspective and a stimulating, great conversation and everyone watching today. Thanks for your time as well.

## GETTING TO GRIPS


Presented by Judy Mackenzie Stuart and Hayley Harris



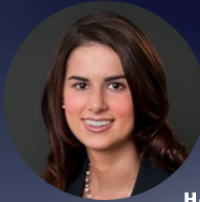
# GETTING TO GRIPS

## Data Integration & APIs

*More and more vendors are offering their data in API form. This demo will show how BCLP matched TR data to internal records and created matter "hubs" using search to streamline the attorney experience. This text doesn't appear on the slide*



**JUDY MACKENZIE STUART**  
Global Chief Knowledge Officer  
*Bryan Cave Leighton Paisner (BCLP)*



**HAYLEY HARRIS**  
Global Director of Central KM  
*Bryan Cave Leighton Paisner (BCLP)*

**March 9, 2023**  
**2:20 pm ET**

Watch live at  
[www.skills.law](http://www.skills.law)

Judy Mackenzie Stuart 0:02

Hi, I'm Judy, and this is Hayley. And we're very happy to be here today to talk to you about our Matters Hub Project. By way of background BCLP is a large international law firm with around 1,400 lawyers in 30 offices globally. After we merged in 2018, it became clear that our combined firm had a number of knowledge and information challenges. So in 2020, we embarked on a major project to improve internal experience sharing for Business Development, help our lawyers identify who had dealt with similar legal issues previously, and use data from our previous work to inform strategy on deals and litigation.

Hayley Harris 0:42

The project involves introducing a new km platform globally. And we chose iManage's Insights Search as a supplement to foundation which the firm already had. Many of you will be familiar with products like Insights Search, but what we want to talk to you about today is how we worked with iManage to customize Insights, linked it with Foundation, enhance it with API's, aggregate data, and create these matter hubs that make it easy to see the story of a matter.

Judy Mackenzie Stuart 1:17



We have called our search platform the BCLP Discover. The first thing lawyers see when they access it is this home dashboard. This is where they can pin favorite matters or documents and see recent and saved searches. Importantly, the dashboard also acts as the entry point for a number of the key business processes that support content input.

Hayley Harris 1:35

You'll see across the top that we have a series of tabs, the matters tab includes all matters of the combined firm for the last 10 years. And for each matter. It is currently searching both a subset of Foundation data and the contents of key documents, allowing us to effectively mine the firm's work product for experienced data in addition to Foundation. So let me show you what that looks like for a transactional matter. In one place. I can review key matter information and see all the documents that have been created on this matter. Plus any documents that have been tagged for knowledge and the associated closing binder. I can run a search within the Matter Hub, including across earlier versions of the matter documents. I can also browse earlier versions. A lawyer can click the Foundation link from the Matter Hub, which takes them directly to the corresponding matter record in Foundation where they can review timekeeper information matter narratives and deal points. For US litigation matters. The matter hub also includes a court filing section. Now through a process developed with our firm's records team and secretaries, we can now patch up all pleadings as they are filed by our firm at court in the US. So this content appears without any lawyer input. We are now working with our data team on developing a similar process for seeking filing in the UK. If I use the Foundation link on a US litigation matter, you will see that we have further enhanced the matter profile by bringing in Thomson Reuters docketing data for that matter using an API. This allows us to perform litigation data analytics within our own systems. And lawyers can toggle easily between litigation results and the underlying documents. I am now quickly going to share with you how we make the magic work behind the tag knowledge and closing binder's tabs. Tag knowledge is the place where lawyers can find templates and forms along with work. Examples that have been nominated by their colleagues. KM maintained content can easily be identified through the green color coding. We developed our own tagging tool which you can see on screen, to allow lawyers to submit their useful materials to Discover. They can nominate with one click a document from the matter Documents tab. And then this automatically adds it to their shopping basket. They can then either tag the document themselves or send their basket to someone else to tag. The closing Binders tab contains all binders that are compiled using the firm's process. Each binder contains a single PDF of the set and individual copies. We are now working to ensure that closing binders created using matter management tools like Legatics or Litera Transact, can be easily picked up by Discover.

Judy Mackenzie Stuart 1:58

For 2023, our priority is to get more foundation data directly searchable within Discover.

Hayley Harris 3:56

Ideally as an additional tab within the metadata that will be great.

Judy Mackenzie Stuart 4:32

We're also looking at drafting tools like to find the intention and what to have them work directly with Discover content. I mean, overall, the response to discover so far at the firm has been great.

Hayley Harris 4:43

Yeah, lawyers love being able to tap into past experience so easily. And they also love having data and documents aggregated for them in such a convenient way.

Judy Mackenzie Stuart 4:58

So what did we learn along the way? Well, data integrations are great, but they often expose data quality issues that require extensive cleanup work, and you need to factor that cleanup time into any integration project. Firm data structures can change and that throws off significant additional work for projects like this. The Thomson Reuters API integration was not plug and play, there was a great deal of data matching needed to make it work. Lastly, we've done a lot to automate workflow around tagging, closing binders, and Foundation match profiling. But the reality is you still need data stewards to support quality data capture. Overall, the firm was very happy with where we've got to so far, we are confident that we now have the right technical and data infrastructure and business processes to build our km solutions from here.

## [AMPLIFYING YOUR BRAND](#)


Presented by Sameena Safdar and Kimberly Rennick




## AMPLIFYING YOUR BRAND

### The Key to Adoption and Promotion

*A law firm innovator's role is challenging. We need attorneys to trust us to adopt new technologies and promote innovative services to their clients. Amplifying your personal brand can help you drive new connections and build trust.*



**KIMBERLY RENNICK**  
Director of Client Relations  
Covington



**SAMEENA SAFDAR**  
CEO and Founder  
Amplify Your Voice

March 9, 2023  
2:30 pm ET

Watch live at  
[www.skills.law](http://www.skills.law)

Sameena Safdar 0:02

Hi, everybody, I'm Sameena Safdar. I'm the CEO and founder of Amplify Your Voice, a digital media consulting business. And I've been in the legal industry for about 20 years in legal technology, sales, and legal marketing roles and big law firms.

Kimberly Rennick 0:17

Hi, everyone. I'm Kim Rennick. I'm the Director of Client Relations for Covington and Burling. And I too have been in the legal industry for over 23 years in sales, marketing, and business development roles.

Sameena Safdar 0:29

So today, we're going to talk a little bit about how you implement innovative techniques or products successfully, really in a law firm context. So Kim, tell us a little about that.

Kimberly Rennick 0:39

Well, oftentimes, when we are driving implementation of a new product solution or tool, we're trying to get people to do something that they haven't otherwise done before. We're ultimately faced with people saying, oh, no one's bought in, oh, the whole thing is doomed. No one's using it, I can't demonstrate return on investment, and therefore the whole product ends up getting abandoned. So today, we're going to talk about a simple but effective process to implement to be able to gain buy in and drive adoption, and demonstrate ROI.

Sameena Safdar 1:11

And really sorry if I "SPOILER ALERT" what the key to it all is really focusing on your end user. So you've got to figure out what they want, what they want to see, and make sure those messages are getting to them. So what's in it for them? So really, I have found, it's pretty helpful to follow a true sales process, even when you're just working internally, to convince people to use it. And it really starts back a long time before you've even gotten the idea for this project. In establishing yourself. It's really key to build a lot of relationships with a law firm, and not just with your direct team or your direct supervisors, but with as many people as you can, whether that's attorneys, whether that's business professionals, whether it's people in other offices, you want to start those relationships early, maybe even one to three years it will take to really build a relationship where they trust you. They believe you have credibility, and they take the time to listen to your ideas. And, of course, I would recommend social media is a great way to really authentically share who you are in a way that can make connect with someone that will help you with your subsequent projects.

Kimberly Rennick 2:13

And then you're going to start on your project by doing a sale before the sale, there is always a sale before the sale. And if you've established yourself with people, oftentimes they are going to want to come along with you. And that's by finding your team of people, oftentimes evangelists who will work alongside you to implement your project or solution and demonstrate to them

again, what's in it for them. And oftentimes, that's a hallmark project on their resume, a promotion, a reason for a bonus.

Sameena Safdar 2:17

Right. And we noted that this was the first sale before the sale, because does this sometimes happen in multiple phases game,

Kimberly Rennick 2:51

It does, sometimes they're a sale before the sale, and then a second sale before the sale. Depending on if there are multiple teams of people you need to influence.

Sameena Safdar 3:01

And once you've kind of started down that path, then you really want to figure out so all these people that we've been selling to, we've got to figure out what our messages are, establish those, and then amplify the messages that are going to resonate with those different folks. And that's where you really want to be trying to reach them in multiple ways, and really getting your ideas to them. So again, that's where I recommend if there's intranet's, if you can go to practice group meetings, if you could do one on ones, if you can use social media, how are you really getting the messages to them, of what's in it for them, and why it's going to be a better fit for them to get on board this train.

Kimberly Rennick 3:36

And so that will enable you to finally embark on the sale with whoever the ultimate stakeholder is. And by doing that, you're not doing that all by yourself, you have already deputized a group who will come along with you, who will demonstrate to the people around them, what you're trying to do, why it's important to them, and why it's something that ultimately should be embarked on for the benefit of the individual and for the firm. There is a methodology that comes on that on the back end to which is capturing, measuring and reporting. And that just simply can be quite plainly a spreadsheet, where you're capturing activity, but also being able to report up among the group, your deputized team, and also report internally on a regular cadence so that you can celebrate successes, and use that to drive further adoption because personally, I think that nothing drives further adoption than creating a FOMO situation where other people want to come along or appealing to other people's sense of competition. And as you do this, you might see things that aren't really working. And so I recommend keeping a really open mind about things that you should deviate away from, and also identifying the places where you're getting great engagement and replicating that again, and again and again and ultra-mentally, what you're doing is repeating regularly your message, repeating it in a short, concise way that makes it memorable. And ultimately, people are empowered to own it as their own message themselves.

Sameena Safdar 5:15

Absolutely. I think listening is really key. Asking a lot of questions and then listening to the different end user stakeholders, whatever on what's really working and resonating that with

them and what's not. So as a takeaway, I really can't encourage you enough to be customer centric, early and often. Thinking, okay, yes, this project is important for me to implement. But I need to think about what is in it for these other people, why they would want to do it and try to appeal to that. And again, you want to use every tool you have for connecting. So whether that is social media can be a great way because you're just building those relationships between you and them. You're engaging with their content, it makes them more likely to talk to you, or intranets or that type of thing. And then Kim, can you can you wind this out here,

Kimberly Rennick 5:59

It's a marathon, not a sprint. Find those opportunities for quick engagement, and celebrate them openly because that will demonstrate ROI in and of itself and allow you to drive greater adoption and return on investment.

Sameena Safdar 6:14

Yep, you got this. Thanks for listening.