



Gaining A Competitive Edge at Your Law Firm:

# The **BEST** Ways to Use Technology!

Technology is rapidly changing the legal profession, delivering new capabilities and greater efficiency in existing processes and tasks seemingly every week. Some lawyers are already leveraging these new law technologies into a competitive edge.

IS YOUR LAW FIRM  
KEEPING UP?



# In this E-Book, you'll learn:

- Ways that law firms like yours are **already using law technology** to improve operations
- How smart adoption of law technology can improve **staff recruitment** and **retention**
- The right way to think about **technology budgeting** and **planning** in your law firm
- The ways technology best fits into your law firm's existing **processes** and **culture**



Let's get started with a survey of the law technology already being adopted in the real world.

## How Lawyers Are Using Technology Today:

While lawyers and law firms tend to fall behind other professionals and industries in the adoption of new technology, both the law profession and the business of running a law firm have already seen significant technological change. **These are a few of the ways that law technology has already reshaped and is currently reshaping the industry.**



### Websites and Marketing

The American Bar Association (ABA) found in its **Techreport 2022** that 94% of lawyers and firms were operating a website in 2022. On site, many law firms are operating a blog to draw in traffic via organic search. 37% of all respondents indicated running a blog, **with larger firms blogging at higher frequencies.**

**Off site, social media** and **email marketing** are other **popular marketing channels.**

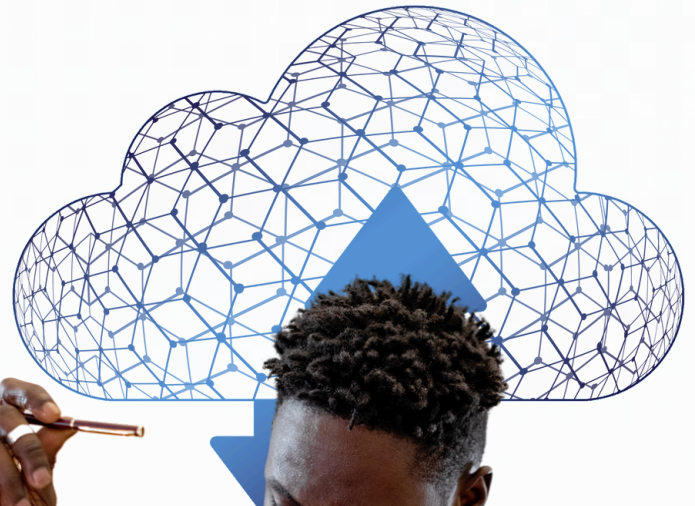


### Cloud

The fastest-growing area of adoption among lawyers and law practices of all sizes **is the cloud** (even though the field of law continues to lag behind general market cloud adoption). This is admittedly a broad category, including everything from consumer oriented SaaS products (**like Microsoft 365, Dropbox, and so forth**) to full cloud deployments for server, storage, and computing power.

The transition to remote and virtual law practice has pushed firms **to adopt cloud tools as well.**

Elsewhere in its Techreport 2022, the ABA found that legal-specific technology was still slow in adoption. Three of the most common products were **Clio (17%), NetDocuments (11%), and MyCase (3%).**



Many products that lawyers have been using for years have themselves migrated to the cloud (e.g., **LexisNexis**). With products like these and straightforward online tools like **Microsoft 365** included in the cloud category, **it's quite possible more law firms are already using the cloud than realize they are doing so.**



## Client Portals

When COVID moved so many aspects of life online, the law profession followed suit. Meetings that used to occur exclusively in person now may occur **online, remote, or hybrid**. And if clients aren't walking through the front door, neither are their documents.

Client portals (and "extranets") **provide secure methods** for transferring documents. Most of the firms reporting in the Techreport 2022 were using **Microsoft SharePoint (already included in Microsoft 365 licenses)** for this purpose.



## Other Technology Uses

Law firms are adopting other categories of law technology as well, including practice management software, budgeting and planning tools, and litigation and e-discovery tech. The ABA has reported in-depth on each of these and others; members can **explore the ABA's 2022 reports in greater** detail if interested.

## Smart Adoption of Law Tech Improves Staff Recruitment and Retention



Implementing any new technology or system involves change and disruption — neither of which are billable or particularly pleasant.

**Perhaps this is part of why the industry has been slow to adopt new tech.**

Avoiding law technology comes at a cost: your firm misses out on whatever these new technologies enable, improve, or optimize. But besides these obvious benefits, there's a slightly less visible benefit: **improved recruitment and retention.**

Put simply, lawyers and staff tend to enjoy working where the work is better.

This is typically the motivation behind climbing the prestige ladder, but let's set aside the dream of making senior partner at a prestigious firm for a minute.

Instead, **put yourself in the shoes of a talented young lawyer** (or paralegal, or whatever other role you need to fill at the moment). Imagine you're being recruited by two law firms of relatively equal prestige and at equal pay. **The workload, areas of focus, pay, and career trajectory are identical.**

**But there are just a few key differences:** one firm has a beautiful office with plenty of natural lighting — and doesn't even demand that you work in that office all the time. The other looks like it crawled out of a 1970s strip mall — **and it requires strict in-person office hours.**

Is it even a question which firm you'd choose? Of course, in the real world, no two firms are ever exactly equal. But in a post-COVID world, **being the firm with the flexible or even fully remote work environment is a big plus.**

Law firms that offer a modern workspace, remote flexibility, and less disruptions due to dated or poorly implemented technology **tend to experience better returns for their recruitment dollars.**

And on the other side of that equation: **law firms that don't modernize their tech and workspaces risk losing staff to the firms that do...**



## Planning/Budgeting: The Right Approach

For many in the law profession, “**digital transformation**” has an uncomfortable ring to it: much time and care was put into building the processes currently in use, **and those processes are delivering a healthy profit.**

Taking those profits and investing into a wholesale reimagining of the way work gets done sounds scary — **because it is.** The disruption that can come along with a full digital transformation can be significant, **and so can the shock to the firm’s annual budget.**

Change is rarely welcome at the individual level, and law firms that base their reputations on professionalism and accuracy can’t afford to get this wrong.

For these reasons, an “**everything, everywhere, all at once**” approach **typically isn’t best.** Instead, the right approach is steady, measured, and directed.



## Aim for Incremental Progress

First, a steady approach looks like incremental progress. Reshaping your organization into a tech-forward firm won’t happen overnight. **But small changes over time will deliver real results.**

Instead of chasing the latest development, **aim for incremental progress over time.**



## See the Big Picture

There’s something missing from the previous step: **how do you know which changes to pursue and in which order?**

Incremental progress has to be working toward something specific. You don’t want to start bolting on random technology tools without an overarching goal or plan in place.

Take the time to determine **what exactly it is your organization wants to accomplish.** What capabilities do you need but don’t currently have? Which processes are functional but could be made better through technology? **And which of these elements is the highest priority?**

Once you’ve scoped out the big picture of what you want to accomplish, it’s time to build a roadmap that shows how to get from here to there. **And for that, you’ll likely need a partner.**



## Choose the Right IT Partner

The right managed IT partner can make all the difference in how well your law firm uses technology. Look for a proactive partner: many managed services providers are reactive, not proactive. They'll help you set up a solution if you ask, **but they aren't there to proactively show you a better way forward.**

You need a partner that can help you map out your digital transformation, one that can help you lay out that big picture and organize it into manageable chunks. **They must understand the work and processes involved in moving you forward.**

You also need an IT partner that understands your industry. The legal profession has several associations and certifications that come into play here, **and not every managed service provider is truly qualified.**

**Cybersecurity matters a great deal, as well:** your law firm must maintain confidentiality, and that means avoiding cybersecurity breaches. You'll need functioning backup and disaster recovery plans so you can keep operating even under highly adverse circumstances.

To sum up: the right approach to technology planning and budgeting is incremental, holistic, and well-supported. When you work with an IT partner that can help you map out your technology roadmap and then execute the projects involved, **you'll experience more technology wins with greater clarity and far less frustration and disruption.**



# How Law Technology Best Fits into Your Organization and Processes

Every law firm is at a different, unique point of digital readiness and has its own set of technologies already in place. We can't tell you exactly which technologies you're missing and where to plug them in — at least not in this eBook. **But we can point to some of the best and most attainable use cases.**

Consider each of these capabilities that law technology can deliver and the difference each one could make in your organization's processes and capabilities.

- Creating a comprehensive, intentionally designed **cloud environment**
- Implementing **industry-specific platforms** like NEOS or Clio
- Enabling your organization to **easily scale** to new locations
- Empowering your firm to offer **flexible remote work**



**When you're ready to start building your technology roadmap, start with the capabilities that would most benefit your organization, and work down your list from there!** If you're looking for an IT partner that actually understands your needs, **we're here when you need us.**



Excellent Networks



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