

# Dear General Counsel: The Tech Tipping Point is Now

Key Takeaways from webinar: <https://www.kartalegal.com/education/general-counsel-the-tech-tipping-point-is-now>



## 1- The Foundational Blocks for a Digital Transformation:

- ⇒ People. Educate. Train. Upskill.
- ⇒ Process. Review. Revise. Redesign. Improve.
- ⇒ Innovate. Now. Innovation grows exponentially. If you don't prioritize this now, you will fall behind fast. Why? Because Big Data + Cognitive AI = Growth like we have never seen before.

## 2- The Change Management tools for Innovation:

- ⇒ Lean Six Sigma Tools
- ⇒ Agile PM tools

## 3- A General Overview of the Legal Tech RoadMap:

There are many offerings under each of the categories below. There are options for every budget, size, and desire for simplicity or appetite for more powerful but complex tools. You should seek outside guidance and **independent** advice. Generally speaking, you will need the following:

### The Basics:

- **Data Security Tools for your remote workforce (mostly an IT function)**
- **Video Conferencing**
- **e-Signing**
- **Collaboration and Project Management tools**

⇒ Collaboration tools are important not only because you want to collaborate internally - within your own team and across other teams and functions - but also externally to have an avenue for content sharing, process creation, audit, or visibility into what your external counsel, vendors, or consultants are doing.

### The Efficiency Boosters:

- **Business Process Management tools and Robotic Process Automation**

- ⇒ BPM is a holistic approach to optimize and automate business processes. It is about identifying and improving processes to make a business more efficient and disciplined, it transfers control to business users to build and model business rules at a business level. To be effective, BPM needs to be more than just an automated workflow.
- ⇒ RPA describes a software development toolkit that allows non-engineers to quickly create software robots commonly known as bots to automate rule-driven processes by replacing human effort to complete those tasks. Software bots mimic human activities such as logging into systems and copying and pasting data across systems, and unlike other solutions are easy to implement.

### The Productivity Watchdogs:

- **Business Intelligence**

- ⇒ BI tools are designed to retrieve, analyze, transform, and report data to give useful business insights. You can customize dashboards that pull information from internal data sources. These tools have API (Application Programming Interface) access and prebuilt dashboards for speedy insights into the data found in the internal or external applications you are already using.

- **Productivity Trackers**

- ⇒ These tools let you know how much time your employees are spending per day/week/month in your network, systems, and applications. Some are very niche offering time tracking and email management.

### The Must Have: Contract Lifecycle Management !

- **Contract Management Systems**

- ⇒ A CMS is crucial to any organization, regardless of size. The time to upgrade your CMS is now. There is a lot of new tech out there with amazing AI capabilities, depending on your needs, size, budget, whether you are looking for an enterprise solution or just for legal.

## Other Priorities:

- **Document Management Systems**

⇒ DMS tools help you with data governance, by storing, managing, and tracking electronic documents and electronic images of paper-based information captured through the use of a scanner. We would argue that you cannot manage, protect, control, audit, and otherwise secure the confidentiality of your data without a proper DMS in place.

- **Document Review Systems and Outsourcing**

⇒ Document review capabilities can be found in other tools such as contract management tools, but a standalone document review tool is also beneficial for early case assessments in-house, due diligence reviews, keeping work inhouse, and outsourcing directly to a third party or low-cost contract attorneys.

- **E-billing and Matter Management Systems**

⇒ E-billing is a must-have for every legal department to handle third-party vendors, including outside counsel. It can be layered with other productivity software and matter management systems or it can stand alone, although this is no longer a best practice.

⇒ The term matter management is often used interchangeably to mean case management or document management. However, matter management is a practice of its own, referring to the activities involved in managing corporate legal work. Therefore, it encompasses document management and contract management as well as other sub-practices.

⇒ Matter management is the process of gathering, tracking, assigning, and reporting on legal work including matter name, type, legal service providers, and in-house counsel working on the case, budgets, and invoices. A matter can be a simple task requested of corporate counsel or a complex legal project. For example, legal research, contracts, disputes and litigation, intellectual property, or M&A. Matter management enables a more effective organization, better collaboration, and reporting of a legal department's work and associated costs.

- **Privacy Tools**

⇒ If you deal with individuals' private or sensitive data, automating your compliance with privacy laws and regulations, domestic and abroad, is the only path forward.

**To learn about how to trigger change management, improve your processes, and the best tech to fit your needs, contact us today:  
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