

Nearly 70 percent of legal operations professionals say their current technology doesn't meet their department's needs<sup>1</sup>. It stands to reason, then, that "legal technology management" was identified as their No. 1 priority for the next 12 months, outranking cost control, cybersecurity and even litigation management.

Meanwhile, more than half – 54 percent – of legal operations professionals said they planned to spend more on technology in 2018 than in the year prior<sup>2</sup>.

If you identify with either or both of these sentiments – your current systems aren't working, or you plan to invest in more tech this year – it's imperative to build a technology roadmap that will guide your planning, purchases and implementation. In this white paper, we'll provide a framework to get you started.

### Why should we have a technology roadmap?

Stephanie Corey, the co-founder of UpLevel Ops and the Corporate Legal Operations Consortium, shared five primary benefits:

- These plans show there's a method to your madness – you're not just making impulse buys.
- They help determine which projects are simple "low-hanging fruit," which can help you triage and dedicate resources to more complicated projects.
- Without a plan, you are likely to end up with the wrong technology...or technology that doesn't work together.
- A good plan will help you focus when planning your budget, staffing and more.
- A legal technology roadmap will help you communicate visually to the rest of the department and to those asking for other resources.

### What are some cues that your department needs a roadmap?

- Team members return from conferences asking for the latest fill-in-the-blank app.
- Your department has no technology budget...or relationship with IT.
- Every member of your team has a different "system" for organizing and completing tasks.
- Your software is unreliable, unsupported or won't synch together.

### What exactly is in a technology roadmap?

A technology roadmap, as defined by chief information officers<sup>3</sup>, is "the governing document that dictates specifically how technology will support the business strategy and help drive business priorities over the next three to five years."

These may vary in complexity and scope, but according to *CIO* magazine, roadmaps should contain:

- A strategy statement with the list of strategic priorities for the business (not technology-specific)
- A prioritized list of improvement opportunities
- A timeline of the initiatives and projects that will occur over the next several years
- High-level justifications for each project
- Estimated costs and durations for each project
- An "owner" for each project

<sup>1</sup>2018 *Legal Operations Report*. The Consero Group, January 2018.

<sup>2</sup>2018 *Legal Operations Report*. The Consero Group, January 2018.

<sup>3</sup>"Why You Need a Strategic IT Roadmap." *CIO*, March 2, 2015.

# ▶ How to Build Your Legal Technology Roadmap?

## 1 Gather Intel

Every successful mission starts with recon. Before you start charting your technology hopes and dreams, stop and collect some macro-and micro-level information.

### Questions for Your Department

Corey provided a number of questions to discuss within your legal department:

- What is the current state of technology in our department – what technology is available, and what are the usage rates?
- What tools are available on an enterprise-wide basis?
- What metrics do we want to track?
- Where are our opportunities for efficiency?
- What systems are lacking or missing?
- How much IT support do we have?
- What resources – money and people – do we have to pursue and implement technology?
- What goals do we want to accomplish with this strategy?

### Questions for Your Organization

Consider who will need to see, approve or understand your roadmap:

**Finance:** How should we approach our technology plans from a budget perspective? Are there any deadlines or constraints we should know as we begin planning?

**Technology:** Who will be the contacts for legal department projects? What kind of rules exist for cybersecurity, cloud computing, et cetera? What kind of enterprise-wide tools do we have that the legal department might not know about?

**Business Clients:** What do you see as our areas of improvement? How could we better serve you with technology? What is your level of technology sophistication?

**C-Suite:** What strategic initiatives are on the horizon for the next three to five years?

Visit with your IT colleagues early and often; they can provide battle-tested advice on product rollouts, and they will be instrumental to your roadmap becoming a reality. Don't surprise them with a "final" document that requires their staff, funding, servers, security assessment and more.

## 2 Prioritize

Taking a cue from the CIO list of roadmap components, start with the first two parts:

- List the strategic priorities for the business. (Not for your department, not for your technology wants and needs, but the business. Overall corporate strategy should guide your decisions.)
- Make a prioritized list of your department's opportunities for improvement.

This second part will be far easier if you have solid data on your legal matters. Xakia users will be familiar with this chart, which shows matters by complexity, strategy and size.

Legal Matters - Complexity, Strategy and size.



Your matters can guide you. In particular, look at the lower-left quadrant of simple matters with low strategic value. These matters are prime candidates for technology projects. What are you doing that could be improved or automated?

Once you have your list of areas for improvement, prioritize. There's no single solution for ranking your tech activities, but it's wise to determine a rationale for what to pursue first. Do you want to fight your biggest fire or start with some easy wins?

### 3 Plan

It's time to build out the details of your legal technology roadmap. With your priorities in mind, draft a timeline of the projects you plan to pursue over the next several years. (Be realistic; technology rollouts often take longer than one might think. Consult a colleague in IT for guesstimates.)

Here's a sample, courtesy of Corey and UpLevel Ops:

## 3 Year Technology Roadmap

Sample

0-6 Months	6-12 Months	12-18 Months	18-24 Months	Years 2-3
Ethics Hotline	Ethics Case Tracking	Document Management	Document Management (continued)	Optimize Contracting Processes with AI
eBilling/Matter Management	eDiscovery	Knowledge Management Program (KM)	KM Program (continued)	KM Program (continued)
Litigation Hold	Financial Analytics	Collaboration Tools (e.g. SharePoint, internal-facing portal)	Legal Intranet (continued)	Legal Intranet (continued)
Legal Research (LexisNexis)	Metrics Reporting	Legal Intranet (client-facing portal)	Metrics & Data Analytics (financial, matter, contracting)	Metrics & Data Analytics (financial, matter, contracting)
Review of Contracting Processes & Tools	General IT Training for Department	Workflow tools	Workflow (continued opportunities for automation)	Workflow (continued opportunities for automation)
Board of Directors Management	eSignature	Dashboards		IT Portfolio Review

For each project:

- Articulate the high-level justifications for each project. *CIO* advises that these should be “robust for projects over the next 12 months and [simpler] for projects past the 12-month horizon.”
- Prepare estimated costs and durations for each project. Similarly, these should be detailed and practical for short-term projects; for long-term projects, you can use estimates.
- Designate an owner for each project. Who in your department will be responsible for researching vendors, liaising with other departments, and training your team? A project's success can hinge on having a credible sponsor who will champion it.

## Now What?

After your plan is complete, trouble-shoot it. Consider the traditional “three Rs” of implementation: Ensure your plan is **relevant** and **realistic**, then **refine** your final list of projects.

When finished, you should be able to answer:

- How your legal technology roadmap helps your business clients
- How your plan makes your department more efficient
- How your plan improves your service delivery
- How your plan advances company strategy

At this point, revisit your stakeholders. Discuss the nuts and bolts of implementation with IT. Discuss how to fund your projects with Finance. Prepare your team for new processes and tools – and possibly some growing pains.

Implement your plan knowing that it may need to be revised as corporate visions and business realities change, but take comfort in knowing you have a comprehensive, strategic guide to arm your department with the tools it needs to best serve your organization.

If you want to go the extra mile – or if you already have many of these tools in place – you can link your tools together to avoid duplicating efforts or re-keying information. For example, a workflow tool may take a document assembled by the business using an automation tool, have it finalized by the legal team, send it to Finance for approval, and ultimately deliver it to an outside party for digital signature.

Whatever the needs of your specific business, mapping out your legal technology requirements here is an excellent place to start.