

UpLevel Ops

Take Legal to the Next Level

# Digital Fluency: Creating an Effective Digital Ecosystem

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# Digital Fluency

The ability to readily and strategically leverage technology so it lives up to its transformative potential



# Digital Fluency:

- Allows Legal Teams to capture and extract valuable data necessary to tell the LD's story, inspire action and drive decisions
- Positions stakeholders to successfully collaborate and communicate
- Empowers Legal Teams to proficiently choose and best use the right tools based on the situation requirements



# 5 Critical Components of Digital Fluency

1. Eliminate basic digital acumen barriers
2. Ensure process drives the technology
3. Design the right tech solution for your environment
4. Embrace beyond-the-basics Change Management
5. Optimize modern legal ecosystem stakeholder roles

# Fostering an Effective Digital Ecosystem

- Define and document roles and responsibilities, and clear expectations inclusive of data requirements.
- Foster a safe environment for people to share feedback and ideas. Recognize that not everyone is comfortable to share in groups settings therefore ensure there are mechanisms to include all voices.
- Establish formal and informal communication cadence: Regularly scheduled group or individual meetings with set agenda and goals (formal) or Check-Ins with individuals (informal). This is one mechanism to enable a safe environment to share feedback and ideas above.
- Identify the tools and resources that can be considered "source of truth" for the department (*Ex. eBilling tool for outside counsel spend or Dropbox to find executed agreements*)
- Establish methods to manage "information overload" by creating communication protocols and governance by communication channels.

# Fostering an Effective Digital Ecosystem

*(continued)*

- Evaluate digital competencies of team against the priorities of the department. Provide training opportunities and resources to close the gap.
- Master the skill of storytelling to enable business decisions and change. Leverage the data in your digital ecosystem to build and support that story.
- Institute Tech/Digital Committees to provide governance. Responsibilities can include informing digital strategy, escalating changes in the environment that may impact technology, establish KPIs, etc.
- Establish and monitor project-specific KPIs; include triggers to identify potential failure points to allow for any required pivots.

# Communication Channel Guidelines

- At UpLevel, we use Slack for substantive knowledge sharing, project coordination, and quick collaboration. It is linked to Dropbox for integrated document management with established protocols for what should be saved and where.
- Like many other organizations, we have also found success by creating intentional space on Slack for social interaction and shared interests. The beauty of this style of set up, it that it also allows the team to engage or disengage at their choosing and focus when they are ready.
- The key is to find the balance that works for your team, without creating an overwhelming number of “channels” that create silos and derail order rather than create it.
- Leverage these channels to foster team building, enable collaboration on work and share information quickly. Think of it as creating a virtual office where you mimic behaviors you had in a physical space and walked down the hall to a co-worker’s office.
- To the right are a sampling of our Slack channels. A similar set up could be done in Teams.



- # 6-week-fitness-challenge
- # CLOC2022
- # fashion-and-beauty
- # legal-ops-knowledge-sharing
- # Legal-Innovation-Network-LINK
- # Social-media-current-events
- # tv-shows-movies-books
- # watercooler
- # stress-and-resilience
- # recipe-cooking-inspiration
- # pelotonruffryders
- # Legal-technology-news
- # (client project teams)
- # New-logo-and-website
- # team-virtual-offsite

# Simple tech surveys can identify needs

- The following page is a sample survey conducted with a Legal Operations department at the beginning of a tech evaluation and eventual implementation.
- Surveys like this should be based on the tools in your environment and can help determine competencies and identify opportunities.
- Training modules, cheat sheets, and other tools can be created to close any existing gaps.



Sample Skills  
Assessment Survey

Digital Skill Competency	Level of Competency					Importance of Skill to Law Department		
	Little to None	Basic	Intermediate	SME	I Don't Know	Not Important	Important	Highly Important
Microsoft or Google Suite apps (be specific)	0	0	0	0	0	0	0	0
Agile project management	0	0	0	0	0	0	0	0
Robotic Process Automation or A.I.	0	0	0	0	0	0	0	0
Data Collection & Analysis	0	0	0	0	0	0	0	0
Intentional Collaboration Platforms (Teams, Slack, etc.)	0	0	0	0	0	0	0	0
Internet of Things	0	0	0	0	0	0	0	0
Cloud	0	0	0	0	0	0	0	0
Design Thinking	0	0	0	0	0	0	0	0
Blockchain	0	0	0	0	0	0	0	0
Stakeholder Management	0	0	0	0	0	0	0	0
(Skills specific to your industry)	0	0	0	0	0	0	0	0

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