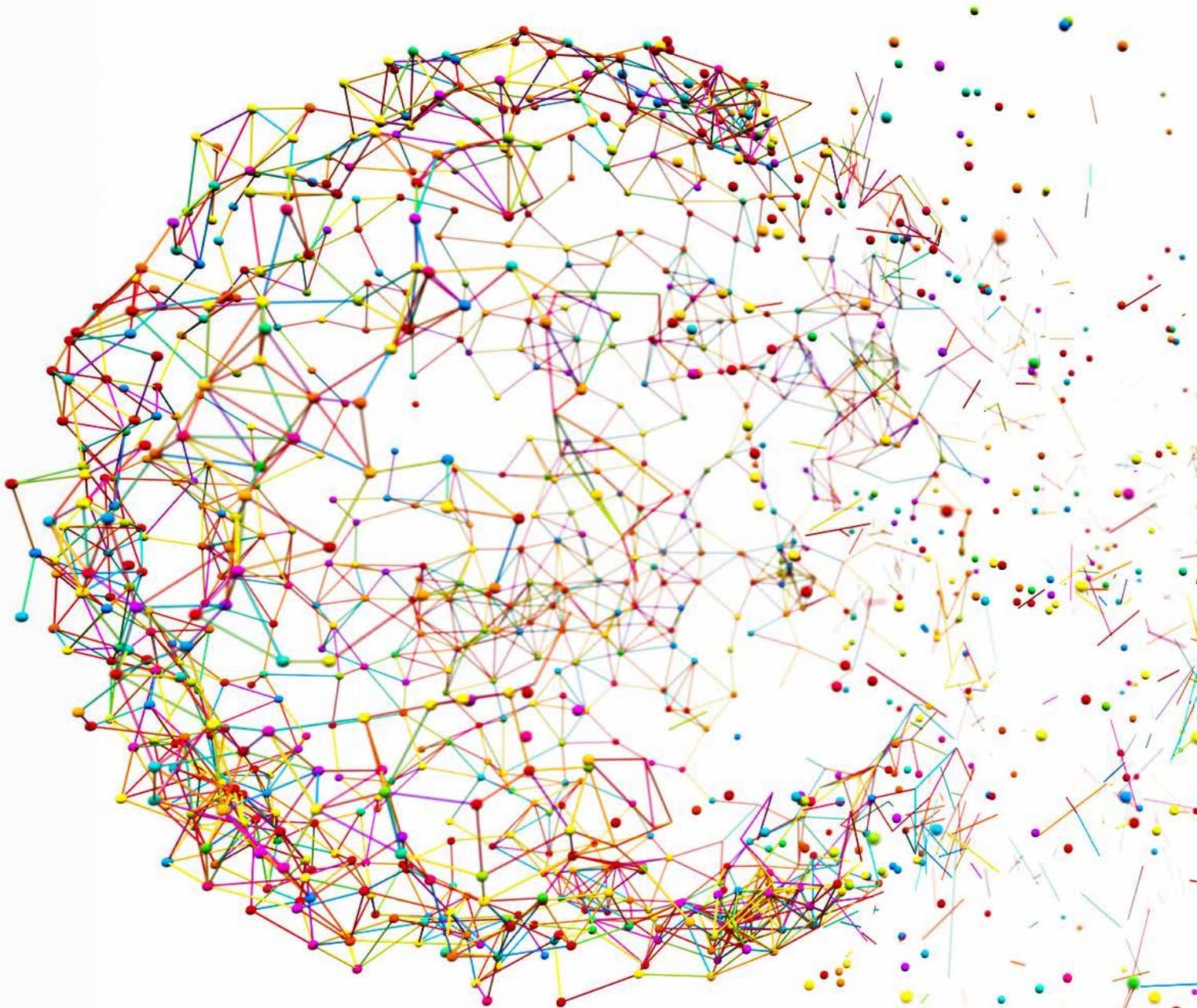


# 2023 Directory of LEADING LEGAL TECHNOLOGY AND PROJECT MANAGEMENT SOLUTIONS

## CCBJ



**Corporate Counsel Business Journal**

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# From the Editor & Publisher

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We are thrilled to present our 8th Annual Directory of Leading Legal Technology and Project Management Solutions, formerly the In-House Guide to Tech, from CCBJ. Over the years, this guide has served as a solution for our many readers who look to bring new and innovative solutions into their corporate environment. We are incredibly fortunate to have access to many subject matter experts who represent any number of industries and solutions within the legal ecosystem.



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Email me at [kcalve@ccbjournal.com](mailto:kcalve@ccbjournal.com) with any questions, comments, or suggestions you may have.

A handwritten signature in black ink, appearing to read "Kristin Calve".

Kristin Calve  
Editor & Publisher



# Enough is Enough: 5 Reasons Why 2023 Will Be Legal's Tipping Point

*David McVeigh, Axiom*



## **David McVeigh**

David McVeigh, Chief Executive Officer at Axiom, has more than 30 years of experience in business leadership, management consulting, and private equity portfolio company management. Prior to Axiom, he served as Gartner, Inc.'s Executive Vice President, Global Business Sales, and as a member of its operating committee. Prior to Gartner, Mr. McVeigh was a Managing Director at Hellman & Friedman, an Operating Partner at The Blackstone Group, and a Partner at McKinsey & Company.

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*We're entering the 'shame on me stage,' or as I prefer to call it, the 'enough is enough' era. For years, in-house legal leaders have begrudgingly stomached increasing law firm billing rates, even as they have watched their own budgets ebb and flow according to marketplace volatility (with more ebbing than flowing).*

Overbill me once, shame on you. Overbill me twice, shame on me. We're entering the 'shame on me stage,' or as I prefer to call it, the 'enough is enough' era. For years, in-house legal leaders have begrudgingly stomached increasing law firm billing rates, even as they have watched their own budgets ebb and flow according to marketplace volatility (with more ebbing than flowing). Sure, they've complained. As far back as 2008, the former GC of Cisco called law firm billing models "the last vestige of the medieval guild system."

And they've reacted. The largest clients have negotiated rate discounts and alternative fee arrangements, while more progressive in-house leaders have built internal legal departments to rival the breadth and depth of external law firms. The former has led to nominal concessions, while the latter has proven to be its own brand of inefficiency given its fixed costs. It has also proven to be a model that's difficult, if not impossible, to sustain in a cost-reduction environment.

Yet here we stand again, looking at another year of law firm rate increases. This time, however, feels different. This feels like the first-time in-house leaders are actually ready to reject the old binary 'staff up or send out (to law firms) paradigm'. This time feels like the first year GCs are not only frustrated enough, but also empowered enough, to let their actions do the talking.

But it's more than a feeling – it's backed by data and context. There are five reasons why 2023 will become the year that in-house legal leaders use their leverage to meaningfully transform the traditional legal resourcing model.

# 1

## **Historically large law firm rate increases:**

According to a [Wells Fargo report](#), 98% of law firm leaders are planning rate increases in 2023. Not only will billing rates continue to rise, but they will do so aggressively. Rates are anticipated to jump between 7-8%, representing the largest increase on record since the report's inception 15 years ago.

# 2

## **Paying more, but getting less:**

Law firms, [like Cooley](#), are increasing rates while trimming staff. Addressing the bloat may be nice in theory, but the possibility of accidentally cutting into muscle should be of concern to GCs who are already [dissatisfied](#) with law firm response time and attention. Trimming headcount also does nothing to address the fact that outsized associate compensation means that clients are underwriting on-the-job-training for junior lawyers at unjustifiable costs. Increasing rates should correlate to more: More experienced lawyers, more pragmatic counsel, more commercial acumen and more customer orientation. Clients are, instead, paying law firms much more and getting much less in return.

# 3

## **The economic context:**

It's not just the historic nature of the actual increases, it's the indefensibility of the rate hikes in the context of the broader economic environment. Many GCs are now operating in a cost-reduction environment marked by hiring freezes and CEO-mandated budget cuts. In fact, recent statistics suggest in-house legal departments are being forced to cut 2023 budgets by [5-20%](#). Law firm rate increases are not only out of step with economic forecasts, but they're also totally out of touch with client pain points. When the law firm becomes part of the GC's problem, instead of part of their solution

to tackle increasing workloads and emerging risks, enough starts to become enough.

# 4

## **The other, empowering, options:**

Law departments can't just cut back – they've been getting busier and busier. Post-COVID organizational change, evolving labor and employment matters, real estate footprint rationalization, continuing data privacy and cybersecurity issues, business and regulatory risks, and spiraling data volumes are just some of the everyday challenges. Nor can they just hire/retain their way out of their workload, given the budget cuts and efficiency issues mentioned above. Rather than confining their thinking to the either/or of in-house or law firms, GCs have another option: Flexible legal talent. In-house leaders can effectively use flexible legal talent to decrease and/or transition spend from fixed to variable to better navigate economic turbulence. Instead of 'staffing up or sending out,' flexible talent can be used to build a virtual bench of 'on-demand' talent that combines elite legal expertise with knowledge of in-house issues. This agile layer of the legal function offers a seamless bridge between internal and law firm options, providing needed flexibility for unexpected matters or surges in workload. It improves risk mitigation by matching legal matters to the right legal talent, right when needed. It extends in-house expertise without adding the fixed costs of permanent hires. And, for the enough is enough crowd, it markedly decreases law firm spend by limiting what needs to be sent to a law firm and when. Flexible talent provides clients with approximately 50% savings as compared to law firms, and with better value for every budgeted dollar.

# 5

**The talent:** Flexible talent providers have been around for 20+ years. So why is now the tipping point? First, while technically categorized as



Alternative Legal Service Providers (ALSPs), flexible talent is no longer 'alternative' to clients. Elite providers have now been effectively utilized by legal departments ranging from growing mid-market innovators to more than half of F100. In other words, flexible talent has a proven track record of success and that thing lawyers love above all else: Precedent. Second, GCs have traditionally turned to law firms because that is where the 'best' talent is employed. That's all changed. We've long witnessed lawyers' desire for a new life in law. It's a trend that's only been amplified by pandemic-induced career reflection, remote work, and desire for more work/life balance. This isn't just an anecdotal observation, the stats bear this out. According to the View from Inside Report, most commercial lawyers (57%) are interested in finding another job, with 14% actively searching now. A significant number of those lawyers (40%) cited an interest in joining a flexible legal talent provider in order to gain more control and autonomy over their careers. What's more, client data speaks to the quality of agile talent: 80% of Axiom clients rate the flexible lawyers with whom they have worked

as equal to or better than lawyers from a law firm. Smart GCs follow the talent, that talent is increasingly making their home with flexible legal providers.

This is not to undermine the value of external counsel or internal teams. Law firms will always have a place in the legal ecosystem for bet-the-company matters. But those matters are rarer than they are commonplace. While many GCs are hiring firms for overflow work or bringing on full-time lawyers to handle emerging specialty needs, GCs aiming to fight budgetary limitations need to know they have options. The right legal resource, when cost mitigation is paramount, is flexible legal talent. By incorporating more flexible lawyers into their resourcing models, GCs can reduce increasingly expensive law firm engagements to those exceptional, high stakes events for which their rates are warranted. But for everything else, enough is enough.

Overbill me once, shame on you. Overbill me twice, shame on me. Overbill me now – when I have a lot more work and a lot less budget – and it's time for change.

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# Process-Driven Decisions Fuel Business Success

*Jared Applegate, Barnes & Thornburg, Alexandra Guajardo, Shell Global*



## **Jared Applegate**

As Chief Legal Operations Officer for the firm, Jared believes in and continuously works to provide market insight, competitive intelligence and innovative thinking to attorneys and clients on pricing strategies and related matter management solutions – which ultimately enhances the value of work we offer our clients and strengthens the relationships we have with them as well. Jared is responsible for managing the law firm's portfolio of alternative fees, creating innovative and practical pricing solutions and improving firm economics.

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**CCBJ:** Tell us a little bit about yourselves and how you came to know each other.

**Jared Applegate:** My role is chief legal operations officer at Barnes & Thornburg. I run pricing, legal project management, practice management, and the rates team. Alexandra and I know each other from Legal Value Network and other groups across the country. We've spoken together on various panels on this topic and have become close friends.

**Alexandra Guajardo:** I serve as the pricing and analytics officer at Shell, supporting all of Shell Legal globally. My primary role is to apply a strategic mindset within our legal operations teams to provide effective and streamlined support to our lawyers. I also manage our panel and facilitate the engagement of external counsel at the best value. This does include pricing and negotiations, but my goal is not cheapest, but best.

**What are some trends you're seeing in legal operations/technology that are helping lawyers work smarter?**

**Guajardo:** We're looking at tools that either streamline our processes or provide us data that allow us to make decisions faster. The problem is that there are about 5,000 new technologies out there. For us, it's not about just having another tool. We are looking at technology that will make us more efficient and effective.

**Applegate:** I agree. Over the last five years numerous new tools have come on the market, along with a tremendous amount of seed money within the industry. Some tools solved a very niche problem that didn't last forever. What I'm seeing in the industry now are people going back to more practical, thoughtful tools as they relate to just doing work better or working more collaboratively. Some of that's looking at the basics: What is the process problem vs. what is the tool going to solve? I believe people are going back to figuring out what are the top two or three process problems they have, and whether technology can be used to solve them. I know that's not

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revolutionary by any means, but I just feel that the muck and mire of all the software out there is finally starting to get sorted into vaporware, niche, and practical tools usable by attorneys and legal ops professionals.

#### **How can technology free up lawyers to spend more time on strategy and innovation for clients?**

**Guajardo:** I've always said it's not enough to just throw the technology at a problem. It has to be process-driven. Our lawyers have to see it as a tool that helps them be better. If it's too cumbersome or takes too much of their time, they're hesitant to even try it or use it on the daily. Then there's the technology like Outlook that became imperative for day-to-day until it became too much of our day and has been supplanted, to some extent, by collaborative tools like Teams and RFP tools that allow us to incorporate different actions and that collaboration piece. What I see is if the lawyers view the technology as something that can really help them focus on their lawyering, they'll use it and it'll be successful. But because there's so much new technology, it can be a challenge to convince them of that until they incorporate it into their day-to-day work.

**Applegate:** That's a good point. From your position at Shell, have you seen firms bring technology to RFPs and pitches that was legitimate and real and augmented work being done by lawyers?

**Guajardo:** We have seen some, especially in the e-discovery space. When there's a lot of documentation to go through, doing those first passes is extremely important because our lawyers don't need to focus on that. Some firms come in and say there's more value in what they provide because they're tapping into this technology; that what they're billing us for is the strategic piece of the work. So it's happening, but on a case-by-case or firm-by-firm basis. One reason there's hesitation around technology is because people are not always confident in what the output will be. When we highlight successes via those outputs, then confidence grows. But



#### **Alexandra Guajardo**

Alexandra Guajardo is the Pricing & Analytics Officer for Shell Global. In her role at Shell, Guajardo is responsible for the management and advancement of the Outside Counsel Program while supporting all legal departments globally. Guajardo leads Shell's Legal Sourcing team, engaging with our legal teams to capture value by negotiating and evaluating Alternative Fee Proposals (AFAs).

it's not always successful. Some of our big firms bring in technology to conduct our large projects and we've seen it go very well in some places, but we've also seen it come back and be extremely generic and not a great work product. It still needed that human touch.

**Applegate:** Lawyers need to focus more on the business challenges of whatever practice of law they're in and how they're using technology to overcome them. The industry doesn't do a good job of selling that. Firms have project managers or talent that's focused on practice systems or practice innovation. But are those individuals going to client meetings and pitch meetings? Are they putting together full-service solutions? Not many are. But I think more firms are going to be thinking about business solutions to the challenges facing their clients' businesses over the next three or four years.

#### **How can law firms and legal departments build the right mix of people, process and technology?**

**Guajardo:** It's about having the right people doing the right things. All of our time is limited; that's the one thing I don't have a lot of. So making sure that I'm only touching things that I should be touching is important. Internally, we have to ensure our team has the right mix of people. We always look at whether something is not going right and ask ourselves: Is the process flushed out and documented? Have the people been trained in the right way? Are we communicating when things go wrong? It's a multi-step approach; we want our lawyers to focus on the things only they can do, just as our legal operations people are focusing on doing what only they can do. This ensures that we're using the right skill set in each place, and then we can work through everything else that comes after that.

**Applegate:** Building the right mix of people, process and technology starts with strategic planning. Identify the three or four business problems that you have and get everybody at the table to talk about that. The reason things go off the rails is because firms don't think about how strategic planning can help them align their missions and goals with their technology systems. Too often they try to boil the ocean, whereas just digging into a few problem areas could really yield positive results.

A lot of people want to lead with tech when they should lead with the problem, then "people, process, technology" in that order. Lawyers lean into that as well. They want to lead with tech because they have their iPhone and wonder "Why can't we be more technology focused?" when in reality their thinking should be more process-focused.

**Guajardo:** On the subject of strategic planning, I'd add that firms have to know who they are and what clients they're going after, just like, on the client side, we have to know which firms make sense for us. Not every firm makes sense for us as a company for every case, and we have to know that. As a law firm, when you're looking at your strategy, you have to know what drives you and what you're trying to accomplish. If you don't know that, then how can you successfully deliver?

#### **What is keeping lawyers up at night regarding client communications and client retention?**

**Applegate:** I think just competition in the space overall. The amount of work that's out there continues to grow, but the competition also continues to grow. Figuring out how to retain a client is extremely important, because it's so much easier to serve an existing client than to find a new

one. That's Business 101. So healthy communication is key, and maybe that communication's a little bit different with each client. Often, law firms only focus on lawyer-to-lawyer communication, when mapping all the client's touchpoints with the firm would be extremely valuable if you're looking to improve client retention.

A law firm's mantra should be "be easier to do business with." Clients can hire plenty of firms in their market, but they chose you. Was it because you are a great lawyer. Or is it more? Is it being easier to do business with than your competitors? I think getting that question answered is what's keeping people up at night. Because with competition so tight and excellent legal work now table stakes, these things are key to sustaining your relationship.

**Guajardo:** From the client perspective, we have to be clear on what we expect from our firms, whether they are working to keep or win our business. If we're not upfront about what we're trying to accomplish and what we need from them, how can the firm succeed with us? It's a relationship, not a one and done, and a constantly evolving relationship. Communication on our end is also important, we don't want our outside counsel staying up all night, if we aren't willing to do it for that specific case. Just as they're investing in us as a client, we want them to know that are also investing in them and see their value. If we're not honest about what we need and what we're trying to achieve and what success is for us, how will the firm deliver on that?

**Applegate:** To circle back to technology, Alex, what are you seeing as the high and right technology you are using now vs. pre-pandemic. What technology has sparked for you?

**Guajardo:** There was a lot of hesitation about doing many

things electronically. People like to print out and sign and send back documents. But the pandemic has shown us that that's not always necessary. Cybersecurity has always been a big concern for us,

especially from the client side. Is our data protected? Our first question is: Any new technology? Are we putting ourselves at risk by the data we're exposing or sharing? Before the pandemic, even something as simple as DocuSign was a huge endeavor. Now it's no big deal and there's increasing opportunities to deploy new

technologies. Privacy of diversity and inclusion data has also always been a big concern; how is our data being shared and safeguarded. Since the pandemic and escalation of remote work, adoption of technology has been unprecedented in pace and scale, and data privacy issues have been addressed across the board.

Anything that allows us to do collaborative work has become more of a need-to-use, almost on a daily basis. Video calling has also become the norm. Pre-pandemic, I had conference calls with my colleagues in Europe all the time and the video was never on. Now it's the default. As we continue to navigate hybrid work and make it less messy, there's going to be a lot more opportunity to bring on technologies that enable us to work more efficiently and collaboratively.

The muck and mire of all the software out there is finally starting to get sorted into vaporware, niche, and practical tools usable by attorneys and legal ops professionals.

-Jared Applegate

**Applegate:** I think that's true. On the law firm side, it's amazing how quickly people adapted to new technology. They always knew how to use applications like Zoom, but almost overnight everybody became somewhat of an expert. My 30,000-foot view is more collaboration tools and moving into the cloud to facilitate smooth communication with clients across the globe. And syncing up systems will continue to be a big theme for firms.

At the micro level, I'm seeing a greater focus on expediting tasks that take a lot of time to complete. For us, it's using deal-closing software so we can close deals faster. Instead of time-consuming couriers and ink signatures, you can cut out the human element and share documents and collect signatures digitally for a secure, smooth closing. In a contract review, it's using artificial intelligence (AI) to pull out provisions. It's collaborating in SharePoint or similar platforms, secure places to store, organize, share, and access information from any device. We've seen those, as well as Teams and Zoom, massively increase across our footprint because we knew that, in certain areas, we needed to do a better job of being more efficient, and increased efficiency equals lower cost to the client.

From a wellness perspective, some of these technologies have also been hugely helpful. Putting a deal checklist together or, at the end, a closing binder are things you don't want to wish on your worst enemy. Trying to collect 50 signatures in a matter of days can drive anybody crazy. So being able to augment those tasks has helped many lawyers step back and go, "Hey, that was a better experience!" and "I can really use this time now to focus on client retention." Just giving people time in their day back has been a wellness benefit. I know technology and wellness aren't typically linked, but I really do believe that some tools have significantly contributed to the mental well-being of our lawyers and staff.

**Guajardo:** On the data front, many firms and clients have been collecting data for years and then neglect to utilize it to make decisions. Data allows both client and firm to take a step back and think about it strategically. Putting it in front of the right people ensures they're aware of what's happening in their cases and what's going on with the day-to-day work or the overall project. There are great tools out there that can visualize data in a way that is extremely helpful. Telling the story behind data helps us do a better job.

**It's not enough to just throw the technology at a problem. It has to be process-driven.**

**-Alexandra Guajardo**

**Applegate:** We've also found data visualization and analysis to be incredibly valuable to clients. An example is when you have large-scale engagements and have the ability to create very simple monthly accruals and budgets. Putting that in the inbox of the person that's making decisions on scope and timeline and saying, "Hey, look: Every two weeks, this is where the budget vs. actual is on this case" is helpful. It's also the thing we have done at scale that has created the most client loyalty and retention. Clients are like, "Hey, I'm glad you send me this, because then I can make some sort of actionable decision on where the scope goes from here." It is a heightened level of communication that requires nothing more than popping out the data and then putting an email together that drops biweekly or weekly or monthly, or however often our clients want to get them.

*The statements made in this interview are the sole opinions of the participants and not those of Barnes & Thornburg or Shell Global.*



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# Efficient & Advanced Technology Solutions for the Corporate Law Department

*Mark Nastasi, CobbleStone Software*



## **Mark Nastasi**

Mark Nastasi is the Executive VP and founder of CobbleStone Software with more than 20 years of professional experience in the industry. He launched the first commercial contract software in 1995 named CMTS (Contract Management Tracking System). He has worked extensively with general counsel, paralegals, lawyers and legal professionals to help manage contracts better.

### **Please tell us about CobbleStone Software.**

CobbleStone Software® was founded in 1995 and we have been offering state-of-the-art contract management systems since then. Our mission is to provide the most advanced, cost-effective, and user-friendly contract and procurement management software applications that enable employees to do their best work.

Through growth and innovation, here are the four aspects of our mission that we have stayed true to:

1. Our software products and staff go above and beyond expectations.
2. We respect our clients, our colleagues and our environment.
3. We exemplify sincerity, personal integrity, humility, courtesy, wisdom and charity.
4. Our products and software solutions continue to evolve to meet ever changing business.

**CobbleStone prides itself on continuous innovation in Contract Lifecycle Management. Please share the culture of the organization and in what way your team is “pushing the envelope.”**

CobbleStone constantly strives to keep users engaged and provides multiple learning opportunities throughout the year in efforts to better understand client CLM issues and how to create solutions for such issues. By hosting multiple conferences, webinars, roadshow events and masterclasses, CobbleStone stays connected to current and prospective clients and their evolving contract management software needs. Alongside that, CobbleStone also maintains its' position as an industry leader by offering efficient solutions, advanced technology and an immersive certification program.

### **What is VISDOM AI and how are clients benefiting from this product?**

VISDOM® is powerful contract artificial intelligence (AI) backed by machine learning. VISDOM AI systematically analyzes contracts

originated by internal or external paper by transforming the documents into building blocks for improved contract oversight, proactive opportunity identification and risk mitigation. Within VISDOM AI, there are several powerful features that clients enjoy using including:

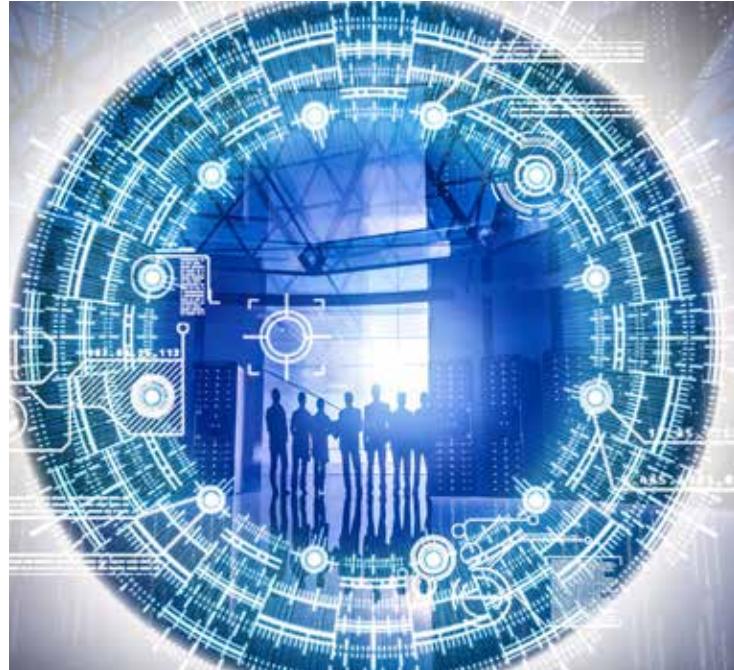
- **CobbleStone Auto-Redline** can automate the inclusion of clauses from users' approved clause library - virtually ensuring that favorable clause language is included.
- **ConfigAISM** provides proactive CLM (contract lifecycle management) field recommendations for metadata fields for contract clauses. This helps streamline contract management software implementations.
- **IntelliXtract** gives users the power to look into their contracts and agreements to find key terms, legal phrases, conditions and other legal text.
- **Theory Calculator** provides users with recurring automated data analysis and on-screen recommendations to provide helpful guidance throughout the contract administration process.

#### **How does your organization support clients as they streamline their CLM?**

CobbleStone Contract Insight® provides clients with all sorts of solutions to help streamline their CLM. Clients can expect assistance with everything from contract and vendor management to procurement and eSourcing. CobbleStone is constantly advancing to support clients by rolling out features and updates on a frequent schedule. CobbleStone strives to provide an efficient and effective system that business professionals can utilize to its' full potential. In our most recent update, we brought forth industry-demanded features such as:

- An easily navigable and expandable core user interface.
- A visually engaging contract record details experience.
- A dynamic progress bar to digest page content as the user scrolls.
- A robust user information and account menu.
- CobbleStone Auto-Redline for improved drafting and negotiations.
- Proactive field recommendations for powerful contract clause metadata management.
- Insightful contract data extraction summaries with VISDOM contract AI.
- A concise yet detailed rundown of clause extraction similarity to gauge consistency of language for a given contract clause.





### **What are some common mistakes that you see among potential clients?**

Many clients worldwide face all sorts of issues when dealing with CLM. Some common contract management mistakes include:

- Relying on manual contract management.
- Using simple spreadsheets, locally saved documents and shared drives for contract storage.
- Using a paper-based system for contracts.
- Including inconsistent language and clauses in contracts.
- Missing significant obligations and deadlines.
- Losing track of contract versions.
- Relying on outdated signature methods, including wet signatures.

### **Please share the KPIs that are critical to designing and continuously evaluating the CLM path.**

The three KPIs we recommend clients track are as follows:

#### **KPI #1 – Contract Efficiency**

Contract efficiency performance metrics may include contract lifecycle time, customer, vendor or geographic trends, contract value assessments and whether or not milestones are met.

CobbleStone strives to provide an efficient and effective system that business professionals can utilize to its' full potential.

#### **KPI #2 – Contract Efficacy**

Contract efficacy performance metrics may include the number of agreements by type of contracts (program, customer or vendor) in one's contract repository, annualized contract value, the remaining value of a terminated contract, order value variance and historical legacy contract trends.

#### **KPI #3 – Contract Risk**

Contract risk performance metrics may include standard clause variance, amount of agreements expiring without renewal dates, missed contract obligations, number of improper electronic signature approvals or vendor authorizations, number of delayed contract approval processes, task completion for terminated contracts and disputes resolved. Leading contract lifecycle management software can provide you with a risk assessment matrix to visually assess risk within a centralized location.



# 7 Features

## To Look for When Selecting Contract Management Software



In this free whitepaper, discover 7 key contracting features to look for in choosing your contract management software.

1. A Secure Contract Repository
2. Intelligent Workflow Automation
3. Reporting & Analytics Tools

**See features #4 through #7**  
and learn more by downloading  
this free whitepaper.

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# Practical, Tangible Strategies for Legal Contract Management

*Karen Meyer, Contract Logix*



## ***Karen Meyer***

As CEO, Karen leads strategy for the company and oversees all aspects of the business. Karen brings more than 20 years of SaaS experience building organizations to scale and drive growth. Prior to becoming Contract Logix's CEO, Karen led Upland Software's Global Customer Success organization. She led commercial and customer engagement teams for over a dozen products and played a critical role in driving Upland's M&A and integration strategies leading to high growth and strong customer retention.

---

**Please describe the company's history. What does Contract Logix do and who are your main customers?**

Contract Logix was founded in 2006 and is one of the longest-tenured contract management software companies in our space. A lot of the original contract lifecycle management (CLM) innovators have worked, and still work, for our company. We work with legal, procurement, finance and sales teams in highly-regulated industries like pharma, healthcare and energy, all with complex compliance requirements and agreements, to help them implement an actual contract management process. They use our software to manage the entire lifecycle of their contracts from the moment an agreement is requested all the way through the termination, renewal or amendment of it.

All businesses have hidden risks in contracts, and the risks due to ineffective contract lifecycle management can be small, or they can be massive. Those risks include everything from overlooked penalties to missed delivery obligations, to lost revenue, to unexpected renewals. Our specialty is helping organizations illuminate and articulate, a lot of times for the first time, what their current processes for managing contracts and vendors are and making measurable and meaningful improvements. For companies that already have an understanding of CLM, we usually find that there's either not a distinctive process in place or there's a lot of waste and inefficiency in the system. When we begin working with a customer, we partner with them for the long haul, helping every step of the way through onboarding, the design of better business processes, user adoption and ongoing support.

**What about your personal background? What experience do you have working with legal teams? Do you feel your earlier experiences translate to your current role at Contract Logix?**

My background is in SaaS helping organizations scale for growth. I joined Contract Logix in February 2022 and have been with the company for a year. My role is to drive change, drive innovation,

and help customers be productive and grow in their own right. In my prior role, I led commercial and customer engagement teams for more than a dozen products, so I know first-hand what it's like to be responsible for driving renewals, getting new contracts into place and working with Corporate Counsel to make sure that we're fully compliant and protecting all of our customer data. We did that without a CLM system and it was very painful and time consuming. Part of my motivation in my current role is understanding that this (CLM) is really a solution that every organization with contracts (i.e. all of them) needs.

**Karen, you mentioned that you work with many General Counsel and corporate legal teams. What are they telling you is the biggest challenge they face? Any common themes or insights you can share?**

The feedback that we get is pretty consistent. Legal teams KNOW that contracts are the backbone to their organization, but across the board, visibility into what's out there remains the biggest challenge. They want and need help consolidating and organizing chaos, and we give them tangible advice by sitting down and asking, "Okay, which problem do you want to solve first?"

For example, speaking with senior counsel at some large companies (where you would expect that there might be a lot more maturity around contract management), visibility still remains an issue. If you think about it, it makes sense. It's so easy to spin up a SharePoint site or share documents via email. These leaders know they don't have a handle on all of the contracts shared this way, so we help them get that one area under control. We sit down and say, "Let's centralize all of the contracts you have in a proper digital contract repository," and then once we have that solved, we move on to the next challenge which might be looking at the actual body of the contracts and helping

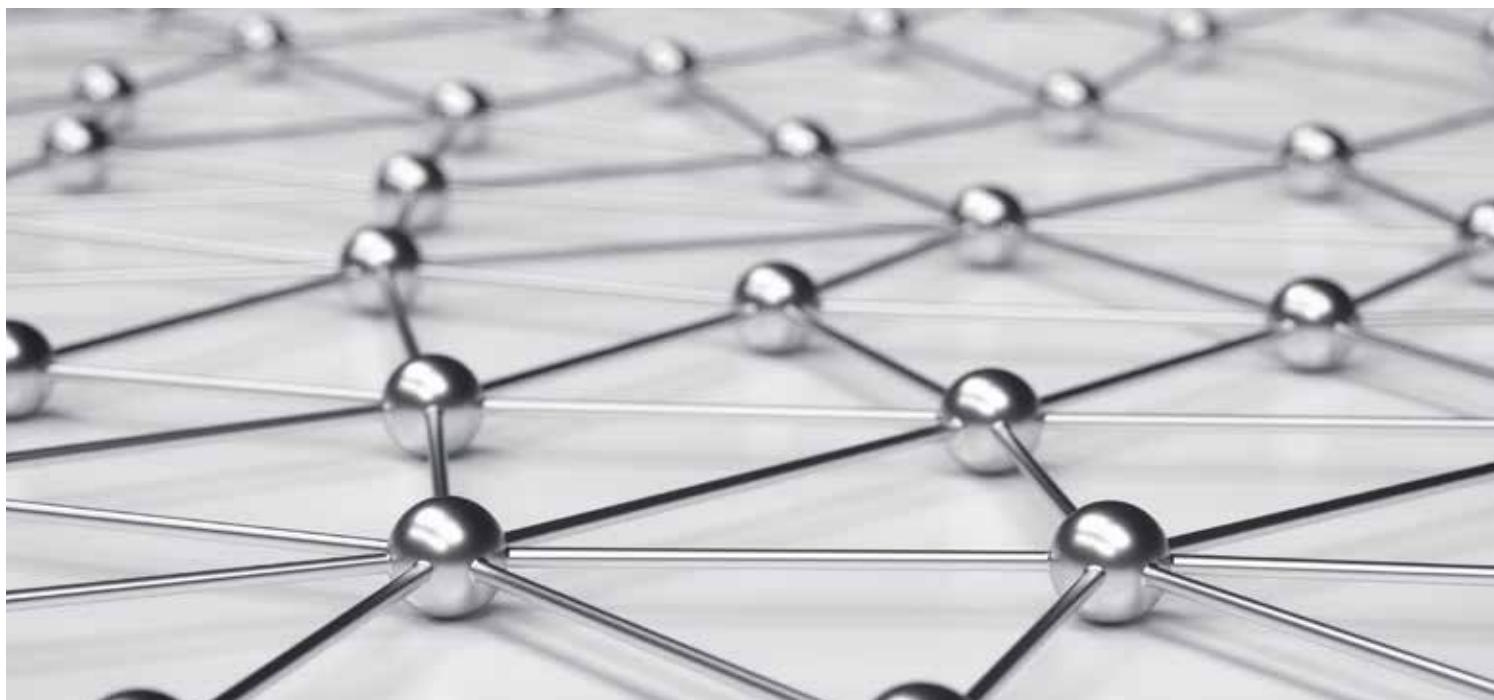
to establish templates. The technology is helping facilitate the process, but it's not just about tech. We're looking for waste and issues and simply a way to improve them. It's not super sexy and it sounds simple, but it's anything but. Once we help them get all these contracts in one place, we can then look at what binds them – is it time, money, etc.? Is there any flexibility to adjust relationships with vendors? What kind of leverage do you have?

For the organizations further along the maturity curve, we're looking for bottlenecks. For example, a number of organizations will get qualitative feedback from IT that legal teams are taking too long to respond. Legal teams have very few resources. So, we sit down, and again, very practically look at: How many requests is the team getting? What is happening in the stages of review? How long is a review going to take? Then we use that to pull together a consistent set of KPIs and SLAs of how the legal team's time is being spent and where it can be improved.

We know that time is money for GCs and CCs. If you look at Bloomberg Law's 2022 Legal Ops and Tech Survey, 86% of respondents cited improving productivity as their reason for using legal tech. As a legal tech company, yes, we're interested in how they use technology, but what drives us is helping solve the practical challenges of visibility into where the contracts are and then helping our customers move forward along that maturity curve.

**Technology adoption is a big focus for GCs and their legal and contracting counterparts in their organizations, but technology adoption is only the beginning. The real challenge has to do with getting that technology operational in a business. What are the biggest issues facing organizations that roll out new technology like Contract Logix?**

Many people in the tech industry don't understand



how to make customers successful after they deliver a product. The technology is just part of the contract lifecycle process. We want our customers to focus on their expertise as attorneys, as procurement professionals and get contracts and processes in place that support the goals of the business. Failures occur when people don't clearly understand the problem they are trying to solve, which is why some of the advice I outlined earlier about defining problems and solving them quickly may seem common sense, but is still critical. We don't want our customers focusing or obsessing about technology. We want them to focus on their jobs. In most cases, our customers have never used or implemented software like ours so there is a lot of change management they need to address. Our job as an organization is to help guide them through that process which is key to getting software like ours operational and adopted in a business.

**It seems like implementation is more about change management than anything else. What are some practical steps organizations should take? How do you ensure successful onboarding, user adoption and long-term success?**

Driving change is truly the hardest aspect of this process because you are dealing with individuals. So make it easy for them to understand. You're going to want to address these questions:

- Why did we make this technology investment?
- Why do we need to make the process better?
- How is it going to make your life easier?
- What's in it for you?

When you show how this will help a GC meet their billable utilization goals, improve productivity, you're showing how

these changes will make it easier to do their jobs and focus on their area of expertise.

This is why we spend so much time with our customers brainstorming and training them on change management. We lean on them to tell us about their specific organizations and their specific challenges, and THEN we work out use cases, implementation plans, configurations and processes, including workflows. We help define how they can measure success and business value.

Our planning process includes making sure that customers pick a problem that is solvable and solve that first. It's great to have a vision and be future thinking, but you need to do the basic blocking and tackling first. You need to get it right and show progress. So, for example, a problem that can be solved: Are your contracts all in one place? If not, get all your contracts in a single repository. If that's already done, is there too much customization happening inside your legal agreements? Solve that problem by getting a good template in place and train the organization on how to use it. After that, pick the next biggest challenge which might be something like getting all your approved language in a clause library. These are all manageable problems that can be addressed in a quarter or two and allow you to realize the business value of CLM.

### **What KPIs would you recommend that organizations track to measure success?**

Depending on where an organization is on the CLM maturity curve, sometimes it's really basic questions: How many contracts do we have under management right now? Vendor contracts, employee contracts, etc.? What is the dollar amount associated with those agreements? What

financial obligations do we have to deliver our services to our customers or partners or to the vendors?

Another suggestion is to quantify risks and terms and to show where there is exposure by not having a NDA in place or updated certificates of insurance, having a handle on limits of liability and making sure you have the right coverage in place to operate a business. As a senior leader, this one is near and dear to my heart.

From a productivity standpoint, you can track volumes of new contract requests, the average turnaround time from new request to execution and storage of the contract, how long it takes to onboard a new vendor or employee, etc.

You can also look at KPIs that track your budget goals and savings. For example, if you're the GC for a company that runs a hotel chain, you have certain vendors in place to provide services in hotels and want to manage that spend wisely. You'll want to know what the existing contracts are, when the renewals are taking place and how much leverage you have in negotiating.

### **Can you provide some quantitative or qualitative examples of ROI an organization can get by implementing CLM?**

We have so many great customer stories across industries. One of our oil and gas customers is now able to execute contracts 90% faster using our platform, and another healthcare customer reduced the time spent tracking

and managing agreements by 40% in two years. We also work with large tech companies and one of our customers said that contract information that would have taken him three days to find before using Contract Logix is now findable in minutes. Another one of our large logistics customers took a look at their driver contracts and was able to make tangible improvements immediately, improving the time it took to onboard a new driver from four weeks down to two, which is a key factor in shortening their time to revenue.

A great basic example, but one that is super powerful because it quantitatively shows CLM's impact, is looking at the numbers when an organization just puts all their agreements in one place. In a large organization when

people can't find contracts, they go to the paralegal, they don't go to the highest paid attorney. But even the paralegal could be making \$100 an hour. If they spend four hours instead of five minutes looking for a contract, in just this example, that's \$400 and can be between \$8,000 to \$400,000 a year just looking for information. It's a great example to justify the cost of putting the right technology and processes in place.

Most organizations are at step one of the contract management process, and we understand that managing contracts efficiently and effectively is a key job responsibility. Getting back to basics and helping organizations take that first step is something Contract Logix excels at and is extremely proud of.



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# 10 Effective Outside Counsel Guideline Practices for Strong Operational Relationships

Brenda Hansen, Epiq



## Brenda Hansen

Brenda Hansen is Senior Legal Operations Consultant for Epiq's legal business advisory practice. Brenda has more than 20 years of experience in the legal industry with both in-house and law firm administration experience. She is known for her ability to partner with business leaders to identify gaps and produce solutions that generate new levels of efficiency and productivity.

For in-house legal departments, relationships with Outside Counsel are integral to the overall management of matters and outcomes. A solid relationship creates synergy and partnership; a dysfunctional one creates frustration and typically increases costs. One of the most common tools to enhance client/firm relationships is setting Outside Counsel Guidelines (OCGs).

Maintaining some variation of OCGs is a common practice these days, but setting comprehensive and clear guidelines is less prevalent. Having drafted many OCGs in my career, I have a strong perspective on their purpose and the approach to take. Here are some pointers for drafting effective OCGs:

1

### Use OCGs as an Instruction Manual not an Engagement

**Agreement:** Law Firm engagement agreements and OCGs should work in tandem to establish the relationship with your law firms. Both are documents reflecting mutually agreed upon contractual obligations. However, there should be distinct differences between the two: The engagement letter outlines the terms associated with representing the Company (i.e. conflict process, liability, IT security requirements and pricing); and the guidelines explain what is expected in the operational aspects of the relationship - invoicing, staffing of matters, what constitutes billable work and cost management methods (i.e. accruals, budgets).

2

### Be Clear & Simple:

Don't overcomplicate the instructions. Highlight the most important aspects and provide details of what is required/accepted and what is not for each topic. Focus on areas such as:

- Methods of submitting invoices (e.g. eBilling tool, PO process) and requesting rate increases (specifying timing and limitations)
- Acceptable and unacceptable types of work (e.g. doing research, training, clerical) and billing behaviors (e.g. forbidding block or embedded billing, requiring narratives)
- Staffing requirements (e.g. change notice, alignment of

- task/level with experience and matter complexity)
- Non-Billable items (e.g. phone, unapproved travel, online research tools)
  - Invoice Requirements (e.g. frequency, format, approved fees/expenses)
  - Budgeting Expectations (e.g. by matter, frequency, and updating budgets)
  - Accrual Submission (e.g. define accruals, deadlines, and timing, matter vs. firm)

**3 Be Mindful of Practice Area Differences:** Most instructions found in OCGs apply across practice areas. However, sometimes there are nuances, and specific instructions should be provided for practice areas that have the biggest impact on spend. For example, if your department has a lot of litigation or E-Discovery, be specific about how matters should be billed, such as use of UTBMS codes. Also, I recommend requiring the use of approved third-party vendors (i.e. E-Discovery or translation providers), leveraging bargaining power to control costs. No longer should you just accept any pass-through costs. In my experience, the practice areas that may need specific guidelines are Litigation, Intellectual Property and M&A.

**4 Be Mindful of Global Differences:** Most instructions found in OCGs apply to U.S. law firms. However, sometimes there are nuances, and specific instructions should be provided for legal services that will be provided by law firms based outside of the U.S. Consider providing instructions related to selection of Corporate Entities, VAT Tax Currency. For example, intellectual property practitioners often work with a network of law firms located around the world – typically in countries where the company files patents and trademarks. In these cases, the OCGs might need to address currency and the cost of currency conversion.

**5 Leverage Company Policies:** Don't re-create the wheel. If your company has travel and expenses policies, incorporate them into your OCGs. Remember, the firms should not be given more latitude than your own in-house team.

**6 Communicate & Train:** Communicate to firms early and often when you're getting ready to launch (or revise) your guidelines. Giving firms enough time to digest, disseminate and implement the guidelines will help ensure their compliance with your expectations. You want to make sure that everyone working on your matters understands the guidelines. Consider hosting sessions for the billing coordinators to highlight key aspects, and maintain the dialogue with occasional update sessions (e.g. quarterly).

**7 Request Value-Adds:** Enhance the firm/in-house relationship by creating opportunity for knowledge sharing and thought leadership. Many legal departments leverage firms to provide CLE programs to new or key legal topics. More advanced vendor management programs have Legal Departments hosting an OC Summit where your top firms (partners and key personnel) come together to discuss business objectives, legal department goals and challenges to the legal landscape. This initiative creates a mutually beneficial opportunity to share perspectives and insights on how best to partner and represent the Company.

**8 Enforce & Provide Feedback:** Ultimately, the guidelines are only truly effective when they are enforced. To achieve that, all members of the in-house legal team, including lawyers, should be familiar with the guidelines, especially if they are invoice approvers. If you don't want to be billed in a specific matter, or were charged for something that is not allowed,



provide immediate feedback to the firm. It is helpful to leverage eBilling tools and/or third-party invoice reviewers to ensure compliance to the guidelines. More mature Vendor Management programs feature an annual review with a scorecard-based evaluation that includes scores on compliance to the OCGs.

[Learn more: How to Get the Most out of Your Legal Billing Data – Fostering Transparency and Collaboration to Better Align Expectations.](#)

## 9

**Revisit & Update:** OCGs should evolve as your Vendor and Spend Management program matures. For example, you initially might not be leveraging alternative fees (AFAs), but one or two years later you may be (a) leveraging a RFP tool; (b) established a preferred law firm panel; or (c) have adopted software to facilitate the relationship with outside

counsel. Naturally, your guidelines should reflect these new processes, tools and approach. I strongly encourage updating guidelines at least every 18 months.

## 10

**Set the Tone:** The overarching approach to OCGs should reflect your company and legal departments' goals and culture. They are a tool to enhance the relationship and are not meant to be adversarial. Rather, the OCGs should create an opportunity for discussion and partnership with your firms.

Having an effective OCG process is key to building relationships with Firms and managing spend. Drafting effective OCGs should be a proactive process and opportunity for your in-house legal departments to align expectations with firms and to enhance future business decisions.

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# Ten Essential Steps to Successfully Implement a Microsoft 365-Based Document and Email Management Solution (DMS)

*Keith Valley, Epona USA*



## **Keith Valley**

Keith Valley has started numerous businesses with varying degrees of success, culminating with a multi-time award winning Entrepreneur Magazine HOT 100 business in the technology sector. In 2011, Keith joined Epona USA, as the Director of US Sales, and as their first employee in the United States, to open the USA office and begin the process of spreading the power of SharePoint as a DMS platform for the Dutch-based Epona Legal BV.

**You have been implementing and deploying DMS solutions for a generation. Take us through the essential steps to a successful DMS on Microsoft 365.**

**Keith Valley:** You want people in the organization that have experience with the business to help design an appropriate solution specific to your business. As soon as your team determines a move to a cloud-based DMS like Epona, it's time to reach out to management and identify your team members and roles. In my experience, you need a great team to manage the process from beginning to end. Making sure you have the right team is key, including the right number of technical people and subject experts. The team should also include "cheerleaders," folks who want to take part and are excited to promote the project inside the organization.

**Having a solid team is at the heart of every successful endeavor. You stress having internal promotion as a key to a successful project. Why is that?**

Imparting clear information when dealing with change in any organization is of prime importance. Cheerleaders support the value of this type of change and what it means for the success of the organization. Communicating new features and outlining the benefits ease concerns of your team. In this stage, focus on understanding your pain points and connecting those with the features that alleviate those pain points.

**What are some of the common pain points you run into on a regular basis?**

Common pain points vary from no current DMS solution to solutions lacking specific functionality/lack of user adoption to the rising costs without added benefits.

**What guidance can you offer as to who should be on your team?**

Daily users from key groups are critical to assist in setting up your new environment and DMS testing. For a successful DMS

implementation, gather anyone that has a stake in your enterprise. Then, outline their involvement and roles to assist in setting up your environmental architecture and DMS testing. These should be daily users of integral systems and processes which need to be included in the design of the new system. One or 2 individuals from key groups should be represented.

**Gathering those who have extensive working knowledge of integral systems and processes can contribute to a better design of the new system. What's next in the process?**

As your implementation partner, Epona will perform a thorough evaluation of your current system and practices. This stage helps identify any potholes that might pop up, such as preparatory projects (ex: upgrading to 64-bit Office software or other network configurations) that may be hiding on the road to a smooth transition.

**Ensuring customers' environments are up-to-date and ready for a new cloud based Epona DMS on Microsoft 365 is invaluable. What's next?**

At this stage, Epona focuses on the 3 most important aspects of your enterprise - People, Processes and Technology. Consultants work with your team to familiarize themselves with new processes and technology such as storing and profiling your content in your security framework and assisting your team in designing the best possible DMS to fit your unique business needs.

**In creating the best possible DMS, walk us through the Design phase of a project.**

This stage focuses on designing and building the perfect system, allowing users to easily accomplish daily practices

## SUCCESSFUL DMS CHECKLIST

**Gathering Your Team**

**Obtain Sponsors and Communicate Benefits**

**Determine Internal Teams**

**Initiation and Analysis**

**System Education – People, Processes and Technology**

**Customize – Design and Build**

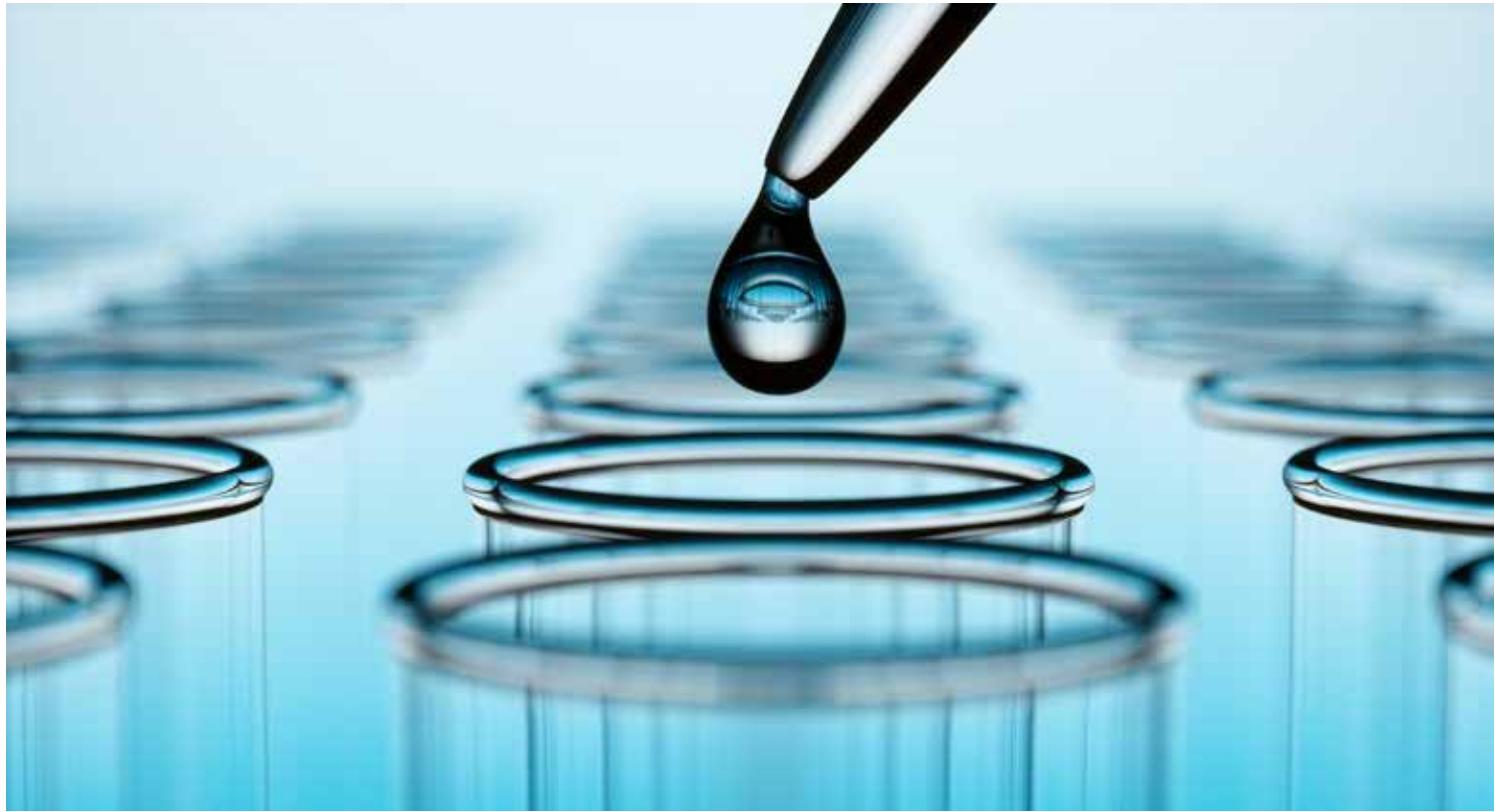
**Qualify – Test and Acceptance**

**End-User Training**

**Pilot**

**Deployment**

**Ongoing Training and Support**



such as accessing, working on and saving their content, as well as easy content searching and filing emails.

#### **Would you elaborate on both the Design and Build phases?**

In the Design phase, a representative group of users is brought in to determine best practices for your organization including day-to-day workflows, folder structures, document naming conventions and more. In the Build phase, communication with highly technical members of your team is of great importance. They will assist with providing the access to your environment, current security models to follow, and Microsoft Tenant Managed Add-Ins, among other things.

**You have the new solution designed and built to the customer's specifications. Is there a Quality Control phase and what does this entail?**

Upon completion of building the DMS to the agreed design specifications, it is time to perform quality control testing to ensure functionality meets expectations. After the initial design has been tested and approved, we begin testing any migrations and finalize training procedures for the end-users.

#### **What type of end-user training does Epona offer?**

Epona offers virtualized training as part of the initial project and/or can provide onsite training (for

an additional cost). It's highly recommended that organizations consider onsite training as it provides a more intimate and effective method of training for end-users. It allows our trainer(s) to assess and attend to any problem areas more easily while on-site. This is hard to achieve with virtual training for obvious reasons.

Epona end-user training can be extensive in accordance with the customers needs. Training is continuously available throughout and after the project. End-user training is a critical component for user adoption and the success of the project.

**Makes perfect sense that onsite training is more effective than virtual. So, you have designed, built, and quality control tested the DMS. What comes next?**

Before deploying your new DMS, make sure you test in a pilot environment. This stage will help your project group shed light on any remaining roadblocks or potholes which could impact a successful, seamless transition to your new DMS. The group will be working with Epona to smooth out any speed bumps discovered, as well as determine best practices for the rest of the organization.

**Providing a test pilot environment prior to deployment sounds like a great way to ensure the environment is exactly what client wants before deploying. Tell us about the Deployment phase of the project.**

The design has been accepted and we are ready to go-live with your DMS organization-wide. Migration finalization, site creation and training plans are completed and scheduled, with all 3rd party integrations completed. Now your Project Group transitions the main point of contact to the Epona support and training team. Ongoing additional meetings can

be scheduled with the project manager if necessary.

**Ongoing support will be a critical factor to the success of the overall project success. What kind of ongoing training and support does Epona provide?**

Ensuring success will require high end-user adoption. Epona ensures this with training classes online or in-person. Classes include refresher-style training after everyone is up-and-running. Epona also provides training documentation, helping new users onboard quickly, coupled with ongoing technical support for any issues that arise. We make certain that everyone understands how to use their new Epona DMS effectively while operating with high efficiency.

**It is apparent you have mastered a step-by-step plan to successfully deploy a Microsoft365-based DMS solution. In closing, what are some of the benefits your customers can look forward to by moving to a Mirosoft365-based DMS?**

It is apparent you have mastered a step-by-step plan to successfully deploy a Microsoft365-based DMS solution. In closing, what are some of the benefits your customers can look forward to by moving to a Mirosoft365-based DMS?

I called a customer two days ago, who had a disaster conversion from their legacy systems to the Microsoft 365 platform and Epona DMS. It had been 2 years since I last spoke to them. When the Teams video call started, the client's face lit up and he greeted me warmly. He told me that, although the first 3 weeks after conversion were exceedingly challenging, in the last 2 years the firms' lawyers have been in love with the new system. This tells me that the Microsoft platform answers the call for the legal profession. My client's lawyers (his partners) were more productive than before. That says it all.

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# 12 Questions Legal Operations Should Ask When Evaluating DMS Vendors

*iManage*



## *iManage*

iManage is the leading provider of document and email management for knowledge workers. iManage enables the world's leading enterprises to manage information more efficiently and securely, and leverage knowledge resources to drive better business outcomes. More than one million users at 4,000 organizations across the globe rely on iManage every day.

Legal operations professionals are continually evaluating new processes and technologies to help their legal departments be more efficient, productive, and secure. One important area of focus is document management – enabling users to save, search and work effectively with the documents, emails and messages that flow through the legal department every day.

Organizations increasingly find that traditional enterprise approaches to document management do not meet the specific requirements of their legal departments. So it's no surprise that 55 percent of legal operators plan to update, evaluate or implement new document management systems (DMS) in the next 12 months.<sup>1</sup>

Before making an investment in a legal DMS, it's important to consider the specific functional requirements of legal professionals and the unique capabilities of leading DMS providers.

### **How does document management help make my legal department more organized and productive?**

A legal DMS works the way legal professionals work. It organizes and structures information so users can find the content they need, collaborate efficiently and leverage existing work product. It saves documents and emails together, in the proper context, organized around the relevant matter, client or transaction. It should also be simple and intuitive to use, so the user can complete tasks quickly and without friction.

### **How does a legal DMS differ from an enterprise content solution? What additional functionality should I look for?**

In addition to organizing information clearly, a legal DMS should provide legal-specific capabilities that match the requirements of legal professionals. For example, legal users need to securely share documents with colleagues and clients and easily manage document changes and revisions. A legal DMS should support this workflow with features like secure collaboration, explicit version control and document histories.



#### **Can the solution manage emails as well as documents?**

One of the weaknesses of legacy content systems is they don't save emails and documents together. A modern DMS must enable legal professionals to manage the high volume of sensitive email they work with by saving emails automatically in the correct location, so their content is searchable and secured. Legal users need to see documents and emails together and in the correct context for a complete picture of the matter or transaction they are working on.

#### **Does the legal DMS make it easy to search and find the right documents?**

An IDC study found that knowledge workers spend about 2.5 hours per day searching for the right information. Legal professionals need to find the right document, the right contract, or the right clause, with pinpoint accuracy to respond quickly to client inquiries, identify precedent, or leverage existing work product. A legal DMS must include powerful search capabilities and findability, with customizable search functions and personalized results.

#### **Is the DMS intuitive and easy to use?**

Busy professionals have little patience for overly complex or difficult technology. The DMS should work seamlessly with the office productivity tools that legal professionals already use and deliver an intuitive user experience on par with consumer technologies. Successful DMS solutions embrace user adoption and engagement as a vital metric of success. Ideally, the solution will require minimal training and provide embedded learning tools to optimize performance.

#### **Can users work securely outside the office or on a mobile device?**

In the new normal of hybrid and mobile work, legal professionals need to access their work securely to be productive wherever they are. Modern document management enables users to work from anywhere on any device, with a consistent interface and user experience. The best DMS solution enables workers to stay productive and responsive to business demands by securely collaborating with colleagues, making revisions or reviewing and approving documents from anywhere.

### **Does the DMS integrate with other legal technologies?**

Legal teams rely on a range of different technology solutions, including matter management, e-billing, case management, contract management and more. Any legal DMS should integrate seamlessly into this environment, with out-of-the-box connections to core systems and efficient tools for extension and customization. Look for a DMS vendor with a robust partner ecosystem that can support implementation and systems integration requirements.

### **Can the DMS protect our company's most sensitive and confidential legal information?**

Legal departments need the highest levels of security protections for proprietary work product, particularly in today's era of increased cybersecurity risk. The DMS needs to deliver a multi-layered approach to security that's both comprehensive and unobtrusive to the end user. Documents and emails should be automatically encrypted, with need-to-know access set at the document and matter level, as well as active threat detection to monitor and flag abnormal activity. Security protections should also include support for defined regulatory policies like GDPR and CCPA, while being fully tracked and auditable.

### **Can the DMS deploy in the cloud?**

Nearly every enterprise is working on advancing their cloud strategy by now. There are clear advantages to the software-as-a-service (SaaS) model, but some organizations worry about moving their confidential legal content into the cloud. Look for cloud native legal DMS providers with well-architected cloud solutions that emphasize performance, reliability, agility, and most critically, security. Check for trusted cloud standards and certifications — ISO 27001 series and SOC 2 Type 2 are the most important.

### **Does the legal DMS vendor have a comprehensive implementation strategy?**

Look for vendors that understand the importance of a seamless implementation process, and have the services, programs, and partner relationships to ensure project success. Vendors should offer comprehensive implementation support that includes project management, risk assessment, data migration, recommended design, with additional assistance to ensure change management, user enablement, and user adoption.

### **Will our corporate IT team have to spend time maintaining the legal DMS?**

The modern legal DMS should leverage cloud service delivery while minimizing the burden on IT. this approach enhances organizational agility with rapid deployment, automated updates, and the ability to quickly add new functionality, while your IT resources stay focused on the business.

### **Who does the legal DMS vendor work with? How well do they support customer success?**

As with any significant technology decision, take care to evaluate the potential vendors in the market against your specific requirements. Look for partners with a proven track record of working with large and complex corporate legal departments in highly regulated industries like banking and finance. Also consider vendors who have a detailed understanding of the unique requirements of legal users gained through deep experience working with global law firms and lawyers. Finally, seek out vendors who have a demonstrated focus on customer success and a history of building long-term relationships with clients.



## PROTECT YOUR KNOWLEDGE

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## SECURE YOUR VISION

Information is the lifeblood of your business.

And keeping it safe is your first priority.

iManage brings context-based security across people, content, and processes without impacting collaboration and productivity, ensuring your people have the ability to access the information they require to do their job.

**Use QR code below to download the eBook.**



# It's About Trust, Not Tech

*The real reason in-house teams are reluctant to purchase software.*

*Melanie Shafer, Onit*



## **Melanie Shafer**

Melanie is the Vice President of Customer Success and Professional Services of Onit's portfolio of simple legal tech solutions which include SimpleLegal, ContractWorks, SecureDocs, and ReadySign. Melanie's passion for managing people, developing employees, and building teams and processes is critical for scaling service operations through significant organic growth.

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**Budget constraints are the main headline in the SaaS world right now. What impact will that have on in-house legal teams looking to purchase new technology?**

Forward-thinking legal teams know that technology, when implemented properly, can be a powerful tool for reducing costs, increasing efficiency, improving communication and ultimately, achieving significant cost savings. Despite this, some legal teams will be forced to prioritize their spending, reducing or delaying the purchase of new software.

**Do you think legal teams can find the budget for technology?**

Budgets still exist – though they may have taken a hit.

Every day, there's a headline highlighting another company that's making double digit workforce reductions. It might sound cliche, and we've heard it time and time again, but legal teams will need to do more with less.

That's where technology comes into play. When a team needs to drive operational efficiencies with fewer resources, they'll find the budget for the right software that meets their needs.

**What advice would you give a legal department looking to take a risk on technology?**

Technology adoption, even in today's climate, doesn't have to be a risk. Companies that are on the fence about purchasing software don't have reservations about the technology itself, they have reservations about how the technology will be implemented, if their team will adopt it and leverage the tool to its full potential, and how to show the tool's value to others across the organization.

**Let's focus on technology implementations for a moment. How can legal teams ensure successful implementations?**

I've seen thousands of successful implementations – and my fair share of unsuccessful ones. Success or failure comes down

to four key things: Buy-in, data, resources and change management.

- 1. Buy-in.** Having an executive sponsor that will help drive change, as well as “doers” that actually execute the change and understand what’s in it for them.
- 2. Data.** For any tool I’ve ever implemented on the buyer or vendor side in the last decade, data has been the make-or-break variable of whether the implementation is completed on time. It’s critical to have the right people included in the implementation – people who know the details of the business – and enough time allotted to get your data in the system effectively.
- 3. Resources.** Do you have the right people on the implementation team to make decisions? And yep, you guessed it, support your data needs. I’ve seen far too many teams rely on the vendor for details that the vendor would never know, like company specific accounting codes or cost centers when implementing e-Billing. Or even something as simple as the correct approvers associated with a matter.
- 4. Change management.** By nature of implementing a new system, you’re asking someone to change. To do something they did yesterday a different way today and tomorrow. You must be able to articulate what’s in it for them and tie it back to what motivates them, whether you use a carrot or a stick or both.

**You also mentioned value. How will legal teams achieve value from their technology the fastest?**

What’s the saying? A plan relieves you of the torment of choice.

To make sure you achieve value quickly, ask the vendor for their implementation plan as early in the evaluation stage as possible. It’s just as critical of a component as the features of the solution.

For all of the solutions in our portfolio, we meet our customers where they’re at and provide options to help ensure their success. For instance, with our e-Billing and matter management solution, SimpleLegal, we have 2 implementation options.

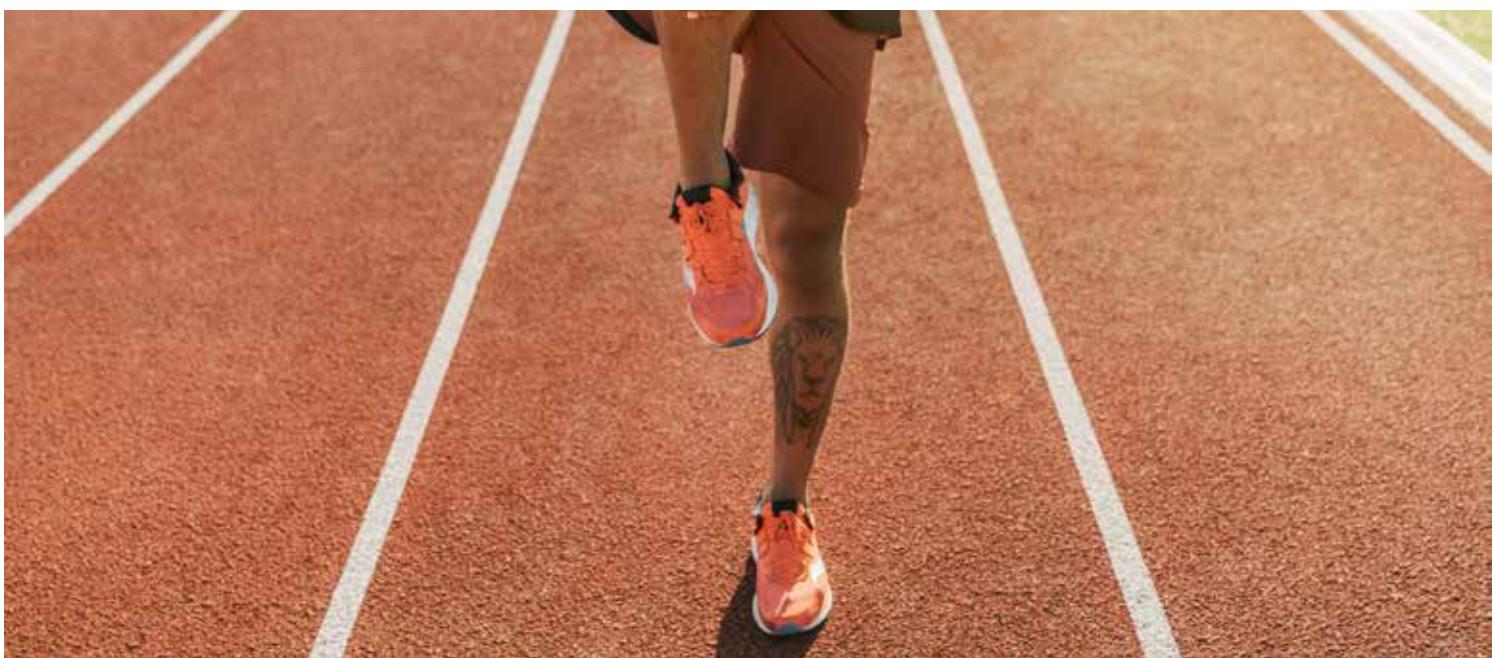
The first is a preconfigured implementation. We take as much guesswork out of implementation as possible, set up our most common configurations to get you started, yet give you the flexibility to adjust it as needed. We’ve sourced best practices from hundreds of implementations to build this out and it accelerates time to value for our customers.

If you prefer more of a “blank slate” approach, then our standard implementation might be a better option. We give you the choices you want and write it according to your plan, not ours. Yes, we have a methodology to guide you through, and yes, we’ll make suggestions along the way, but this is more for our customers who know exactly what they want and just need help getting there.

**Can you put a timeframe on when a legal department will see value from a solution?**

We’ve seen customers get value in their trial period, even before they become customers. It could be days, weeks or months, depending on the product mix or complexity of the organization’s needs. Our goal is to always implement

**In my experience, trust is built on how issues are handled when they arise.**



as quickly as possible without sacrificing quality, so our customers get to the outcomes they're expecting.

We encourage a "crawl, walk, run" approach in that we make sure we're aligned to implement features that will give our customers value as quickly as possible. We work with them over time to evolve in any combination of breadth, depth and frequency of use of those features that will allow them to best solve their business problems.

#### **How do you create trust with your customers?**

Everyone has experienced at least one nightmare implementation. As a software vendor, we have to create trust with legal teams, acting as support, guidance and even an advocate. In my experience, trust is built on how issues are handled when they arise. Everyone, for the most part, expects a positive service experience, but relationships are strengthened or damaged based on a vendor's ability to work through those issues with their customers.

Whether you're looking for e-Billing, contract management, contract drafting or e-Signature, our tools simplify the complex. We take a "no BS" approach to how we communicate. We have a point of view on legal ops and we focus on delivering tangible results and value for our customers at every stage of their journey with us.

#### **Any final thoughts for our readers?**

Now is the best time for legal teams to look for legal tech, even if it might not seem like it.

But in order to succeed, legal teams should be encouraged to look beyond the tech and get to know the team behind it. Standout vendors will strive to know their customers and their business needs, connecting them with not only the features that will help them succeed, but also best practices, industry insights, contacts in the legal ops community they can learn from, and where it makes sense, additional solutions that can provide value to them.

# Reclaim your time

Meet the legal tech portfolio that drives operational efficiency and business impact



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# Practical Law Dynamic Tool Set

*Sterling Miller, Thomson Reuters*



## ***Sterling Miller***

Sterling Miller is a three-time General Counsel who spent almost 25 years in house. He has published four books and writes the award-winning legal blog, *Ten Things You Need to Know as In-House Counsel*. Sterling is a frequent paid contributor to Thomson Reuters as well as a sought-after speaker. He regularly consults with legal departments and coaches in-house lawyers. Sterling received his J.D. from Washington University in St. Louis.

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When it comes to Practical Law, long-time readers of my “Ten Things” blog know I wear my heart on my sleeve: I believe it is hands down the best tool for in-house lawyers and in-house legal departments on the market today. This holds true for both small and medium-sized businesses where in-house legal resources are often scarce to non-existent and for large businesses with corporate legal departments that need a sophisticated platform of continuously maintained resources to round out their value proposition.

Armed with Practical Law, legal teams are placed on an even playing field, without adding headcount or busting budgets. Teams of all sizes can easily increase the quality and velocity of their work — smaller companies may even be able to skip the lawyers altogether, while larger departments keep more work in house. The product is that comprehensive and easy to use.

Similarly, it is no secret that I am enamored with the potential of artificial intelligence (AI) to dramatically change the legal landscape, in terms of both lowering the cost of legal services and providing tools capable of increasing the productivity of lawyers generally. I wrote about this several years ago in a multi-part series of articles for Thomson Reuters titled “Artificial Intelligence and Its Impact on Legal Technology: To Boldly Go Where No Legal Department Has Gone Before”. Since then, I have been eagerly watching legal technology announcements for the next big breakthrough of AI for attorneys. I have seen some interesting things but nothing that got me very excited — until now.

For the past few weeks, I have been privy to some exciting technology from the team at Practical Law. Technology that makes a great product even better. Technology that uses artificial intelligence to make searching the huge amount of Practical Law content, easier, faster and better. I am talking about the new Dynamic Tool Set (DTS). While not all of the new features utilize artificial intelligence, the scope of what is new is like putting a jet engine in a Corvette.

This is one of the first truly “turnkey” practical uses of artificial intelligence for in-house lawyers and corporate legal departments.

### **What is Practical Law?**

Practical Law is a highly developed legal resources tool that features content prepared by more than 300 expert attorney-editors and contributions by well-regarded lawyers at name-brand law firms. The content is constantly maintained, meaning Practical Law’s attorney editors are tracking changes to the law and updating everything with the latest developments. In addition to 16 practice areas (from litigation and commercial transactions to capital markets/corporate governance), cross-practice collections (global COVID-19 resources and startups and small businesses), and industry sectors (retail, construction, financial services, technology), Practical Law provides the following:

- Practice Notes
- Checklists
- Toolkits
- Standard Document Templates and Clauses
- In-House Resources Center
- Global Guides and Trans-Border Topics
- “What’s Market”
- And much more

With the assistance of AI serving up the expert legal work of more than 300 fulltime attorney-editors, an in-house practitioner can even more quickly get up to speed on a myriad of legal issues and tasks, such as drafting contracts, preparing litigation pleadings, or detailed summaries of the law. It can turn a single person legal department into a Swiss Army Knife of legal skills, providing expert legal guidance in hours, if not minutes.

### **What's new?**

While the current version of Practical Law is great, the new Dynamic Tool Set (DTS) makes a great product even better. Before DTS, users would start their Practical Law journey by typing a basic query into the search box and getting a long list of links to Practical Law content back as the result. The user would then scan the links and click on those that seemed the most promising. Enter Dynamic Search.

### **Dynamic Search**

The folks at Practical Law have married AI to its robust search features. With Dynamic Search, when you enter your question into the search box (think “Google search”), not only do you get back the familiar links to Practical Law resources that tie into your query, you also get materials that answer your question directly! In most cases you get:

1. An editor’s summary of the answer (a new Q&A content type drafted by Practical Law’s editors).
2. Up to three AI “answer cards” each highlighting a portion of a Practical Law resource that most directly answers your question.
3. The usual list of links to all of the Practical Law content that may answer your question, including templates, Practice Notes, checklists, etc.

[Click Here for an Image](#) of my inquiry about the different types of mergers showing what I mean.

This incredibly powerful combination of AI search and Practical Law content is a winner for both busy in-house lawyers in large law departments and lawyers for small



business owners, a combination providing comprehensive answers to legal issues fast, materials and answers that put the legal department on par with outside counsel.

### Knowledge Maps

As much as I love Dynamic Search and its use of artificial intelligence, I think my favorite new tool is the Knowledge Map functionality. Knowledge Maps are data visualizations for lawyers that allow you to enter a search and then visually — and quickly — navigate through the entire Practical Law collection of resources and related topics. Most importantly, Knowledge Maps allow you to see issues you may have missed or not considered when starting your search. For example, I entered a search regarding

the difference between Infrastructure as a Service and Platform as a Service agreements and got the [following initial Knowledge Map](#):

The highly visual map allows me to see at a glance all of the different resources available to me by category, such as Standard Clauses, Toolkits, Checklists, Practice Notes, etc. I can click on a resource and get taken to that content plus see additional relevant content added to my map automatically. Here, I clicked on the Practice Note Cloud Computing: Understanding the Legal and Business Issues and got the [following additional content](#) and set of issues to consider:

The map allows me to quickly hop around different related topics and resources while the tool keeps track of where I

have been so I can always select — and easily get back to — the resources I think will best help me solve my problem.

### Interactive Matter Maps

With the new Interactive Matter Maps feature, I can create a list of tasks and phases, with links to Practical Law resources, I need to complete a certain type of project from start to finish. I can use preset maps found in different subject categories, or I can now create my own custom Interactive Matter Map. For example, if I use the existing Interactive Matter Map for federal discovery, I get [the following](#).

I can rearrange the tiles to fit my particular matter, I can color code tasks, and if I click on a tile I am taken to a list of Practical Law resources; for example, “Issue Document Requests” in column three above takes me to links to templates and other materials on preparing document requests (and I can add other hyperlinks or Practical Law resources to the tiles as I see fit). I can also share this task list with my team and even assign tasks, leveraging the power of Practical Law with basic project management.

### Other innovations

There are two other Dynamic Tool Set tools added to the mix.

**What's Market Analytics** – The existing What's Market tool searches public databases to provide users with summaries of contracts and certain contract clauses containing certain language (or not). This allows you to analyze and compare terms or features across multiple deals, along with links to the underlying contracts. From

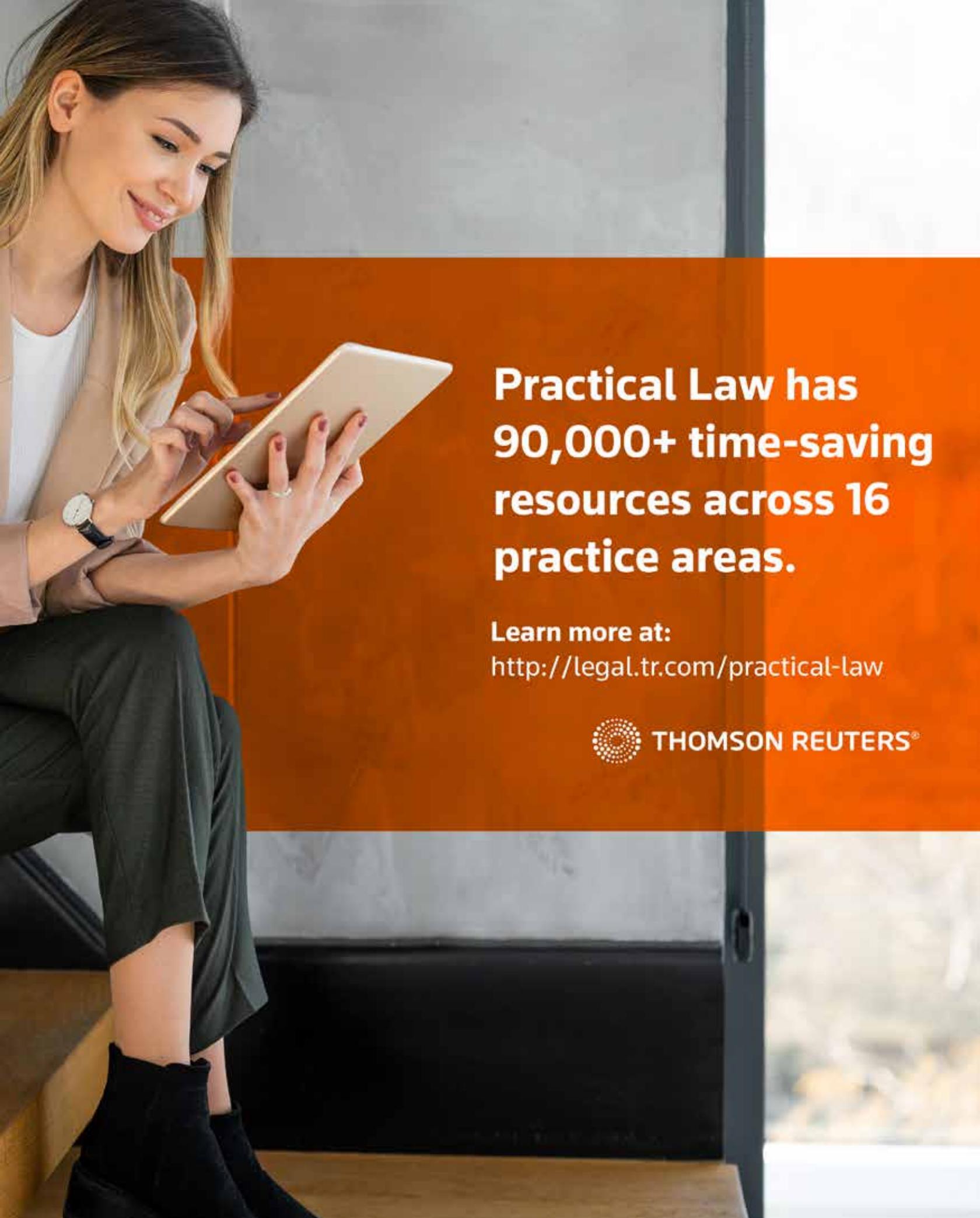
this you can determine whether something you — or the other side — is asking for in a contract is “market.” What's Market Analytics adds the ability to instantly draw insights from and create graphical visualizations of the information for a certain sub-set of deals and agreements. I can use these analytics when negotiating contracts. For example, if I wanted to know the range of “break-up fees” in merger agreements I can get [this chart](#).

**Quick Compare** – With a few clicks you can now create custom charts showing answers to legal questions across several states. For example, you can compare the applicability of Impossibility, Frustration of Purpose and Impracticability of contracts in [Florida, New York and Texas](#).

This is incredibly useful for litigation and dispute analysis and you can also use it up front when deciding which state law you want to apply to your contract depending on the legal issues that concern you most.

### The power of AI to drive answers

Practical Law puts a tremendous library of resources in the hands of in-house lawyers and legal advisors for small businesses. Not only can you find an amazing amount of content on basic “how do I” questions, but you can now utilize the power of AI to drive answers to your legal questions — crucial for when time is short and the team, or an executive, wants answers now. It will be interesting to see how Practical Law adds to these new tools and how they further innovate the product overall. For example, will Thomson Reuters tie the new HighQ Contract Analysis AI tool into Practical Law? We'll see. But for now, definitely a “wow moment” from Practical Law with the Dynamic Tool Set.

A professional woman with long blonde hair, wearing a white top and a tan blazer, is sitting on a wooden bench. She is smiling and looking down at a white tablet device she is holding in her hands. The background is a modern interior with a large window showing a blurred landscape.

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# A NEWSLETTER FOR EVERY PROFESSIONAL!

The thumbnail shows the header of the newsletter. At the top left is the "PinHawk" logo. To its right is the date and volume information: "Tuesday, April 19, 2022 | Volume 21, Issue 334". The main title "LAW TECHNOLOGY DIGEST" is centered in large white letters against a dark blue background with a glowing circuit board pattern. Below it, the word "DAILY" is written in smaller white capital letters. At the bottom of the thumbnail, there's a horizontal bar with links: "Top News", "Legal Administrator Daily", "Law Firm News & Press", and "Employment". Below this bar are icons for LinkedIn, Twitter, and Facebook. Further down, a blue banner features the text "The Legal Workflow Management Report" and "The largest piece of research into law firm workflow practices". To the right of this banner is the "BigHand" logo and a pink button labeled "Access Report".

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