

Ultimate guide to improve the legal operations of a corporation



Bigle Legal



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Where to start on your journey of Legal Tech digital transformation

If you are at the beginning of your company's digital transformation journey, or if you have already made some investment in legal technology and you're unsure of the steps needed to reach your potential, here are some key things to consider.

Cultural change comes first

Make a conscious decision to embrace legal technology throughout your organisation. By making sure that your entire team is enthusiastic and receptive to technology and receptive to technology and transformation, your chances of success will be greatly increased. Cultural change is a great place to start, as it allows you to set the tone for the future of your organisation.

Research, research, research

See how other companies are using innovative technologies in each of their departments. Research your competitors and consider the technology offerings available.

Think about transformation

Technology will only benefit your corporation if you think about the complete transformation needed in your business. This may mean offering new services, implementing new processes and roles, and updating your business model.

Prioritise

Based on your research, decide which technologies should be a priority. To allocate your resources most efficiently, start by adopting technologies that solve your biggest business problems. Then you can move on to resolve the secondary issues. Finally, ask software vendors for case studies of it's clients. This could help you quantify the expected outcome of the technology purchase and estimate whether it fits your company's needs.

Be an example of transformation

Developing a digital transformation case study will force you to consider exactly why and where change is needed, how it will measure your success, what will happen if it doesn't, and the associated risks and costs.

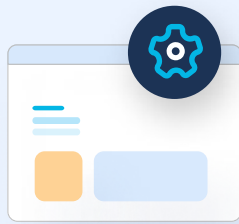
Review, review, review

Companies' transformation is a continuous process. The most successful and innovative are constantly reviewing their digital transformation status, risks and needs, and making decisions to achieve their long-term goals.

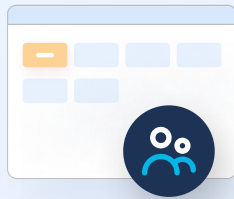
Five pillars for the digital transformation of your organisation

As explained in our previous section, legal technology alone is not enough to bring about change. It is important to understand how the whole organisation should evolve. We will describe five pillars of transformation. Each of which must be considered in order to bring about a complete change in the organisation.

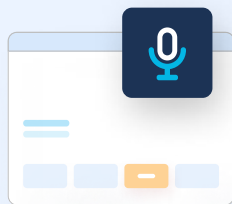




Transformation
of **processes and operations**
in corporations



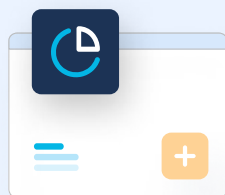
Transforming
customer service
in corporations



Transformation
of **communication**
in corporations

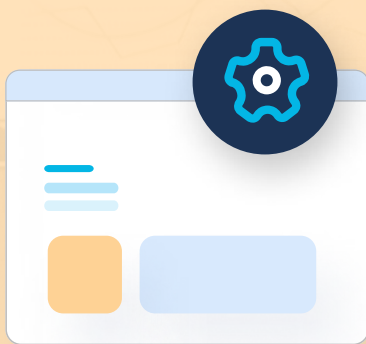


Transforming
marketing
in corporations



Reducing **costs**
and **efficiency-orientation**
of the corporation

1



Transformation of processes and operations in corporations

In recent years, to remain profitable and competitive, large corporations have striven to make their administrative functions much more efficient by reducing the task duration, maximizing staff time and revenue, and improving the quality of provided services. In addition, business practice is now under greater regulatory scrutiny and must find ways to support and demonstrate alignment with regulations.

How legal technology can help transform the operations of organisations and corporations

A wide range of solutions is now available to improve the efficiency of large companies' operations. While many of them have traditionally used isolated technologies that are often incompatible and outdated, the latest enterprise business management platforms bring together all aspects of a corporation's operations, including:

Project management.
Workflow.
Billing and accounting.

Key considerations

As you review how to transform your organisation's operations, we recommend that you consider:

- **Integration:** Systems integration is essential to ensure the alignment of information and data across your organisation. Most of the latest practice management platforms bring together almost all of the corporation's needs into a single platform. That means there will only be one set of client details, billing data, billing history and payments.
- **Accessibility:** Many large companies are moving towards an increasingly agile and flexible working model. As such, all operational systems and processes need to be securely accessible, regardless of location. Cloud-based technology solutions allow staff to work from any location with the benefit of encryption and secure centralised document storage.

Software as a Service (SAAS)

SAAS provides a simple model for purchasing IT services. Instead of purchasing, installing and managing solutions in-house, many corporations prefer to pay a recurring subscription to a vendor to handle specific administrative tasks. Thanks to this externalisation, their internal staff can focus on their core services, and external specialists can administrate their systems.

Technological solutions to consider:

Google Drive.
Dropbox.
Google Docs.

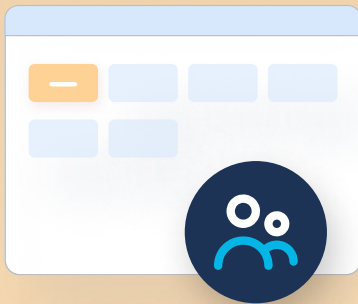
Case Study:

File management software

Before the adoption of GlobalSearch, Custom Professional Accounting stored client records in expandable folders and all forms or documents were copied and placed in the folders by hand. The payroll client folders, for example, can include hard copies of Form 940s and 941s, as well as state and municipal unemployment and workers' compensation statements, and tax client folders may contain W-2s and stock and mortgage interest transactions.

Since the transition to GlobalSearch, they no longer keep printed copies, except in unusual circumstances. Now, while the forms are prepared, they make a single paper copy of each form. They scan the customer's originals to capture them in GlobalSearch and then give the printed copies to the customer. The original forms are filed with the IRS or another entity. Working from originals means there is less opportunity for errors.

2



Transforming customer service in corporations

In the annual reports issued by large companies, it is common to find complaints and claims from customers due to some kind of incident that has not been done efficiently. The goal of any large corporation is to reduce the number of annual incidents as much as possible and to improve customer service.

The main reasons for mismatches in the resolution of a potential incident are:

Delay/Failure in progress.
Failure to provide advice.
Failure to follow instructions.
Poor communication.
Costs.

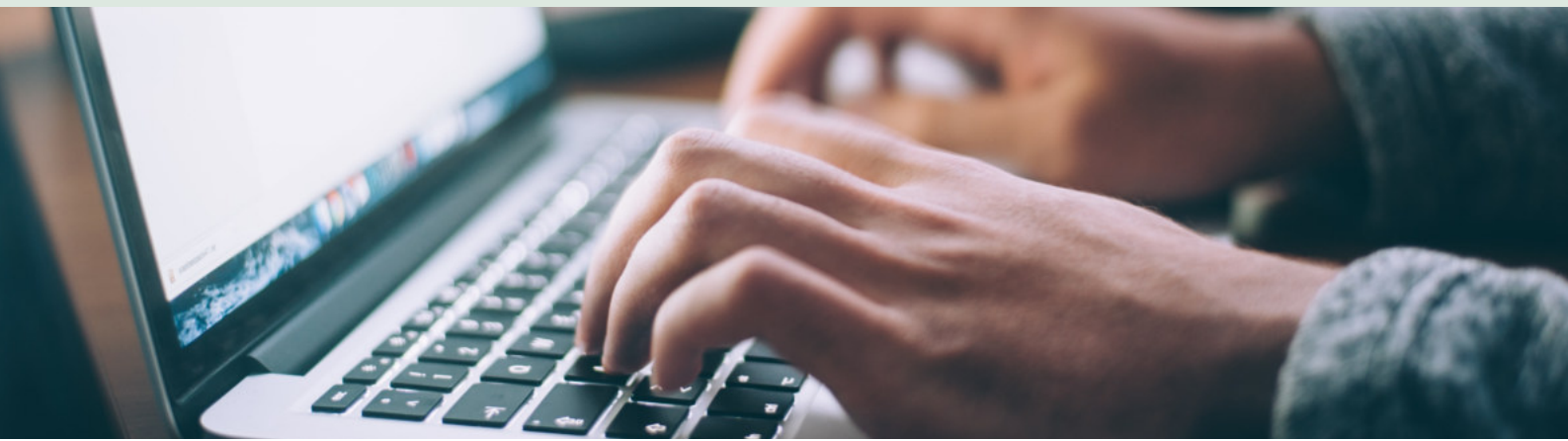
With the introduction of appropriate technology and resources, companies can mitigate these failures to provide good customer service.

Commonly, entrepreneurs themselves think they know precisely what their customers want even better than they do. However, this assumption does not consider a crucial element: loyalty.



A mistake well taken
care of is the best opportunity
to build customer loyalty.

Jürgen Klaric, neuromarketing and neuro
innovation American writer and researcher.



How the right software system can help to transform customer service

File management software can play a decisive role in eliminating each of these complaints by providing:

- **Scheduling and reminders:** To ensure that all incidents are dealt with.
- **Automated workflow solutions:** Systems can be set up to ensure that each step in an incident is followed in the correct order.
- **Control panels:** Allow managers to see an overview of all incidents, divided into the most frequent typologies.
- **Customer portals:** Customers can access and review the details of their incident and its status via any type of device (mobile, tablet or computer).

Other technology solutions aimed at improving customer service include:

Comprehensive document automation software with an electronic signature.
CRM and email automation solutions such as Hubspot.
Chatbots and messaging instead of emails and phone calls.

Key considerations

When reviewing how you will transform your company's customer service, we recommend you consider:

- **New ways of communicating:** Regarding customer service, effective communication is as relevant as the provided advice. Traditionally, all communication with customers was face-to-face and over the telephone; however, clients now prefer the option of communicating with their lawyer via email or instant messaging.
- **Transparency:** Any technology that reduces the barriers between the company and the customer should be under consideration. Often, customers feel that they do not know the status of their matter. Online customer portals that automatically send updates to customers as their case progresses can help provide complete transparency.
- **Security:** When reviewing the capabilities and needs of your system, we recommend that you assign a high priority to security and data protection. The UK's National Cyber Security Centre (NCSC) informs that £11 million of customer funds were reported stolen by cybercriminals in just one year. As a result, many large businesses invest significant sums of money to ensure that their customers are not affected by cyber attacks.

Automated workflow technology

Automated workflow technology

In 2007, Walker Foster implemented Proclaim's automated workflow and the Eclipse Legal case management solution. The main benefit has been the elimination of errors during the claims process.

The Proclaim solution utilises high-level workflow and automation to reduce the risk issues associated with the claims process, with very little intervention from their staff.

Steve Jobs:

The visible face of one of the world's largest corporations.



“ When you innovate, you run the risk of making mistakes. It is better to admit it quickly and move on to another innovation.

In the past, large companies took for granted what customers wanted. The options were limited to the services offered by large corporations; it was limited to looking at a range of options and, as consumers, simply choosing. However, times have changed, and concepts such as the "smart customer" emerged. The customer is no longer looking for "something" within the available range of services and products; the customer "demands" to acquire a service or product he has in mind because it is what he needs.

For this reason, the figure of the "customer" demands and requires services and products that are much more complex and personalised... Client is no longer satisfied with just anything.

“ You can ask customers what they want and then try to give it to them. By the time you have it built, they will want something new.

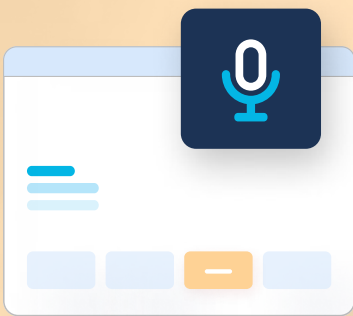
The main thing to bear in mind is to know what the customer will want before he knows it himself. The key to this is anticipation. And for a great company to function at this anticipation level and, above all, to become great, the most important thing is that everything that operates internally works like a Swiss watch, with perfect gear: every department, every manager, every employee. Everything matters.

“ My job is to make all the members of the executive team so good that they are worthy as successors.

In that sense, interdepartmental communication is essential for a large corporation; but that is not enough. The buyer deserves to be listened to as much (if not more) as the management team itself. Without knowing what the customer thinks and what service will demand (whether it exists or not), few efficient ideas can come out of a large company's management team.

Therefore, the more innovation at the internal business technology level, the more and better the service offered by a large company will be. It is precisely this that makes a company great.

3



Transforming communication within corporations

Successful large companies are structured to allow easy and effective collaboration between colleagues because:

- Teamwork encourages involvement in service delivery.
- Departmental collaboration is crucial to the optimal performance of an organisation or corporation.
- An employee who feels part of a project will perform three times better than one who does not.
- If there is collaboration, then the channels and tools for internal communication will improve.

How technology can help transform communication within organisations and corporations

Solutions to improve internal communication and collaboration:

- **Direct messaging:** Direct messaging is now commonly used instead of email. Solutions, such as Slack, allow employees to filter out irrelevant communication and only participate in the discussions they want to join in. This method of communication also allows fast information transfer.
- **Online meetings:** Online calls and video conferencing can bring together staff members located in any office at any time. Such solutions should be easy to use and allow the exchange of documents.
- **Management of business projects:** Complex projects require adequate planning and coordination. The latest technological solutions allow the creation of project plans for these cases and the assignment of tasks to team members.

Key considerations

When reviewing how to transform the internal communication of a large company, we recommend considering:

- **Building an open culture:** Technology to enable effective communication within teams will not be effective without a culture that promotes participation. Every partner must boost a culture of openness and collaboration.
- **Rethink performance metrics:** It is shown that if employees only pay attention to their individual goals, they are less likely to have the time to communicate effectively with other colleagues from other departments. In this sense, it is necessary to promote the common goals of a team over individual ones; it is proven that teamwork improves the performance of any large company.
- **Keep communication within limits:** There is a tendency of technologies such as direct messaging to make employees feel obliged to work outside office hours. It is not only necessary to ensure the job quality, but also to respect the team member's private life. To this end, the recommendation is to put controls in place to ensure that direct messaging does not become a burden.

Technological solutions to consider:

Glasscubes - collaboration solution.
Foxwordy - collaboration solution.
Slack - collaboration and messaging.
Asana - project management.

Case study:

Collaboration tools

The growth of the collaboration tools' market is a fact, but providers and companies face a technology gap, as many workers, often older, are unfamiliar with how they work. But this barrier will be overcome by internal training and awareness programmes, which cover from knowledge of these platforms to security recommendations and best practices.

At the regional level, North America will account for the largest share of this market by 2024, mainly due to increasing adoption in the United States. Mostly in large enterprises and SMEs of the IT and telecommunications sector. Europe currently occupies the second position, thanks to growth in adoption in countries like the UK, Germany, France, Spain, Italy and Sweden. As for the Asia Pacific, which is in third place, experts say it will be the region where the market will grow the most in the forecast period.

Thanks to the progress of digitisation in organisations based in countries such as China, Japan, India, Australia, Singapore and South Korea, among others. The regions of South America, the Middle East and Africa, are also expected to see substantial growth due to the proliferation of collaborative tools among small and medium-sized enterprises.

4



Transforming marketing in corporations

Attracting a steady flow of potential customers is always a challenge for any business. Many large companies turn to content marketing, pay-per-click campaigns, social media and data analytics to target new audiences. Technology is becoming essential to business marketing, and targeting the marketing budget right is vital to their business development.

How technology can help transform a company's marketing

Companies can see substantial growth through the technology:

- **Customer Relationship Management (CRM):** The latest solutions in practice management CRMs maintain all historical and prospective client information.
- **Data analytics:** It is a paradigm shift when it comes to business marketing. By bringing together data on existing and new customers, you can have insights that can improve your targeting and help win more customers.
- **Automated inbound marketing:** We recommend using software that allows companies to make a scientific marketing approach. By designing automated campaigns and comparing their results, your marketing team, no matter how small, can take a competitive advantage over other corporations.

In general, numerous software solutions allow your company to automate marketing efforts. They also act as CRM, content management platforms and social media planners. Such platforms include Hubspot and Zoho CRM.



To think creatively, we must be able to reconsider what we normally take for granted.

George Kneller

Key considerations

As you review how it will transform your company's marketing, we recommend you consider:

- **Invest in digital marketing:** The world is now moving through the Internet. Large companies must therefore move in the same environment. The first challenge in adopting digital marketing is to show a measurable return on investment, backed up with clear evidence.
- **Create the design and user experience (UX):** A harmonised and modern design will enhance the customer experience and make your company look more trustworthy, evoking confidence in your potential customers. Don't try to do everything on your own; hire an in-house designer or work with freelancers from platforms such as Upwork.com and Toptal.com.
- **Be a data-driven business:** Companies around the world have realised the benefits of being data-driven. By applying a scientific approach and treating marketing more like an experiment, you can improve your results and better understand your customer, also how to reach them.
- **Encourage sales and marketing collaboration:** Sales and marketing have traditionally worked hand in hand, but not in a fully collaborative way. By ensuring that both teams are aligned and working towards a common goal, the results of one will help improve the results of the other in a continuous cycle.
- **Embrace personalisation and keep optimising:** Modern Martech (marketing technology) allows us to create highly personalised marketing communication and target each of our prospects with the right message at the right time. And with free tools like Google Optimize, you can test all kinds of variations on your site and customize entire sections of your pages, creating a seamless and enjoyable user experience.
- **Tell your story, evoke emotions and create value:** People trust the people behind the brands: they are much more likely to respond to stories than raw facts and data. The starting point for building a successful marketing strategy is to create your unique narrative and think of ways to make your brand identity more human. You can opt for content marketing and start to use blog and video formats to help your potential customers and tell your story in a less intrusive way.

Technological solutions to consider:

Hubspot - CRM solution.

Zoho - CRM solution.

Client.ID - Online marketing and demand generation software.

Peppermint Technology - CRM solution.

Lex Machina - legal analysis.

Legalytics - legal analysis.

Wavelenght Law - legal analytics.

Case Study:

CRM in the cloud

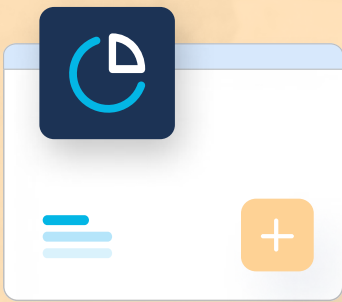
Peppermint Technology is a provider of solutions for well-attended legal practice, records management and cloud-based document management. One of its clients, Carey Olsen, one of the world's leading offshore law firms, implemented Peppermint's cloud-based solution.

The main objective of the solution for Carey Olsen was to improve its marketing and business development. The system fully integrates the Microsoft Dynamics CRM, and the users can easily see an overview of all customer and contact data of all of the firms. Users will also use dashboards to obtain important information about the firm's business development performance.

According to Peppermint, four months after launch,

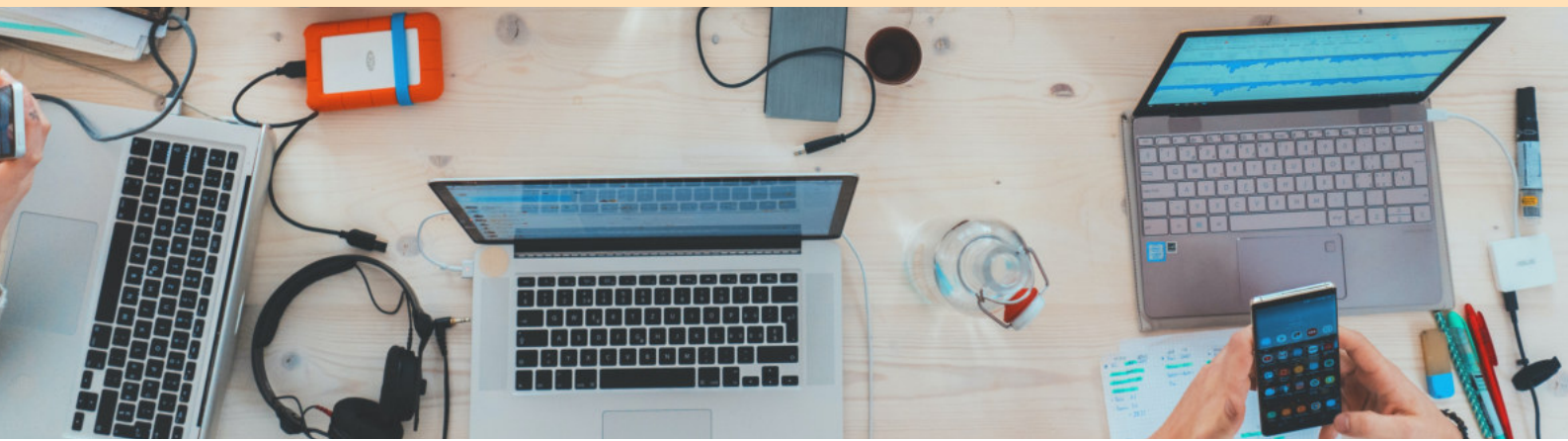
👉 Compared to the same period in 2017, data showed an email open rate increase of up to 55% and click-through rates of up to 26%. Undeliverables decreased by 14%, with an unsubscriber reduction of 70%.

5



Cost reduction and orientation of the corporation towards efficiency

Large companies are under increasing pressure to remain efficient and competitive.



How technology can help to transform the efficiency of companies

The greatest advantages can be achieved through the adoption of:

- **Automation:** Optimal automation of tasks like customer billing/ collections, customer intake, document management and (or) automation, digital dictation and smart contracts will optimize the efficiency of companies. Each of these technologies has the potential to free up vast amounts of time. Companies can redirect them to tasks that deliver actual revenue. Johannes C. Scholtes, PhD, President and Chief Strategy Officer of ZyLAB, reinforces this view. Says that "all companies have enormous opportunities to improve margins and revenues by deploying advanced technology".
- **Artificial Intelligence (AI):** AI technology will become a dominant catalyst for companies' efficiency in the next ten years. Many of these technologies already exist, but they expect considerable breakthroughs.
- **Data analytics:** Data analytics provides business managers with the unprecedented ability to see patterns in the vast amount of data at their disposal. Using the latest data analytics technology, users will be able to:
 - Gaining a better understanding of the business's profitable areas.
 - Avoiding projects that are unlikely to be successful or require excessive resources.
 - Adopt business strategies that lead to a positive outcome more quickly.

Key considerations

When reviewing how it will transform the efficiency of your business, we recommend you consider:

- **Focus on the opportunity:** Reasoning about efficiency, it is easy to focus on saving money and time and increasing productivity, but doing so can undermine employee morale. We recommend that you shift the focus to the opportunity to take on a higher-value customer assignment. By relieving staff by automating time-consuming tasks, they can pursue higher-quality projects rather than higher quantities. Efficiency can also mean personnel working in a more agile way, offering them the opportunity to improve their lifestyle.
- **Teamwork:** An organisation can not deploy an efficiency improvement all at once through all its departments. Instead, we recommend creating a working group composed of strategic and compromised people. Their role will be relevant to driving efficiency in a coordinated and well-communicated way in all areas.
- **Subcontracting:** In the past, implementing new systems in the company could take months or even years from start to finish. Consider Software as a Service (SAAS) offerings where possible. These typically have a month or annual cost and avoid the costs of assigning internal IT staff to the project implementation, configuration, testing, training, maintenance, and upgrades.



Case Study:

eDiscovery solution for FOIA requests

The Kansas Government Johnson County had several problems in accommodating all requests for disclosure of information, including:

- An increasing number of non-email requests.
- Limited staff to respond to requests.
- Inability to follow up the process to respond to requests.
- Not knowing how much information is needed to satisfy the request.
- Incapacity to know whether the request is unique or whether the information collected needs to be updated from time to time.
- Not knowing what collected information needs to be updated from time to time;
- Difficulty to narrow down the scope of the information from a broad starting point.
- The need to satisfy multiple entities involved. They needed the information for internal investigations, judges, external lawyers, etc.
- There is no unified solution for all types of electronically stored information (ESI).

Johnson County implemented the Zylab eDiscovery solution. It helped to transform the information request and answer management process. The change has resulted in significant efficiency improvements due to the ability to:

- Manage workflow and policies designed to ensure that freedom of information responses are appropriate.
- Help users narrow the scope of searches.
- Collect data more conveniently and make it ready for later review.
- Enable review of all types of electronic files at once.



Leading the process of digital transformation

In our experience, there are six keys to a successful digital transformation of a corporation to be a success.



Get your employees and departments to embrace the technology journey

Companies should find ways to make their staff feel they can confidently embrace technology. This confidence will make employees feel more empowered and make changes easier to adopt. Ways to do this include organising training and masterclasses that they can attend during work hours to develop their skills, encouraging professional development and enhancing their legal tech skills.

Clarify your objectives from the outset

Before you do anything, take the time to clarify your company's ambitions and goals. These goals are not about technology; rather technology is just an enabler. Think about the market position you want to achieve, the type of company you want to be, the competition you want to beat, your values, how you want to work. Only at this point, you can paint the picture of your organisation's future.

Create a bold vision

An exciting and bold future requires exciting and bold ideas. The companies that have achieved excellent success have created a compelling strategic vision for their organisations and worked hard to get all staff behind it. The complex change programmes require determination and hard work, and by creating a lot of positivity and momentum, your company will have the best chance of success. Consider organising seminars, roadshows or out-of-office days to show your staff the bold vision you have created and the exciting career benefits they can expect.

Find transformation champions

There are few better ways to alienate and frustrate your team than ignoring their views and leaving them out of the transformation process. By inviting staff members to participate in the change process, either as part of the project team or by consulting them about their needs and wishes, you will get them to promote the initiative.

Technology is only a tool

Technology is one aspect of business transformation. There are also people and processes to consider. Technology is a tool that can be used to save time by maximising the potential of people and optimising processes.

Hire a Project Manager

Organisation and planning are vital. Experienced Project Managers understand how to take a project from inception to completion in a way that meets its time and cost objectives. Companies looking to avoid the cost of a project manager often pay much more in costs due to mismanagement of contracts, scope, delays, mistakes, errors and poor planning in general.



13 steps to implement Legal Tech



Step 1

Document your initial business needs and objectives, invite all stakeholders to collaborate.



Step 2

Research possible solutions, suppliers and vendors.



Step 3

Invite solution providers to demonstrate their technology.



Step 4

Re-evaluate your requirements based on supplier demonstrations and the opinions of the different decision-makers in your company.



Step 5

Set targets to measure your technology implementation later on: marketing conversion rates, lawyer spend, employee satisfaction, customer satisfaction and cost-effectiveness of the subject matter.



Step 6

Seek solutions that meet your needs in the short and long term.



Step 7

Look for 'system advocates' within your business who will play a key and influential role in technologies' successful implementation and subsequent consolidation.



Step 8

Hire a dedicated project manager with experience in legal practices and the implementation of IT solutions. It will ensure the project's management from a risk, cost, people and time perspective. Providing the ability to learn for other employees is also relevant.



Step 9

Create a project board that is ultimately responsible for the project to provide guidance and approval to the project manager and their team.



Step 10

Ensure that staff have adequate support and time away from their core role to conduct training on technology solutions.



Step 11

Once the solution is in place, survey the users on the benefits they are experiencing. In addition, ask them about the problems that need to be managed and solved.



Step 12

Periodically measure the success of the solution according to the targets set before implementation. Look for gentle ways to break down any resistance you may encounter along the way.



Step 13

Finally, be sure to document any learning opportunities and make sure of their realisation in the future.



What's next for Legal Tech?

Legal technology is already reaping considerable benefits for business operations, customer service, client communication, internal communication and collaboration, marketing, overall savings and efficiency.

It is never too late to invest in digital business transformation. Likely, your customers and competitors are already using some combination of artificial intelligence, data analytics, automation, cloud-based systems, cyber-security solutions, workflow or other business-enhancing technologies.

Let the technology do the heavy lifting, and your team of professionals handle premium, value-added tasks to improve your company's revenue.

Would you like to start transforming
your organisation today?

Contact our sales team

for more information on the document
automation implementation
in your company.

Contact us

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Blog

sales@biglelegal.com



About Bigle Legal

Bigle Legal is an all-in-one document automation platform, provides an AI-powered, cloud-based solution that automates the legal operations of a company while improving safety and minimizing the risk of legal contingencies.

A pioneer tech company and leader in the field of document automation from Spain, with a presence in the UK, Austria, Netherlands or Portugal, and a reseller network across Latin America. Its clients include real estate companies, corporations, and large law firms. The platform is precise, flexible, and intuitive, providing full control over the entire document lifecycle.



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