

LEGAL **BUSINESS** WORLD

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With Special Contribution:

LESS LAW, MORE BUSINESS REFRAMING THE CHALLENGE AND REDESIGNING THE CORPORATE LEGAL INDUSTRY

By *Peter Connor*

Other contributions by: Scheree Gilchrist, Susan Andrews, Manu Kanwar and Stuart Woollard, Steve Fretzin, Ari Kaplan, James Sherer, Ross Guberman, Richard G. Stock, Valérie M. Saintot, Tod McDonald, Dr. Geertje Tutschka, Dr. Christian Kessel, Adv. Janet Belleli Goodvach, Daljit Singh, Marco Imperiale

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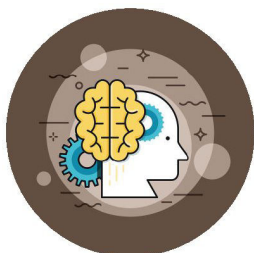
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Lexpo'24 Speakers



Akshay Verma, COO of Spodraft, evolved from environmental law to legal consulting at Axiom, with roles at Meta and Coinbase enhancing legal ops. A Santa Clara Law alumnus, he's also an Adjunct Professor.



Jaap Bosman, founder of TGO Consulting and award-winning strategist with 25 years in legal practice, is globally recognized for his innovative insights. Author of 'Death of a Law Firm,' he brings unmatched expertise to Lexpo'24.



Klára Talabér-Ritz, with the European Commission since 2003, leads in State Aid, Antidumping, and the Green Deal. She represented over 200 cases and pioneers in AI and LegalTech. An alumna of Eötvös Loránd, Corvinus, and Harvard.



Marco Imperiale, founder of Better Ipsum, specializes in legal design and innovation. The ex-Head of Innovation at LCA Studio Legale and co-author of Italy's first book on legal design, he's a trailblazer in legal innovation.



Nicola Shaver, with 20 years in law, led innovation teams in firms like Stikeman Elliott and Paul Hastings, and advised on legaltech. Her quest for better market solutions inspired the creation of Legaltech Hub.



Reena SenGupta, with decades in legal consulting for law firms and the Big Four, created Chambers & Partners Guides and FT Innovative Lawyers. Now leading RSGi, she's a pivotal figure guiding the legal sector's sustainable future.

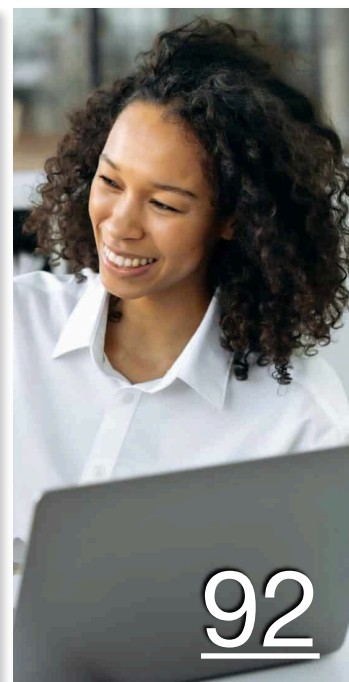
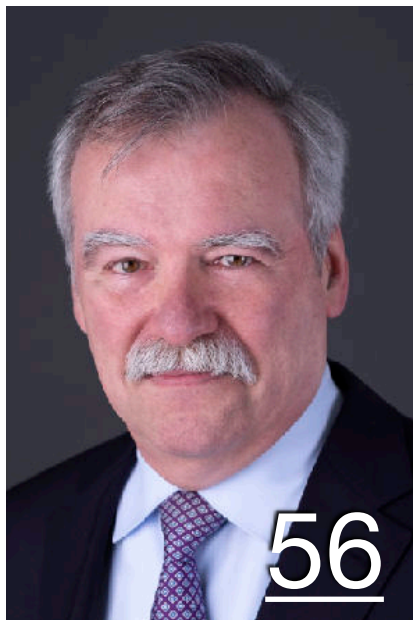
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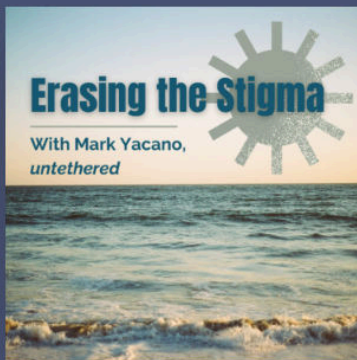
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ERASING THE STIGMA

Mark Yacano Untethered

Podcasts on Mental Health & Well-being



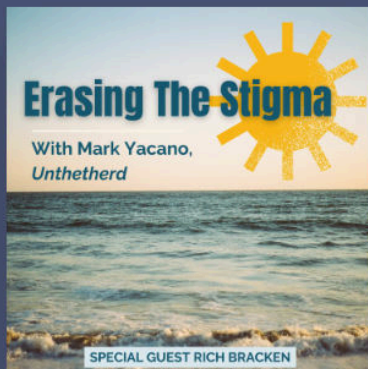
Erasing the Stigma

Erasing-The-Stigma--Conversations-About-Mental-Health-in-the-Legal-Community (7)

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Erasing the Stigma

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THE AI REVOLUTION: TRANSFORMING LEGAL AID AND EXPANDING ACCESS TO JUSTICE

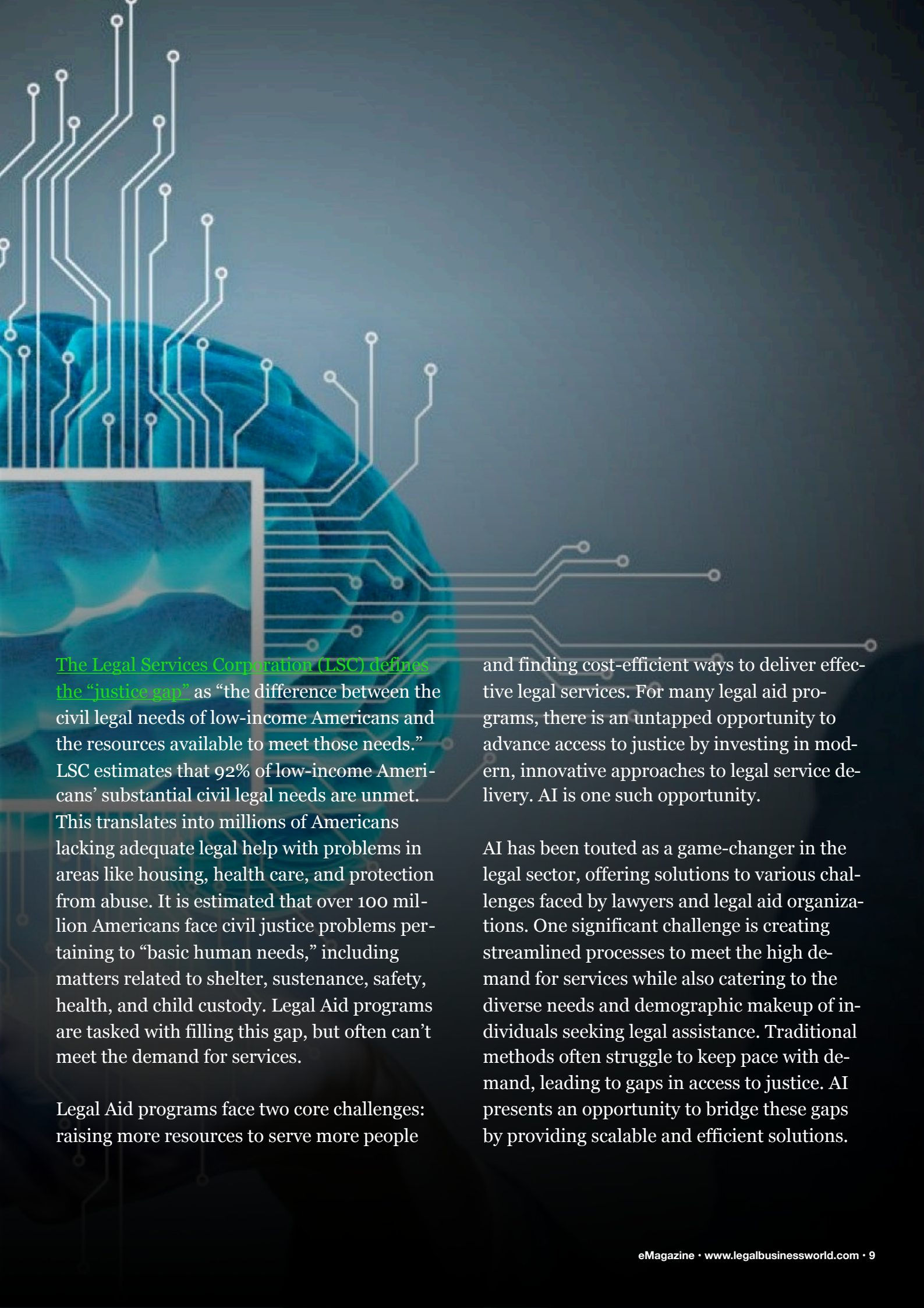
Scheree Gilchrist, Chief Innovation Officer at Legal Aid of North Carolina (LANC)



In the constantly evolving world of legal services, technology plays an increasingly crucial role. Innovations like artificial intelligence (AI) are poised to transform how legal aid organizations operate, from streamlining processes to improving client intake and communication. Legal Aid of North Carolina (LANC), through its Innovation Lab, has embraced AI to enhance its online services, particularly through the implementation of a virtual assistant powered by LawDroid. This article delves into LANC's utilization of AI, focusing on both the technical aspects and real-world impact of this innovation.

AI and the Justice Gap

Though the widespread availability of generative AI tools is new, the justice gap, and efforts to close it through technology are not.



The Legal Services Corporation (LSC) defines the “justice gap” as “the difference between the civil legal needs of low-income Americans and the resources available to meet those needs.”

LSC estimates that 92% of low-income Americans’ substantial civil legal needs are unmet.

This translates into millions of Americans lacking adequate legal help with problems in areas like housing, health care, and protection from abuse. It is estimated that over 100 million Americans face civil justice problems pertaining to “basic human needs,” including matters related to shelter, sustenance, safety, health, and child custody. Legal Aid programs are tasked with filling this gap, but often can’t meet the demand for services.

Legal Aid programs face two core challenges: raising more resources to serve more people

and finding cost-efficient ways to deliver effective legal services. For many legal aid programs, there is an untapped opportunity to advance access to justice by investing in modern, innovative approaches to legal service delivery. AI is one such opportunity.

AI has been touted as a game-changer in the legal sector, offering solutions to various challenges faced by lawyers and legal aid organizations. One significant challenge is creating streamlined processes to meet the high demand for services while also catering to the diverse needs and demographic makeup of individuals seeking legal assistance. Traditional methods often struggle to keep pace with demand, leading to gaps in access to justice. AI presents an opportunity to bridge these gaps by providing scalable and efficient solutions.

Efficiency and Innovation

AI can improve efficiency by automating time-consuming and complex tasks like legal research and document preparation. AI-powered software quickly sifts through large volumes of documents to identify relevant information, reducing the time clients spend looking for answers in self-help materials online.

Additionally, AI enhances client services by providing quicker responses to queries, automating routine communications, and offering self-service options for simple legal matters. These capabilities lead to increased client satisfaction and a more streamlined client experience.

Most significantly, AI fosters innovation in legal aid programs by enabling the development of new tools and services. These innovations range from virtual legal assistants to online screening and referral platforms, providing new avenues for legal service delivery. Overall, AI empowers legal services organizations to work more efficiently, deliver higher-quality services, and adapt to the changing demands of the legal landscape.

How AI has Evolved

The evolution of AI in the legal sector has been nothing short of transformative, immediately so in larger law firms. Now, it is poised to revolutionize how legal services are delivered to those who cannot afford traditional legal representation. Initially, AI in Legal Aid was used for routine tasks such as drafting simple documents, handling basic communications, and automating repetitive processes like legal re-

search. This allowed Legal Aid lawyers to dedicate more time to complex matters. However, as AI technology advances, the potential for its role to expand into more sophisticated areas, such as predictive analytics, could be a game changer that helps Legal Aid organizations anticipate legal issues and allocate resources more effectively.

AI-driven chatbots and virtual assistants are at the forefront of this transformation. These tools provide round-the-clock support and guidance to clients, making legal assistance more accessible. AI-powered platforms can facilitate online dispute resolution and simplify the process of accessing legal information and services, enhancing access to justice for underserved communities. By reducing costs and increasing efficiency, AI enables more tailored and effective legal services.

LANC's Innovation Lab and LawDroid Collaboration

Recognizing the transformative potential of AI and emerging technologies, LANC has pioneered an Innovation Lab. This dedicated hub identifies and implements both tech and non-tech solutions to enhance service delivery.

A key initiative from the Innovation Lab is its collaboration with LawDroid, a legal automation platform that builds and manages custom AI-enabled chatbots for law firms. This partnership focuses on developing and deploying an AI-powered virtual assistant on LANC's website, designed to swiftly navigate large volumes of legal information and resources to provide users with quick,

convenient answers to civil legal questions, and referrals to other sources of help when necessary.

The collaboration with LawDroid underscores LANC's commitment to leveraging innovation to maximize client impact. Integrating AI into their website required a thorough revision and upload of LANC's extensive legal information, self-help materials, referral sources, and other public-facing documents. This ensures the virtual assistant is equipped with comprehensive information to respond effectively to inquiries or guide users to the most appropriate source of assistance. Initially, LANC focused on four primary areas: domestic violence, child custody, landlord-tenant, and consumer law, reflecting the highest volume of legal queries they encounter.

By integrating AI, LANC has streamlined the process for individuals seeking legal information on their website. Users can now access pertinent information swiftly and easily, bypassing the need to sort through numerous, legally dense resources. This empowers individuals to navigate legal information with greater efficiency and confidence. Additionally, having the AI legal assistant guide website traffic acts as a force multiplier, freeing up staff time to address more complex tasks.

The Tech Behind LawDroid

By partnering with [LawDroid](#) to develop a virtual assistant that transforms access to legal information, LANC has taken a giant step towards breaking down barriers that prevent access to basic legal information. This AI-driven assistant uses innovative natural language

processing (NLP) algorithms to understand user questions and quickly retrieve relevant information from LANC's vast database of self-help resources.

A standout feature of LawDroid is its flexibility in using various inference models. It primarily relies on GPT-4, known for its high controllability and accuracy with well-crafted prompts. Additionally, LawDroid has developed a custom-trained BERT model for specific NLP tasks and is exploring the new GPT-4o model for further enhancement.

To ensure the virtual assistant remains accurate and reliable, LawDroid conducts regular optimization sessions with clients. These sessions analyze usage patterns and incorporate user feedback to expand and refine the knowledge base. While the learning process is manual, the AI assistant automatically generates precise answers for users.

LawDroid's robust technical infrastructure plays a crucial role in its effectiveness. It employs a modern API structure to manage conversation states and call AI models for inference, using programming languages like Node.js and Python. The backend is hosted on Digital Ocean, with Pinecone used for vector embeddings. This advanced setup ensures that responses are accurate and based strictly on the provided data, minimizing errors.

User Testing

LANC is committed to ensuring the effectiveness and reliability of its AI-powered virtual assistant. To achieve this, the organization is conducting user testing involving applicants,

clients, lawyers, law students from Vanderbilt Law School's AI Lab (VAILL). This testing phase serves multiple purposes:

Accuracy Assessment: Evaluating the chatbot's ability to provide accurate and relevant responses to user queries.

User Experience Evaluation: Assessing the ease of use and effectiveness of the chatbot from the perspective of end-users.

Feedback Collection: Gathering feedback from testers to identify areas for improvement and optimization.

Initial feedback from users testing the LANC virtual assistant was positive, emphasizing its ease of use and helpfulness. Users appreciated that the bot effectively answered questions even when they were phrased unclearly, providing them with relevant clinics and resources. Despite some concerns about slowness in responses, users found the bot valuable for obtaining legal information without needing to wait on the phone. Some users were pleasantly surprised by the bot's ability to answer questions outside of predefined topics, such as car repair inquiries, highlighting its versatility. Overall, users found the virtual assistant easy to use and appreciated its assistance in navigating legal issues.

Real-World Impact

The implementation of the AI enabled virtual assistant holds significant promise in enhancing the delivery of legal services. By providing a user-friendly interface for accessing legal

information, LANC's AI solution contributes to greater access to justice. Users, including those with limited legal knowledge or resources, can easily obtain answers to their questions without the need for extensive research or assistance from legal professionals. Moreover, the virtual assistant serves as a valuable resource for individuals facing legal issues in underserved communities. By leveraging AI technology, LANC extends its reach beyond traditional service delivery methods, reaching individuals who may not have access to physical legal aid offices.

As the organization continues to innovate and refine its AI capabilities, the impact on the communities it serves is expected to grow, fostering greater empowerment and access to legal resources for all.

About the Author

[Scheree Gilchrist](#) is the Chief Innovation Officer at Legal Aid of North Carolina (LANC). In this position, she oversees the development of a sustainable, strategic plan for innovation that will improve access to justice for clients and improve the way staff works to deliver services. She is also the director of the Legal Aid of North Carolina Innovation Lab, the first of its kind in a Legal Aid program nationwide, where she oversees an interdisciplinary team in their mission to collaborate, develop, and implement ideas that allow legal services to be delivered more efficiently to North Carolinians.



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HOW EXISTING AND DEVELOPING LAWS APPLY TO ARTIFICIAL INTELLIGENCE

Part I


Susan Andrews, Founder and Principal of Andrews Dispute Resolution



The use of Artificial Intelligence (AI) by businesses is becoming increasingly prevalent due to its evolving and improving advantages. Most global businesses reported an increase in performance or profitability from digital transformation including AI over 24 months based on KPMG's Global Tech Report 2023. [1]

This expansion of AI activity increasingly highlights the need for legal oversight of the appropriate and ethical development and use of AI. Such activity also draws attention to the nature of AI. Obviously, most things have both negatives and positives, and AI is no exception.

The following quotes address aspects of the nature of AI:



“Artificial intelligence is not a substitute for human intelligence; it is a tool to amplify human creativity and ingenuity.” — Fei-Fei Li, Co-Director of the Stanford Institute for Human-Centered Artificial Intelligence and IT Professor at the Graduate School of Business [2]

“People treat the current AI models like experts when they should be treated like children.” — Robert Bergman, CEO, Next-Level Mediation

“Technology is always a double-edged sword.” — Stephen Morris, Drummer [3]

Thus far, two major legal developments in the

United States and the European Union have emerged to address the concerns with AI, the EU Artificial Intelligence (AI) Act (“EU AI Act”) and the Artificial Intelligence Accountability Act (“US HR 3369”). The article title subject has been separated into two parts, with this article being Part I and a subsequent article to be Part II. Part I addresses the aforementioned legal developments, while Part II will further address the subject with broader global coverage and a focus on some of the substantive or practice areas that are triggered by AI and relevant laws.

EU AI Act

The EU AI Act was adopted on 13 March 2024 by a 523-46 European Parliament majority.

The EU AI Act aims to both regulate the ethical use of AI [4] and to extend to AI legislation the Brussels effect that occurred with the General Data Protection Regulation (GDPR) [5]. In other words, the European Union, through its legal institutions and standards, exercises a global power to “Europeanize” important aspects of global commerce. [6]

Because the EU AI Act is expected to be broad, it is likely to have a significant impact on businesses, and this application of the law will start between early 2025 and early 2026, depending upon the type of technology and system. Also, it divides AI systems into various risk levels and can impact both users and providers. Therefore, businesses should be aware that they might be regulated as both users and providers of AI technology and systems, depending upon their activities.

Further, the EU is intending to develop additional legislation targeting specific areas, such as products liability, employment, and copyright. The products liability legislation is already being developed, while the employment and copyright laws are expected to emerge following the June 2024 EU elections. [7]

Finally, as it relates to this article, compliance with the EU AI Act does not relieve businesses from their obligations with existing EU laws, including certain sectoral legislative acts. Examples of such laws include personal data, consumer protection, social policy, national labor law and practice, and product safety (to which existing sectoral legislative acts also apply). [8]

US HR 3369

US HR 3369 was introduced to the United States House of Representatives on 16 May 2023. US HR 3699 instructs the Assistant Secretary of Commerce for Communications and Information to conduct a study on accountability measures for AI systems, to hold meetings with relevant stakeholders for the purpose of soliciting feedback, and for other purposes, including submitting a report.

The study is to include an analysis of how accountability measures: are being incorporated into AI systems used by communications networks and electromagnetic spectrum sharing applications; can facilitate the closing of the digital divide and assist the promotion of digital inclusion in the United States; and may reduce risks related to artificial intelligence systems, including cybersecurity risks. The study is to also analyze how the term “trustworthy” is used, defined and applied, as well as the relationship between the terms “trustworthy,” “responsible” and “human-centric” with respect to AI. [9]

Comparison Points of EU AI Act and US HR 3369 [10]

The EU AI Act defines AI as software developed with machine learning, logic- and knowledge-based approaches, and statistical approaches, including deep learning, while US HR 3369’s definition focuses on systems using machine learning.

The former applies to AI systems placed on the market, put into service, or used in the EU, regardless of development origin, while the latter’s scope of application is on companies

providing AI systems in the healthcare, transportation, and criminal justice sectors which pose significant risks to privacy, security, or other public interests. [10]

The EU AI Act defines AI as high risk if intended for use as safety components of products or in critical applications such as employment and essential public services where significant risks can arise. US HR 3369's definition of high risk focuses on whether AI's use involves significant impacts on individual rights, safety, or critical services access, or poses systemic risks to such sectors as financial stability or public safety. [10]

The EU AI Act imposes compliance obligations of risk assessment, high quality datasets, transparency and user information provision, robustness, accuracy, and security measures, while US HR 3369 requires impact assessment, bias and discrimination testing, transparency reports, and privacy safeguards for high-risk AI systems. Enforcement mechanisms under the EU AI Act involve significant fines of up to 6% of annual global turnover or €30 million, whichever is higher, plus other corrective measures. Under US HR 3369, relevant federal agencies could impose unspecified penalties that might include fines, injunctions, and other corrective actions. [10]

Transparency requirements of the EU AI Act include mandatory information sharing regarding AI systems' capabilities and limitations. US HR 3369 requires mandatory disclosure to regulators, and in some cases to the public, of the logic, data, and design processes of high-risk AI systems. [10]

Data governance under the EU AI Act requires data quality and management without bias and with privacy, especially for high-risk AI systems, while US HR 3369 focuses on preventing discrimination and ensuring data privacy and security by AI systems. While the EU AI Act has mandatory human oversight of high-risk AI systems to ensure they can be overridden or disabled and to reduce risks, US HR 3369 stresses the importance of human review and decision making authority, particularly in critical decisions affecting individual rights and safety. The technical documentation and record keeping requirements of the EU AI Act are technical documentation and logs for high-risk AI, while US HR 3369 mandates detailed documentation of the design, development process, and training data for high-risk AI systems to facilitate oversight. [10]

Finally, under the EU AI Act, market surveillance and monitoring involves marketing authorities monitoring the market to ensure compliance, including the ability to carry out inspections and impose remedies. In contrast, US HR 3369 requires federal agencies to monitor compliance and conduct evaluations of AI systems' impacts in critical sectors. [10]

Conclusion

In the context of the adoption of AI for the legal industry generally and as it pertains to business more specifically, the somewhat fragmented and inconsistent nature of the ensuing standards inherent in the existing and emerging laws is bound to create ambiguity. Such ambiguity is likely to be both an advantage and disadvantage in the legal context, as

the potential inconsistent and incompatible legal standards lead to challenges. The reality is that this situation will create more disputes for resolution through the plethora of dispute resolution processes ranging from negotiation and mediation to arbitration and litigation.

This concludes Part I on the subject of how existing and developing laws apply to AI, with its focus on the two major legal developments in the US and EU, the EU AI Act and US HR 3369. Part II will further address the subject of AI law enforcement with broader global coverage and a focus on some of the substantive or practice areas that are triggered by AI and relevant laws.

Notes

[1] Decoding the EU AI Act, KPMG, 2024, Introduction, page 4, <https://assets.kpmg.com/content/dam/kpmg/xx/pdf/2024/02/decoding-the-eu-artificial-intelligence-act.pdf>

[2] Top 10 Expert Quotes That Redefine the Future of AI Technology <https://www.nisum.com/nisum-knows/top-10-thought-provoking-quotes-from-experts-that-define-the-future-of-ai-technology>

[3] It All Comes Back Around for Stephen Morris, Tempe Nakiska, Interview Magazine, 18 October 2012 <https://www.interview-magazine.com/music/stephen-morris-new-order>

[4] Infra. 1., Executive Summary, page 6.

[5] EU Formally Adopts World's First AI Law, Data Matters Privacy Blog, Sidley Austin, LLP, <https://datamatters.sidley.com/2024/03/21/eu-formally-adopts-worlds-first-ai-law/#:~:text=On%20March%2013%2C%202024%2C%20the,in%20favor%20of%20the%20legislation.>

[6] Bradford, Anu, The Brussels Effect (2012). Northwestern University Law Review, Vol. 107, No. 1, 2012, Columbia Law and Economics Working Paper No. 533, SSRN:

<https://ssrn.com/abstract=2770634>

[7] Infra. 5.

[8] Infra. 4.

[9] H.R.3369 - Artificial Intelligence Accountability Act, 118th Congress (2023-2024), Congress.gov, [https://www.congress.gov/bills/118th-congress/house-bill/3369/text?s=3&r=6&q=%7B%22search%22%3A%5B%22%5C%22Artificial+intelligence%5C%22%22%5D%7D](https://www.congress.gov/bills/118/house-bills/3369/text/s=3&r=6&q=%7B%22search%22%3A%5B%22%5C%22Artificial+intelligence%5C%22%22%5D%7D)

[10] AI Regulations, Mediators and Arbitrators, Robert Bergman, 21 March 2024, mediate.com, <https://mediate.com/ai-regulations-mediators-and-arbitrators/>

About the Author

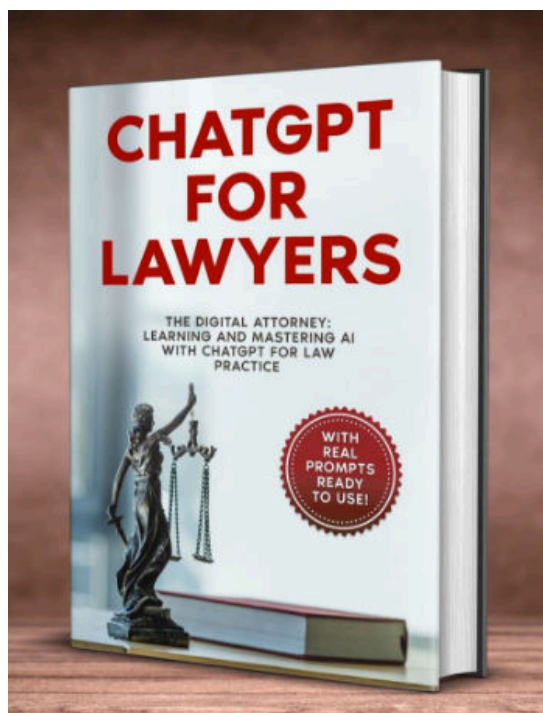
Susan Andrews is Founder and Principal of Andrews Dispute Resolution, focusing on Online Dispute Resolution, Dispute Resolution Analysis, Negotiation, and Mediation services for dispute resolution, decision making, and dealmaking in General Civil and Commercial contexts domestically and internationally. She is an Active Member of the Kentucky Bar Association, Chair Elect of its Alternative Dispute Resolution Section, a Life Fellow of the Kentucky Bar Foundation, the nonprofit, charitable arm of Kentucky's legal community, an International Mediation Institute (IMI) Qualified Mediator, Co-Chair of its Online Dispute Resolution Task Force, an Advisory Board member of InnovADR, a Member of the

American Bar Association (ABA) Online Dispute Resolution Task Force Working Group III, Guidance with Respect to Special Issues Relating to Private ODR, that published the American Bar Association Section of Dispute Resolution Guidance for Online Dispute Resolution (ODR), and a Life Fellow of the World Mediation Organization (WMO). As a certified NextLevel™ Mediation Dispute Resolution Analyst and Online Dispute Resolution specialist, Susan has a keen interest in technology in general and as it pertains to dispute resolution in particular.

She is a co-author of “Mediation Beyond Covid: Hacks, Craics and Crocodile Tears,” an Amazon #1 Best Seller in multiple categories internationally, bringing readers behind the front lines of pandemic conflict resolution with reflection, wisdom, and humour, and with proceeds supporting Mediators Beyond Borders International (Oceania) (MBBO) in

promoting peaceful conflict management and resolution in the region.

Susan holds a Juris Doctor (JD) degree from Southwestern Law School (formerly Southwestern University School of Law) and a Bachelor of Arts (BA) in Liberal Arts from Mount Saint Mary's University (formerly Mount Saint Mary's College) in Los Angeles. She studied International Law both domestically and internationally, including Private and Public International Law, Comparative Law, European Union Law and International Trade Law, at Southwestern Law School, Tulane University Law School's Tulane Institute of European Legal Studies at Paris-Dauphine University, and University of Georgia / Institut d'Etudes Européennes, Université Libre de Bruxelles's Dean Rusk International Law Center Annual Brussels Seminar on the European Union.



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LESSONS FROM THE LAW FIRM MATURITY INDEX

How authentic is your firm about ESG?

By Manu Kanwar (l), Founder and Director at LexSolutions, and Stuart Woollard (r), Founder and Council Member at The Maturity Institute





ESG

The emergence of Environmental, Social and Governance (ESG) has become a big business opportunity for law firms. ESG has helped to change the definition of corporate success. Business value is no longer just about profitable growth, even though underlying economic and financial systems remain designed around it. Boards and C-suites beware. Business activities that may harm people or the natural world can no longer be ignored.

There are myriad examples of how ESG risk, or harm, has affected value. Volkswagen has given us two, very clear examples. Firstly, it was caught in a now infamous vehicle emis-

sions cheating scandal that continues to run today. More recently, thousands of VW cars were impounded in US ports after allegations of forced labour arose in its Chinese supply chain. These Environmental and Social issues have caused much concern for the car company. Investor flight, reputational damage and market value erosion have arisen while VW's Governance has been put under intense scrutiny.

ESG is a “non-financial” framework that has become a staple for investors to help assess corporate risk. It is also being used to drive new corporate regulations, ratings and reporting.

ESG brings new markets but also new challenges for legal firms. As ESG related revenues increase for law firms, greater scrutiny arises. This is now shining a bright light on whether firms themselves are walking the talk of ESG.

Companies increasingly need law firms to navigate the mushrooming array of ESG laws and regulations. They also need their help when ESG risk manifests. Yet law firms themselves are subject to the same pressures. Clients are demanding that they be responsible too. Legal regulators are strengthening ESG rules and guidelines. ESG also drives the motivations of existing staff and potential hires. Law firms need to ensure that they exhibit and evidence all the right traits. Diverse, inclusive, environmentally conscious, and with mentally healthy staff are just some.

It is of little surprise that in a burgeoning ESG market, with growing stakeholder pressure, law firms feel compelled to make bold claims about who they are. Here is a typically worded statement from a leading, global firm:

“Having a shared purpose and set of values gives us a common sense of identity. It sets a collective direction as we navigate the future for our clients and our people and ensures we continue to be a sustainable and responsible business.”

This firm is making a direct and explicit claim to be sustainable and responsible. But how much does such rhetoric match up to the lived reality? On what basis can this claim be made? ESG rankings and third party insights are now emerging for law firms, as they have done for listed companies and investment firms. Re-

sponsible business reports have become significant pieces of law firm literature. While these all provide some insight, they do not provide robust evidence of what may actually be happening on the ground. Like the investment sector before it, accusations of exaggeration and hypocrisy are emerging. In the words of one Law Firm Maturity Index respondent from the same firm:

“Absolute greenwashing all over the place (as with many big firms). Talks the talk but reluctant to turn down profitable mandates for polluters.” LFMI respondent (Chambers Band1 Global Firm)

Such a comment ought to send a shiver through partners at this particular firm and beyond. It goes to the heart of authentic leadership, a characteristic we know is of critical importance.

Authenticity is crucial to effective governance and a healthy corporate culture. The actions and behaviours of leaders are usually highly visible and a foundation upon which *trust* is built. Inauthenticity is also a good predictive indicator of future, suboptimal performance. This is because workforces spot the signs quickly and respond accordingly, often withdrawing discretionary effort and potentially damaging the organization in a variety of ways. Trust is always eroded in an inauthentic climate. When it does finally break down, it disappears quickly and is extremely difficult to win back.

Trust breakdown has a direct impact on the financial health of the organization. It often manifests in the form a damaged reputation or

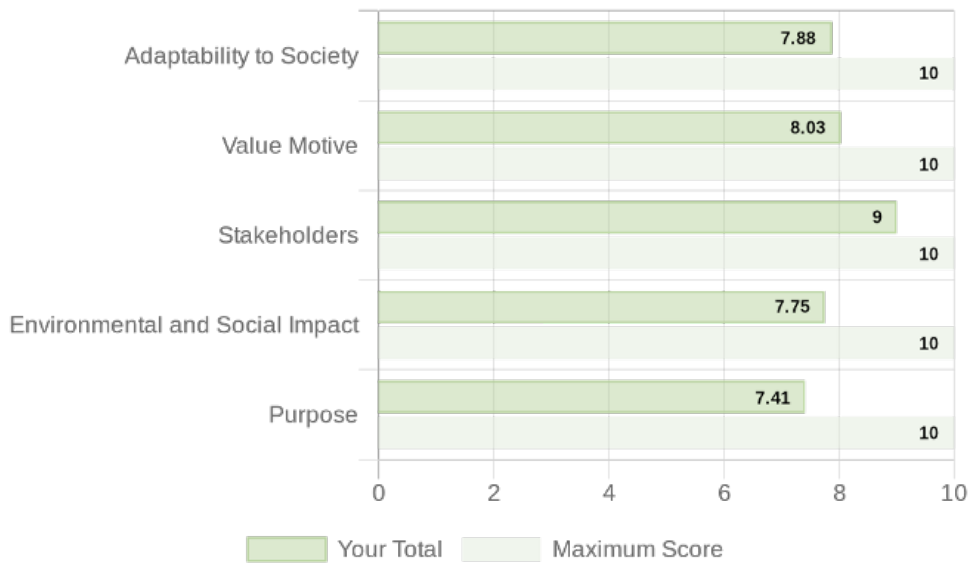


Figure 1 - LFMI ESG Profile

brand. In maturity terms, trust breakdown undermines the quality of the whole organization. It weakens all the human relationships that are the foundation of organizational sustainability. As well as staff, if clients lose trust in a firm, they effectively lose trust in the people that run and work for the firm. As with all cause and effect analysis, trust can only be restored by repairing or removing the cause of the problem. In this case, trust repair is about the rehabilitation (or ‘repair’) of the people at the heart of its cause. In extreme cases, it can also require their removal.

The LFMI measures ESG across several inter-related factors, as shown in Figure 1. It creates an ESG profile and an overall score from factors that include the following:

- **Purpose** – measures the clarity of a firm’s purpose and its link to benefiting society
- **Value** motive - measures the importance of law firm quality and whether a firm proactively manages out harm to people and planet

- **Adaptability** – scores the firm’s ability to adjust to changing societal norms and values
- **Impact** – gauges links between environmental and social benefit and individual job roles
- **Stakeholders** – evaluates a firm’s degree of focus on all its stakeholders

The LFMI feedback above reflects a highly negative view about one firm and its peers. However, LFMI participants overall, present a more mixed picture. This more positive ESG profile reflects real data from a mid-size UK headquartered firm.

With this kind of profile, we would expect that the strategic imperative of ESG is properly acknowledged. This firm is likely to have an understanding of how management systems must be designed to foster mutually inclusive value creation for all its stakeholders. There will also be structures in place to help achieve this, so that responsibility and business strategy can eventually be fully reconciled.

However, like most in this situation, this firm will still be a work-in-progress. The LFMI feedback above and that shown below, helps to illustrate a wide spectrum of perspectives on authenticity and ESG. Different firms exhibit a broad range for the sector overall; from those with significant gaps between rhetoric and reality, to those who can be trusted to be who they say they are:

- *“I don't believe [this firm] is mindful of the impact the business has on environment and social causes.”*
- *“The reality inside is one of a culture that does not adapt well to best practice and where espoused cultural & society values are sometimes not followed given the reality of business and political expediency”*
- *“[This] is the only place I've worked where the values and culture presented to external audiences is fully representative of the actual reality of being an employee.”*

The LFMI is designed to provide the legal sector with independent, objective data and insights. For corporates, investment and legal firms, Maturity Index data helps to assess the health of any organisation beyond financial results. In an emerging era of ESG, sustainability, and impact, firms will increasingly be held to new standards and measures of success. The sooner that firms embrace and use new evidence to help them with this transition, the better placed they will be to survive and thrive.

If you want to see how the LFMI data could help your firm, try it for free and receive an instant Maturity report by clicking on [this link](#).

***The Law Firm Maturity Index** is a unique diagnostic of culture and organisational health. A Lex Solutions and Maturity Institute initiative, it provides evidence and insights to help improve the legal sector and deliver greater benefits to all its stakeholders. You can add your voice to LFMI data and receive an instant Maturity report by clicking on [this link](#).*

About the Authors

Manu Kanwar is a former tech General Counsel, legal consultancy founder and a leadership and organisational coach. His consultancy, LexSolutions, is dedicated to making life in the law better for all those who provide and use it, through flexible legal resourcing, legal operations and programmes around culture. Manu combines his experience as a mindfulness facilitator, design-thinker and relationship systems coach to the work he does with legal teams, law firms and their leaders for a creative, progressive approach which is unique within the legal industry.

Stuart Woollard is a Founder and Council Member at The Maturity Institute. He has over 20 years of experience in helping organizations become purpose-driven and

human-powered. Stuart co-designed the OMINDEX® diagnostic tool, which measures the organizational health and Maturity of companies; showing how firms can build better systems and cultures that drive sustained

value. He also co-authored "The Mature Corporation - a Model of Responsible Capitalism", a textbook that offers a new vision and framework for sustainable Total Stakeholder Value creation.

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Reframing The Challenge And Redesigning The Corporate Legal Industry

Peter Connor, Founder and CEO of AlternativelyLegal



Almost everyone in the corporate legal industry is focused on process and technology changes to deliver legal services/do legal work more efficiently. But, as necessary as that may be, will that approach address some fundamental design problems with firms and legal departments? Is there something else that can make an even bigger difference for corporate lawyers, legal departments, and firms?

To address these problems, and supercharge the impact from change initiatives, I believe it is necessary to re-frame the way we look at change and to consider how might legal departments, firms, and other stakeholders in the corporate legal industry be redesigned.



The key to do that is for leaders of legal departments, firms, and other stakeholders to shift the primary focus from internal to external, from firms and legal departments to clients and from technology and process to people (specifically to the work they do and their capabilities to do different work, not just using technology to do the same work more efficiently).

A Focus on People

The people we support, in the corporate legal industry, are business executives [i] and the people who support them are lawyers and other professionals. In broad terms what I am advocating is for legal departments, firms, and other legal service providers to change the

work their people do so that they can help the people they support, and ultimately the corporations they work for, in new ways beyond just providing legal advice and doing legal work. In other words, do less of certain types of current 'legal' work so that they can do more of what I call Business Work. I call this human transformation, which is just as important, if not more so, than digital transformation.

This article explains what I mean and, in the process, provides a high-level overview of my two books [ii] and my T-Shaped Lawyer vision and T-Shaped Lawyer Framework™ for individuals, the T-Shaped Team Framework™ for legal departments and the T-Shaped Firm Framework™ for law firms.

Fundamental Design Problems

There has been a lot of change in the corporate legal industry over the last decade with lots of new businesses emerging, Legal Tech proliferation and the rise of Legal Operations. But what has not changed in any significant way is the underlying business models of law firms, the operating models of legal departments, and the work done by their lawyers. Despite that, in general, it would seem to be mostly happy days in the industry as most firms continue to make big profits, in-house legal and legal operations roles abound and ever-increasing regulation and business growth means continued demand for legal support.

However, if you scratch the surface a bit, some problems and some interesting opportunities start to appear including the following:

The ‘overwork’ problem. The prevailing business model for most law firms encourages lawyers to work long hours and the serious health and safety consequences of this are becoming more and more evident and concerning. Many legal departments have the same issues because of an operating model that tolerates, if not encourages, somewhat of a ‘free-for-all’. By that I mean doing any work for anyone in the organisation to help them out and often to a ‘perfect’ standard.

This result is that many in-house lawyers have not only too much work to do but often too much of the wrong kind of work.

The ‘value’ problem. As busy as in-house lawyers may be, a complaint that I frequently hear from them in my legal team bootcamps is

that their business colleagues do not appreciate the work that they do and as a result they do not feel valued by many of them. That sentiment is largely echoed on the other side in stakeholder interviews that I undertake with business executives [iii]. In other words, they are doing too much work that is low value and too little work that is high value from the perspective of the client.

Almost every General Counsel has a priority of trying to add more value, in part so that the department is not just seen as a cost centre which can be slashed as soon as the business deteriorates. Some progress is being made by some departments in measuring and marketing the existing value but there is very little evidence of changes to lawyer’s work that adds significantly new value from the client perspective. To put this another way, there may be some Internal Innovation, largely by those in legal operations roles, but very little Client Innovation.

The same can be said in general of law firms. Almost all innovations primarily benefit the firm with, at best, an incidental benefit for the client. Some firms have established separate ‘New Law’ side businesses and firms also offer so-called Value Add services which are often given away to gain legal work. However, have lawyers at firms made any changes to their work that really adds significant new value for clients?

The ‘future of work’ problem. We can debate the extent to which Generative AI, and other technologies present and future, **will impact the future of lawyers.**

However, few would argue that the work that lawyers do today will be the same as the work that they will do in the immediate, let alone longer-term, future.

Are legal leaders in firms and legal departments adequately meeting their responsibility to prepare their lawyers and other professionals for that future? Have leaders provided clarity about what they believe this new and different work could and should be and the new skills and other capabilities required to do it?

Probably not according to Deloitte Insights in their Redefining Work article [vi], where they say ‘*Few are asking the most basic, fundamental question about what that (future) work should be...We need to redefine work and that ..is fundamentally different from augmenting current work with technology... it requires a shift of the objective of work from efficiency and cost savings to broader value creation and a shift of the focus from executing routine tasks and processes to identifying and addressing unseen problems and opportunities.*’

This observation and perspective corresponds completely with what I have seen, and what I have preached, in my work with legal departments and firms all over the world since 2015.

The Current Approach

Design Thinking and business innovation principles tell us that if you are trying to solve difficult design problems, and to come up with innovative solutions, you need to focus

on ‘the customer’. Start by understanding their needs and then work backwards to imagine new ways that you can address these needs.

That is not how it works in general in the corporate legal industry. Typically, the change conversation starts with law firms, who are at the opposite end to clients in the supply chain, and focuses primarily on what changes can be made to improve law firms and make lawyers more efficient. To some extent that is understandable given that most lawyers work in firms and firms have the largest pot of money to pay for change agents and products to help them.

In recent times, especially with the growth of legal operations, this change conversation has also moved to include legal departments, the next player in the supply chain. However again the primary focus is on how to improve the efficiency of lawyers and the operations of the legal department.

With this way of approaching the change conversation it is no surprise that the challenge for firms and legal departments is usually framed as ‘how can we deliver legal services more efficiently and at lower cost’. It is also no surprise that the focus of most change initiatives in firms and legal departments is internal and on process and technology.

No matter how successful firms and legal departments are in the pursuit of higher efficiency and lower cost, which at some point starts to hit some limits, it will not solve the three design problems mentioned above.

It will not mean lawyers do the right sort of work and the right amount of work. It will not mean that their work provides continual and significant value add for clients. It will not mean lawyers are starting to do work that they might do more of in the future and starting to develop new capabilities to do that work.

One consequence of this current approach is that, at best, it results in improvements and rarely in any transformation. Improving the work of lawyers will not solve those fundamental design problems. Also, despite the marketing spin, the beneficiaries of most change initiatives are primarily the firms and legal departments, not clients. If there is any transformation it is a digital or process transformation. Sure, people are impacted by these technology and process changes, but these changes augment existing work and typically do not involve a transformation of the people themselves, the work that they do and their capabilities to do new and different work. In other words, there is little to no human transformation.

Another crucial point is that this framing of the challenge for legal departments and firms assumes a continuation of the model where the client business executives need to contact a lawyer to receive the legal guidance, information or documents they seek. This historical engagement model is one of the primary causes of the overwork problem in a legal department and it also gives rise to a related problem for clients where Legal can, an often does, become a bottleneck for the business.

The limitations of the current approach to change are compounded to some extent by a



lack of precision, accuracy, and consistency when it comes to the language of change used in the corporate legal industry. Every lawyer is a business partner and a trusted advisor, and every change is a transformation, an innovation and adds value whereas that is clearly

the case. Being precise when it comes to the language of change in the law matters just as much as it does to the language used in the law in contracts, legal opinions, and legislation. My recent article – [A Glossary for Change in the Corporate Legal Industry](#) [v] – is an attempt to highlight why that is a problem for change. It proposes a common language [vi] for stakeholders to use to discuss change and assess the merits of change agents and their proposals and offerings.

This focus on process and technology change to reduce costs and enhance the efficiency of legal service delivery happens to suit many stakeholders in the corporate legal industry. If you are an existing provider of legal services, then there is little incentive to consider any alternative that significantly reduces the need for legal services. The same applies to businesses that provide services and technology products primarily aimed at managing or enhancing the efficiency of legal service providers. That accounts for almost all the corporate legal industry with one notable exception – inhouse legal departments.

In-house legal departments are the one part of the corporate legal industry that can drive real change, dare I say transformation, and it is in their interests to do so. They are closest to the client and have more freedom to change the work that they do than they typically realise.

The fact that, in general, they have not taken advantage of this opportunity has a variety of causes. Most in-house leaders come from law firms and have preconceived ideas of what it

means to be a lawyer and what their work should be. They are also extremely preoccupied with the challenging task of managing the legal department and counselling the business leaders. But perhaps the most significant factor is that it is easier to improve, than it is to re-imagine, your current work and, until now, there was no clear alternative.

Reframing the challenge and an alternative approach

To optimise the effectiveness of change it is critical to focus first on the client [vii] business executives, and then on the lawyers and other professionals in the legal department who support them. If you do that, as I have done myself when I worked in-house, and many times since in my role as a legal team coach, then a compelling alternative approach to change becomes blatantly apparent.

As Richard Susskind has stated [viii] many times ‘*clients don’t need lawyers, they need the outcomes that lawyers currently provide*’. What are the outcomes that business executives need? The answer, in broad terms, is legal guidance, information, and documents. That is what they request from their lawyers and that is what their lawyers provide to them. But they need more than that. They only ask for that because they think that is what the legal department offers and what they need to do to obtain those outcomes. However, as I like to say, ‘*clients don’t have legal problems they have business problems. Sometimes legal considerations are an important part of the problem, other times not so.*’

Client business executives may not ask lawyers for it, but they need help *preventing and solving business problems and identifying and implementing business opportunities*. Lawyers, and other professionals in legal departments and firms, can help meet these broader needs and some do, sometimes.

Likewise, legal department leaders may not ask firms for it, but they need help with business challenges, not just legal challenges. In fact, the General Counsel, and other leaders, spend most of their time dealing with business issues operating and managing the department and supporting the business of the company. Firms can help legal departments with these business problems, and some do but typically through separate side businesses with minimal involvement from their lawyers.

If lawyers limit themselves to legal advice and legal work, as many do, then they limit the value of their contributions and therefore the

extent to which they are valued by their clients.

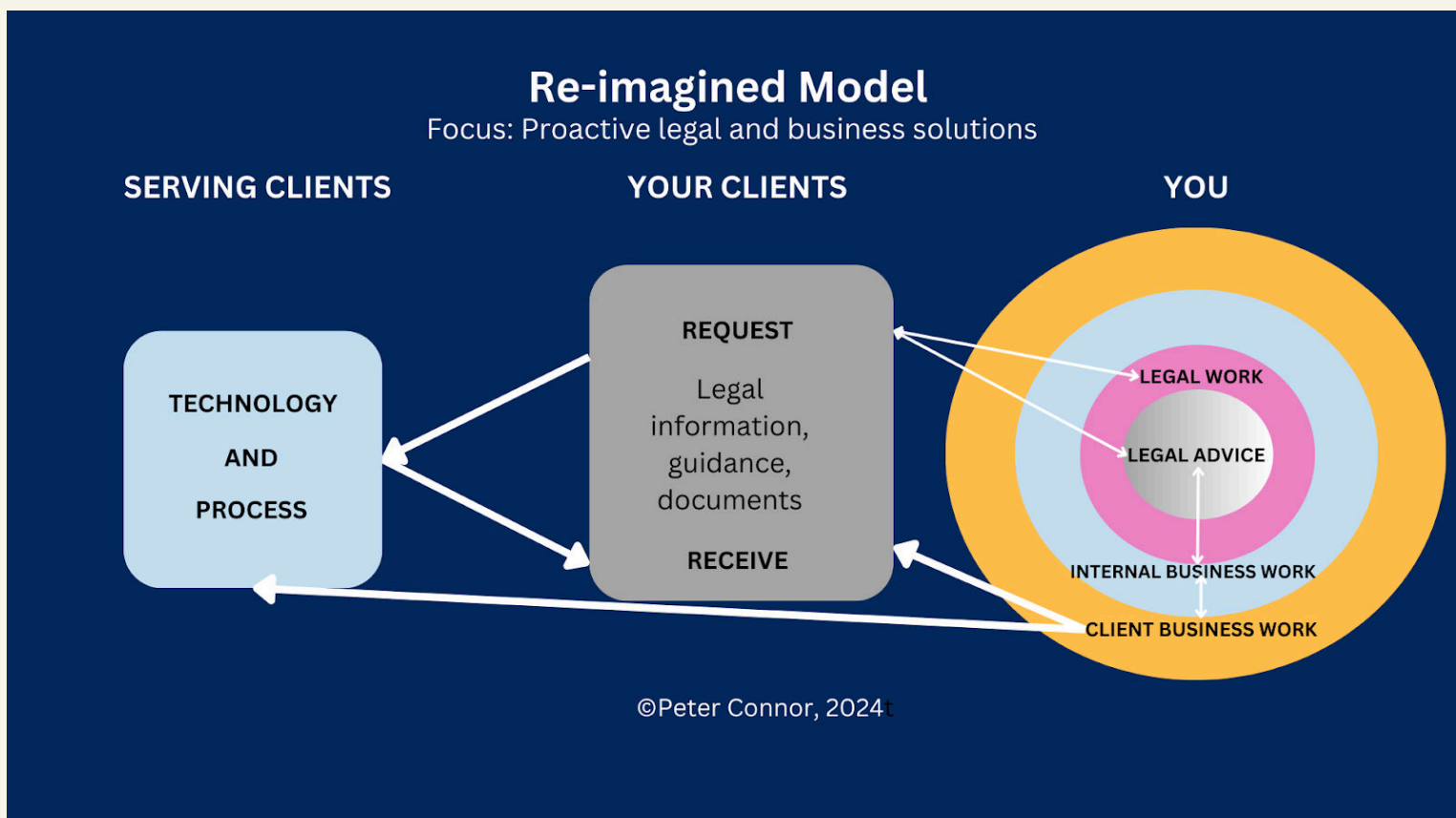
In these two simple but fundamental ideas:

- I. Outcomes, rather than task-based, thinking, and
- II. Business, not just legal, assistance,

lies the key to reframing the challenge in the corporate legal industry, and to reimagining and redesigning it, to address the three fundamental design problems referred to above, plus more.

The framing of the challenge changes from:

- *‘how can we deliver legal services more cost efficiently’ to*
- *‘how can we provide clients with the legal information, guidance, and documents they need, with minimal to no need to interact with a lawyer, so that we can spend more time proactively, not just reactively, helping clients with their business problems and opportunities’.*



No doubt this suggestion will sound blasphemous to many. Many lawyers will be quick to point out how ridiculous it is to suggest that they do not need to be involved in so called ‘bet the company’ matters such as some types of litigation and M&A transactions. I would agree, at least for the foreseeable future. However, in most companies those sort of matters and transactions are sporadic and don’t provide a regular stream of work for in-house lawyers. Often, a lot of that work is outsourced to law firms and the involvement of in-house lawyers may be minimal. Finally, who would say with any certainty that lawyer involvement in, for example, litigation may not diminish as new forms of online dispute resolution become more prevalent.

For business-as-usual matters – the more routine, common, and less risky ones – the situation is much clearer. Some legal departments have already started to implement so called ‘self-help’ solutions for FAQs, policies, NDAs, and other low risk agreements. However, there is scope to expand this significantly by assuming higher levels of risk, differentiating between different types of clients, enhancing the legal astuteness of clients, and by taking advantage of what Richard Susskind calls ‘increasingly capable machines [xi]’. As Susskind highlights, these technology-based solutions can be designed, developed, and maintained by lawyers or, more likely, by others with appropriate legal input and oversight.

I don’t like to make predictions about the future. However, removing lawyers from the

equation as much as possible and allowing client business executives [x] to directly access these solutions for the information, guidance, and documents they need is where the puck is going [xi] in the corporate legal industry. This trend makes so much sense on so many levels. It removes lawyers as the bottleneck for matters that typically are lower priority for them. It goes with, and leverages, the Generative AI momentum rather than trying to resist it. It also aligns with other legal department initiatives to reduce workloads to address the overwork problem.

But it does beg the question of what other work in-house lawyers will do if a lot of their traditional work ‘disappears’. In the short term, most legal departments and their lawyers will see it as a sufficient that it helps the lawyers cope better with workloads. However, there is no necessary end point to this trend. Leaders of legal departments do need a clear and better story about what alternative future work looks like, without which lawyers will be reluctant to ‘let go’ of their current work. It is not enough to say, as many do, that lawyers can do ‘more strategic or higher value’ legal work. If that higher value work was clear to legal leaders, then surely, they would already be prioritising this work for their lawyers over existing lower value work!

The good news is that, in addition to ‘high value’ legal work that in-house lawyers should already be doing, there is different, high value work that lawyers can do. It involves certain types of Business Work which I define as any work that a corporate lawyer [xii] does other than legal work. You might

think that there can't be that much business work that lawyers could or should be doing. However, when you explore the revealing question of what constitutes legal work, as I do in my bootcamps and in one chapter in one of my books, you will see that a lot of work that lawyers currently do is not really legal work [xiii] and is more appropriately classified as business work. Also, in-house lawyers can be very effective at business work and are often in a unique and ideal position to do it [xiv].

My first book - *The T-Shaped Lawyer: A New Vision for You and Your Work* [xv] - outlines in detail the many different reasons why doing business work is so important for all corporate lawyers. I know this from my own personal experience and when I talk to other senior corporate lawyers, especially those working in-house, there is almost universal acknowledgement that it is this business work, more so than legal work, that is going to make the biggest difference to your individual careers and to the value you can provide to clients. The typical reaction is 'of course it is important, but I have never thought about it that way before'. It is why I refer to highlighting business work as shining a bright light on the 'dark art' of the effective practice of law that almost no-one talks about. I am certainly not the only lawyer to engage in business work, but I may be the first to spell it out and call it out so that others can do it more often and more effectively.

Without spelling it out clearly, most assume that the ever-increasing references [xvi] to the importance of business to lawyers, and to

being more than just lawyers, is just about developing non-legal or so called 'soft' or 'human' skills to enhance your legal work.

But the importance of business for corporate lawyers goes above and beyond skills, knowledge, capabilities, and professional development as this recent comment [xvii] from prominent academic, Professor David Wilkins, the Director of the Legal Profession Centre at Harvard Law School highlights, '*It (the future for lawyers) is scary in the sense that there used to be very clear, easily identifiable career paths that you could follow. And if you played by the rules, you'd be fine. Well, a lot of those career trajectories are being disrupted, whether by technology, competition, globalization, or by the kinds of problems that lawyers are being asked to solve. All these changes are pushing law from a "fee for service" model, in which clients bring lawyers "legal questions," and lawyers provide "legal answers" which the client then client then implements, to what I've been calling an "integrated solutions model." In this model, **neither the contours of the problem nor the possible array of solutions is strictly "legal"** or fully understood by either the client or the lawyer. **Instead, lawyers work collaboratively with a broad range of professionals to help clients refine their understanding of the problem and the potential array of solutions in ways that promote the client's ability to continue to make good decisions moving forward.***'

When Professor Wilkins refers to 'problems' and 'solutions' that are not 'strictly legal'

then, in a corporate legal context, I would suggest that he is really talking about business problems and business solutions [xviii]. I agree with his comment and even more so his description of lawyers working collaboratively with a broad range of professionals to solve these problems. That is precisely the definition of a t-shaped professional and why recently I chose to refine my original conception of the T-Shaped Lawyer[xix] beyond non-legal skills to actual work. In other words, to be a t-shaped professional, and to collaborate with diverse professionals, involves doing work beyond the narrow confines of your primary area of expertise, not just learning skills beyond your core area of expertise. The whole point of doing the

latter is to do the former.

So, if a T-Shaped Lawyer is not just someone with some non-legal skills, as many believe to the case, what does it mean?

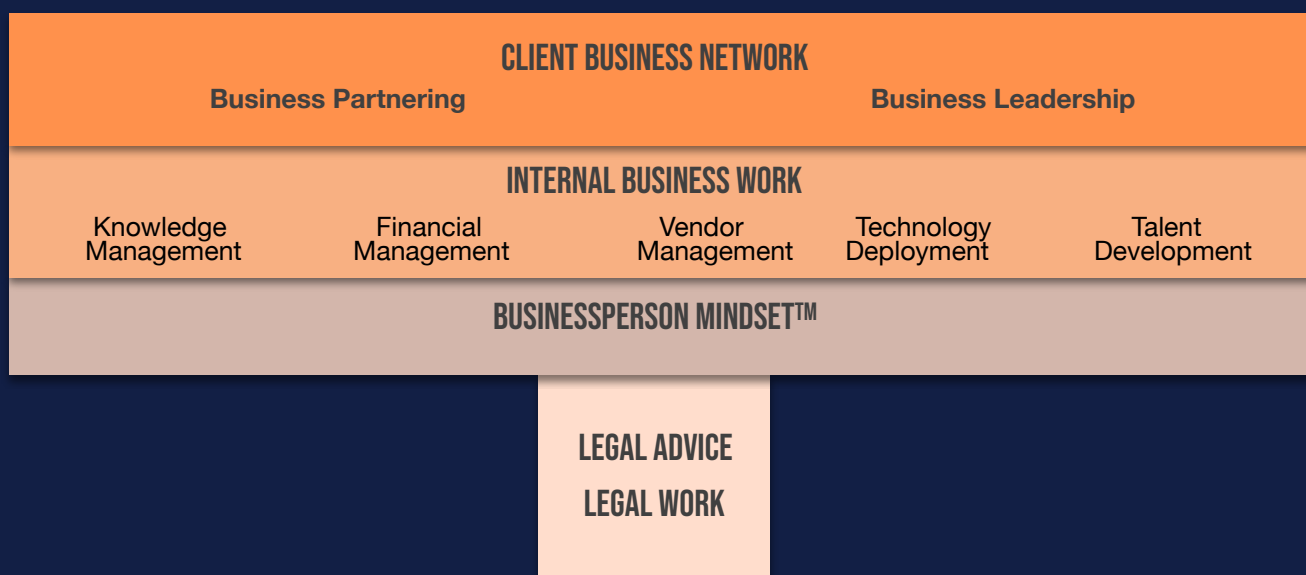
What is a T-Shaped Lawyer?

My vision of a T-Shaped Lawyer is:

- a businessperson, not just a lawyer,
- who provides business input and advice, not just legal advice,
- and does business work, not just legal work,
- for the benefit of the company, not just the legal department or firm.

Below is my attempt to capture this idea in an image.

THE T-SHAPED LAWYER | LESS LAW MORE BUSINESS



Each of the key components of this T-Shaped Lawyer vision are described in detail in my first book. The detail really is crucial because if you skim over the detail, as many do, you can misunderstand the concept and come to the mistaken conclusion either that you already are a T-Shaped Lawyer or, at the other extreme, that it is not for you.

Below are some high-level points about the key components of what it means to be a T-Shaped Lawyer:

- To repeat, it's more than just skills or training or professional development although that is important as I explain below. My vision of a T-Shaped Lawyer is more about what you do, not just what you are capable of doing. Your output, not your input.
- The t-shaped concept makes sense for many reasons that I outline in the book but if you don't like that name then another analogous expression that I use is a *Legal Expert Business Generalist*
- Being a Businessperson means thinking of yourself as a businessperson, not just a lawyer, and thinking like a businessperson, not just like a lawyer. My Businessperson Mindset™, which is different to simply being business-minded, is a way to assess the extent to which you are a businessperson as opposed to having what I call a Just-a-Lawyer Mindset. There are interventions you can make to change your mindset just as you can with a Growth Mindset.
- It is important to distinguish between Internal Business Work and Client Business Work.
- Internal Business Work includes admin work, people management/ development, and everything involved in running a legal department or firm as a business including business development for firms and what is now referred to as Legal Operations in a legal department. Most Internal Business Work is increasingly done by professionals who are not working as lawyers. However, it is important for lawyers to understand and at least support this work especially if they are, or aspire to be, leaders in the firm or legal department. Most of the conversation in the corporate legal industry about business is about Internal Business Work which of course is central to the current focus on enhancing the cost efficiency of legal services delivery. However, despite the typical marketing spin, the primary beneficiary of that work is almost always the legal department or firm, not the client.
- The type of business work that does primarily benefit the client is what I refer to as Client Business Work. It attracts very little attention or discussion which is why I focus on it so much. Doing more Client Business Work, and doing it more effectively, is the game changer and the differentiator both at an individual and team/firm level.
- Client Business Work covers a broad range of activities. At one end of the spectrum is Business Partnering and at the other end is Business Leadership.
- The expression *business partner* is used a lot, typically as a noun. When I refer to *business partnering*, I am using that expression as a verb. It is what you do, not who you think you are, that matters most. When you properly understand business partnering, even the very best lawyers

- concede that they do it a lot less than they think, and a lot less than they should.
- Very few lawyers engage in what I refer to as Business Leadership and yet that is where you can add the most value to clients. It also happens to correspond to what Deloitte and others are saying represents the future of work as I touched on above and as I explain in detail in my book.
- Whilst it is easier for in-house lawyers to do business work, it is also possible for those working in firms to do it as I explain in my book
- You may feel that characterising everything other than legal work as business work is a bit of a stretch. My point in using this expression is to simplify the discussion about work and to clearly contrast business work with legal work. You will find that it helps to then home in on what types of non-legal/business work are worth doing and what is not worth doing.

If this new vision resonates with you then how can you turn it into reality? Well, one of its many attractions is that it can, and indeed should, be applied at both an individual and team level through a series of frameworks.

The T-Shaped Lawyer Framework™ for individual professional development

Once individuals from firms or legal departments properly understand what a T-Shaped Lawyer is, there is nothing stopping them from becoming one by simply doing more business work.

As I explain in my T-Shaped Lawyer Spectrum™, at the beginning of your career the

primary focus will typically be on legal work and on developing legal skills and knowledge. However, even from that stage, it is important to start doing business work and developing other skills and knowledge and that is easy to manage.

But to help accelerate the transformation from an I-shaped lawyer to a T-Shaped Lawyer, and believe me that for most lawyers this will be a transformation, it is crucial to develop your non-legal capabilities. Almost every lawyer knows that legal skills and knowledge are insufficient for a successful career as a lawyer now and into the future. Now, almost everyone is trying to guess what non-legal skills are essential but there are several problems with the typical speculation:

- The fact that almost everyone is speculating is a problem in and of itself. If non-legal skills are so important, and if you have limited time and money to devote to professional development, then you want to do better than guess or select these on some random basis. Yet that is precisely what most are doing.
- It is impossible to decide what new skills you need unless and until you are clear about what work you intend to do now and for the foreseeable future. Non-legal skills are primarily to do non-legal/business work. If you only plan to do legal work, then frankly non-legal skills are not that important. But non-legal skills are very relevant if you plan to do business work.
- Almost everyone calls everything a 'skill'. But not everything is a skill. For example, most so called 'human skills' are really

qualities. Again, we need to be more precise in our change language. Why? Because the way you develop and use a skill in your work is very different to how you develop and use a quality.

- In any event you need more than just skills. You will also need competencies, qualities, mindsets, and knowledge and these need to be selected and developed and used for the type of work you want to do and the type of professional you wish to become. My T-Shaped Lawyer Framework™ is a very specific combination of skills, competencies, qualities, knowledge, and mindsets, as shown in the graphic below. It is specifically formulated to help you be a T-Shaped Lawyer to do business work as well as more effective legal work. My second book, *The T-Shaped Lawyer Guidebook: A Framework for Your Professional Development*

[xx], covers the Framework and explains what each component means and how to develop and use it for legal and for business work.

Having a framework is important because as Santhi Lathi, the Dean of the Academy at leading law firm Rajah Tann Asia, says in the foreword to my second book that you want to ‘adopt a structured approach to professional development for your teams, that goes beyond an ad hoc selection of non-legal skills and competency training’. As she explains in the foreword, we worked together to use the Framework as the basis for the professional development of their entire 1000+ staff including lawyers and other professionals working in 10 countries in Asia. That includes different levels of competency for each Framework component, individual assessments

The T-Shaped Lawyer Framework™

Your professional development guide to business, not just legal, work

SKILLS	TECHNOLOGY	PROJECT MANAGEMENT	RISK ASSESSMENT	BUSINESS PARTNERING	BUSINESS LEADERSHIP	PROCESS IMPROVEMENT	DESIGN THINKING		
COMPETENCIES	NETWORKING	EMOTIONAL INTELLIGENCE	CHANGE MGT	INNOVATION	COLLABORATION & TEAMWORK	COMMUNICATION	PROBLEM SOLVING	CRITICAL THINKING	LEADERSHIP
KNOWLEDGE	TECHNOLOGY		CLIENT		BUSINESS		LEGAL INDUSTRY		
QUALITIES	INTEGRITY	CREATIVITY	CURIOSITY	EMPATHY	ADAPTABILITY	RESILIENCE			
MINDSETS	INNOVATORS			BUSINESSPERSON		GROWTH			



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incorporated into performance reviews which then inform general training needs based on data and targeted individual professional development plans.

But as we discovered when we worked together, and as she notes in the foreword to the book, what started out as a focus on professional development quickly morphed into discussions with management of the firm around strategy, culture, business models, innovation, and ways of working.

While you could just look at all of this from the narrow perspective of just professional development and training, the T-Shaped Vision offers so much more for legal departments and firms. I already knew that from my work with legal departments and legal service providers, but I decided to explain that in the T-Shaped Team Framework, for legal departments, and T-Shaped Firm Framework, for law firms and other legal service providers. I had originally planned to write two more books on both those Frameworks but, for now at least, below is a very brief and high-level overview of these ideas.

The T-Shaped Team Framework™

If the T-Shaped Lawyer vision resonates with the leaders of a legal department then it can, and indeed should, be incorporated into the vision and mission of the legal department. Most legal departments do not have a vision statement or, if they do, it is usually some relatively generic statement that references legal and/or operational excellence. Typically, once it is prepared, it is filed away and never sees the light of day again.

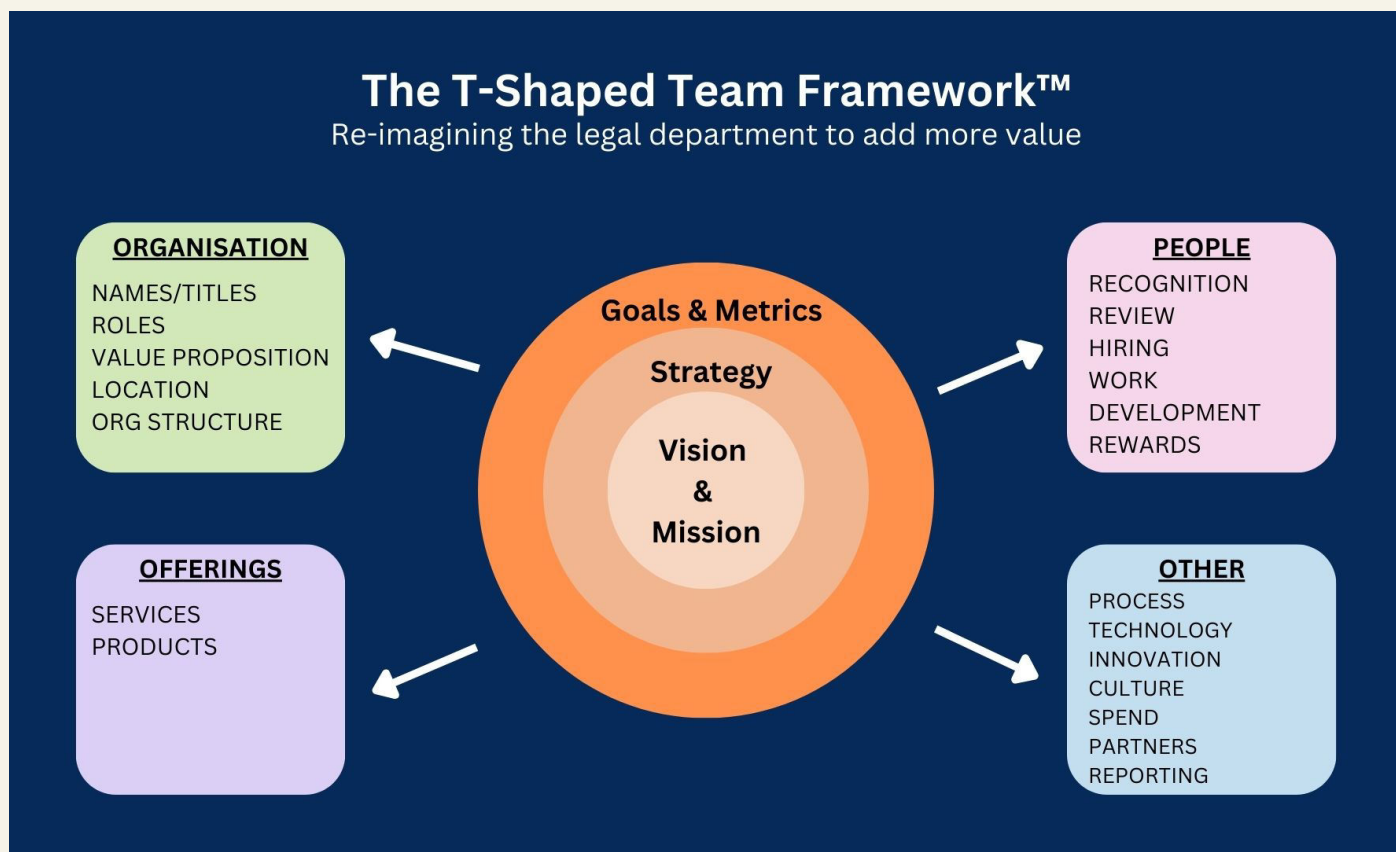
Vision (and mission) statements are, or at least should be, the foundations of every legal department which the team uses as reference points for literally everything. As I explain in detail in my first book, they are critical if you wish to change, dare I say transform, the department in any significant way.

Adopting, and adapting, the T-Shaped Lawyer vision as a legal department is game changing because it changes everything as shown in the graphic below.

Adopting the T-Shaped Lawyer vision, especially when combined with outcome-based thinking discussed earlier, impacts, for example:

- your team culture and the way your department is organised and structured
- the work that your people do and the services AND products that you offer
- your strategic initiatives, which will ‘automatically’ align with the business
- what you measure and how you report it
- all your people processes including hiring, reviews, rewards and recognition
- which third parties you choose to work with and how you work with them
- what technology you adopt and how you use it beyond just using technology internally to augment existing work
- your approach to innovation to make it part of the way you work not just a series of internal projects.

As you can see, unlike most other propositions for change, the T-Shaped Lawyer vision does truly allow you as a leader to reimagine and



transform the legal department and your value proposition. What's more, once you properly understand the key ideas, you and your colleagues can go about implementing this big bold vision in smaller manageable steps with minimal to no third-party support. To the extent that you do need funding to implement your vision, your business case is so much more compelling because it is 'for the business', not just for the legal department!

The T-Shaped Firm Framework™

So far, I haven't spoken much about firms [xxi] and, as I mentioned right at the outset, that is intentional if we were, hypothetically, aiming to redesign the corporate legal industry. With this aim, the questions for firms should be not just how can we provide legal services more efficiently but rather, above and

beyond the provision of legal advice and doing legal work:

- how might we help the business executives of the client corporation prevent and solve business problems and create and implement business opportunities and
- how might we help the leaders of legal departments with their business problems in operating the department and in their efforts to be a T-Shaped Team?

Framing the challenge in this way will result in a new vision for firms which also changes everything for a firm in much the same way as it does for a legal department as shown in the Framework graphic above.

A detailed discussion of the T-Shaped Firm Framework is beyond the scope of this article.

However, below are a few points to note:

- like legal departments, most firms lack a compelling vision statement which is crucial if they are to change in any significant and meaningful way
- firms may not have the same proximity to the business executives that in-house lawyers enjoy. However, unlike inhouse lawyers, firms do have the benefit of collective experience with a range of clients which could be used beyond the provision of legal advice to do business work
- firms often have 'business' resources and experience that they utilise internally to run the business of the firm in areas such as technology, process, project management and knowledge management. Legal departments often lack these same resources to help them not only do Internal Business Work but, if they wish to be T-Shaped, to do more Client Business Work. For example, in-house legal departments need help with things such as aspects of legal operations, technology solutions and advice, back-up human resources and managed services. Some, but not all, firms have over the last few years recognised this need and have started to offer these services and products. For various reasons these offerings, which are really business, not legal, offerings, are typically provided by a separate but related entity to the firm
- Whilst these offerings are a step in the right direction, one consequence of the separate entity structure is that the lawyers in the firm have little or nothing to do with these offerings and in general are not really thinking about, let alone, doing much

business work whether for the legal department or for the corporate business executives.

- One of the most common complaints from legal department leaders about firms is that those working in firms do not understand the corporation's business or the business problems of the legal department. They also often complain that the advice they receive is too legalistic and not sufficiently commercial to enable them to simply pass it on to their business colleagues. Here are two very simple ways that lawyers and others in firms could apply the Less Law, More Business idea to have an immediate impact.

But wait, do clients really want their lawyers to be T-Shaped Lawyers?

You may be thinking that this all sounds interesting but I'm not sure, if I asked my clients, they would want me to be more than a lawyer and to do more than legal work. Here comes the interesting part, and why I am not a fan of the typical client survey – *'what do you want from your lawyers?' - when it comes to trying to find an innovative breakthrough solution to such fundamental problems as outlined above. Had I conducted such a survey, business work would almost certainly NOT have topped the list of responses if it had featured at all. What may have topped the list is something like 'faster turnaround on legal work'.*

Thomas Ford, the founder of the automobile company, allegedly said, *'if I had asked customers what they wanted, they would have said 'a faster horse'.* Increasing the efficiency of legal service delivery, the primary focus of

most change initiatives in firms and legal departments, sounds a lot like a faster horse, doesn't it?!

A fundamental principle of innovation in the business world, and that is what we are talking about with the T-Shaped Lawyer, is that you don't ask. You show and assess the reaction. Although I didn't think about it that way to start with, that is precisely what I did. In other words, rather than surveys, the empirical basis for my ideas originates from my own experience observing business executives and doing both Internal and Client Business work during my 30-year global career as a lawyer. The feedback I received from my superiors in the firm and legal department [xxii], and more importantly from the C-Suite executives [xxiii], to doing a range of business work reinforced my belief that it did provide significant and unique value even if it wasn't necessarily something they would ask for. In the last decade, I have had a chance to turn these ideas into theories, programs, and workshops as part of my legal team coaching business. This work provided a further opportunity to test, refine and validate [xxiv] these ideas with literally thousands of lawyers, and their business clients, all over the world.

The fact that there is so much 'corroborating' evidence from others for these ideas, such as that referred to in this article and in my two books, should give you even greater confidence to just give it a go.

Conclusion

Lawyers love to refer to themselves as Trusted Advisors to their clients. However, as I explain

in my first book, quoting from the authoritative book [xxv] on the subject, the way you become a trusted advisor is not through your legal expertise, but through being a businessperson and doing 'more business'.

Less Law More Business does not mean that being a lawyer, having sufficient legal knowledge or doing quality legal work is unimportant. Quite the contrary, a T-Shaped Lawyer is a Legal Expert Business Generalist, and in my first book I explain how the depth and breadth of legal expertise required varies depending on your role.

Less Law More Business means in simple terms:

- thinking of yourself more as a businessperson and less as just a lawyer
- thinking more like a businessperson and less just like a lawyer
- doing less of the work that you currently do as an in-house lawyer in particular anything that is not really Legal Work
- spending more time doing, or at least supporting, Internal Business Work
- spending more time doing Client Business Work
- spending relatively less time on enhancing your legal knowledge, and spending
- relatively more time on enhancing your non-legal capabilities in a structured way.

Do I really think this transformation will happen?

There is certainly nothing stopping any individual lawyer from becoming a T-Shaped

Lawyer and my two books provide sufficient guidance to help you do just that. After all that is how I became a T-Shaped Lawyer without any specific approval or guidance from my superiors.

Whether the corporate legal industry will change in the way that I am proposing all depends on legal department leaders. Not every such leader will lead this type of adaptive change partly for reasons that I mentioned above and partly because not every leader is an adaptive leader [xxvi]. But some progressive leaders, like my clients, are open to new ideas and guidance from others and are up for the challenge of trying something different. One of the attractions for such leaders of the change that I am proposing is that, once you understand what the change involves, you need minimal third-party assistance, and the impacts can be immediate, significant, and noticeable by your business colleagues. I won't attempt to predict the future. All I hope to do is to help inspire and guide just a few legal leaders and individuals to create their own different future or at least spark a discussion about it.

If such a transformation is to happen it will be one individual at a time, one legal team at a time, one corporate legal industry stakeholder at a time. Join me in trying to make this happen.

Notes

[i] Firms and other legal service providers also support lawyers and other professionals in legal departments as discussed later in the article.

[ii] *The T-Shaped Lawyer: A New Vision for You and Your Work* and *The T-Shaped Lawyer Guidebook: A Framework for Your Professional Development*. Both books available on Amazon and Apple Books.

[iii] Just to be clear, in general, most business executives are 'happy' with their legal team but consider their contribution as somewhat marginal to the business because it is typically confined to working on legal problems and legal risks which are just part of the problems and risks they are facing.

[iv] <https://www2.deloitte.com/us/en/insights/focus/technology-and-the-future-of-work/what-is-work.html> and even thought this article was written a few years ago the quotes are just as applicable now.

[v] Legal Business World magazine 3rd edition 2024 and see also the appendix to *The T-Shaped Lawyer Guidebook*.

[vi] The definition of terms used in this article are as defined in my Glossary.

[vii] Client is an expression that does not work well for those working in-house. She calls them stakeholders. I prefer to use the expression colleagues but for the purposes of this article I will, as I did in my books, refer to them as clients so as not to confuse too many people.

[viii] See for example *Tomorrow's Lawyers*, Oxford University Press, 3rd Edition, May 2023

[ix] Ditto

[x] This same idea also applies to in-house lawyer clients who increasingly access the information, guidance and documents they need without the need to go to a law firm

[xi] A reference to the famous quote from the well-known ice hockey player, Wayne Gretzky,

that ‘good players play where the puck is, great players play where the puck is going’,

[xii] By corporate lawyer I mean any inhouse lawyer who works for a corporation or for a legal service provider who provides services for a corporation.

[xiii] In the sense that it needs to be done by a qualified lawyer

[xiv] I explain this in detail in my first book and highlight the fallacy in the argument that lawyers should stick to what we are good at because ‘you would never hire a plumber to do legal work’. In short, plumbers don’t have the knowledge, skills, authority, or opportunity to do legal work. None of those obstacles apply to corporate lawyers doing business work and we can be very good at it.

[xv] Self-published on Amazon, Apple Books and Kobo in 2023. This book supersedes the prior version published in Legal Business World’s magazine entitled *The T-Shaped Lawyer Vision: Part 1 of the T-Shaped Lawyer Series*.

[xvi] See, for example, the tag line to the May 2024 ACC Europe Conference is ‘Beyond Legal’ and for ACC Australia is ‘More than a Lawyer’ and for the in-house lawyer community Law Ninjas is ‘Don’t be Just a Lawyer’. Other examples include references to being a ‘business partner’ and to being ‘business minded’.

[xvii] *The legal profession in 2024: The wider view*. Harvard Law Today, February 21, 2024, quoting from an interview with Professor David Wilkins.

[xviii] Which is really another way of saying, what I said earlier, that corporations don’t have legal problems they have business problems and legal considerations may or may not be relevant.

[xix] I first applied the t-shaped professional concept to lawyers about a decade ago in my workshops with legal departments and, around that time wrote an article that was later published in the Association of Corporate Counsel Docket magazine entitled *The T-Shaped Lawyer*. The image of the ‘non-traditional’ T-Shaped skills from that article is often cited in numerous articles written by others since that time. To some extent that image continues to haunt me because very few people understand that this original conception has changed significantly as explained in this article.

[xx] *The T-Shaped Lawyer Guidebook: A Framework for Your Professional Development*. Self-published on Amazon and Apple Books in 2024.

[xxi] For purposes of this article ‘firms’ includes other legal service providers

[xxii] Including supporting my efforts to ‘move the needle’ for the legal department as explained in my first book.

[xxiii] Including being the only lawyer to win the 2004 Sun Microsystems CEO Business Leadership Award which, as I explain in my first book, involved being interviewed by the C-Suite execs about my work. Also receiving regular positive feedback about going above and beyond my responsibilities as a lawyer including one comment from a C-Suite exec that ‘he would have me on his management team even if I was not a lawyer and he had to pay my salary’.

[xxiv] Using a design thinking like approach.

[xxv] *The Trusted Advisor*. David H. Maister, Charles H. Green, Robert M. Galford, Free Press; 20th Edition, February 2021

[xxvi] I explain what I mean by adaptive

change and adaptive leadership in *The T-Shaped Lawyer Guidebook*.

About the Author

Peter Connor is the Founder and CEO of AlternativelyLegal. In addition to being an author, Peter is a Legal Team Coach primarily for

in-house legal teams but also for law firms. As a team coach he runs T-Shaped Team Boot-camps™ for smaller teams or for the leaders of larger teams. He also provides a range of other training and consulting services all over the world.

See page [67](#) to Order the books at Amazon

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Australia-Based General Counsel Survey Report
Managing the Unmanageable

EMBRACING DISCOMFORT: IT'S TIME TO ACCEPT THE CHALLENGE

By Steve Fretzin, President Fretzin, Inc



So, this morning I got my ass kicked. Not by a local neighborhood bully or in a bar fight, but rather by my Pilates instructor. Just being honest in sharing that my abs (or lack thereof) feel like mush and my triceps are aching from my 7:30 a.m. class. The real question is, why am I putting myself through this punishment in an uncomfortable place, with a room full of women, and doing something that doesn't feel good? I'm not sure if you've heard the expression, "embracing the suck," cause that's what I'm doing.

When I meet with lawyers, as I do daily, to talk about legal business development and growing that all mighty book of business, it's clear to me that I'm asking lawyers to do the very same thing as I did Saturday morning. You have the



billable hour, difficult clients, challenging cases, as well as for some, management responsibilities.

Now throw on top of that your personal lives with family and friends, and for most it's utterly overwhelming. Many rainmakers know that when you build your originations and develop your own clients, you can take control of your hours and your life in many ways. Let's look at the similarities of me taking Pilates and you having to embrace the suck that is legal business development.

Comparison #1

When I go to my Pilates class, it's all women and me. Every class, every time. While this might seem intimidating, it gets worse.

They're all better than me. Sometimes I must take a break near the end of an exercise, as my abs break down. Super embarrassing. That all being said, I know that over the next month or two this will change. I'm listening closely to the teacher and following her instructions to improve form and engage muscles that will ultimately make me stronger.

Like Pilates, business development can be uncomfortable and challenging. You may have to attend networking events, travel to a conference, or meet with a client, not knowing if any of your non-billable time will pay dividends toward new business. So, like Pilates, you must learn new approaches to be more effective in those scenarios. As you know, doing the same thing over and over

and expecting a different result is the definition of insanity. So read my books and articles (like you are now), listen to my podcast **BE THAT LAWYER** and build that business development muscle. If this isn't doing the trick, email me and we can discuss coaching to get you to the next level.

Comparison #2

Since I'm sharing some personal details about yours truly, I may as well mention that I've had surgery on both of my feet and had my left hip replaced. This is important information in Pilates, as the teacher must work around each client's personal physical issues to make the exercises safe and beneficial to each participant. Knowing where you're strong or weak is very helpful to enjoying the classes, versus feeling nervous or unsafe.

In developing business, you, too, have strengths and weaknesses that must be considered and addressed before investing too much time doing what you hate or are not very successful with. For example, an introvert attending a big networking event with hundreds of people. Probably not playing to their strong suit. Think about what you do enjoy and lean into it. This might be more one-on-one meetings or small group events. For me, a good example is playing paddle tennis. I get to kick some ass and have fun, while also getting to know lawyers from other racquet clubs. Whatever the case, be honest with yourself and focus on activities you enjoy or have had past success doing.

Comparison #3

One of the most important elements of Pi-

lates is, simply, breathing. Thinking about one's breath is unusual, as we breathe all day never thinking once about it. The reason this is so important in Pilates is because it facilitates correct muscle activation and increases the safety of the exercises. Wow, probably more than you wanted to know there. The point, dear reader is that we all need to find our breath, and that doesn't just mean when exercising.

There are two unique benefits to breathing in developing your book of business. First, there's literal breathing, where you stop the madness of your day and just take 8-10 seriously deep inhales and exhales to regain your focus. Most people don't do this, but if you do, you'll feel better and more focused directly afterward. Additionally, take a breath by getting away from the office, home or otherwise to rethink your plans for the month, quarter, or year to come. Most people just go year to year doing the best they can, never stopping to think and plan a growth strategy for what's to come. This is a huge misstep in developing business because a failure to plan is a plan to fail.

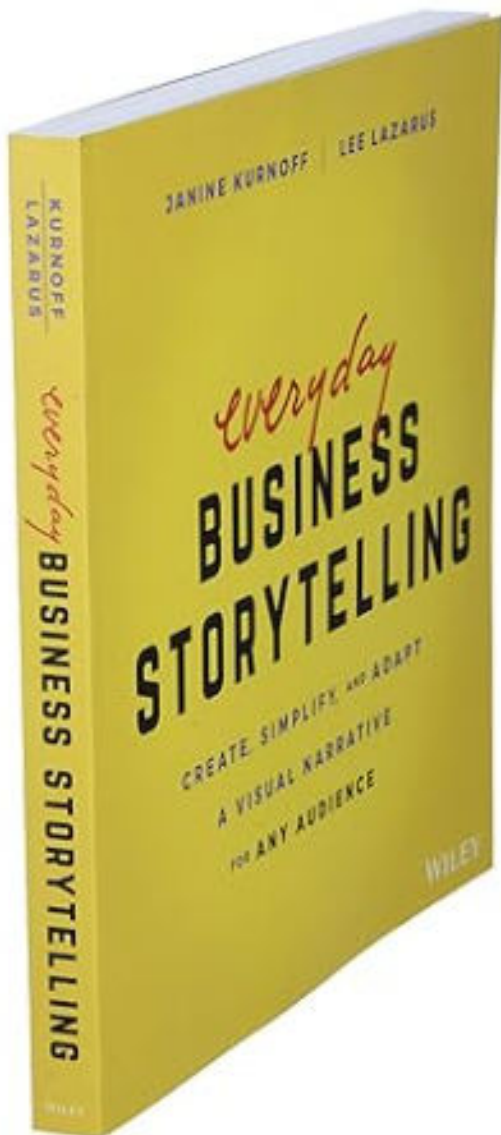
The most important element in this article from my perspective is to make improvements in your life, as you only get one shot at this thing. For me, playing better paddle and winning matches is important. Taking Pilates will help me accomplish this while also improving my overall health. I'm already embracing the suck and feeling better every day for it. Think about what you need to do to live your best life and be the best version of yourself. My guess is that it's not about squeezing

in a few more billable hours, but rather the importance of being happy with balance and control over your time and destiny.

If you'd like to discuss your practice with me, I'm always available to meet and offer advice and guidance. My email is steve@fretzin.com and my website is www.fretzin.com.

For more information about growing your law practice or taking your firm to the next level, please email Steve Fretzin at steve@fretzin.com or go to his website at www.fretzin.com.

You can also enjoy Steve's BE THAT LAWYER podcast on all major podcast platforms.



A practical, easy-to-use guide to transform business communications into memorable narratives that drive conversations--and your career—forward

In *Everyday Business Storytelling: Create, Simplify, and Adapt A Visual Narrative for Any Audience*, visual communication and storytelling experts Janine Kurnoff and Lee Lazarus leverage decades of experience helping executives at the world's top brands--including Colgate-Palmolive, Nestlé, T-Mobile, Medtronic and Meta--bring clarity and meaning to their business communications. Whether you're building a presentation, crafting a high-stakes email, or need to influence the conversation in your next meeting with an executive, or have to communicate with data, *Everyday Business Storytelling* offers an insightful exploration of how to develop compelling business narratives that meet diverse audience needs.



CHANGING CLIENT EXPECTATIONS AND HOW LAW FIRMS ARE TAKING ADVANTAGE OF AI-POWERED DRAFTING TOOLS

Ari Kaplan speaks with James Sherer, a partner at BakerHostetler, who serves as the co-leader of the Emerging Technology Team of the firm's Digital Assets and Data Management group, and Ross Guberman, the founder and CEO of LawCatch, the developer of BriefCatch, a software platform designed to elevate legal writing, which has recently introduced new generative AI features for lawyers and legal professionals.





Ari Kaplan

Tell us about your background and your practice at BakerHostetler.

James Sherer

I am a partner at BakerHostetler and graduated from law school in 2002. I was supposed to start as a transactional attorney focusing on telecommunication issues, but the firm collapsed, so I became a products liability litigator. That was my first introduction to e-discovery on a large scale, which was formative. I moved to Dickstein Shapiro, where I practiced white collar defense and insurance coverage policyholder-side litigation and continued to assume responsibility for a lot of discovery. I moved in-house to Dow Chemical, then to Redgrave, where I was truly immersed in e-discovery and information governance, before joining BakerHostetler,

where I have worked for 10 years. My focus here began with e-discovery, then progressed to information governance, and now is equally concentrated on artificial intelligence and Big Data analytics.

Ari Kaplan

You practiced law for several years before pursuing a career focused on legal writing and developing BriefCatch. How is technology changing the way lawyers advocate on behalf of their clients?

Ross Guberman

I left the actual practice of law about 20 years ago, and this is the most exciting thing I've ever seen in terms of the profession and legal tech, where we are at a bit of a crossroads. We are seeing an interesting and ever-changing mix of fear of the unknown, being replaced,

and security, sometimes legitimate and sometimes exaggerated. And on the other hand, there is a lot of curiosity, optimism, and excitement about the possibilities, including making legal services more accessible. I don't think we have figured out where we will end up on that spectrum between fear and ebullience, but I'm guessing it will be closer to the positive side when all is done.

Ari Kaplan

Have client expectations of how their lawyers communicate with them changed?

James Sherer

When you are in-house counsel, you are task-oriented along several lines. The first is that the work is self-contained to the extent you have outside counsel creating specific documents for you, whether they're litigators or transactional lawyers. The second is helping other in-house attorneys solve internal issues while considering politics and cost constraints. Clients today want actionable guidance and are working with us tactically to solve immediate problems. The work product is moving much more quickly.

Ross Guberman

Do you think the desire for efficient delivery of legal advice will increase as more clients realize that law firms should be able to respond faster with legal technology, or are they also concerned about legal technology? How is legal tech going to affect their expectations?

James Sherer

It is changing. Most clients who can afford the bigger law firms work with multiple sets. If some of those firms start to accelerate how they

respond, giving actionable answers rather than citations to the law that they need to interpret, clients will look to those who can adapt and get answers quickly because it is more challenging now than it was when I was in-house well over a decade ago. Clients expect answers from their law firms immediately because in-house lawyers need to guide their business units more quickly. If we can use technology to increase accuracy and responsiveness, we will do so.

Ari Kaplan

Given your work with judges worldwide, how do the kind of communication skills, good writing, and well-crafted positions that James refers to affect the outcomes of bet the company matters?

Ross Guberman

During COVID, almost all judges shifted to reading everything they had to read, mainly briefs and motions on iPads, which matters because people are much more impatient when they read on iPads. Just as James said, clients always want accurate information quickly, and judges have little patience when perusing motions and briefs, especially when reviewing them on screens. So, there is a real premium more than ever in having hard-hitting, compelling introductions and preliminary statements because they are reading those carefully and then skimming. If you know what you're doing, there are opportunities to seize on these trends and the overall impatience of many readers.

Ari Kaplan

You help clients draft policies on privacy, information governance, records management,

security, and AI. What is the key to drafting guidelines that people will follow and which can be seamlessly enforced?

James Sherer

We start from the premise that we cover the waterfront for what matters to the organization. We incorporate what all of the laws require and currently have several AI standards in Colorado and New York, as well as the AICP guidance and the NIST AI risk management framework. We have some building blocks to start orienting programs and policy language toward. However, there is still a middle ground, and the direction depends on whether you are drafting a policy for public reference or a procedure that needs to be followed completely. With the influx of generative AI capabilities, companies may want to offer guidance on protecting confidential information without preventing technological adoption, so we will offer feedback on those higher-level points while providing the requisite level of detail to help the internal team manage specific inquiries that arise. We may also help draft brief policy statements that can be used for regulatory or audit requirements and frequently asked questions for a website. We are also seeing a much more fluid environment for where an organization begins and ends based on how much work a company outsources to a third party.

Ross Guberman

What do you think about texting clients?

James Sherer

You will meet the client wherever their need is. I try to direct the conversation back to more traditional channels, but people reach out on

LinkedIn, SMS, or WhatsApp. Some industries, especially financial services, face institutional challenges related to regulatory enforcement about managing certain types of communication. Still, we have to be flexible to accommodate the needs of our clients. They are looking for answers rather than a change in their preferred method of communication. I think there's an expectation that we will have the right technology platform to allow us to serve clients wherever they want to reach us in a compliant way, which will protect confidentiality and privilege.

Ari Kaplan

Given James's point about law firms trying to meet their clients where they are, how do you, as a developer of legal technology, help in the drafting process and ensure that your tools are evolving with the needs of your users?

Ross Guberman

One exciting thing about owning a legal tech company is that it is easy to constantly update your product almost instantly in response to user requests and behavior. As an editing product, we have all different constituents, including law firm lawyers, in-house practitioners, and judges, who want us to help users avoid certain language or phrases in their filings. We can always improve and innovate, but there is almost no end to the possibilities of helping lawyers of all types generate superior legal documents much more quickly. There is a lot of potential, and we have really only just begun.

Ari Kaplan

Has the craftsmanship involved with creating documents, drafting arguments, and manag-

data in high-stakes litigation changed due to technology?

James Sherer

I hope it's only improved, and I believe the expectations for technological proficiency have increased. Ross focuses on the heart and the meat of it for people looking at compelling arguments and turns of phrase. If clients can see problems, they won't trust those areas where they are not deep enough in the weeds also to see issues. We have started to see a gradual integration of different technologies, allowing us to continually improve the work product we deliver. Ideally, we want to focus on areas that are not replacing practice by any means but where there is a continual improvement in how we deliver those services to free our time and allow us to focus on those areas clients expect to hear from us. There have been challenges where some practitioners have taken that process and delegated it all to the technology.

Ari Kaplan

What new opportunities can law firms realize with artificial intelligence?

Ross Guberman

You can do a lot to consolidate the style of partners in the same practice area at the same firm to standardize their collective habits, including promoting their use of similar phrases. Beyond style, the next stage for companies like ours is to verify the logic of specific arguments to ensure that a writer has not skipped a step or provided a level of detail that distracts the reader in ways that were impossible before the recent influx of ChatGPT and similar tools.

Ari Kaplan

How do you see law firms benefiting from AI-empowered tools for litigators and practitioners going forward?

James Sherer

I don't think it's a replacement by any means. It's a slow adoption. It's exciting because we are digging into the technologies and asking difficult questions about them. It's slow adoption. It's measured. It's intentional. And clients are starting to expect it. They want to know how their law firms are using these technologies to improve the delivery of legal services. If you're going to use it as part of your practice, you have to understand how it works or get someone who really understands it because it's still your certification and your license. We are getting to the point where you can't practice without integrating these tools, and you cannot avoid that progress as we see the integration of Microsoft Copilot or other technologies.

Ross Guberman

A provocative post recently on LinkedIn noted that lawyers will become the ideal prompt engineers, which is counterintuitive. I own a legal tech company, employ developers, and do not know how to code. You can create a custom GPT using plain language with the right tools. In fact, you are rewarded for using ordinary English, which is why lawyers are praised instead of criticized for being better than other professionals in handling these challenges.

James Sherer

The practice of law is steeped in ambiguity

and I do not get easy questions because we are too expensive for that. There aren't necessarily easy answers. You're analogizing. You're drawing comparisons. How these technologies work, for the most part, is very similar. You're coming back with an approach but not the correct answer. Even with more traditional machine learning systems, 2+2 is likely 4. It is about being responsible with those tools and technologies to save time because there are increasing pressures from clients, especially in the face of rising billing rates, to show value. TVs are less expensive, but that has not been the case for lawyers, so we need to demonstrate the extent of our partnership with clients.



About the Author

Ari Kaplan (<http://www.AriKaplanAdvisors.com>) regularly interviews leaders in the legal industry and the broader professional services community to share perspectives, highlight transformative change, and introduce new technology at <http://www.Reinventing-Professionals.com>.

Listen to his conversation with James Sherer and Ross Guberman here: <https://www.reinventingprofessionals.com/changing-client-expectations-and-how-law-firms-are-taking-advantage-of-ai-powered-drafting-tools/>





Bringing Transparency to
Legaltech Procurement

IMPROVISE

TO PLAN OR TO IMPROVISE

By Richard G. Stock, M.A., FCG, CMC, Partner with Catalyst Consulting

This is the fifty-first in a series of articles about how corporate and government law can improve their performance and add measurable value to their organizations.



I am quite sure that 95 % of companies, institutions and government organizations develop plans and priorities each year. Most have specific goals and strategies that span 3 to 5 years and guide the deployment of resources. It follows that the same organizations track progress and performance against their plans.

I have read hundreds of corporate, strategic and business plans over the years. In many cases, their quality is very good. My interviews with business units in these organizations suggest that plans are an effective management tool at both the corporate and business unit levels. So why do law departments fare poorly when it comes to applying the same methodologies and management practices to themselves? Some time ago, I had the opportunity to exchange with more than 50 law departments

PLAN



on this issue. Here is what I found.

On the question “Does your law department produce a written business plan each year?” 40 % said they had a written plan in place, 55.7 % said there was no plan and 2.5 % did not know. This distribution reconciles with my own consulting experience, although I tend to spend more time with departments that have yet to develop plans. None of these statistics shed any light on whether law departments do good work or whether they are appreciated by those who use their services. But they speak volumes about the chances of a department having a significant strategic impact in the organization each year. Why - because they are reactive and can rarely make the time to change their focus.

The second question asked “Is there a formal

process for obtaining business unit input in preparing your plan or in anticipating their requirements for legal services delivery?” Only 19 % reported that they relied on a formal process of getting input from business units to either come up with a plan or at least to anticipate requirements for service. Overall, 64 % sought no formal input and another 17 % of respondents did not know whether such a process was in place for their departments since they were not responsible for the management of the law department.

I am persuaded that Chief Legal Officers and General Counsel are quite capable of preparing formal plans. I know that they speak with business units every day during the normal conduct of business – but rarely to learn more about demand for legal services. This approach

closely resembles a law firm business model that is professional, relationship-based, and able to react capably when called upon. But it does not let the law department achieve its full potential as a strategic business contributor.

“Is your law department able to forecast the number and type of matters it will handle each year?” The answer to this third question is not surprising. I wanted to understand whether the informal approach to planning produced the same results as that achieved with a formal business plan. Only 20 % of the law departments can forecast demand at the matter level. Some 75.5% are unable to secure this level of detail, and 5 % of the respondents did not know. Forecasting demand by type, hours, number of matters and complexity level does not require a matter management system or timekeeping in the law department.

I have had the opportunity to test the capacity of law departments to estimate demand for services. Discussions with 10 different corporate, institutional, and public-sector law departments revealed a great deal. Lawyers were asked to allocate their time by business unit and by legal specialty so that it totaled 100 % for the year. It took 15 – 30 minutes for each lawyer to complete the survey, confirming that they know their practice well enough.

I then requested an estimate of the number of matters / files handled which fell into one of three ranges: 0 – 5 hours, 6 – 25 hours and more than 25 hours each. The lawyer then estimated what proportion of the year was represented by each of the three groupings. This profile of the law department was interesting

for everyone in the department. It provided the General Counsel with a baseline to question anomalies and from which to adjust client usage patterns. It was a short next step to discuss the findings and the demand for legal services with business units, and from there to fine-tune usage patterns, as well as to change practice patterns for individual lawyers and staff in the law department.

The final question asked “Do you believe that your law department should be more structured when planning and then managing the deployment of its resources?” Seventy-nine percent (79 %) said they should be more structured, 16 % said no – perhaps because their plans are sufficiently structured, and 5 % did not know. I believe that the results of this survey are likely to be the same a year from now if law departments wait for the company to require formal plans. The distribution of answers will be dramatically different if the General Counsel decides that a more formal planning process and focussed business priorities will be the order of the day for the law department in 2025. The precedents and tools are available. It is not enough for law departments to be good goaltenders. Setting a deadline and investing 25 hours will generate a game plan for better results.

About the Author

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THE ART OF DESELECTION: MINDFULLY FIT BY DESIGN

Lex Maze Series

By Valérie M. Saintot, Lawyer and Mindfulness Teacher



The legal profession has entered a hyperactive era and is experiencing a tsunami of stimuli: technology, mental health, new mega business challenges to advise on, change of geographical references, new ways of working, included the redefinition of the importance of leadership and management in legal teams. Some days the headlines are about a silent mental health pandemic in the legal profession. Other days we are told how much we underestimate our replaceability by generative AI. Not easy to keep cool as the summer heat is approaching.

Eastern and Western contemplative traditions advocate that when everything goes too fast and we experience a sense of being overwhelmed, the best thing to keep up is not to accelerate and run. No, it is to slow down and retreat a moment.



May and June are the peaks of legal conferences season, with a rain of social media postings capable of activating our conscious or unconscious fear of missing out, experiencing the famous FOMO syndrome. What about pausing and practicing ‘deselection’ to inhibit our drive for unreasonable busy-ness which may not bring much business? What about growing our mental fitness and focus on the essential and what matters to empower ourselves with what we can truly change here and now?

Five years down the legal technology revolution blast, thought leaders start to affirm that with the dust settling, we can now be more rational and realise that yes technologies will structurally transform the profession in ways we may not even imagined. Yet, here and

now, legal professionals are still fighting with many issues that need human embodied solutions. Roadmaps to encourage high rate of adoption of legal technologies invite ecosystems to evaluate the digital maturity of their processes and skill profiles. Many agree on the need to provoke a shift in the working culture of legal teams to make best use of technological revolution while being ever more life centric and appreciative of the incredible human potential.

These trends are welcome and necessary. The challenge is to avoid paralysis feeling overwhelmed not knowing where to start or spin in fruitless hyper activism. The goal is to walk the golden middle of awareness and proactivity while steering away from excessive confusion and pain.

This is why we promote **the art of deselection** as a special way of looking at the world. The idea is to develop a grounded approach to transform our presence to our environments, augmenting ourselves with technologies (digital and social ones) and exercising deep discernment to select and even better deselect what does not contribute to the deep transformations we aspire to.

Two toolboxes come handy to help legal professionals in this respect: legal design thinking and mindful working. This is what this short article endeavours to bring forth. It highlights challenges we have experienced as counterproductive. It also bring forth practices that are efficient mitigators and even possibly highways to structural and deep rEVOLution we so much need.

When combining legal design thinking and mindfulness practices in a legal team, many challenges become more manageable and overcome with grace and contentment by the teams. More than often, legal design thinking is viewed as focused on legal deliverables and legal services for users and clients. In the present article, we do not explain legal design thinking process, tools and deliverables but more on how it can help legal teams to improve their own daily lives (1). We continue by zooming into how mindfulness bring another dimension to the conversation in terms of mindset and attitudes it fosters and directly synergize with legal design thinking to slow down the process and fast-forward the impact (2).

1. How legal design thinking contributes to the art of deselection

Over the two + decades of using both (legal) design thinking and mindfulness at work in different departments, including legal, we could experience four perspectives that need dedicated attention to not stand in the way of teams.

A. Less silos, more pluridisciplinarity

Legal design thinking enhances the interactive, collaborative, and iterative nature of the design process, boosting access to information and the flow of ideas based on participants' expertise and capabilities. Everyone within the legal ecosystem is encouraged to join the design process following the 'no tie no title' principle. This significantly amplifies the cognitive resources tapped by team members as they work together to solve problems, create new ideas, refine processes, or make data-driven decisions. Sharing the challenges across several brains, hearts and bodies by design naturally make the burden less heavy for each team member. Equally, involving stakeholders from across legal teams or departments with different skill set help with increase the importance given to pluridisciplinarity as a major asset to nurture and mobilise.

B. Less complexity, more user centricity

Improving legal processes without applying legal design thinking is not highly challenging but also a missed chance to evolve culture and mindsets.

Legal processes often involve strict deadlines, specialized terminology, and an understanding of legal procedures. If legal professionals use the opportunity of rethinking their working mobilizing themselves the methodology (not

delegating it to ‘designers’), they start to see how design thinking can be put to the service of hardcore legal output. It reduces the number of rounds of comments and increases the mobilization of business intelligence and know-how. In turn, it significantly increases the acceptance of the final output.

Legal design thinking prioritizes the end user's needs from the start of the creation process. In our mind, the end user can also very much be the lawyers and all within the team. By having these reflexes, developed when practicing legal design, legal professionals can let the mindsets and key characteristics be transferred to other legal output. Learning to reduce complexity without simplifying reality is a very meaningful skill to master for a legal professional. The efficiency achieved results in substantial time savings for everyone involved, leading to a high return on time invested.

C. Less knowhow loss, more upskilling

Legal design thinking is highly effective for managing legal knowledge as it helps legal professionals to think more 3D and less linear. The more legal professionals get comfortable to deconstruct and rebuild their work in a more multimodal way, the more they increase the impact of their work with clients, peers or judges. Legal design thinking can help with big picture thinking so important to provide comprehensive overviews of available legal assets. Legal design acts as a catalyst for efficient knowledge retrievable because it helps to store it in a more intuitive and memorable way and downstream it helps with the dissemination and accessibility avoiding reinventing the

wheel on the same topic again. Additionally, legal design thinking encourages to present legal information in more engaging ways for both lawyers and non-lawyers. This approach promotes active recycling of legal knowledge and leads to saving significant efforts and precious resources.

D. Less risk adversity, more innovation

Mastering legal drafting and public speaking is no longer sufficient. Lawyers must approach communication from a broader perspective. Legal design thinking and legal knowledge visualization do not replace text-based outputs but rather complement them. Yet, such methods enhance the cognition of legal professionals and improve the understanding and retention of information for their audience.

By being more prototype oriented, also in the realm of ideas and legal reasoning - not limiting legal design thinking to documents or interfaces redesign - legal professionals can associate a more diverse number of stakeholders. This directly influences the possibility to be more innovative as teaming up with others lower risk adversity.

More people with more diverse backgrounds can grow disproportionately more confidence in trying new ways of solving problems as more minds and hearts can think and feel how reasoning could take new avenues.

2. How mindfulness contributes to the art of deselection

Let's remember that the present piece is about promoting the Art of Deselection.

In this respect, mindfulness (the ability to pay attention in the present moment non-judgmentally) can play a significant role in legal design thinking as it does in agile and other creative processes.

A. More attention, less infobesity

Focusing one's attention is a direct experience and lasting benefit of practicing mindfulness. With a concrete sense for our ability to direct our attention, we can usefully regain agency to steer away from being victim of the infobesity times we live in. Mindfulness helps team members maintain focus on the task at hand, reducing distractions and improving productivity.

During creative rounds, openness in the here and now is needed to understand and solve complex problems. This openness translates in not being caught up in past solutions and certainties and being able to hold a blank canvas to allow new solutions to emerge and be designed. This sense of openness is crucial in design thinking sprints and the more it becomes a concrete and shared experience, the more it also can mature to become an unconscious competence applicable across the board.

B. More creativity, less auto-pilot

Mindfulness practices encourage to create distance between stimuli and the reaction we oppose to these stimuli. Mindfulness reduces our cognitive rigidity and fosters our creative reaction to life events. This flexibility is key for creativity and innovation. This is essential in design thinking where innovative approaches can lead to better outcomes by generating more creative solutions. Taking a step back,

breathing in and out, not jumping to judgment and conclusion too early is powerful beyond words. When we just not turn to our auto-pilot, we give ourselves the chance to revisit our past certainties and freely choose a brand new course of action. We break the pattern of being prisoner of the past and allow to choose new options in the present moment.

C. More empathy, less conflicts

Mindfulness promotes better communication, empathy, and understanding among team members. By training the ability to be self-aware and resourceful, mindfulness creates a space where diverse views can be shared and appreciated. This directly helps in the design thinking process to improve collaboration when brainstorming and prototyping. It helps depersonalize conflicts and bring the focus on the process and the ideas and less on the authors of the ideas. Resolving conflicts quickly and amicably becomes a natural mindset.

Without mindfulness and design thinking, discussions tend to be happening in our mental clouds and be disembodied.

They possibly become dramatized specially among legal professionals who are quick at producing ideas and vigorously plead for their convictions. When slowing down and being more mindful, the natural propensity to instigate drama drops and a space for more mutual appreciation opens.

D. More resilience, less overload

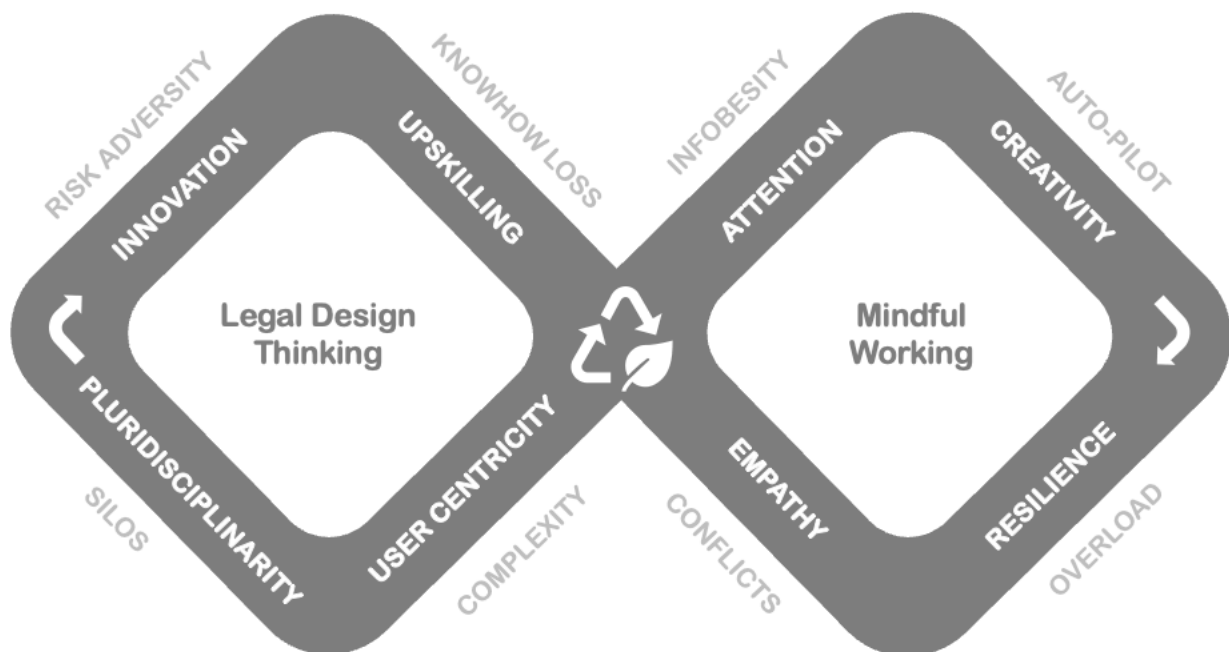
The iterative nature of design thinking can be stressful either by self-imposed pressure, by the discomfort of the deconstruction phase or

by the misunderstanding one would need to be creative. Mindfulness helps manage stress and maintain emotional balance. Just inviting to a moment of silent reflection several times during the process can help team members to remain calm and effective under pressure. The more these qualities are practiced in the context of design thinking related activities, the higher the chances they get transferred to other parts of the legal work where legal design thinking may not be central. With less stress spilling in the team, setbacks and failures become less taboo. This is important in design thinking, where iterations often include learning from failures. As an outcome, a sense of confidence to face whatever challenge come our way grows and we become more resilient and responsible.

Bringing together legal design thinking and mindfulness: the Double Diamond

Mindfulness encourages present-moment awareness and reduces impulsivity, leading to more thoughtful and informed decision-making. This is beneficial in design thinking, where decisions need to be made based on user insights and feedback. By growing the sense of effectiveness and efficiency dear to legal professionals and knowledge worker generally, there is a growing appreciation for pooling assets to serve the decision that needs to be made.

By integrating mindfulness practices into design thinking, teams can enhance their overall effectiveness, creativity, and well-being. We speak of this approach as an art because it is a



Valérie M. Saintot, LL.M., PhD, 2024

MINDFULLY FIT BY DESIGN - DOUBLE DIAMOND

nonlinear process, not easy to reproduce and before being a recognized artist it takes 10'000 hours of trials and errors. We need to deselect our auto-pilot mode; we need to deselect our beliefs and prejudices; we need to deselect attending every opportunity. Then we need to select contentment with what we achieve, small or big.

Promoting mindfulness and (legal) design thinking at work for 20 + years, it is our first-hand experience that one needs to stick long enough with both to benefit from them and grow the art of deselection. In the face of a technological revolution of the size of the one we are going through, this is even more essential to sort the short-lived from the transformational, the fads from the trends that have come to stay. The goal is not to deny or withdraw. The goal is to mobilize resources as smartly as possible, so actions are timely and impactful versus scattered and self-exhausting, creating a lot of distress for limited to no impact.

FURTHER READINGS

For those interested in a deeper understanding and evidence, you can use the following keywords in Google Scholar for more in-depth exploration of deep trends and extensive research: #mindfulness and #designthinking; #mindfulness and #projectmanagement; #mindfulness and #agile; #mindfulness and #creativity. For more management-oriented literature, a search in Google combining #mindfulness and #designthinking also show how these toolboxes have been teamed up across the board.

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About the Author

[Dr. Valérie M. Saintot](#), LL.M., is a lawyer (since 1994), mindfulness teacher (since 2005), visiting lecturer at [Bucerius Law School](#) (since 2021), and adjunct professor with SKEMA Business School (since 2022). Valérie is promoting life centric AI developments as active member of the [Liquid Legal Institute](#) and with [Z-inspection](#). She is an education ambassador for [Green Project Management](#). She builds on analytical frameworks offered by mindfulness, neuropsychology, and philosophy. She cares to combine law-AI-sustainability-mindfulness as means and goals to promote a resilient and regenerative way of living and working.

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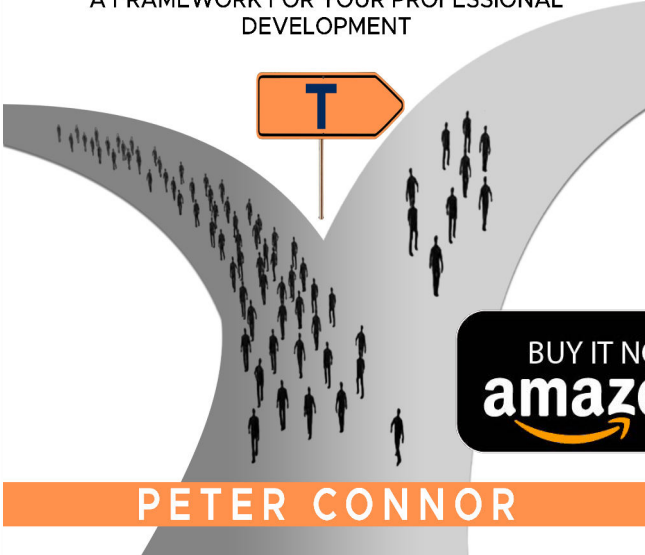


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HOW AI IS CHANGING THE GAME FOR FINANCIAL INVESTIGATIONS

Tod McDonald, co-founder of Valid8 Financial



Just as electronic discovery transformed the way lawyers collect and analyze documents in legal cases, AI-driven verified financial intelligence (VFI) is poised to revolutionize financial investigations.

Whether regarding suspected embezzlement, bankruptcy or a family law case, these investigations are typically lengthy, arduous and expensive. Lawyers might spend weeks preparing and organizing data or hire costly forensic accounting firms or expert witnesses. Either way, the time and resources spent are significant.

The volume and complexity of financial data are the biggest hurdles to building a solid case. Professionals often spend **90% of investigation time** just preparing and managing data.

A hand holding a magnifying glass over a digital interface. The interface features a line graph with two lines, one of which has a data point labeled '214.54'. There are also various data points and lines scattered across the background, suggesting a complex data analysis environment.

214.54

Administrative tasks consume precious time, limiting the depth of analysis. Emerging technologies, including VFI, can remove data preparation burdens for more efficient and effective investigations.

The benefits of VFI

AI-powered VFI reduces manual data management, shortens investigation timelines, enhances evidence quality, supports case building and presentation, and contributes to higher job satisfaction.

- **Data management**

Every professional knows the pain of manually reviewing hundreds or thousands of documents, from bank and brokerage statements to handwritten checks, spanning mul-

iple institutions, accounts and time periods. Teams are tasked with sorting, separating, entering, verifying and reconciling all the data before they can begin analysis. The painstaking and repetitive nature of this process, coupled with the pressure of case deadlines, renders a comprehensive examination of every transaction practically impossible.

AI-powered VFI accomplishes in hours what takes humans days or weeks. These solutions automatically extract relevant financial data, regardless of format. Unconventional documents typically require manual entry, but VFI eliminates that necessity. Quality platforms can even read handwritten checks and deposit slips.

VFI software runs checks to verify the data, detecting discrepancies such as omitted, duplicated or erroneous transaction extractions. The algorithms automatically merge and match entries from across accounts, institutions and time periods and alert investigators to issues like missing monthly statements or incongruent account balances. These solutions can even categorize transactions by type, location, counterparty and other characteristics for enhanced value.

VFI's speed and accuracy enable investigation teams to build a comprehensive, verified dataset covering every transaction in a minimal amount of time.

- **Data analysis**

The accelerated data preparation phase gives teams more time and better data for a more thorough investigation. VFI platforms create centralized databases that are easy to update and search to support ongoing analysis efforts.

Data verification algorithms highlight missing information so teams can track down unaccounted-for statements. While traditional processes require someone to manually reconcile the new data, creating headaches and delays, AI seamlessly integrates it with existing evidence.

VFI platforms also flag unusual or potentially suspicious transactions that human review might miss. Additionally, the complete financial record reveals more of these instances than the limited dataset available with human preparation. For example, contradictory balances or mismatched account numbers may be

mistakes, but they might also signal malfeasance. VFI platforms quickly surface these discrepancies so investigators can examine them more closely.

Spreadsheets present significant limitations to tracking money movement. A VFI platform grants additional visibility by turning thousands of individual transactions into graphs and charts. Investigators can literally see the flow of money between accounts to spot unusual activity and drill down into specific transactions. Perhaps a sum left one account but never appeared in another, possibly signaling a hidden account or embezzlement. This insight presents leads and helps investigators develop a narrative.

All of this investigation can happen in the time previously reserved just for data preparation.

- **Case-building**

VFI creates courtroom-ready evidence. Lawyers know the data is verified and can produce a continuous chain of custody to meet the high standards required for a legal case.

The centralized database facilitates better collaboration among law firms, accounting teams and other stakeholders. Everyone can access complete and updated information, eliminating challenges with version control and reducing communication delays. This streamlined process accelerates and enhances discovery and analysis for faster time to insight.

The additional time for analysis, coupled with the comprehensive view of financial transactions, supports better narrative-building and a

stronger court case. Teams can conduct more thorough reviews to uncover more sophisticated schemes in fraud investigations or gain a more exhaustive understanding of a complex set of assets in a family law or bankruptcy case.

The complete portfolio of transactions demonstrates the depth and thoroughness of the investigation, preventing opposing counsel from attempting claims of overlooked evidence. Visualization tools also help lawyers prove the case narrative. Judges and juries can more easily follow and understand intricate money trails for a more convincing case.

- **Legal Team morale**

Burnout is a significant challenge facing the legal field. One study found that two-thirds of [lawyers suffered from burnout](#); other research suggests similar rates. Some of this dissatisfaction is likely due to time-consuming and tedious but exacting work, such as data preparation. This task requires significant attention to detail but can quickly become monotonous. Lawyers, paralegals, and related support staff prefer to spend their time accomplishing the high-value tasks they were trained for, like developing case strategy, not extracting, reconciling, sorting and categorizing financial transactions.

VFI platforms automate much of the tedious work involved in data preparation. Instead of working tirelessly for weeks to create a limited dataset, lawyers or their partner accounting firms can begin investigating the entire transaction history in just a few hours. The reduction in time spent on manual tasks reduces the

overall workload, improves morale and increases job satisfaction.

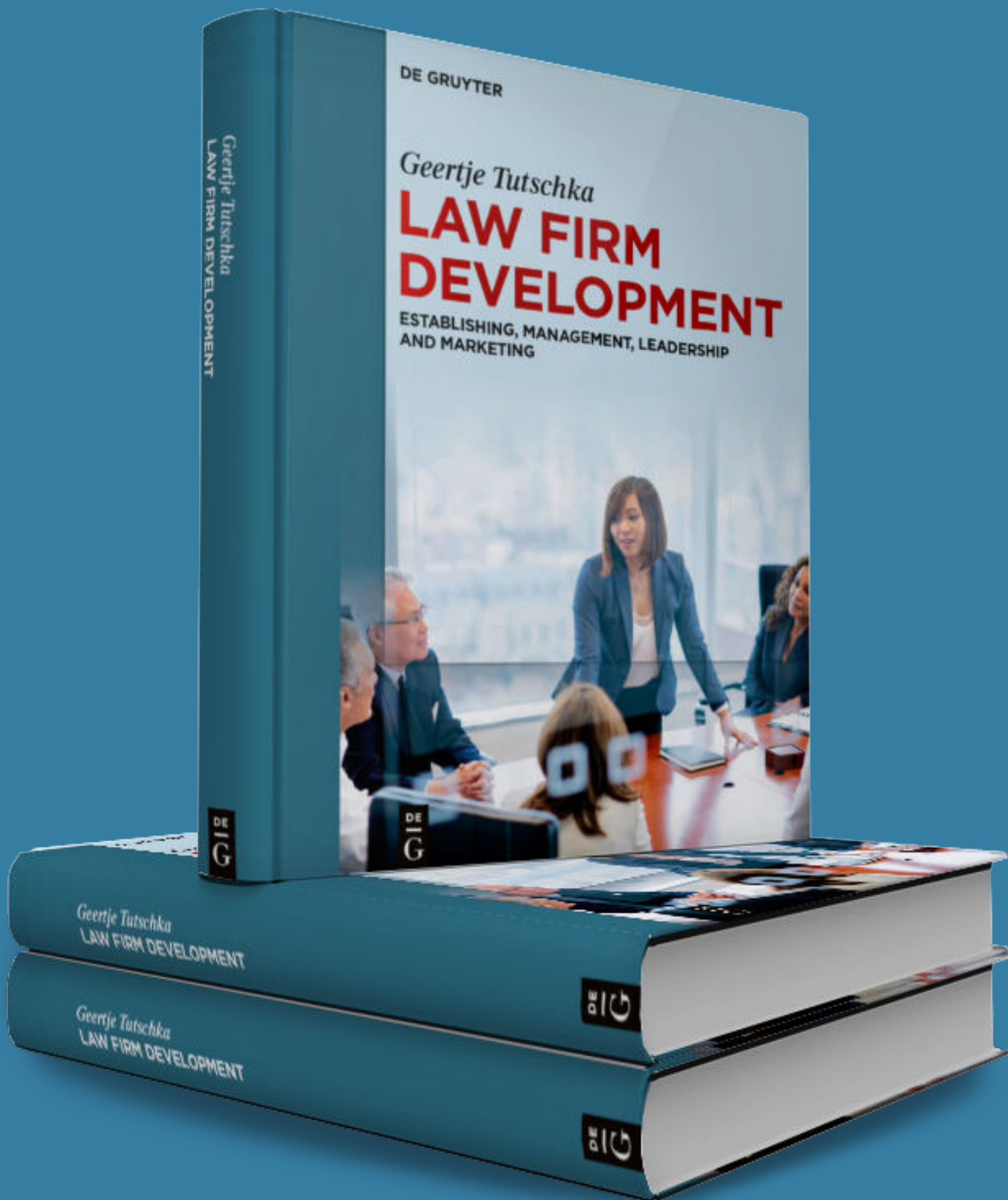
AI's role in financial investigations

AI will not replace lawyers. VFI technology is merely a tool to empower lawyers by managing data and delivering insight. Humans must investigate that data to draw informed conclusions that account for the external context and leverage their critical thinking and creativity. Technology does not tell stories and build relationships — humans do. These elements are what legal practice is all about.

VFI handles the heavy lifting of data preparation for financial investigations so lawyers can focus on the delicate tasks of building narratives and presenting cases, ultimately resulting in better outcomes for clients and a more fulfilling job experience.

About the Author

[Tod McDonald](#), CPA, CIRA, is the co-founder of [Valid8 Financial](#). Early in his career, Tod was an auditor with Ernst & Young and has spent decades navigating complex financial situations, including leading an investigation that unraveled a \$200 million real estate investment Ponzi scheme in Washington State. Motivated by this experience, he co-founded Valid8 Financial to build a Verified Financial Intelligence solution to expedite data prep, eliminate sample risk and improve the speed and quality of rendering a professional opinion on complex financial cases.



LAW FIRM DEVELOPMENT

Establishing, Management, Leadership and Marketing
Dr. Geertje Tutschka, MCC

Reviewer: Dr. Christian Kessel LL.M

This is an awesome book. On 482 pages in fairly small print it provides a wealth of information on the set up (Chapter C), the management (Chapter D) and governance (Chapter E) of a law firm as well as on effective marketing, the sale of services and acquisition of clients (Chapter F). It starts, however, with a very comprehensive overview on the legal market and the environment for the provision of legal services by lawyers and law firms (Chapter A) before covering some key considerations of the actual set up of a law firm: forming a vision on its scope of specialisation, business model, ideal clients, industry focus or niche of choice; and the rationale for its set up or further development (Chapter B)

And while the book is valuable for all sizes of law firms and their management it can just as much benefit any individual lawyers for his or her own practice and its development in any existing law firm.



All of the author's writing is backed up by some real life showcases and expert opinions as she has assembled an amazing group of experts from all parts of the legal environment who were willing to share examples and insights and be quoted in the book.

The book has a number of particular strengths: First, it is very practical and it quickly becomes obvious that the author has dealt with many of the issues she addresses personally either in her own law firm and working environments or as a coach to those facing the challenges of day-to-day law firm development and leadership.

Second, it provides a very pertinent economic, technical/ digital, generational and work diversity related analysis of present and future challenges for the legal market and the firms operating in it: Her analysis is always embedded in the big developments or pivotal points of society at large, with often very interesting and at times surprising comparisons of the three countries and jurisdictions she has lived in and knows intimately: United States, Germany and Austria.

Third, and to me personally most importantly, the general message is always very entrepreneurial and the reader is encouraged and challenged to leave behind the traditional role of a lawyer simply as a service provider, adviser and (at least in Germany) part of the judiciary system and instead adopt the mindset and behaviour patterns of a true entrepreneur. In going through the pages, the reader is clearly led to understand that being en-

trepreneurial is the key for success in the legal profession whether at firm level or for the individual practitioner.

Fourth, the author is very clear that a key part of the lawyer's responsibilities are selling him- or herself, the team or the firm in its entirety. "Sales and acquisition" (heading of Chapter F.II.) is therefore in my view the right and best way of referring to what is perhaps more sophisticatedly (but also more shyly) often referred to as business development.

A particularly enjoyable feature of the book is its always optimistic tone. And there is a constant call to action, whether to become crisis resistant, to simply get going (instead of waiting or thinking for too long) or to accept how the market has developed and what therefore is required as essential building blocks for a sound law firm concept, strategy and business model. The author does not leave the reader alone with many options but always recommends a course of action.

In that manner she always encourages the reader to embark on journeys of trial and error and taking risks.



(Photo: Dr. Geertje Tutschka, MCC)

Even glowing praise may be privy to a few ideas for the next edition: some of the charts and graphs are too small to be easily legible. In view of the continuous success story of Kirkland Ellis or the merger of Allen&Overy with Shearman&Sterling, it remains to be seen whether large law firms will become a discontinued model as the author predicts. And the effective and efficient practicalities of successful sales/business development could perhaps be expanded to the same measure as the very detailed passages on marketing and communication.

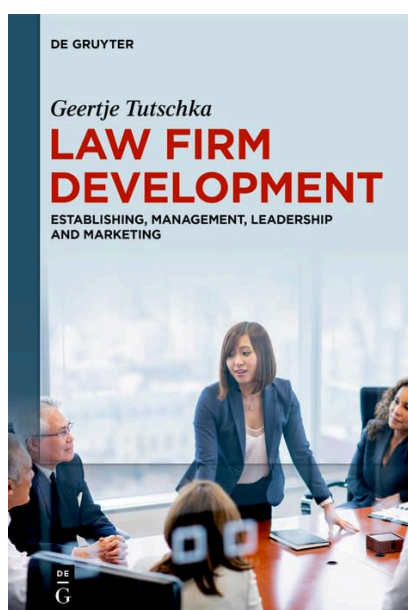
In conclusion, this is a very comprehensive and detailed starting point for all those who are unaware, unsure or untrained as regards whether to set up a law firm and, if so, with what concept, vision and strategy, how to effectively form it, and then manage and eventually develop its growth. I am impressed by the

wealth of topics covered and the depth of analysis, practical advice and recommendations for each of them. I have therefore great pleasure in wholeheartedly recommending this tome.

About the Reviewer

Dr. Christian Kessel LL.M(London)

After 32 years in private practice in the international law firms Baker&McKenzie (initially in London, later Frankfurt) and Bird&Bird in Frankfurt for the last 17 years, Christian has taken regular retirement at the end of April 2022. He has subsequently set up his own business as a coach, trainer and consultant for Successful Business Development for lawyers (and other professionals) of any seniority level (from associates to partners). For further details please [check his webpage](#).



Due to digitalization, the pandemic and several economic crises, as well as the new demands on the world of work and the responsibility for sustainable business, the legal market and the ways lawyers work are changing. Law firms are facing entirely new and more complex challenges than before. This book provides answers to all questions related to law firm formation, law firm management, employee leadership, and law firm marketing. It highlights all aspects of modern strategic law firm development, including related business models such as legal tech. The clear and didactically prepared structure with chapter breakdowns, working examples, expert statements and summaries also facilitates selective reference to specific topics.



DOCUMENT REVIEW WORK

Ready, Set, Prepare, Go

Adv. Janet Belleli Goodvach, Head of E-Discovery and Document Review at LawFlex



It is a matter of debate whether it was Benjamin Franklin or some other great wordsmith who penned the phrase: “by failing to prepare, you are preparing to fail”. What is not in debate is the accuracy of this statement, or its less sharp document review application – by failing to prepare, you are preparing to spend a lot more time and money.

Recently I had the pleasure of pulling masking tape from the skirting boards around a room I painted. I felt chuffed at the drip free clean paint job. The last time we had a bedroom painted, I spent around 6 frustrating hours cleaning paint marks off floors and furniture because the painter had failed to properly cover surfaces and prepare the room before painting.



This time around, I spent a valuable hour carefully covering surfaces and preparing the room. The time proved productive.

It got me thinking about some of the document review and eDiscovery projects I have worked on over the years, and how many times law firms and corporate clients rush into getting a massive document review exercise started - and hurry through the planning and preparatory phases in an effort to get the project moving. However, with some extra time allocated for planning and preparation, the review process can be smoother, take less time overall, and bring with it improved clarity, accuracy and associated cost savings.

Document Review Work Reality

Each document review project has its own unique work flow, hurdles and complications. Here are two extreme examples I encountered over the years worth sharing:

For one project, Lawflex was approached by a large retail group. The frazzled client representatives were in the midst of M&A discussions with thousands of customers' and service providers' contracts requiring review in a short time frame. The client wanted to better understand its customer base, contract entitlements and liabilities. The client had hurriedly set up a process for contract review, but was unwilling to allocate time for a "contract

review trial run” or to amend its process and work flow once the review started, fearing delays and an inability to achieve the review within the time limit that had been set by the finance department. The instructions to the legal document review team were littered with ambiguities, but the legal team were instructed to get working nonetheless and ask questions along the way. The client was happy with the project outcomes, and the review was completed within the allocated time period. However, the number of errors along the way that required correction could have been reduced, and the overall speed of review improved, had extra time been allocated at the start for planning and testing of the workflow.

By contrast, I managed a different project where Lawflex were helping a leading international law firm with its e-discovery needs, but the firm agreed to work with Lawflex in a planning phase, prior to the full e-discovery exercise. Whilst the IT team was busy collecting and uploading data from custodians, running search terms across the data fields and creating review batches, a smaller team of lawyers started a review exercise to “test” the data. The smaller introductory review team enabled coding instructions to be clarified and the coding panel improved. This reduced the chance of misunderstanding once the full much larger review team came on board. The “test” review team were also able to identify tens of thousands of documents that could be bulk batched and coded for production, and removed from the data set needing review. By the time that the full document review team started work two weeks later, the volume of documents that required review had reduced

substantially, and the risk of errors in coding, was sizeably reduced.

Don't rush to start a project

eDiscovery and document review tasks are usually conducted under the pressures of tight timelines and dates set by the court or arbitration orders. There is usually a feeling among those leading the document review task, that they are diving into a great data abyss – with uncertainty how wide and deep that data lake will be.

However, after decades of being involved in massive document review exercises, a few tips to avoid a lot of unnecessary mess include:

- Make sure you appoint a document review team manager (or several depending on the size of your review team). Involve them from the start in the planning phase and they will be better equipped when leading the document review team, helping answer queries and guiding reviewers throughout the review process. They should work in collaboration with the client or with the lawyers driving the legal process as early as possible in the document review process, and then regularly throughout the process.
- Work with a smaller set of document reviewers for the first few days / weeks of the project. This allows ambiguities in instructions to be clarified before a full team of reviewers embark on the review.
- Encourage feedback from your initial micro review team on the review process. Ask them - what is helpful? What is hindering?

What is unclear? Encourage your reviewers to be active participants in the process, rather than “robot reviewers”. It will enable improvements and efficiencies to be implemented. This is particularly important before the full review team come on board.

- Encourage feedback from your full review team – the more questions / feedback, the better chance of avoiding errors, and identifying and resolving problems that are being faced by the full review team.

Often these additional steps prior to the review kicking off, are viewed as a luxury in time and cost that the client or law firm think they cannot justify. I can vouch that with a little extra time taken to plan and prepare, time will

ultimately be saved throughout the document review exercise.

About the Author

Adv. Janet Belleli Goodvach is head of E-Discovery and Document Review at [LawFlex](#). She has spent over 20 years managing large and complex litigation, arbitration and document review projects across many jurisdictions around the world. Janet graduated with a BA/LLB from Monash University Australia and worked with Australian and British law firms, before joining LawFlex: janet.goodvach@lawflex.com If computers end up replacing lawyers before Janet retires, she may start offering house painting services.



HOW TO MAKE VALUES REALLY MATTER

Daljit Singh, Principal of Transforming Talent



Many law firms have core organisational ‘values’ proudly displayed on their websites, and office walls, which they promote to their people and clients.

This article discusses the critical role of core values, how to assess if law firms are ‘living’ their values, and how to make values really matter.

Core Values

Core values represent the core beliefs and principles that help guide the actions of an organisation. These values should:

- Resonate with the firm’s people and its clients
- Be widely shared within the firm

- Signal what the firm stands for and what it will not compromise
- Act as a compass and ethical basis for decision-making
- Guide interactions and relationships, within the firm, and with clients
- Influence the development of firm culture

Many researchers including the management ‘guru’ Jim Collins [1], have highlighted the advantage for organisations who live their core values. These include the following:

- Developing a more positive and cohesive firm culture
- Attracting and retaining the best talent
- Creating stronger client relationships
- Promoting alignment in navigating

- strategic challenges and opportunities
- Creating a unique identity that stands out

Listed below are the five most cited core values of the world’s twenty largest law firms, based on a review of their websites in May 2024. The number of firms mentioning the value are noted in brackets.

1. Excellence (11)
2. Diversity and Inclusion (9)
3. Client Centric (8)
4. Collaboration (7)
5. Respect (7)

There is a wide divergence in values noted across the firms with ‘Excellence’ being the only value mentioned by more than half of the firms.

Many of these firms state that their core values are integral to who they are, their culture, and how they operate. This raises the question as to the extent these firms, and many others with core values, are living their values.

Are Firms Living Their Values?

One of the best ways to know if a firm is living its core values is to get feedback from its people. Clients can also be surveyed as clients should be able to comment if they are experiencing those core values in their interactions with firm members.

Number of Yes Responses	Is the Firm living its Values?
0-4	No – values are for ‘promotional’ purposes with little commitment to living them
5-7	Somewhat - values regarded as ‘aspirational’ with limited commitment to living them
8-10	Yes - values are regarded as ‘critical’ to organisational identity and purpose with a strong commitment to living them

Below are key questions for a brief assessment on whether a firm is living its core values.

1. Are the values widely communicated in the Firm?
2. Is each value well-defined with behavioral examples?
3. Are people able to recall the values, without having to look them up?
4. Are there clear consequences for violating the values?
5. Are the values referred to in making important Firm decisions?
6. Are values embedded in key HR processes such as recruiting, performance management, and promotions?
7. Do leaders role model the values?
8. Are there examples of values being upheld despite challenges?

For example, the firing of a senior firm member who repeatedly violated values.

9. Is feedback sought from people, and clients, on whether they are experiencing the values as being lived, in their employee, and client, experiences respectively?
10. Is feedback on whether values are being lived used to make improvements?

Below is a guide to assess whether values are being lived, based on the frequency of answering ‘Yes’ to the above questions:

It is doubtful if the answer will be ‘Yes’ for most law firms based on this assessment, which leads us to consider how to make values really matter.

Making Values Really Matter

Firms should focus on the following three areas to ensure that their values really matter:

1. Incorporating human-centered values
2. Implementing practices to embed values
3. Developing values-based leaders

1. Incorporating human-centred values

It is important that firm values incorporate shared human-centered values that have a deep appeal to both people and clients. Rushworth Kidder [2] summarised the research across cultures and different time periods that revealed the following five widely shared values:

- Compassion
- Respect
- Responsibility (or Accountability)
- Fairness
- Honesty (or Truth)

The acronym CRAFT has been suggested by some writers for these values.

Research highlights the importance of incorporating human-centered values for both clients and people:

- Daniel Aronson [3] highlighted that emphasising shared human-centred values such as compassion, inclusion, and care, help organisations to stand out in the marketplace. He noted that values centered around competence and credibility did not effectively differentiate organisations in crowded markets.
- Partick Krill and colleagues [4] highlighted that attorneys in law firms that prioritised values centered on humanity and professionalism had significantly better mental health and well-being than attorneys in law firms that prioritised values centered on financial performance such as productivity and profits.

The prioritised values in the Krill et.al. study were values actually perceived and experienced by attorneys rather than espoused firm values. The authors also noted that the law has been observed to be operating more like a business in recent decades, with the pursuit of profits becoming the overarching priority for many firms.

Additionally, they highlighted the heightened

risks of poor attorney mental health and well-being even for those firms doing well financially. This included diminished cognitive function, poorer quality client work and relationships, and increased likelihood of costly mistakes, and they noted that payouts for legal malpractice had increased sharply at the same time as firm profits had soared.

This calls for reimagining what constitutes success for law firms, beyond the typical focus on short-term financial performance. It also has to be about the longer term sustainability of the firm, and how it is meeting the needs of its people to enable them to thrive. My article on ‘Human-Centric Leadership’ [5] shared research that highlights how having a human-centered approach to values and leadership enables both people and performance (including productivity and profits) to thrive.

Shared human-centered values such as CRAFT, and related values such as authenticity, empathy, and inclusion, should be the critical or foundational values of any law firm’s culture. These and other core values adopted by firms, such as client focus and excellence, also must be lived values, rather than only espoused values.

2. Implementing practices to embed values

For values to work, they should become an integral part of the day-to-day life of a firm. This requires implementing practices to help embed values.

Here are some examples of key organisational actions:

Setting and communicating expectations	<ul style="list-style-type: none"> Clearly define each value, together with behavioral examples Widely communicate the purpose and importance of values, and the expectations for everyone to live the values Share clear consequences for value breaches
Leadership	<ul style="list-style-type: none"> Have leaders share their personal stories of the values in action Require leaders to role model values Provide leaders with feedback on their living of the values
Development	<ul style="list-style-type: none"> Encourage people to discuss how values apply in their daily work Provide development activities to help people internalize the values Recognise and celebrate people who demonstrate the values
HR Processes	<ul style="list-style-type: none"> Embed values into the following processes to align values, incentives, and behaviours: <ul style="list-style-type: none"> Hiring Performance management Reward Promotions
Decision Making	<ul style="list-style-type: none"> Base key decisions on values. For example, in considering layoffs during a downturn, and if so, how to do this with the human-centered values of compassion, respect, fairness, transparency etc. Be willing to accept any negative short term financial consequences for living the values Address breaches of values
Feedback	<ul style="list-style-type: none"> Reinforce values through regular coaching and feedback Check if values are being lived by getting feedback from people and clients Act on areas for improvement

All of these actions acting in concert will help to embed values. We will explore leadership further by looking at how to develop values-based leaders.

3. Developing values-based leaders

Law firm leaders must role model and ‘walk the talk’ on values. In other words, they must become values-based leaders.

Most law firms will have to go beyond their current approaches in developing their leaders as values-based leadership requires leaders to have a greater level of self-awareness to ensure behavioural change.

Unfortunately, many leaders have low levels of self-awareness. Some are unaware of the extent to which their actual behaviour is inconsistent with espoused core values. Others will be aware of their incongruent behaviour, but will justify it, based on often unchallenged personal beliefs and assumptions.

Here are some examples of leaders behaving inconsistently with core-values:

1. The leader who espouses respect and accountability but ignores the behaviour of a known bully, because that person is a ‘rain maker.’
2. The leader who espouses diversity and inclusion but does not intervene when a colleague mocks the accents of people from minority groups.
3. The leader who espouses honesty and fairness but avoids giving negative feedback, to avoid ‘uncomfortable’ conversations.
4. The leader who espouses collaboration but avoids introducing their colleagues to ‘their’ clients and seeks to ‘outshine’ others in meetings.

What is required is leadership development using ‘vertical development’ or ‘vertical growth’ practices. These contrast to ‘horizontal development’ practices which solely focus on skills development, without addressing leader mindsets (beliefs and assumptions). Skills training in isolation, for example on promoting values such as respect, inclusion, etc. is highly unlikely to create the required behavioural change.

Vertical growth practices will simultaneously challenge and support leaders to help them internalise core values. This development process will enable leaders to:

- Explore their highest aspirations regarding a set of values
- Identify the gap between their behaviour and values-congruent behaviour
- Critically examine the mindsets that are driving their behaviour
- Learn to revise their mindsets to adopt more values-congruent behaviour
- Strengthen their commitment to personal change
- Begin to practice more values-congruent behaviour
- Sustain their behavioural practice leading to strongly internalised values

Starting with the leadership team, this process can be cascaded across the organisation,

thereby accelerating the development of a healthy law firm culture.

‘Vertical Growth’ by Michael Bunting and Carl Lemieux is an excellent reference that provides practical guidance on how to use vertical growth practices to help core values come alive for leaders, teams, and organisations [6]. It examines the alignment of personal and organisational values and includes helpful diagnostic and action planning tools for use at the individual, team, or organisational level.

Conclusion

There are many significant competitive advantages for law firms who live their core values, including an enhanced ability to attract the best talent and clients.

Firms should assess if they are living their core-values and make them really matter by incorporating human-centered values, implementing practices to embed them, and developing values-based leaders.

Notes

[1] Collins, J. and Porras, J. (1996). Building Your Company’s Vision. Harvard Business Review. September-October ; Also see Titov, E. and Umarova, L.(2017). Impact of Real and Propagated Values on Organisational Success, Chapter in ‘The Congruence of Personal and Organisational Values’. InTechOpen.

[2] Kidder, R.(2009). Moral Courage - Taking Action When Your Values Are Put To The Test. HarperCollins.

[3] Aronson, D. (2024). Why It’s Good for Business When Customers Share Your Values. MIT Sloan Management Review.

[4] Krill, P.R., Degeneffe, N., Ochocki, K. and Anker, J. J. (2022). People, Professionals, and Profit Centers: The Connection between Lawyer Well-Being, and Employer Values. Behavioural Sciences, 12, 177.

[5] Singh, D. (2024). Human-Centric Leadership in the Age of AI. Australasian Law Management Journal. Law Council of Australia.

[6] Bunting, M. with Lemieux, C. (2022). Vertical Growth – How Self-Awareness Transforms Leaders and Organisations. Wiley.

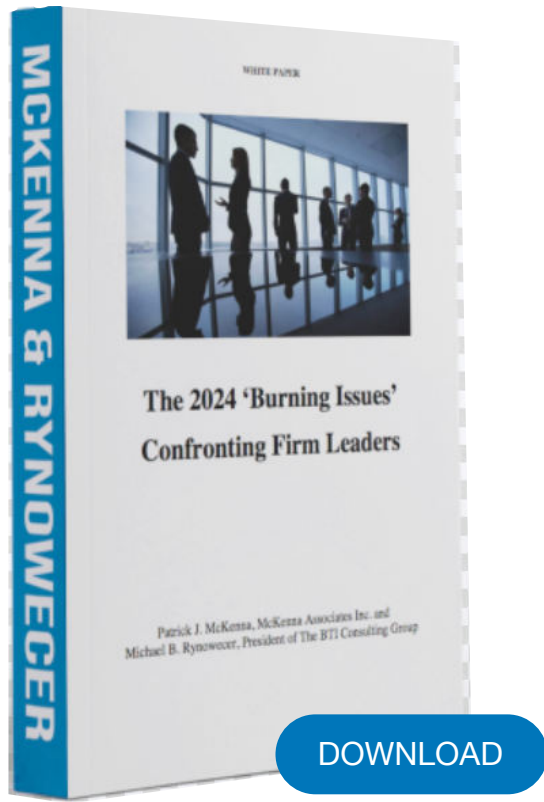
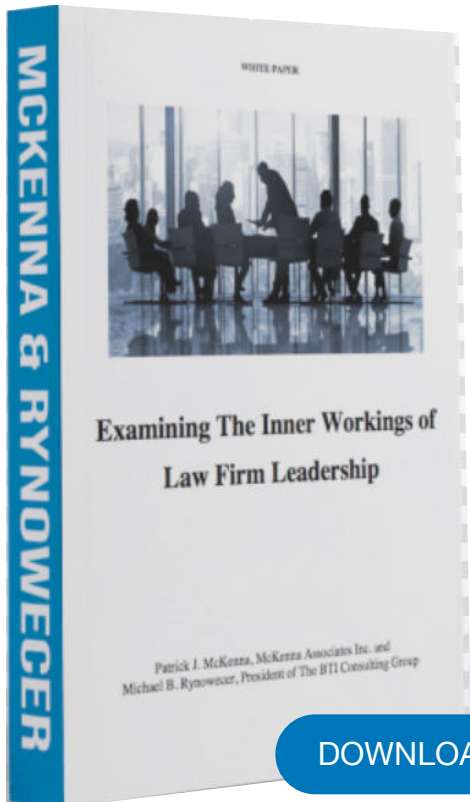
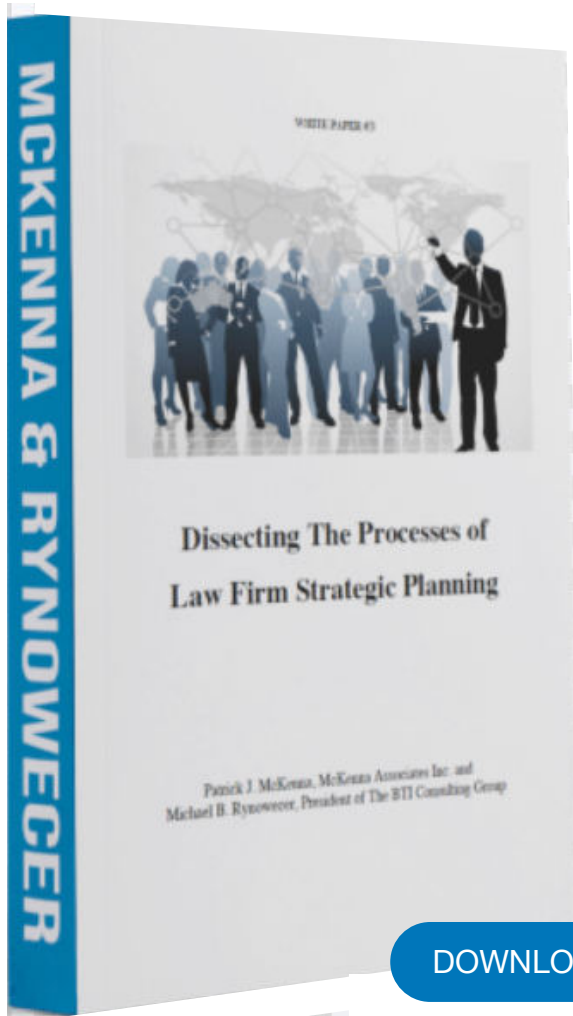
About the Author

Daljit Singh is an expert in Talent Management and Leadership Development and the Principal of Transforming Talent. He is also a Teaching Fellow with the Australian College of Law where he teaches two subjects – Workforce of the Future, and Leadership. Daljit has had senior roles in talent management and leadership development with KPMG and Baker McKenzie. He can be contacted at daljit.singh@transformingtalent.com.au

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THE JOURNEY TO A PURPOSE-DRIVEN LEGAL CAREER

Marco Imperiale, Founder and Managing Director of Better Ipsum



Introduction

In a profession deeply entrenched in tradition and rigor, the concept of "purpose" often gets overshadowed by the daily grind of compliance, cases, and legislation. However, the role of purpose in the legal field is more relevant than ever. Compassion, indeed, serves as a moral compass that guides ethical decision-making, drives passion, and sustains commitment through the complexities and demands of legal work.

Lawyers driven by a clear purpose are more likely to persevere through challenging cases and ethical dilemmas. They are able not only to excel in the respective fields but also to inspire future generations of legal professionals by demonstrating the power of aligned values and actions.



This article explores the integral role of purpose in legal careers, providing strategies for nurturing a purpose-driven approach to legal practice.

A Definition of Purpose

Before delving into the strategy to develop our purpose, whether for a team, an organization, or a law firm, I believe it is beneficial to provide a definition.

According to the Cambridge Dictionary, purpose is defined as *“the reason for which something is done or created or for which something exists”*.

However, the first thing I think of when I reflect on purpose is, surprisingly, “coherence”. Should I release a social report? How about de-

fending the authors of a terrorist attack? Can I ask a tobacco company to sponsor a legal event? As you can imagine, multiple lawyers will respond in different ways, but it is crucial – both as lawyers and law firms - to be honest with ourselves. The awareness required to understand who we want to be, and the adherence to our personal (or institutional) ethical framework, not only enhance personal satisfaction but also build public trust in the legal system.

Another common connection when I think about purpose is “personal mission”. Whether it means championing a legal revolution, aiding the underprivileged, or advocating for the rule of law, purpose is the fuel our daily actions and motivates us each morning,

striving for a better society and a better version of ourselves. As someone often mentions, Gandhi and Abraham Lincoln were both successful lawyers.

Developing Our Purpose

Developing a sense of purpose in the legal profession involves a combination of introspection, education, real-world experiences, and ongoing assessment of personal values aligned with professional responsibilities. It starts with a profound understanding of why one chooses to practice law—be it advocating for the underprivileged, interpreting the law, or solving complex legal challenges that affect business or public policy. Sometimes, it starts in the personal statements required for admission to law schools.

It is sad to see that most law schools rarely offer courses on this specific matter. Law schools, indeed, play a crucial role in this formative stage, not only imparting the necessary skills for legal practice but also instilling a sense of duty and ethical considerations. In any case, I would stress the mentorship factor. Mentorship from seasoned practitioners and professors offers invaluable insights and guidance in developing a moral compass, helping emerging lawyers to align their careers with a purpose-driven approach. These figures can provide practical examples of how to integrate personal ambitions with professional ethics, shaping the professional identities of new lawyers.

A Dynamic Purpose

Sometimes we forget that purpose is dynamic. Maybe we start law school with the intention

to solve climate change and find ourselves working in tech law, or maybe we start solo practicing and end up working in big law because we believe that our work may have a stronger impact in a more structured environment. In my case, I started as a copyright lawyer and ended as an entrepreneur in the legal innovation field. Life can be surprising sometimes.

Dynamic purpose also means that sometimes it extends beyond ourselves. It can be linked to our heritage or legacy—whether it's continuing a family tradition, supporting newer generations of professionals, or establishing a law firm that transcends individual names and becomes a symbol of integrity and justice.

If we seriously take into account the dynamic element, we see how much it is necessary to nurture it constantly, like providing daily water to a plant. It can be investing in continuous professional development, or participating in bar associations and legal forums. Each of these aspects can enrich a lawyer's understanding of the diverse roles legal professionals can play in society, broadening our perspective and defining new horizons. I would also suggest active involvement in pro bono work and community service. This reinforces our commitment to social justice and ethical practice, offering practical ways to apply legal skills that directly benefit society and align with personal moral goals.

Challenges to Purpose

Maintaining a balance between personal life and professional responsibilities is crucial for sustaining purpose in one's legal career.

Without this balance, the risk of dissatisfaction and burnout may increase, potentially leading to a gradual detachment from the core values that originally inspired us to become lawyers.

However, navigating the intrinsic challenges of the legal profession while maintaining a sense of purpose can be daunting. We often face pressure to meet billable hour requirements, which may prioritize profitability over the pursuit of justice or client wellbeing. Additionally, client demands can sometimes conflict with personal ethics, placing lawyers in difficult situations. If this is not enough, the competitive nature of the field can lead to toxic work environments, further complicating the alignment of personal ethics with professional conduct.

Other elements that are significantly affecting our purpose are the rapidly changing landscape of law and the increasing reliance on technology, which require us to continuously adapt while staying true to their ethical convictions. Research shows that flexibility, adaptivity, and eagerness to innovate are rare to find in the legal field, which tend to rely on the maintainance of the status quo. However, we cannot be purpose-oriented lawyers if we only look at the past. Embracing the challenges of a tech-driven world is the only way to show our commitment to personal growth and ethical integrity.

Conclusion

The journey to a purpose-driven legal career is both challenging and rewarding. It demands continuous efforts to align personal

beliefs with professional actions in a manner that not only fulfills career aspirations but also contributes to the greater good of society.

Lawyers must actively engage in self-reflection, seek educational opportunities, and embrace mentorship while balancing their professional and personal lives to effectively cultivate and maintain their sense of purpose. By doing so, they not only enhance their own wellbeing but also uphold the integrity and relevance of the legal profession in society.

This commitment to a purpose-driven career fosters a legal landscape where justice, ethics, and personal fulfillment are intimately connected, driving the legal field forward in a meaningful and impactful way.

About the Author

Marco is the founder and managing director of [Better Ipsum](#), a benefit corporation focused on legal design, legal innovation, and legal wellbeing. He is a lawyer with extensive experience in legal design, legal tech, and in the interplay of copyright law and the entertainment industry. Whenever he finds time, he also works as mediator, teaching fellow for Harvard Law School (CopyrightX course), and mindfulness trainer. He is a frequent public speaker and the author, together with Barbara de Muro, of the first Italian book on legal design.

A GUIDE TO STAYING SHARP AND RELEVANT IN AN EVOLVING LEGAL INDUSTRY

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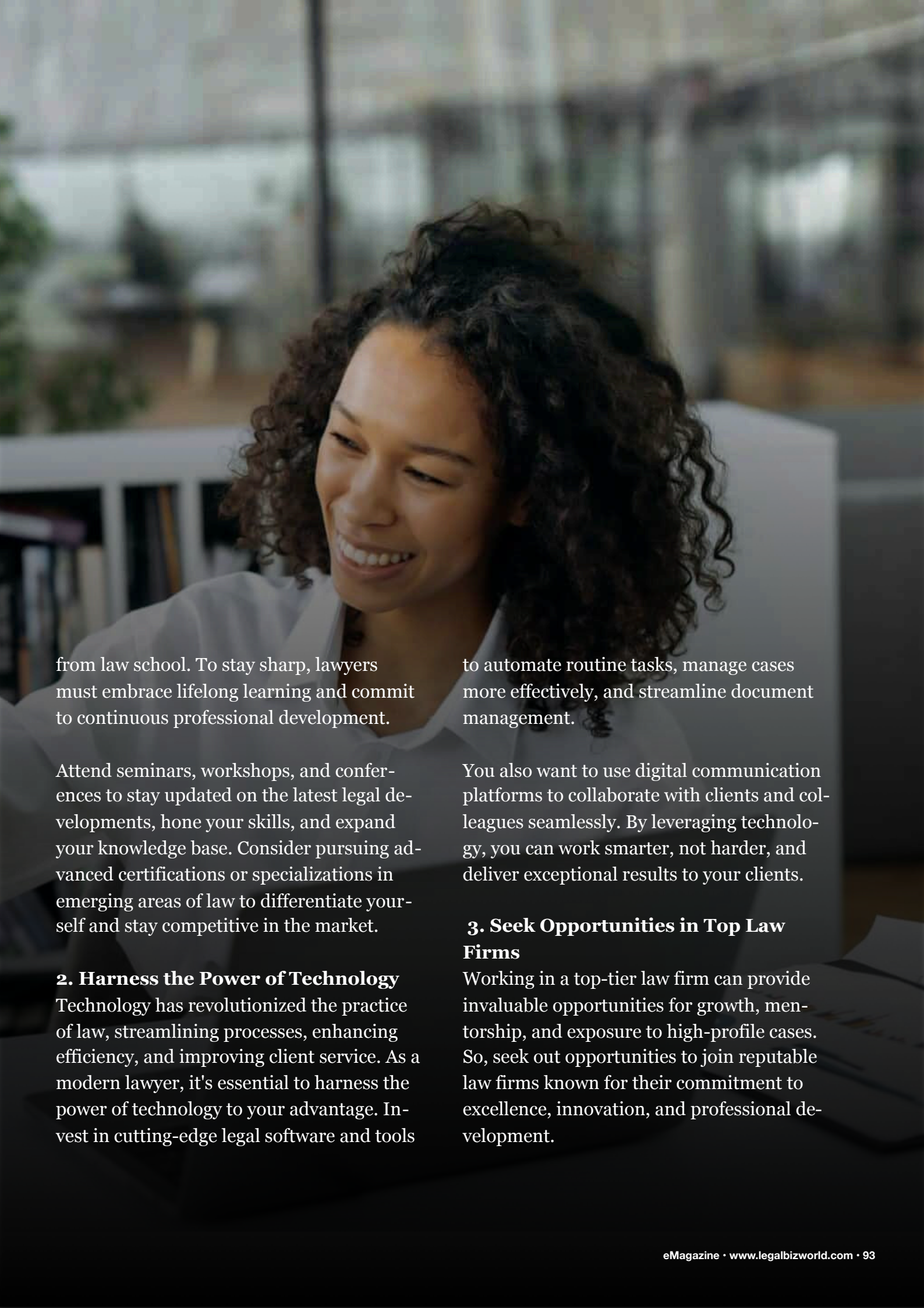


No industry remains stagnant for long, and definitely not the legal world. Hence, you want to keep up with the times if you must remain relevant and sought after. With rapid advancements in technology, shifting client expectations, and evolving legal trends, lawyers must continuously adapt and innovate to thrive in the industry.

Whether you're a seasoned attorney or a fresh-faced law graduate, this guide will help you stay ahead of the curve and excel in today's legal landscape.

1. Embrace Lifelong Learning

The legal profession is built on a foundation of knowledge and expertise, but the learning doesn't stop with graduation



from law school. To stay sharp, lawyers must embrace lifelong learning and commit to continuous professional development.

Attend seminars, workshops, and conferences to stay updated on the latest legal developments, hone your skills, and expand your knowledge base. Consider pursuing advanced certifications or specializations in emerging areas of law to differentiate yourself and stay competitive in the market.

2. Harness the Power of Technology

Technology has revolutionized the practice of law, streamlining processes, enhancing efficiency, and improving client service. As a modern lawyer, it's essential to harness the power of technology to your advantage. Invest in cutting-edge legal software and tools

to automate routine tasks, manage cases more effectively, and streamline document management.

You also want to use digital communication platforms to collaborate with clients and colleagues seamlessly. By leveraging technology, you can work smarter, not harder, and deliver exceptional results to your clients.

3. Seek Opportunities in Top Law Firms

Working in a top-tier law firm can provide invaluable opportunities for growth, mentorship, and exposure to high-profile cases. So, seek out opportunities to join reputable law firms known for their commitment to excellence, innovation, and professional development.

While it is not always easy to find openings, you can leverage platforms focused on placing attorneys at law firms with job openings. In top law firms, you'll have access to cutting-edge resources, training programs, and mentorship opportunities that can accelerate your career trajectory and keep you at the forefront of the legal industry.

4. Cultivate a Growth Mindset

Success in the legal profession requires more than just skills – it demands a growth mindset and a willingness to embrace change and challenge. If you see any new opportunity or obstacle, approach it as a chance to learn and grow rather than a roadblock. Seek feedback from mentors, peers, and clients to identify areas for improvement and development.

Embrace failure as a stepping stone to success and use setbacks as opportunities to refine your skills and strategies. When you cultivate a growth mindset, you can adapt to the evolving legal landscape with confidence and resilience.

5. Adapt to Changing Client Needs

In today's customer-centric world, it's crucial to build your practice around your client's needs. As client expectations evolve, you must adapt your practices and service offerings accordingly. Take the time to listen to your clients, understand their goals and concerns, and tailor your approach to meet their specific needs.

Offer innovative solutions, alternative fee structures, and value-added services to pro-

vide clients with greater flexibility and value. By prioritizing client satisfaction and responsiveness, you can build lasting relationships and earn their trust and loyalty.

6. Prioritize Diversity and Inclusion

Diversity and inclusion are not just buzzwords – they're essential components of a thriving workplace now more than ever. In today's globalized world, lawyers must recognize the value of diversity in perspective, experience, and expertise. Prioritize diversity and inclusion in hiring, promotion, and client representation to foster a more inclusive and equitable legal profession.

Entertain diverse viewpoints, backgrounds, and experiences to enhance creativity, innovation, and problem-solving. This allows you to create a more dynamic and vibrant legal community that reflects the richness and complexity of society.

7. Stay Ethically Grounded

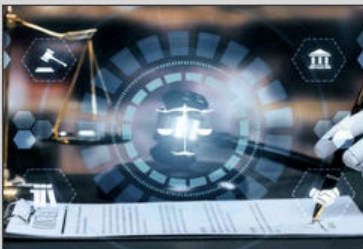

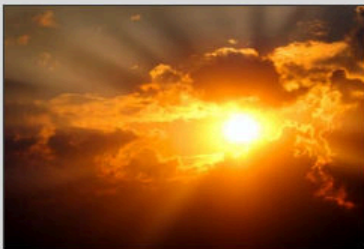

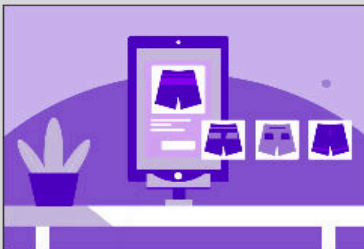

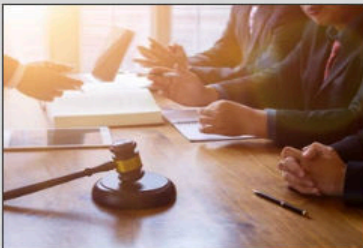





In an era of rapid change and uncertainty, maintaining ethical integrity is more critical than ever for lawyers. So, you want to uphold the highest standards of professional conduct, integrity, and ethics in all your interactions and decisions. Even when faced with difficult choices or pressures, adhere to the principles of fairness, honesty, and transparency in your practice.

Stay informed about changes to legal ethics rules and regulations and ensure compliance in your practice. With good ethical conduct, you can earn the trust and respect of clients, colleagues, and the broader legal community.

Wrapping Up

There you have it: 7 things to prioritize to ensure you remain relevant and a step ahead at all times in the legal industry. As the legal profession continues to evolve, remember that the journey to excellence is ongoing – so keep learning, growing, and innovating to stay ahead of the curve.

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- Evidence-Based Insights for Resilience & Well-Being
- How to Create a Cohesive Team for Peak Performance
- Beating Burnout Using the 6 Pillars of Personal Leadership
- The Rules of Persuasion: How Great Communicators Convince, Inspire, & Lead

Previous attendees include

Adobe
Capital One
Con Edison
Constellation Brands
Cotopaxi
Deutsche Bank
Docusign
Dolby
Equinix
Gap
Google
Honeywell
Hyundai
Khan Academy
LegalZoom
Lyft
Mercedes Benz
Meta
New York Times
OpenText
PayPal
Reddit
Salesforce
Starbucks
TED Conferences
Verizon
Workday
Yahoo


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Session tracks and topics, continued

10+ General Counsel sessions include:

- Generative AI: What GCs Need to Know – and Do About It
- Business & Metrics: Connecting with & Influencing Your C-Suite
- What CEOs Want from Their GCs
- How to Stand Up a Legal Ops Function: What GCs Need to Know
- Developing a Strategic Plan that Inspires Your Board & C-Suite

10+ Legal Project Management sessions include:

- Integrating LPM into RFPs to Maximize OC Savings & Outcomes
- Using ECA Techniques to Enhance Litigation Scoping & Planning
- Building High Performing Teams
- From Data Chaos to Peak Performance
- From Matter Transparency to Budget Predictability

NEW TRACK

8+ Litigation Operations sessions include:

- eDiscovery Metrics to Free Up Budget
- Deepfakes and Evidence
- Ethical Considerations for Adopting AI in Litigation Workflows
- GDPR Guidelines & Workflow for Multinationals
- Protocol Considerations for In-house Teams (Privilege, TAR & ESI)

NEW TRACK

8+ IP Legal Operations sessions include:

- How Digital Transformation Can Drive IP Value
- Leveraging AI for Better IP Management
- Advanced IP Management Strategies for Protection & Monetization
- Using Data & AI to Keep Your Patent Portfolio Organized & Pruned
- What Changing US Politics Mean for IP Protection & Enforcement



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Featured Speakers (See more on LegalOps.com)



Emily Teuben
Senior Director of
Legal Operations
PayPal



Marcelo Peviani
Vice President,
Global Legal Ops
Equinix



Damien Riehl
Vice President,
Solutions Champion
vLex



Jessica Vander Ploeg
Vice President,
Legal Operations
OpenText



Janine Dixon
Legal Operations
Manager
Meta



Léo Murgel
SVP & COO,
Legal &
Corporate Affairs
Salesforce



Kiran Mallavarapu
Exec VP & Sr. Mgr,
Legal Strategic
Services
Liberty Mutual



Monica Phillips
Director
of Learning,
Content & DEI
ChIPs



Dina Ganz Traugot
Group GC & Chief
Contracts Counsel
Travelers



E.A. Rockett
VP, Office of the
General Counsel
Adobe



Mark Smolik
Chief Legal Officer
DHL Supply Chain
Americas



Lizzie Shilliam
Chief of Staff &
Legal Operations
Vanderbilt
University

Agenda Overview

Tue
SEPT 3

- 3pm Welcome and Leadership & Personal Effectiveness Sessions
- Leadership
 - Self-Knowledge
 - Personal Brand
 - Connecting/Collaboration
 - Change Management
 - Self-Management/Self-Care
- 6pm Networking reception
- 7pm Evening free for private events

Wed
SEPT 4

- 6am Morning yoga
- 7:30 Networking breakfast
- 8:30 Sessions with networking breaks
- 12pm Networking lunch
- 1:30 Sessions & technology demos with networking breaks
- 6pm Networking reception
- 7pm Evening free for private events

Thu
SEPT 5

- 6am Morning yoga
- 7:30 Networking breakfast
- 8:30 Sessions with networking breaks
- 12pm Networking lunch
- 1:30 Sessions & technology demos with networking breaks
- 6pm Networking reception
- 7pm Evening free for private events

Fri
SEPT 6

- 7:30 Networking breakfast
- 8:30 Sessions with networking breaks
- 11:30 Conference wraps

Introduction to Legal Operations Management Program

- 1:30 Sessions & content
- 5:30 Networking reception

Attendee Pricing

Early Bird Rate	Advance Rate	Onsite Rate
through June 5	through Sept 2	Sept 3-6

Corporate In-house	\$895	\$995	\$1,095
Global LPM Summit attendees (virtual LPM sessions only)	\$345	\$395	\$495

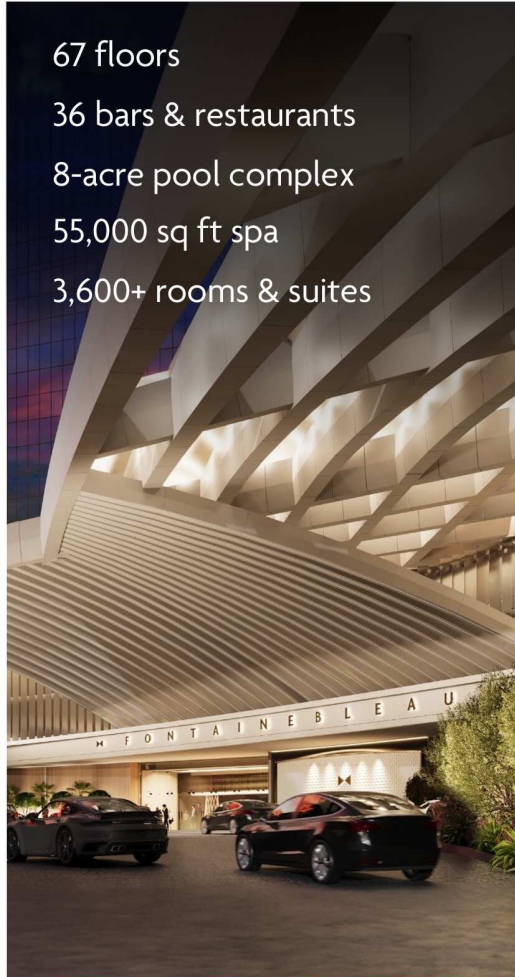
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REINVENTING
PROFESSIONALS

How Expert Witnesses Are Using Generative AI

May 16, 2024

I spoke with [Dr. Collin Starkweather](#), the Chief Data Scientist at [Luminos.AI](#), a spinoff of [Luminos.Law](#), where he was formerly Director of Data Science, and [Dr. Izzy Nelken](#), a financial mathematician and the founder of [Super Computer Consulting](#), which develops tools for securities pricing and valuation. We discussed how lawyers can determine whether their expert witnesses are using best practices and secure protocols with generative AI, guardrails law firms should implement, and how generative AI will affect expert services. Learn more about their work [here](#) and [here](#).

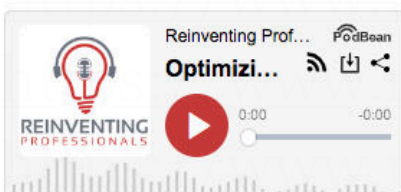


REINVENTING
PROFESSIONALS

Optimizing Digital Transformation in Law Firms

May 21, 2024

I spoke with [Nicki Kastellorizios-Lee](#), an IT Communications Manager at [Perkins Coie](#) in Chicago. We discussed best practices for approaching digital transformation in law firms, the technology messaging challenges and ethical considerations for attracting the attention of modern legal professionals, and how IT leaders can empower the communications strategy of their teams.



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