



# User-centric cloud design for the legal sector

Putting people before tech

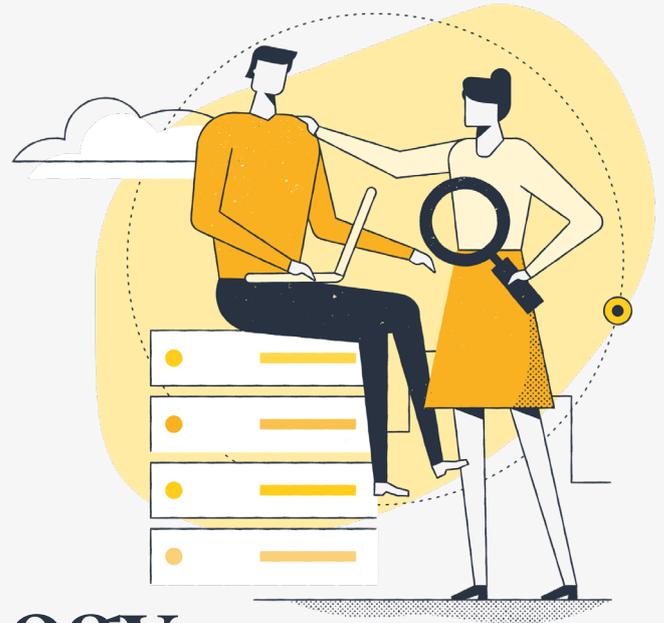
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# Navigating the current technology landscape

The legal sector is well known for being resistant to change but after years of being behind in terms of technology, the legal sector is finally catching up.

Law firms are now adopting technology to become more efficient, improve processes and offer superior value to their clients. However, there are many different technologies to choose from.



Time management



Cybersecurity



Document assembly

From practice and case management systems to document assembly, automation to e-discovery, law firms face the challenge of finding the right tools to suit both their business operations and their users. However, technology deployment alone does not guarantee a return on investment or user adoption.

Many law firms invest in technology as though people are an after-thought, placing focus on the financial side of operations, leaving users finding their own way through a labyrinth of different systems and applications, crowded with unused features.

Navigating and moving data between applications and platforms in order to complete day-to-day operations makes employees less productive (especially if the interfaces are not intuitive). [The University of California](#) found that it can take more than 20 minutes to get back into the groove once their work has been interrupted. Additionally, research published in the Proceedings of the [National Academy of Sciences](#) found that people who try to absorb information from several digital sources at the same time perform worse than people who take it one task at a time.

With the growing number of complex systems being implemented, users are looking for ways to simplify their daily work lives, meaning some technologies are being abandoned in favour of easier (yet not always appropriate) ways of achieving the same outcomes. If users don't use the technology you're investing in, it isn't worth it.

**Technology without people isn't productive.**



# What is a user-centric approach?

Technology isn't just about the infrastructure and devices. Technology revolves around the end-users. What they are doing and why, what they need to do and how they use technology to execute these tasks.

Law firms must acknowledge the importance of a user-centric approach when investing in technology. This will allow them to control costs, enable agility, increase client value and improve adoption rates, thus increasing productivity and efficiency.

## Cost Control

With the growing number of platforms and applications available to the legal sector, vendor lock-in is becoming more of a concern as law firms seek flexibility.

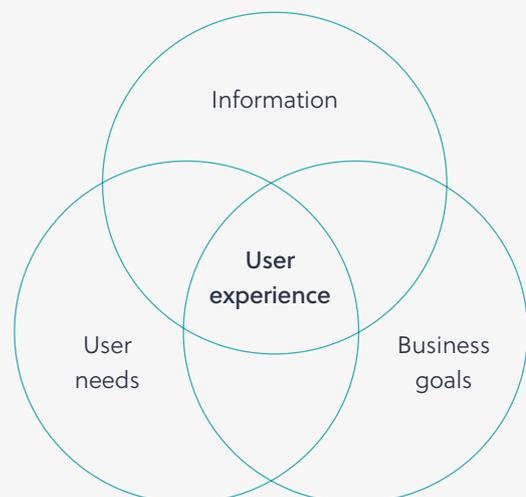
Many vendors offer two to five-year contracts for their services, meaning that you may be unable to switch to another provider before your contract end-date without expense. If leaving your contract in favour of another product isn't viable, you may end up paying ongoing costs for a service that you don't use or no longer want. Some vendors also make it difficult to migrate to a new platform, ultimately holding your data "to ransom".

A user-centric approach will allow you to make informed decisions about technology investment, limiting the possibility that your users will reject the product, resulting in financial loss and potential migration difficulties.

## Talent Retention & Gain

Generation Z, who have been born into new technology, have officially entered the legal workforce and it is inevitable that they will begin to impact the way that law firms operate, as their expectations of employers greatly differ than the generations before them.

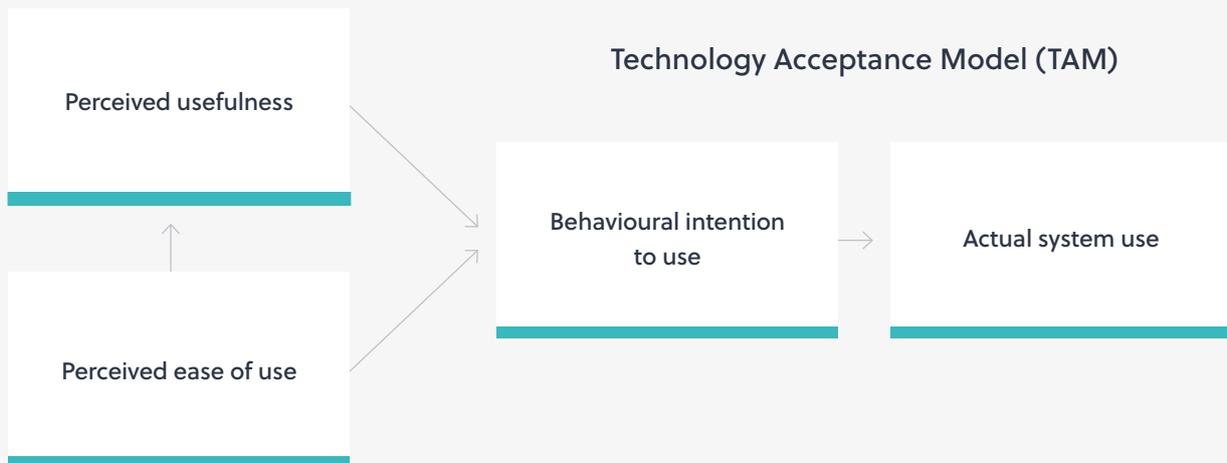
Unintelligible technology will be a pain point for law firms when it comes to gaining new talent, but also retaining existing employees.





## User Satisfaction

The Technology Acceptance Model (TAM) suggests that, when presented with new technology, there are two main factors that influence their decision to use it: perceived usefulness and perceived ease-of-use.



Taking a user-centric approach will ensure that you can effectively address these factors, boosting user satisfaction, and ultimately, adoption. But how can you measure user satisfaction to confirm you've made the right investment?

Efficiency, productivity and profit are quantitative measures of performance, however, there are other ways in which you can gauge the effectiveness of your investment. Does it feel like it is making a difference? Do your staff seem happier? It is important to regularly engage with users to fine-tune your intuition and gain valuable feedback that can shape the next steps of your tech journey.

**“As we move into the next decade, it’s clear that innovation remains at the top of the legal agenda.”**

Nick Watson, Legal Legends

## Increased Adoption

The critical point is understanding the workstyles that are current and what is needed. You need to find out what people are doing and why, what they need to do and how they can best do it. The technologies and programs must suit their needs, and be easily modifiable to keep track of changing requirements. This can often mean several “best in class” programs that are linked together with integrations are more effective than a “one size fits all” approach in many cases.

Many firms will procure software that satisfies as many feature requirements as possible, whilst neglecting the fact some features could be instrumental to the function and value of the firm. Focussing on these key features as a priority will ensure users will take to software like a duck to water. By ranking the priorities of such features, a phased roll out will also ensure users are not overwhelmed with too much change at once.



# What do users want from moving to the cloud?

“Currently within the legal sector, there is a focus on cloud technology and which cloud type – public, private or hybrid – will best match the requirements of law firms. However, tangible user-centric value often slips under the radar.



## Security

Cybersecurity solutions can be laborious and complex for end-users, which can leave law firms vulnerable to breaches as a result of human error. Users will often create their own “easy alternatives” such as writing down a complex password, sharing via Dropbox or emailing themselves a file to their personal account just so they can open it on a mobile.

Reduce the likelihood of human error by designing security solutions that put the user first by automating their routine, such as access to systems through single-sign on or user behavioural analytics to monitor regular user patterns and automatically report anomalies.

Hardware-based multi-factor authentication (MFA) is to be strongly considered over traditional SMS or email MFA.

“Law firms’ technology investment decisions should centre around enhancing user experience and what the cloud can deliver to operational efficiency, productivity and profitability.”

Mohamed Bakeer, CTO at CTS



Our client had a whole team copy and pasting from a spreadsheet into a web platform. **We wrote a script to automate this in less than 1 hour, saving days' worth of work."**

Nick Watson, Legal Legends

## Accessibility & Agility

User demand is one of the main driving factors behind digital transformation, with agility being a key driver of productivity. With the rise of remote working, users expect to be able to access the data, files and platforms that they need from anywhere at any time on any device.

To achieve agility, law firms must be able to adapt their technology solutions to the requirements of their end-users and their working practices.

## Automation

Struggling with completing repetitive, daily tasks can culminate in low quality work and increased operational costs, not to mention unmotivated staff with a low morale.

According to the annual [Legal Trends Report](#), lawyers spend 71% of each work day carrying out administrative tasks. Reducing manual processes by introducing cloud-based automation of client intake, document assembly, client communications, knowledge management and more, the legal sector can save both money and time, and provide their employees with a more enjoyable and manageable work experience.

## Speed

Users expect to be able to access business-critical resources quickly, so that they can complete daily tasks and deliver high-quality customer service to the best of their ability, and so the need for bandwidth is essential.



Law firms must regularly monitor their infrastructure, applications, servers and network bandwidth, and make changes where necessary, to achieve best performance, increased efficiency and maintained long-term viability and success. Proactive management of IT and knowledge of your end-users needs and wants is invaluable when building your IT environment.

**Make sure your hardware is fit for purpose too. Something as simple as hosting data on servers with a Solid State Drive (SSD) can significantly improve the speed of read/write-intensive operations such as compressed file extraction or mass document conversion.**



## Collaboration

Cloud computing enables workplace collaboration in countless ways, from communication to file sharing to remote working, removing any boundaries that law firms once faced.

The ease of which employees can communicate is vital for a healthy and productive work environment. Using cloud collaboration tools, such as Microsoft Teams, for communication and file sharing allows users to connect and work more seamlessly with each other and with clients, from anywhere on any device, powering a more agile firm.

**We have put together some thought-provoking considerations based on scenarios that regularly occur in the legal sector:**

### **If your users are comfortable working with Microsoft Office and have done for their entire career, plus their peers are using the very same – why would you move to another platform?**

Microsoft 365 offers such a high degree of familiarity, great security and a fully-comprehensive API that the majority of tech firms already integrate with. It's a great base for your data and starting point for collaboration.

### **Why spend a lot of money on a fully-comprehensive DMS (document management system) when all you need is a way to tie matters in with documents and emails?**

Tools exist for existing platforms such as Microsoft Sharepoint. Bespoke, automated scripts and software can take this a step further.

### **Do you use a complicated, cumbersome and “one size fits all” CRM (customer relationship management) platform targeted to multiple industries and use cases?**

It may be highly configurable, but if you are spending a lot of time or high consultancy fees to get things moving, perhaps it is worth considering one of the CRM platforms aimed at law firms? They have done much of the user experience research already and are not overloaded with extra features that clutter the interface or make things hard to set up.

### **Do you download/upload large files (such as a PST file) in order to process the data?**

Perhaps this could be done in the cloud with automated scripts, thus saving the wait times on having to download/upload large documents (and improving on security/usability).

### **Do you fully trust your tech provider to back up your data?**

Check with them what retention periods, processes and disaster recovery plans they have in place. Consider using a third party service and building scripts to create an extra backup of your own, for peace of mind.



# IT design considerations for law firms

You must identify those who will use the product, what they will use it for and how they will use it, as well as identifying any business requirements or objectives that must be met in order for your technology to be successful.

Having this knowledge will allow you to create a technology environment that addresses these wants and needs, thus boosting user adoption and return on investment. And when designing your product, in order to make them highly usable and accessible, there are several factors that you must take into consideration.

## Portability

A major concern when it comes to migrating to the cloud is data accessibility and portability. Having your information backed up by an Managed Service Provider to a secondary location, where it can be replicated in real time and easily exported to different storage types and server models, provides easy accessibility of any cloud-based workloads to maintain total authority of your data.

Having the ability to move applications and data between systems can increase flexibility and operational efficiency, as well as reduce the human efforts required to redesign and redeploy a service.

## Interoperability

The performance and efficiency of a law firm relies heavily on how successfully a firm can integrate their existing systems with new cloud-based applications, as integrations lead to improved efficiency and faster end results. It is advantageous for all systems within the firm to fully understand each other's interfaces, data formats, configurations, etc. to all work alongside each other in a cohesive way, reducing the need for manual data input, therefore saving time and boosting performance.

**A workforce unencumbered with fragmented systems is a productive one.**

It is always worth considering a "master repository" for all your data, where the core data sits. From here, you can build out integrations with other platforms or even create scripts to automatically sync data from this single master copy. What is most important is users know exactly where the most up-to-date copy of a file or data is to be kept. Automate as much as possible - the less thinking here, the better.



When designing your cloud environment, law firms would greatly benefit from **working through an assessment process** that examines what their end-users want and need from their IT.

Gaining continuous feedback from your employees, in regards to technology, can support your cloud selection process by lessening the likelihood that you adopt a piece of technology that is too laborious or complex for your users to use, meaning financial loss and an unhappy workforce.

**Ask your users:**

- What do you use?
- What don't you like about it?
- What are your frustrations?
- What parts do you find repetitive?
- What do you want to do more/less of?



Being armed with this information will result in informed decision making, allowing you to fully and effectively plan your tech investments.

Nick Watson, Legal Legends advises: "Create a culture change programme if necessary. Sell the benefits, encourage feedback, bond on a personal level and target those most tech-adverse to be your ultimate champions – if you can change their perspectives, the rest will follow!"

"And don't forget to lead by example. If you are responsible for implementing a document disclosure platform but continue to send documents by email, you can expect your end-users to do the same."

For further tips for making and improving legal tech applications that will result in a successful user experience, check out Nick Watson's educational article in Artificial Lawyer [here](#).

**"Don't make me think."**

Nick Watson, Legal Legends



# Developing a successful technology roadmap



**Taking a user-centric approach to your IT is an ongoing process that will allow you to understand the key challenges that you users face, and ultimately, develop a successful technology roadmap, which can be adapted and changed as you receive further feedback from your end-users.**

Consistent communication is critical to understand the work styles of your employees, and to determine how you can use technology to support them. Consider what the issues are, why your currently technology isn't being used and how you can drive tech adoption from a user point-of-view.

Whether it comes down to complex systems, low confidence in one's technical abilities or providing more training and education on platform usage, your end-users can give you invaluable information that can be utilised to improve your decision-making process.

**The bottom line is, if users adopt your technology, it works.**

## About CTS

CTS delivers IT services that transform the user experience and operational success of Law Firms and Barristers Chambers, both day-to-day and in the longer term.

Unlike most IT firms, we understand the highly regulated nature and distinctive culture of the legal sector and their users.

Our experience and expertise allow us to create a tailored solution that will maximise the efficient use of fee earners' time, enhancing productivity and profitability.

## About Legal Legends

Legal Legends was created by Virtual Data Room platform, Ruby Datum's founder Nick Watson as a way to help law firms and tech companies with their user experience, creating integrations, automated scripts or bespoke software if necessary. Their innovative model allows for firms to partner with Legal Legends in order to take this software to market as a commercial product.



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