AdvoLogix

Bridging the Gap Between Knowledge and Action

IT'S LONG PAST TIME FOR US TO TRANSFORM LEGAL

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1 ▪ IT'S LONG PAST TIME FOR US TO TRANSFORM LEGAL!

We are going to start this eBook off in a strange sort of way: we are going to apologize. We are sorry that we are mentioning the Pandemic. We are sorry that this is probably the one-thousandth, one-millionth, or maybe it even feels like the **one-billionth** piece that you have read about what the Pandemic has done to us all in the Legal industry.

And they probably all started with "in these difficult times . . ." didn't they?

At least we aren't doing that.

The Struggle is Real... *YOUR* struggle is real!

So we will humbly ask you to bear with us, because we are going to try to do something different this time: we are going to offer you something useful. We are not going to assume that we have to tell you how you are overworked, how your budget is at the limit, and how you've been told over and over that you need "to do more with less." You know all of that. And we know that you know all of that. You don't need us to tell you that - not for the thousandth, millionth, or billionth time.

Chapters:

1 • It's Long Past Time for Us to Transform Legal

2 • Putting it all on the Platform

3 • Making Matter-Centric Lawyering Matter

4 • The Single Pane of Glass

5 • Putting it Into Practice (Use Cases)

6 • Isn't It About Time You Started Doing More, With More?

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So you know that you have a problem, that the whole Legal industry has a problem. The Legal industry has all kinds of ways to capture and store knowledge, and even now to disseminate it, as easily, quickly, and widely as would ever seem possible throughout your organization. And yet, where are the resulting gains in productivity? Why is it that every time you hear that you need "to do more with less" you feel sick to your stomach?

No matter how easily, quickly, and widely knowledge spreads throughout your organization, there's still something missing: the action. We need to find a way to break through that resistance and solve this problem, hopefully before you have to hear that you need "to do more with less" yet again. The old approaches to dealing with ever-increasing legal demand are no longer enough. You cannot hire enough people, you cannot pay more billable hours to outside counsel to get yourself out of this demand trap. We need to do something transformative, or as Jason Barnwell, General Manager for Digital Transformation of Corporate, External, and Legal Affairs at Microsoft, ***puts it best***:

> ...if our organizations are going to keep growing at an accelerating rate, these approaches are not good enough. We will need more capacity and new capabilities that mere conservation of resources cannot deliver. Our evolutionary path needs improvements on how we do work today that range from whole-multiples to orders-of-magnitude. This is transformation.

So, let's start with some proof that you are not imagining things: you **are** working harder than ever - and you are doing that with fewer resources than ever. And, we hate to tell you, this problem is going to get worse before it gets better - though you probably knew that already too.

You Are Overworked and Under-resourced. . .
And it is Only Going to Get Worse

This is the part of the eBook where we are supposed to throw a lot of statistics at you, to convince you that you have a problem. You don't need that. You know you have a problem.

But we're going to cite some statistics anyway, if only so that you can use them to help try to convince your CFO or CEO that you have a problem. Will it help? Maybe. We even have some really cool graphics that we created, because CFOs and CEOs really love really cool graphics. Feel free to copy and paste them when you try to convince them to help you solve this problem.

Even if you are determined to skip this section, and again we wouldn't blame you if you did, please don't skip the last few paragraphs. There's a twist there, something that you want to read, because it will help you get started on how to actually start the transformation that you need to solve this problem.

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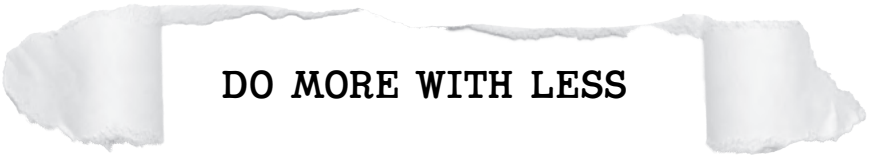
Yes, you are doing more

Every recent study confirms that workloads for Legal departments keep increasing.

- "General Counsel expect workloads to increase by 25% over the next three years . . ." *EY- Center on the Legal Profession at HLS General Counsel Imperative Series: "How do you turn barriers into building blocks?"*;

- "Workload is up for 76.7% of responding law departments, with 25% up "significantly" *Altman Weil 2020 Chief Legal Officer survey; and*

- 67% of Law Department Operations respondents report that "we are actively trying to cut costs by bringing more work in-house" *14th Annual Law Department Operations Survey "Navigating in the Era of Doing More with Less" (Blickstein Group and Deloitte).*



And, yes, you are doing more with less

Likewise, these very same studies confirm that the in-house lawyers having to do more, are doing it with less - with less money:

- "Workloads are increasing faster than budgets and law departments are planning even more ambi tious cost reductions. . . . 75% don't expect budgets to keep pace . . . 88% of General Counsel reported they are planning to reduce the overall cost of the legal function over the next three years . . ." *EY-Center on the Legal Profession at HLS General Counsel Imperative Series: "How do you turn barriers into building blocks?"*

- "In 2021, 44% of CLOs anticipate that their total budgets will decrease, while 39% plan increases. If these plans are borne out, it will the first time in ten years that more law department budgets are shrinking than growing. *Altman Weil 2020 Chief Legal Officer survey; and*

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". . . the average survey respondent spends 26% of his or her time on cost savings, cost efficiency, cost management, outside counsel management and vendor management." 14th Annual Law Department Operations Survey "*Navigating in the Era of Doing More with Less*" *(Blickstein Group and Deloitte)*.

And other studies show that you are having to do more with less - with less technology than you need:

- Approximately one in every three law departments still say they don't have the technology they need to do their job. *EY- Center on the Legal Profession at HLS General Counsel Imperative Series: "How do you turn barriers into building blocks?"*

- More than three-fourths of participants said their companies need to invest in and implement new technology. *Deloitte Modernizing legal services 2021 State of Legal Operations Survey*

- Ninety-seven percent of General Counsel said they face challenges securing budget for investments in legal technology, the number one challenge being the C-suite not prioritizing investments in legal and risk management. *EY- Center on the Legal Profession at HLS General Counsel Imperative Series: "How do you turn barriers into building blocks?"*

- So, let's start with some proof that you are not imagining things: you are working harder than ever - and you are doing that with fewer resources than ever. And, we hate to tell you, this problem is going to get worse before it gets better - though you probably knew that already too.

If only if you could do more with. . . .More?

So, we are all on the same page here: you need more to be able to do more. But there's a difference between potential value and actual value of technology. Potential value is . . . well, pretty easy - and you've had an awful lot of vendors sell your department on the potential value of their technology. Yet getting that actual value from technology, by making your work simpler, easier and more productive - that's a lot harder. And far too many law departments aren't getting actual value out of their technology:

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•91% of survey participants agreed there's an opportunity to modernize how legal services are delivered and the time has come for leadership to take bold steps to innovate legal operations. *Deloitte Modernizing legal services 2021 State of Legal Operations Survey*

•Only 50% of law departments, for example, report they have made greater use of technology in the past 12 months. *EY- Center on the Legal Profession at HLS General Counsel Imperative Series: "How do you turn barriers into building blocks?"*

•Despite all this technology, if legal departments are going to truly modernize their efforts, they need to start making significant gains in their automation efforts. Only 18% report that they are able to automate most of their routine tasks using their current technologies. Those existing technologies carry significant dissatisfaction rates when it comes to demonstrated value (38%) and user experience (47%). *Deloitte Modernizing legal services 2021 State of Legal Operations Survey*

What if we told you that you already have what you need to do more?

Now here's the big reveal, the part that you don't want to miss, because it is something that you probably haven't seen before. So far, we have only told you things that you almost certainly already knew: You are being asked to more with less, doing more with less doesn't actually work because you need something more, like technology to help you, you have technology that is supposed to help but it doesn't - at least not nearly enough. Oh, and those who approve budgets at your organization don't want to keep paying for technology that doesn't actually add value, that doesn't pay off in terms of productivity. Can you blame them?

What if we told you that you already had the technology that you needed to add value, to pay off in terms of productivity, and - most importantly - to make your life easier, finally. What if we told you that the problem wasn't that you don't have technology - you have lots of technology, tons of technology, too much technology! The problem is that you have technology that is siloed. You have technology that doesn't connect with your client. You have this specialized technology just for you and your department that doesn't work for your client even if it does work for you (which it might not anyway, from what we've already seen).

Let's turn to a new report, that we have been saving of sorts, the Juro 2021 Tech GC Report "Navigating the new reality" and the words of David Wang, the CIO of Wilson Sonsini in a special commentary section at the end of that report:

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> People often start with automating to get beyond the stack of "low-value work" keeping them from the "high-value work". The reality is often that the lack of digitization for the legal function both prevents automation of routine work, and the proper organization, articulation and data collection to enable other "higher-value" tasks, such as understanding the nature and scale of the risks being accumulated in the business. . .
>
> Due to this lack of digital maturity, the legal department often can't interact with the tech stack other departments use day to-day. Add onto that the fact that there are different tools for different teams, **legal often ends up working in different digital spaces that are totally outside of their control and not built for their needs; be it Salesforce for sales teams, Workday for HR teams, or any of the other core systems of record.**
>
> Other functions are working in those environments, and legal can't pry them out of it - and at the same time, legal doesn't have its own core digital environment, leading to high fragmentation for legal. *Juro 2021 Tech GC Report "Navigating the new reality" David Wang, Chief Innovation Officer, Wilson Sonsini asks "why are lawyers buried in low-value work?"*

In short, according to David Wang, you have your client working in Salesforce, Workday and other systems while you work in your own specialized, siloed systems - and you will never, ever get the rest of your organization to leave those systems. So - and here it is, that big reveal we promised all along: **why not go to them**? That's right, why not go to where your client teams are working? Don't just meet them half-way, meet them ***all*** of the way and get connected to them by working where they are working. Digitize your legal function, achieve digital maturity, whatever term you want. It's time to de-silo yourself. It's time to ***connect.***

But, wait, you say, "we can't do that!" We can't just start using Salesforce. It's not designed for lawyers . . . for us . . . for me. Except that it is. There are solutions out there designed just for you, just for lawyers, with all of the matter management, budget and spend management, calendering, task management and automation that you expect, **and** that connect you with everyone in your organization. These solutions are based in Salesforce (which, as we will see, connects with everything else) but are designed for lawyers. Designed for **you.**

This is your chance, finally, to do more to actually transform Legal, with solutions that give you more. A solution like Advologix.

2 • Putting it all on the Platform

Platforms drive value

As some in the legal industry have recently quoted, “platforms offer unmatched advantages: innovation, reliability, performance, up-time and defensibility of security.” Platforms can bring all of these great things to Legal because Platforms create connections. A platform provides a way for different functions, for different user teams, in different departments to do their own work, use their own familiar systems and yet still work together because their data works together. To reflect again upon the words of David Wang, CTO of Wilson Sonsini - “Other functions are working in those environments, and legal can’t pry them out of it - and at the same time, legal doesn’t have its own core digital environment” - platforms allow all of those other functions to work on their own core digital environments, even Legal. And no-one has to “pry them out of it” because they - we - are working together. Platforms connect people.

Platforms also connect data. Connected data is powerful data, per Salesforce’s **“Salesforce for the Legal Sector”:**

> “This unified data also provides a foundation for the use of automation to further drive insight and understanding, as well to implement process automation to cut costs, reduce human error, and improve compliance.”

Our experience at Advologix, in working with legal teams just like yours for over fifteen years shows us the power of connecting people, connecting data, but most of all, connecting the people to the data. This connection gives you the understanding that you need to actually do that more, sometimes even with less. That drives genuine value.

As just a few examples of what we have seen, we’ve been told by general counsels more than a few times that they often feel that they are “overhiring” for matters, as in using expensive, top-tier firms even for small, low-risk matters, because they just don’t have the data to fit the right firm to the matter - at least until they can connect with the data that they need to make that call. We also find ourselves assisting legal departments that wanted to send their “low-value work” to ALSPs, but never could do that - until they were able to use a platform to connect those ALSPs into their workflows.

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Salesforce is everywhere

Your company already has Salesforce.

Yes, we *can* just say that.

Salesforce is not just a "leading" Customer Relationship Management (CRM) platform or even the leading platform, it is the platform. Salesforce has over 150,000 customers; it has a bigger market share than the next nine competitors combined. More than 88% of the Fortune 100 use Salesforce. Salesforce just celebrated its eight consecutive year as the top CRM platform - and it is pulling away from all of the others as it projects over $31 billion in revenue into FY 2023 with yet another year of over 20% growth.

In 2020 Salesforce spent $27.7 billion dollars to acquire the collaboration platform superstar Slack. One of the first things that Salesforce has done with Slack is to connect company Slack channels with each other, so that users can now communicate across the entire universe of Slack channels at every company.

And those other functions at your organization, like HR and their Workday platform that they live on all day (which David Yang mentioned) - among so many others? Salesforce connects to all of them, through what it calls the "AppExchange." Starting with Workday for example, there's an entire ecosystem dedicated to making these systems work seamlessly together, **starting with the AppExchange**, working **within Workday** and with dozens of integrators. And these are just some of the literally thousands of integrators working within the Salesforce ecosystem.

All of this is why those who have started to tout the power of platforms in Legal have said that "Salesforce is the ultimate proof of platformization, and there's no reason this cannot be replicated in the legal community." And they are right. In fact they are even more right than they might think, because this "ultimate proof of platformization" already has been replicated in Legal - by Advologix.

And we've been doing that for more than fifteen years.

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Advologix has brought the power of Saleforce to Legal - to *you*

Contemplating all of those startling statistics about the massive scale of Salesforce, it is easy to start feeling like a very small fish in a very big pond. It's easy to worry that your unique needs will go unmet or even entirely unnoticed. With Advologix, there is a way to leverage the unparalleled power of Salesforce and still feel right at home.

Advologix has been a Salesforce partner for over fifteen years, having built our case and matter management application upon the Salesforce platform. Advologix can give you the kinds of benefits and features that come from our extensive experience in working with corporate legal departments and leading law firms for over a decade and a half. You gain the benefit of service that our testimonials call "amazing" while knowing that your clients' confidential data will be secure on the tried and tested Salesforce platform. That helps you feel right at home.

Advologix can give you exactly what your unique needs require because we've built our "hub-and-spoke model" to adapt to those needs. We leverage Salesforce to bring together matter:

- Intake
- Planning
- Document Assembly
- Document Management
- Finance
- Project Management
- Closing

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Advologix also connects with iManage, ContractExpress, DocuSign and many others. That means that you can connect the systems that you live in every day to those that your client lives in everyday.

However, simply connecting all of these functions together is not enough. For far too many others, "platform" means too little. At best, "platform" often seems to denote a common user interface and user experience ("UI/UX" in nerd parlance) that makes it easy to learn the initial features of new systems. At worst, "platform" becomes just a buzz-word used by umbrella conglomerates for disparate, disconnected systems with a top-level gloss of branding to make them all seem somehow connected.

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That's why we built all of these features on top of Salesforce, so that the data from your intake will help you plan out the matter, then be used to assemble the documents that you need, properly manage those documents and so on and so forth. All of our Advologix capabilities connect your data together within Legal, but it doesn't stop there. Because the foundation for Advologix is the foundation for your entire enterprise, Advologix connects all of the data from your enterprise into Legal. Advologix and Salesforce give you that single system of record for everything in Legal and your enterprise as a whole.

As our own Jonathan Reed, President of Advologix for all it's over fifteen years within Legal, has written:

> What business units need is something that can provide the high level of security, control, etc. required from a security compliance and conformance perspective? We see now with the Cloud and pre-integrated solutions that organizations are quickly moving from their current state to a desired state where they have a single system of record. This allows organizations to not just have their data centralized but also to put into context, to create a single source of truth.

Yes, you *could* continue doing everything yourself, and start afresh with each new matter that comes into your department for intake, but imagine not having to go through all of that - to be able to delete that task from your list of "more things to do (with less)" because you can instead just click a few buttons and have intake created from the data already existing within the company. When you need to do even more later on in later or related stages, like finance, you can do it with less, because you make use of what is already available, already approved, already done because you leveraged the data from that single source of truth.

So, avoiding low-level work, busy-work, and re-work? That sure sounds like value!

Of course, it's all-too-easy for *us* to say that. So instead please take this quote from Legal leader, Alberto Estrella, on what Advologix's ability to connect people, connect data, and connect people with data has done for his organization, from our **September 2021 webinar:**

". . . most firms have different silos of data and they have a matter management, a document management system and a financial and a billing platform that don't necessarily speak to each other. We've been able to move from that to a one single platform in Advologix where everything is there."

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At the same time, Advologix, by leveraging Salesforce, connects not just data but more importantly it connects people. Advologix uses the power of Salesforce to put your work where they - the rest of the company - works. We give you the power not to just meet people halfway, you can meet them all the way, and get the work done better, faster, and with few resources - a true more with less victory. Ryan Buoscio, Senior Legal Program Manager & Insurance Litigation Analytics Lead at Uber spoke with us in our Corporate Counsel Business Journal webinar, "Industry Experts Reveal Their Secret Case Management Best Practices" told us how he uses Advologix to connect with people to get more done, with less.

Ryan described how UBER needed to integrate a never-ending parade of stakeholders from outside Legal into their workflows. These users "have a narrow but critical role and involvement with your cases." For this reason, "you need to enable a frictionless interaction" with the system "for a group of people who you will likely have no control over." Because Advologix leverages the Salesforce platform, it allows Ryan "to tailor needs with surgical precision" to create "user experiences that are painless."

Implementing Advologix gave UBER the single system of record that it needed to centralize Legal. Creating that single source of truth then allowed UBER Legal to do something even more critical than just react within particular matters: optimize a communication framework that interconnected Legal to the rest of UBER. With a centralized system that replaces the chaos of email with a controlled communications structure of workflows and queues, Advologix now guarantees that all the relevant information would be included in requests and responses – all without those disruptive mass and "reply all" emails that hit dozens of inboxes!

Now that's doing more - a *lot* more, with a *lot* less!

Advologix gives you all this platform power, plus unmatched security

We would be remiss if we didn't discuss one final thing . . . well, maybe not "final," because even though it often seems to be left for last in the discussion, it probably should come earlier, like first: security. As we started this section with, platforms offer the "defensibility of security." What does that really mean?

Once again, our very own Jonathan Reed makes this clear when he writes:

> The Cloud is all about the ability to staff, procure, deploy, maintain and manage the latest in hardware, software, security systems alerts, event tracking, etc. Oh, and to do it at massive scale. That massive scale carries over into massive savings, but also something even more important (and even more massive): safety.

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> So the long story short is that these platforms are incredibly secure. Cloud-based platforms allow you to control access to data down to the field level. They come with very highly secure transmission and storage of data and as well as access control encryption. These systems have been tested over and over and over, with thousands of top Security personnel working around the clock to protect them.

Salesforce has invested heavily in cybersecurity, with a comprehensive online "**Trust Center**" and a "**Chief Trust Officer" who leads a diverse team of "security trailblazers.**" Salesforce **has taken great** efforts to make certain that the Cloud is indeed safer than on-premises software for its customers. Not surprisingly, the cybersecurity consulting firm UpGuard **rates Salesforce's cybersecurity** as an "A." What that means is that you can connect data and people on Advologix with the confidence that those connections will stay safe.

Despite the centrality of the importance of making the data-to-people connection, it is in the end, just the foundation for what has to come next: getting your work done. The primary goal of so many in Legal, our "Holy Grail" in some ways, has become "Matter-centric lawyering," i.e., the ability to focus on each specific matter as a whole. That also means being able to drill down into the component document and tasks that compose that matter while simultaneously being able to step back and get the larger picture when needed.

Having the whole matter in your hands - from the strategic view down to the smallest detail - all with just a few button clicks? Looks a lot like value - if you can make it happen. So let's see how with Advologix, you can!

3 • Making Matter-Centric Lawyering Matter

> "Deploying more technology, especially practice management tools: As we noted in our last Client Advisory, this industry could not have switched so successfully to a remote work environment had it not been for the technology investments made in recent years. We see that our clients widely acknowledge this and have a greater appetite for further investment in technology that enables their businesses to grow. Aside from continued use of videoconferencing tools, we expect to see greater investment in practice tools to help drive greater efficiency. These include systems that support knowledge management, client relationship management, billing and collections, and contribution analytics." **Citibank/Hildebrandt 2022 client advisory**

In the last few years we've seen more and more discussion about how legal work needs to be matter-centric to drive efficiency and effectiveness. The goal is to manage the entire lifecycle of a matter, from intake through closing - and if you can do it all within one system all the better. But you have to start from the right place.

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Client-centric work is too broad to drive true efficiencies

The first step in transforming Legal processes was making work Client-centric. One would think that this wouldn't be much of a transformation, as it seems natural that work in Legal would center around the client naturally. Yet our oftentimes tendency in Legal towards seeing risk as omnipresent necessitated a new way of thinking, to focus upon genuine client needs first and foremost. By doing so, Legal could then focus on the overall relationship with the client; as per "Salesforce for Legal":

> As a general trend, clients are increasingly insisting that the businesses that deliver their legal advice and support provide more engagement and insight than ever before. They expect to be seen and interacted with holistically, across their business operations and divisions, and to receive responsive, insight-driven, rapid, and ultimately client-centric experiences.

Document-centric work is too narrow

Thus, client-centric work became the first step in the transformation of Legal. Unfortunately, while client-centric work could drive effectiveness, by responding more directly to client needs, it was not the ultimate solution that Legal needed to drive cost efficiencies. What Legal required was something that was not so high level, that was more about the client relationship. We needed a way to transform the *process* of Legal work.

Another approach to transforming Legal work has been to shift the focus from the high-level of client centric work to perhaps the lowest, most granular level of documents. Documents are certainly central to nearly all Legal work, and are often the key communications points and final deliverables of processes. But documents don't drive those processes. Documents typically don't even expose the process. What comes next after this form is filled out? Does someone review this contract next, and if so, who? How do we respond to this motion? All of those are extrinsic elements that are a part of the process, not internal to the documents involved therein.

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Instead of improving processes then, or even surfacing them, document-centric work becomes wholly reactive. Advologix does a lot of work with organizations, and one of the things that typically happens during the deployment process is we sit down with Legal and find ourselves discussing the matters that come through the department. When our clients start to describe their workflow the interesting thing is that many times it's the first time that people have gotten together and actually talk about what they do. Quite often, all they had been doing was simply reacting to the documents coming across their desk, doing whatever they needed to do to get those documents off of their desk and onto someone else's.

There has to be a better way. Fortunately, there is: matter-centric work. And the even better news is that platforms make matter-centricity possible.

Matter-centric work holds the promise to truly transform Legal

A strong matter-centric system will tie work to tasks. The system should set tasks to timelines as well as to quality metrics. That all may seem, well . . . a bit obvious, but in Legal that can represent a real breakthrough. Indeed, some refer to these holistically as Legal Matter Plans.

Matter-centric work also ties work to people. This again may seem a bit obvious, but it needs to be said, because the disconnect between work and tasks to people has been far-too-common in Legal for far too long. And, of course, with the current hybrid environment seemingly now never-ending, combined with seemingly never-ending labor shortages, making work more efficient is absolutely necessary if you are going to do more.

Finally, matter-centric work connects all of the above to knowledge. It is not just about managing knowledge, but about taking the next step and putting knowledge to work. As iManage, in it's latest eBook, "Making Knowledge Work" puts it best.

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While knowledge management focuses on acquiring and organizing knowledge, putting it to effective use is what catalyzes productivity and collaboration around the lifecycle of each individual task or unit of work. Making knowledge easy to share, safely, is at the heart of improving productivity

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Most importantly, we are now looking at self-service of knowledge, where everyone within Legal can access the knowledge they need when they need it to get their work tasks done. This new paradigm allows us to create a whole new form of process management. The old way of doing this, of trying to transform processes was to force the process. That would mean sitting down with the Legal team, who is likely for the first time discovering their processes, and then forcing them to set those processes in stone, fixed forevermore. As one might imagine, failure in such a scenario was an option, sometimes the only one.

The new approach is to make the transformation gradual, consensual, and above all configurable. Using this approach, Legal teams typically immediately find a number of inefficiencies or ways to do things better than they could have even imagined! One of the great things about the capabilities available today in platforms is that it gives up the ability to sit down with users and easily map out a process, map out a workflow and automate task management. A lot of that is automated via the processes, and it's a great discovery effort. This gives the Legal team the opportunity to discover their processes, drive the process, and ultimately test and adjust to find the true efficiencies. Advologix leverages the Salesforce Flows capabilities to provide this kind of "Agile" workflow development.

Advologix can then connect the work to the data and the data to the people, to automate the low-value work. The ability to automate tasks is yet one more incredible advantage for platform users. Your team can automate event scheduling to ensure that each and every item that needs to be checked off during a particular stage of a matter is listed and assigned. You can take the efficiencies a step further once you are able to know that a particular task is going to be done. You gain the ability to not just automate process and workflow but integrate with the actual task management.

Bringing this back to the deliverables, the documents, integrating workflows and task management really shines during documentation generation. This integration improves not only the outcome of work being done, but also people's level of confidence in the work that's done. It even improves your team's general satisfaction with the job because they're no longer under the stress of "did I do the right thing at the right time." Once you get it implemented, this integration within your department can better integrate you within the entire organization. That's because when you are done, you will have every matter, everyone on the same page . . . or as we say in our modern, paperless update to that phrase: the single pane of glass.

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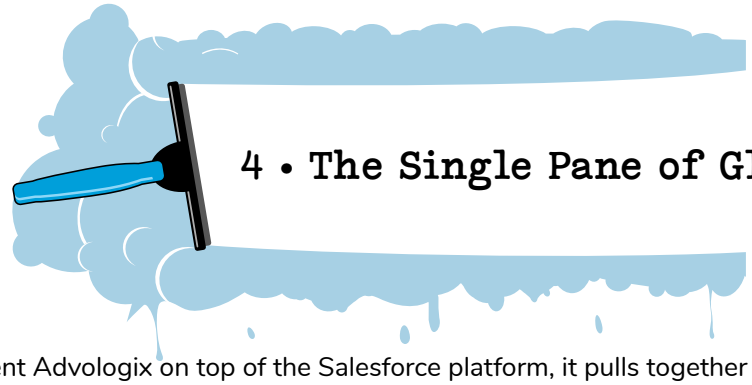


Once you implement Advologix on top of the Salesforce platform, it pulls together all documents and data from department sources such as iManage, along with data from Salesforce from the larger organization. As a first, immediate step towards generating value through greater productivity, this eliminates the distraction of "context-switching" because it pulls everything that anyone needs for that matter - hence matter-centric - into that single view. You don't have to stop what you are doing, take the time to figure out where something might be, find it there, and make sense of it within a separate context - and then pull the data that you need back into the prior context.

Instead, you and your team get a single view. In fact, everyone within your organization can get that single view. Except, there's something truly magical, that truly drives value, that then happens: it's not one single view that gets imposed upon everyone, no matter their context, no matter their needs. It's a single view that gives each and every person, within your team or within your organization what **they** need.

It's contextualized. It's a single pane of glass that adapts. And that alone is a reason to stop calling it "being on the same page" - have you ever heard of paper that can do that?

But again, it is easy for us to say that. Let's go back to Alberto Estrella, from our webinar with him:

> My dashboard looks different than that, and another team member's dashboard here looks different because we're able to customize it and show the team members the information that they need because it's what's relevant for them.
>
> the response that I was receiving from different team members or how excited they were that they finally had a tool that allowed them to be more efficient, more effective and provide our clients with a better service.

Now that we are all on the same ~~page~~ - sorry - single pane of glass, how can we put this all into practice for you and your team? How can we truly use this to transform Legal? Let's consider three examples.

5 • Putting it Into Practice (Use Cases)

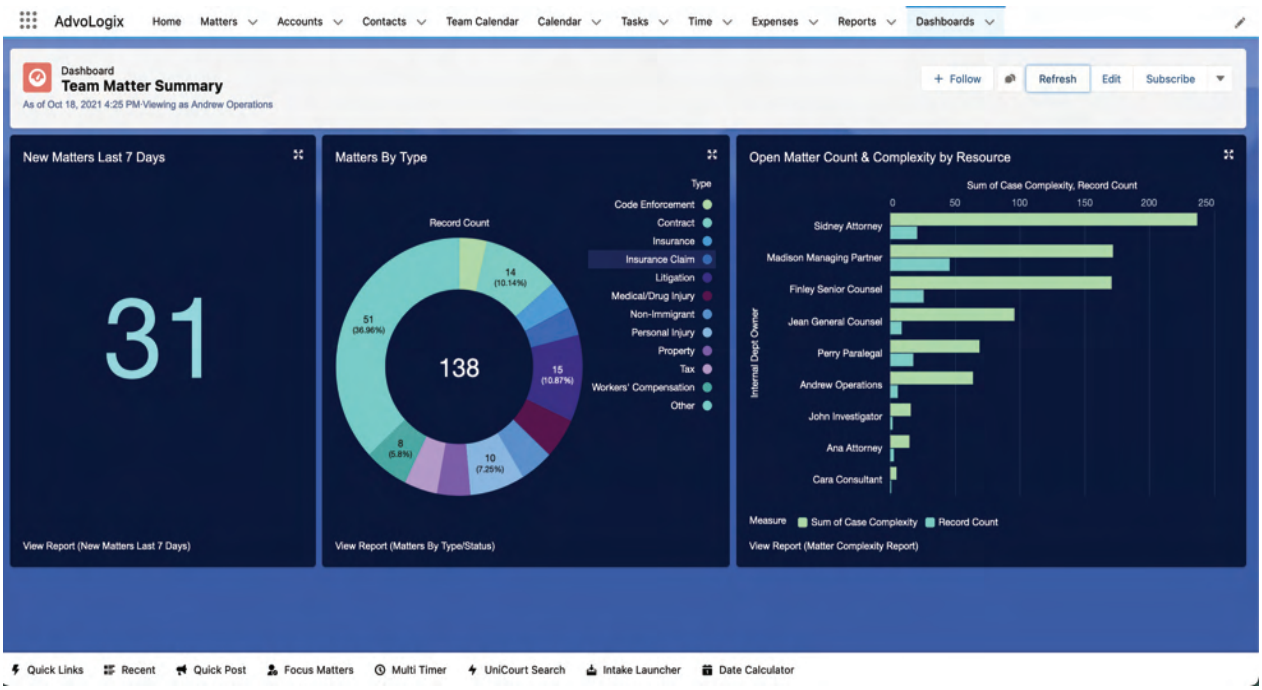
1 ▪ DASHBOARDS

What:

Get a high-level view of current matters, their progress, their costs, and be able to drill down into details - while also making this visible to leaders of other areas in terms of what they need to see

Why:

•Get the big picture
•Drill down into the details as far as you need to go
•Be on that single pane of glass to share information with others, but have it presented within the context of what you need
•Keep your team on track by fine-tuning that single pane of glass for their needs
•Keep allied execs and budgetary approvers informed on their own contextualized panes



Bridging the Gap Between Knowledge and Action

How:

•Connect Advologix to your other Legal systems, such as documents, contracting, records, outside law firm systems and the like
•Connect Advologix with Salesforce connectors into financials, HR, to create that single system of record and single system of truth
•Work with your team to understand their requirements and discover then fine-tune workflows to be able to contextualize what they need
•Set the context for other departments by what they need, what they keep asking for

Integration & Automation

AdvoLogix provides best in class matter centric business process automation with 360 degree continuity. Harness disparate systems through our API or over 3,000 AppExchange applications.

Integrations Include:

- Document Management
- Email
- Billing and Accounting
- Phone System and Call Center
- Courier Services
- Data Import/Export Tools
- Public Platform API
- Create Your Own
- And many more

Bridging the Gap Between Knowledge and Action

2 ▪ WITNESS PREPARATION

What: We've already heard from Ryan Buoscio at Uber how he uses Advologix's connection to Salesforce to connect with those outside his department to obtain the facts needed and prepare them as witnesses (especially if you clicked on that **QR code** - if not, here it is again). But let's go into some of the details on how you would do this at your organization.

Why:

•Coordinate better with business units - and improve your interconnectedness with them
•Get what you need to manage your matters faster, with self-service inputs
•Keep those outside of Legal involved and informed, but not overwhelmed
•Stop wasting time and resources on the busy-work of chasing people down and manually sheepherding them through the workflow

Who:

•The business unit employees - whomever is involved in litigation, whether it is commercial, tort matters, whichever
•The attorneys on your team running these matters
•Your support staff, project managing the matters

How:

•Connect Advologix to the Salesforce repositories where the business unit employees input their information - this can be directly in Salesforce or in a system connected to it (even Slack)
•Create forms in Advologix to provide to the business unit
employees within Salesforce or other systems to provide answers to direct questions
•Present curated portions of your dashboards to keep the employees updated as to what is needed, what comes next, how they are contributing
•Coordinate this all within the workflows and checklists used by your team

Bridging the Gap Between Knowledge and Action

3) CHECKLISTS

What: Ever read “The Checklist Manifesto” by Atul Gawande and thought to yourself that it was something you wish you could do for your team? Now you can. And the value that it can deliver in terms of systematizing work, reducing mistakes and rework, and improving quality . . . priceless!

Why:

•Go the next step further past discovering and fine-tuning your processes into actually actioning them, so that you can create simple, check-box workflows that present the next necessary task right on time when needed

•Have the confidence to know that your team’s work will get the work done the way that you want them to - without having to look over their shoulders 24x7x365 like you do now

•Get younger lawyers up to speed faster, while having an automatic quality check on their work (they didn’t follow the next step - get a notification in your dashboard and then find out)

•Eliminate the multitude of calendars and to do lists and all that that everyone on your team keeps - in fact, more importantly, eliminate the multitude of unique formats of all of those that keep you all from working as a team

Who:

•You, and your senior team who set the pace here

•Your junior lawyers who need to follow these checklists

•Everybody who hates having to review a million separate calendars and to-do lists to get anything done, i.e., everybody

How:

•Work with your team to start small, on a few matter types - or even just one and figure out what the best way that you have handled such thing - we find that often everyone just seems to know it, even if they’ve never had to say it outloud before

•Break these into simple tasks, in chronological order

•Group them as best makes sense for the main phases of each matter type, so that you can have the right workflow automatically appear when ready

•Connect these checklists with your Advologix dashboards to be able to monitor progress at a glance

•Connect to other Legal systems - and other systems of record that are connected to Salesforce to automatically pull information when needed, or to push it out to calendars and the like

Achieve more with

AdvoLogix

6 • Conclusion: Isn't It About Time You Started Doing More, With More?

32.8% of law departments already have matter management implemented. 29.3% plan to do so soon. 14th Annual Law Department Operations Survey "Navigating in the Era of Doing More with Less" (Blickstein Group and Deloitte)

Are you one of those 67.2% of the corporate legal world who still don't have matter management set up yet? Maybe you haven't been able to prove the value to those who approve your budgets? Maybe you haven't been able to prove the value to yourself? Perhaps it's that nagging voice in the back of your head that keeps telling you that this will become just one more disconnected system that once had the promise of adding value . . . until, it didn't.

So even if you are part of the majority that has matter management in place, but still hopes and wishes that one day you will see some value from it, it's time to really make the transformation happen - by connecting . . . data . . . people . . . and real value.

Contact our team to get started with a personalized AdvoLogix experience.

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