



An Integrated Approach to  
Digital Transformation of Legal Operations

**A Whitepaper**

# 01 An Integrated Approach to Digital Transformation of Legal Operations

There has been a lot of talk about the need for Digital Transformation in the Legal Operations space, and rightly so. Over the past few years, as companies launched Digital Transformation initiatives to find new and better ways to serve their customers, CIOs focused on data-driven technological solutions and deployed them in areas such as Finance, HR, and Supply Chain management. Now it's Legal's turn.



Today, Chief Legal Officers (CLOs) are being asked to be more than the lawyer in chief. They are being asked to create and sustain an environment where relevant decision-making and prioritized focus of resources contribute directly to the corporate bottom line while mitigating organizational risks. In many legal departments, the CLO has a general understanding of what their legal professionals are working

on at any given time. However, their processes are typically not as structured or monitored in such a way that effective use of key performance indicators (KPIs) or metrics can drive prioritization of individual or team performance. They are forced to work too hard to determine whether or not their most effective resources are being applied to high-risk, high-value activities, or how effective their budgets are being allocated internally or externally. So, how can CLOs get the information they need to drive their departments efficiently and effectively?

## 02 Platform Approach vs. Integrated Approach



According to a 2021 survey of CLOs, over 40% of those surveyed indicated they will pursue technology to provide access to the information they need to better manage their team and legal projects, and track and justify their division costs.

The question is, do you take a Platform approach, whereby you replace your existing matter management, spend management, document management and e-billing systems with a single platform that promises to provide you with access to all the data you need at your fingertips? Or, do you leverage the existing platforms you have by investing in the ability to share data and processes amongst them?

The answer is, You do Both.



## 03 Platform Approach

If you have already invested in a platform that promises a “single source of truth”, you have undoubtedly learned that while a platform approach does solve a number of common data-sharing and integration challenges, it still falls short of delivering on the promise of satisfying all your legal requirements. The sheer volume of data and documents that enter an organization on a day-to-day basis that are related to a given legal relationship make it virtually impossible for any single platform to manage them effectively.



For example, many large organizations rely on SAP for financial accounting and accounts payable solutions. There is valuable data residing within these systems that would help CLOs manage and drive internal and external budgets. This data would continue to remain siloed from the legal

platform data, unless copied or moved manually, or an integration solution is provided. Additionally, most organizations leverage an HRIS system to ensure optimal management of human resources, business processes, and associated employee data.

Strategic collaboration between Legal and HR can help reduce risk with the business' internal clients. Even if legal platform vendors have the ability to natively manage HR-related information, most legal departments do not have the luxury of choosing the system HR will utilize. The inability for legal to obtain access to such information can introduce unnecessary risks for the organization, again, unless manually copied or moved, or an integration solution is provided.

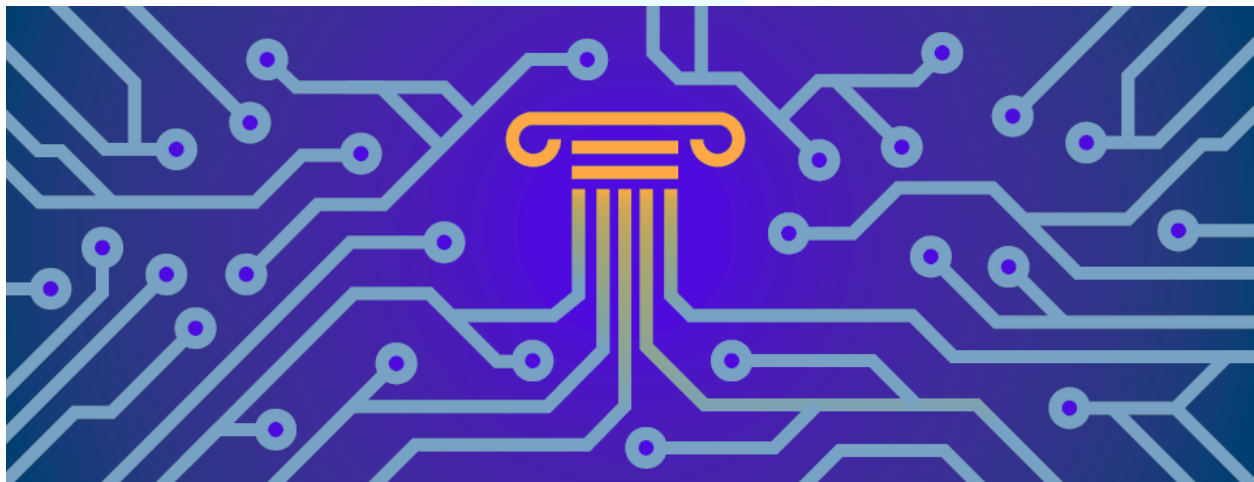


And finally, most organizations leverage the Microsoft 365 platform for email, document management and collaboration features. While many legal platform vendors offer email integration to store emails and attachments into their systems, documents, instant messages and discussion threads continue to be stored separately in SharePoint. The need to search and access these documents and associated content will continue to exist and will only be resolved through manual retrieval or an integration solution.

## 04 Integration Approach

Many legal departments have grown organically and have added technology solutions over time as the need surfaced. As a result, you'll often see departments with a collection of point solutions for areas such as contract management, matter management, IP management and e-billing. The need to share information and have the point solutions work together to provide CLOs access to the data they need to drive their departments efficiently and effectively is still a requirement. So, the investment is made in systems integrators who are hired to integrate the point solutions to facilitate the data and process interoperability needed for the CLO.

The platform vendors will argue that this approach to technology implementation is too tactical and therefore is one of the barriers of true optimization. But, as described above, the sheer volume of data and documents coming into the enterprise will require systems integration anyway. The key to success is to find a vendor that provides off-the-shelf integration solutions that eliminate hard core integration development through a low-code and no-code integration platform.



## 05 Conclusion

The world of the CLO is changing. CLOs are now expected to create and sustain an environment where relevant decision-making and prioritized focus of resources mitigate organizational risk while contributing directly to the corporate bottom line. Successful CLOs will be data-driven. Whether you move to an siloed solution platform, or whether you decide to leverage your existing investments in your best-of-breed solutions, there will be a need for systems integration if you are to transform your legal department to meet the growing expectations. How you choose to accomplish that integration is the real decision.



## About LogicShark

At LogicShark, we want to give you, the CLO, time back in your day by giving you access to the information you need to manage your team and legal projects, and track and justify your division costs. We aren't about replacing the systems you have already invested in, but rather making them work better together with greater visibility and smoother cross-platform workflow.



It all comes together here®

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