

# exizent

## Successfully Adopting Legal Technology

Wednesday 27<sup>th</sup> March 2024



# Who we are

[www.exizent.com](http://www.exizent.com) – Making the process of bereavement easier for all involved



## **Aleks Tomczyk, Co-Founder and Managing Director**

- ‘Golden thread’ is technology innovation, transformation and business building
- Has built a number of tech businesses and spent a large part of his career doing large technology-led change projects
- Board Member of Lawscot Tech and FinTech Scotland



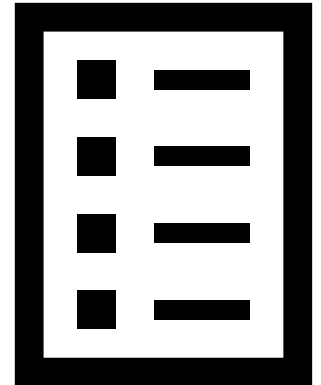
## **Paige Donnithorne, Implementations and Customer Success Manager**

- Focus is to ensure users get the best out of Exizent’s probate software starting from signup
- Experienced legal software specialist
- Previously ran implementations and support for a practice management systems company

# Agenda

Aim: to share views and recommendations in order to help firms succeed in technology adoption.

- Context
- Common technology challenges
- LegalTech and AI trends
- Benefits
- A simple approach
- Q & A



# Context for today

Why this topic?

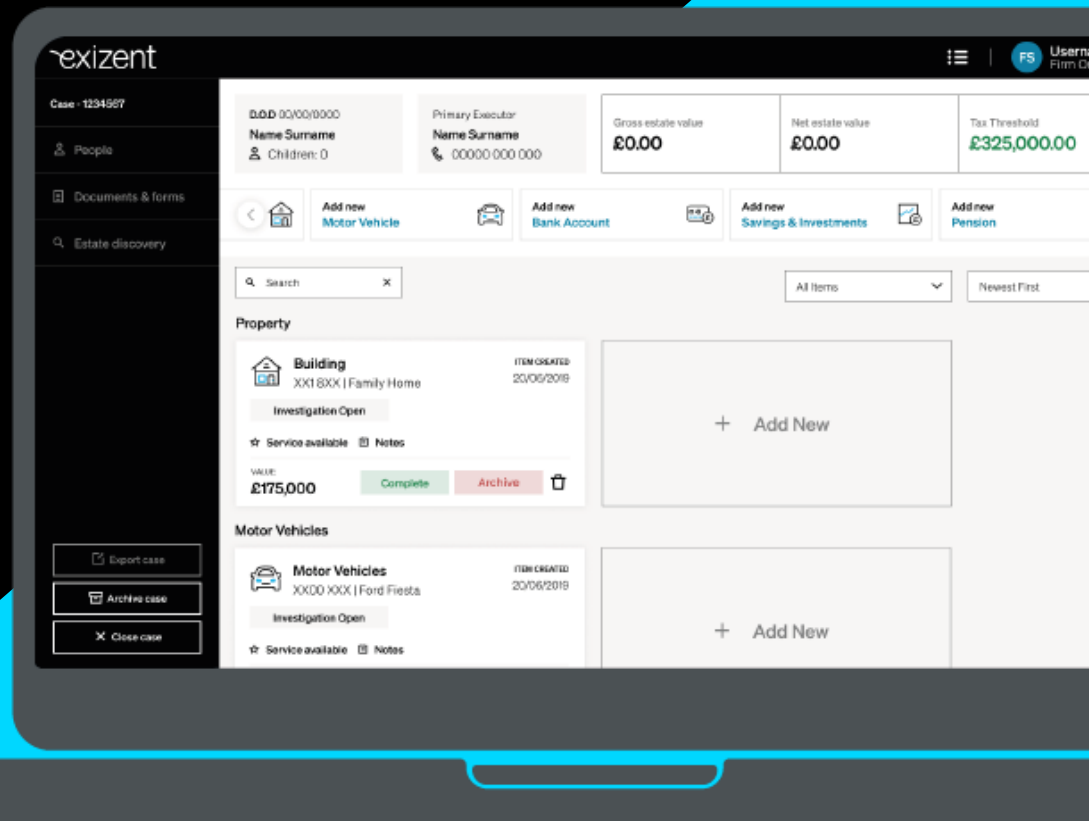
Why focus on small and medium sized law firms?

What outcome would I like?



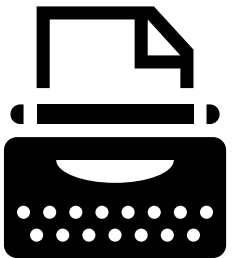
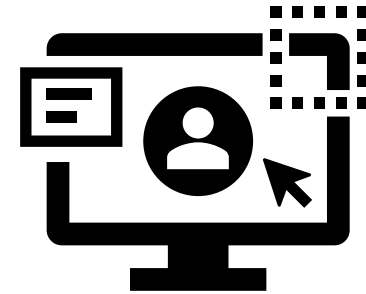
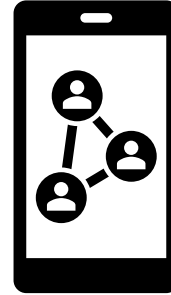
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Common technology challenges



# Experience and perceptions

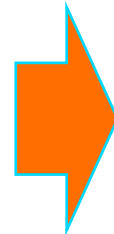
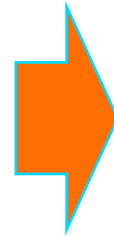
- Personal
- Business
  - Common office tools, eg Microsoft suite
  - Legal technology, eg case management systems, document management systems
  - Home grown tools, eg complex Excel or fully bespoke software
- Risk and reward



# Overcoming barriers to success

## Barriers and Exizent's current approaches to overcoming them

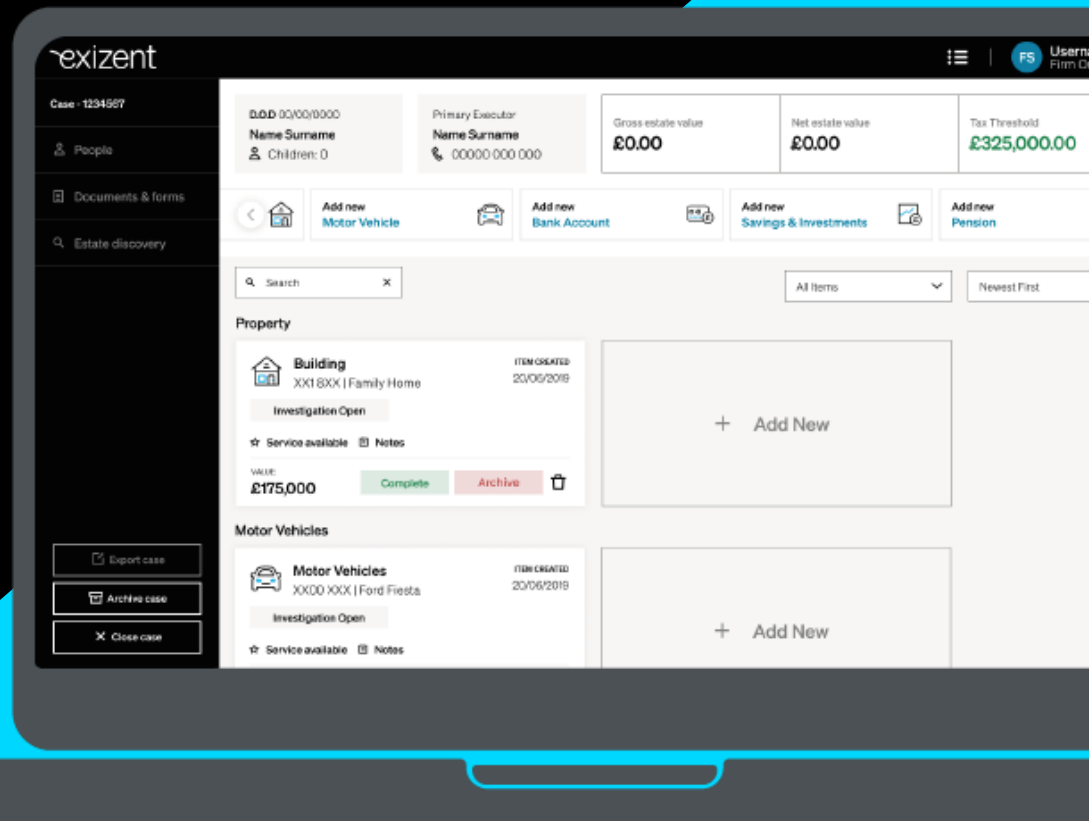
1. Worry that the product will not meet needs.
2. Risk the product will stagnate.
3. Concern about cost up front and in the future.
4. Challenges adopting and using.
5. Limited time and resources for training.
6. Integration challenges.
7. Worry about vendor support and customer service.
8. Regulatory and compliance concerns.
9. Difficulty in forecasting and measuring ROI.
10. Concerns about availability and scalability.
11. Concerns about security and confidentiality.
12. Cultural resistance and scepticism.



1. Demos, free trials, paid pilots, honesty.
2. Frequent releases, user feedback sought, prioritisation.
3. Transparent, published pricing, no installation charges.
4. Template implementation plans, support and training.
5. Intuitive design, customer support, knowledge base.
6. Technology available, open API, integration partner.
7. Testimonials, case studies, references, credentials.
8. Internal framework, policies, processes inc ISO27001.
9. Help with business case, tracking during on-boarding.
10. Technology selection & stack, trusted people, data.
11. Architecture, processes, external testing/audits, info.
12. Open and honest culture, support, engagement.

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LegalTech and AI trends





# What is going on

- LawTech / LegalTech initiatives
  - LawTechUK <https://lawtechuk.io/>
  - Barclays Eagle Labs [LawTech](#)
  - Regional LawTech and National Network, eg Leeds, Manchester, LawscotTech
  - Academic studies, eg [Attitudes to LawTech Adoption](#)
  - [Legal Tech Trends](#) Newsletter
  - Encouragement, Events and Awards
- LegalTech trends
  - Older tech being improved, eg PCMS, document management solutions
  - Consolidation of vendors led by large LegalTech firms, eg Advanced, Access, ATI
  - Modern software available – often point solutions, some from overseas, eg Clio, PEXA
  - Investment – mainstream and specialist, eg [The LegalTech Fund](#)
- Government and regulators
- LawTech and LegalTech Companies
- Law firms – investment levels are mixed – some help is available [TiPS](#)

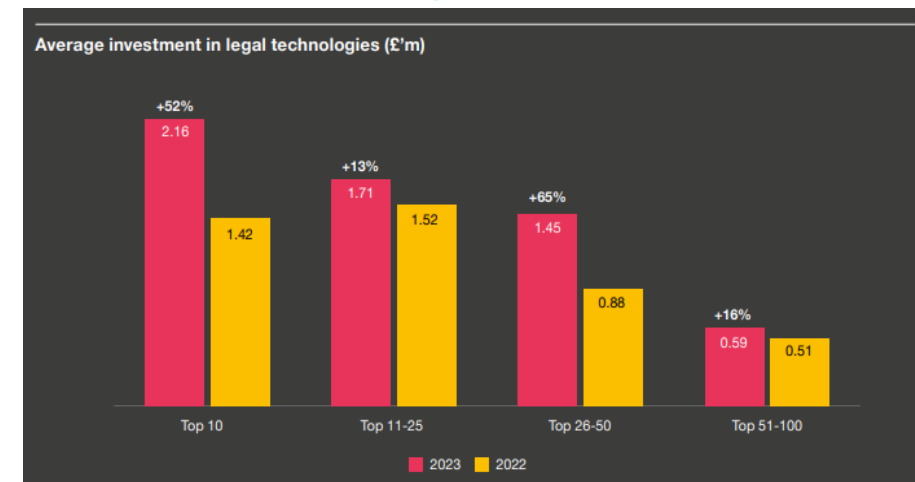
LAWTECH UK

LEGALTECH TRENDS

LEGAL GEEK



Source: [PwC Law Firms Survey 2023](#)

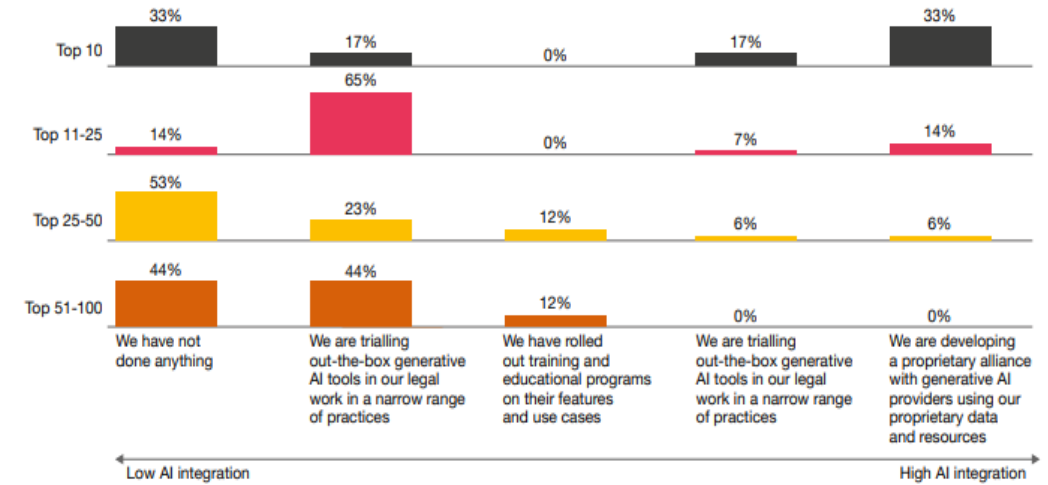


# AI

- Generative AI has created a lot of hype, eg OpenAI
- We are all using AI now and it can do lots – drafts, analysis, patterns, communications
- It is in its infancy; tools are evolving very fast and care should be taken
- Long term impacts are unknown, eg on career paths, access to the law
- The Law Society has published guidance – Lawscot is about to

Source: [PwC Law Firms Survey 2023](#)

Extent of usage of AI tools (such as ChatGPT/Harvey)



## Legal tech teams turn to AI to advance business goals

Our case studies highlight how the latest tools are helping speed up legal work

FT 19 Oct 2023

<https://www.ft.com/content/9a117ac7-29ae-43fe-b840->

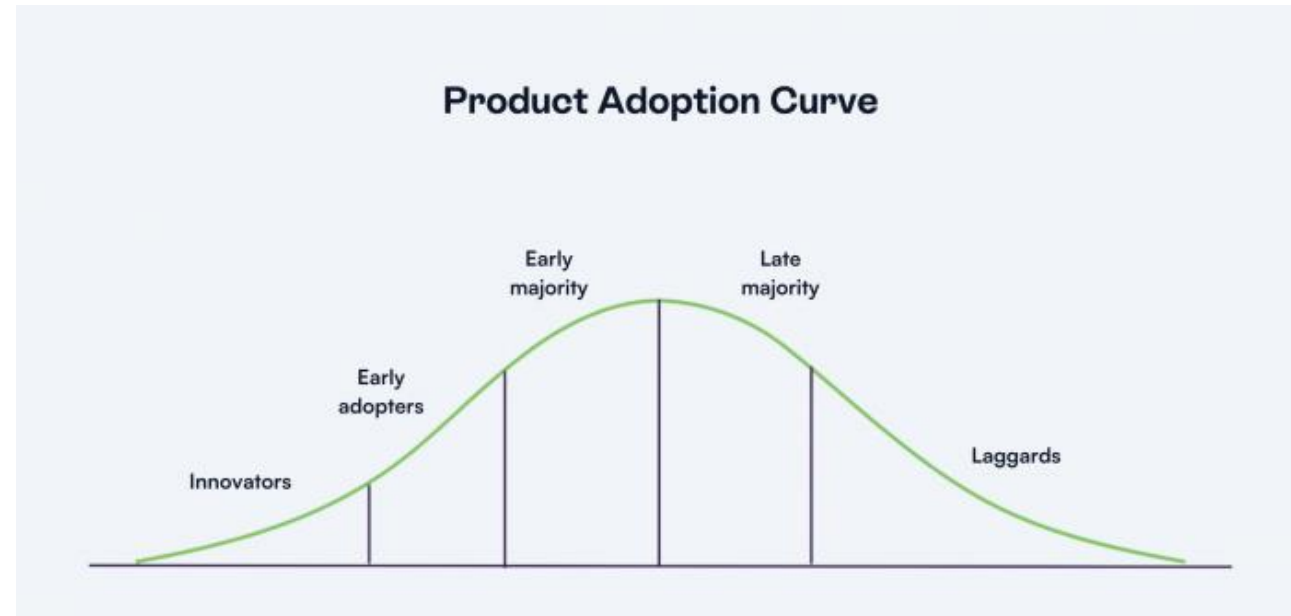
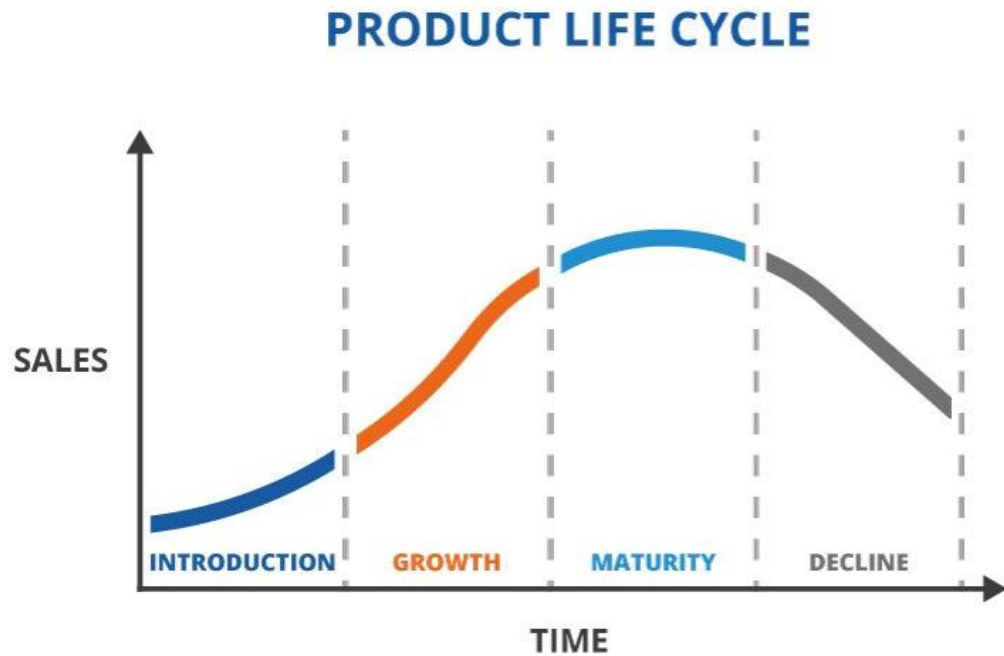
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### Generative AI use cases across industries

	eCommerce	Healthcare	Travel and transportation	Manufacturing and supply chain	Utilities	Entertainment	Education
Chatbots and virtual assistants	✓	✓	✓	✓	✓	✓	✓
Design and development	✓	✓	✓	✓	✓	✓	✓
Content creation and repurposing	✓	✓	✓			✓	✓
Data analytics	✓	✓	✓	✓	✓	✓	✓
Risk mitigation	✓	✓	✓	✓	✓	✓	✓
Predictive maintenance		✓	✓	✓	✓		

# Products and adoption

- Product Life Cycle – all products and services
- Product Adoption Curve – where are you and for what?

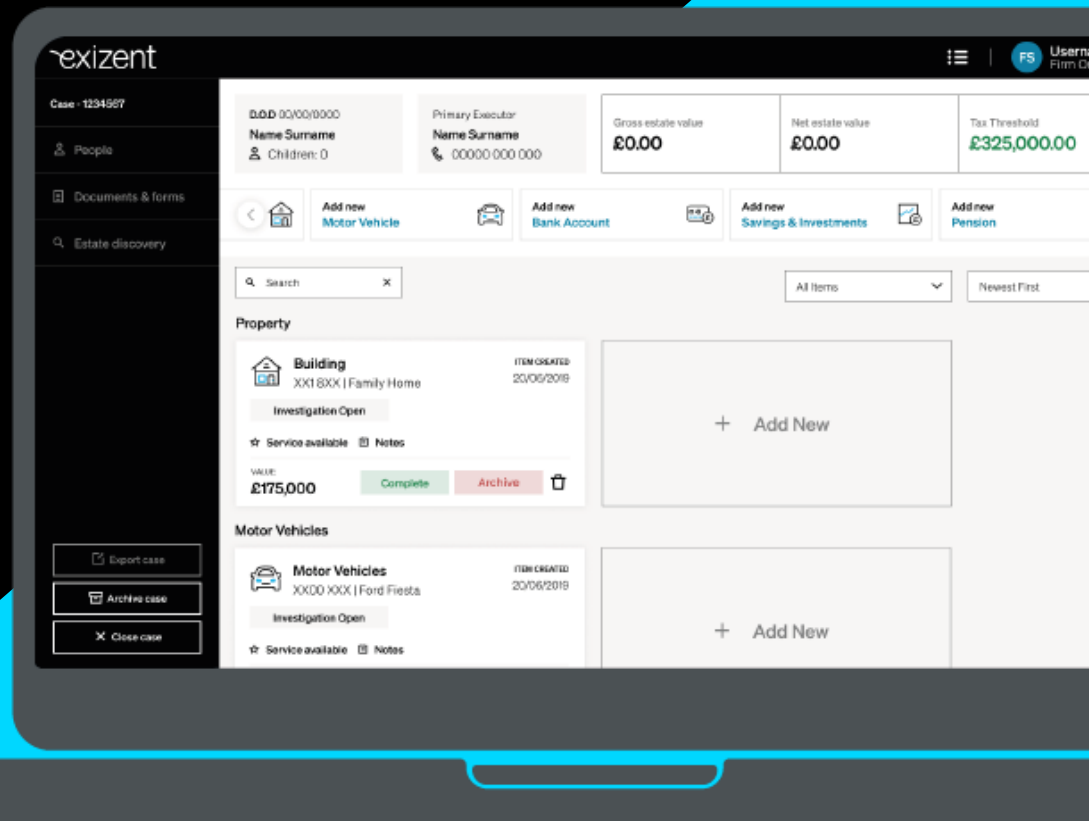


# Who wants what?

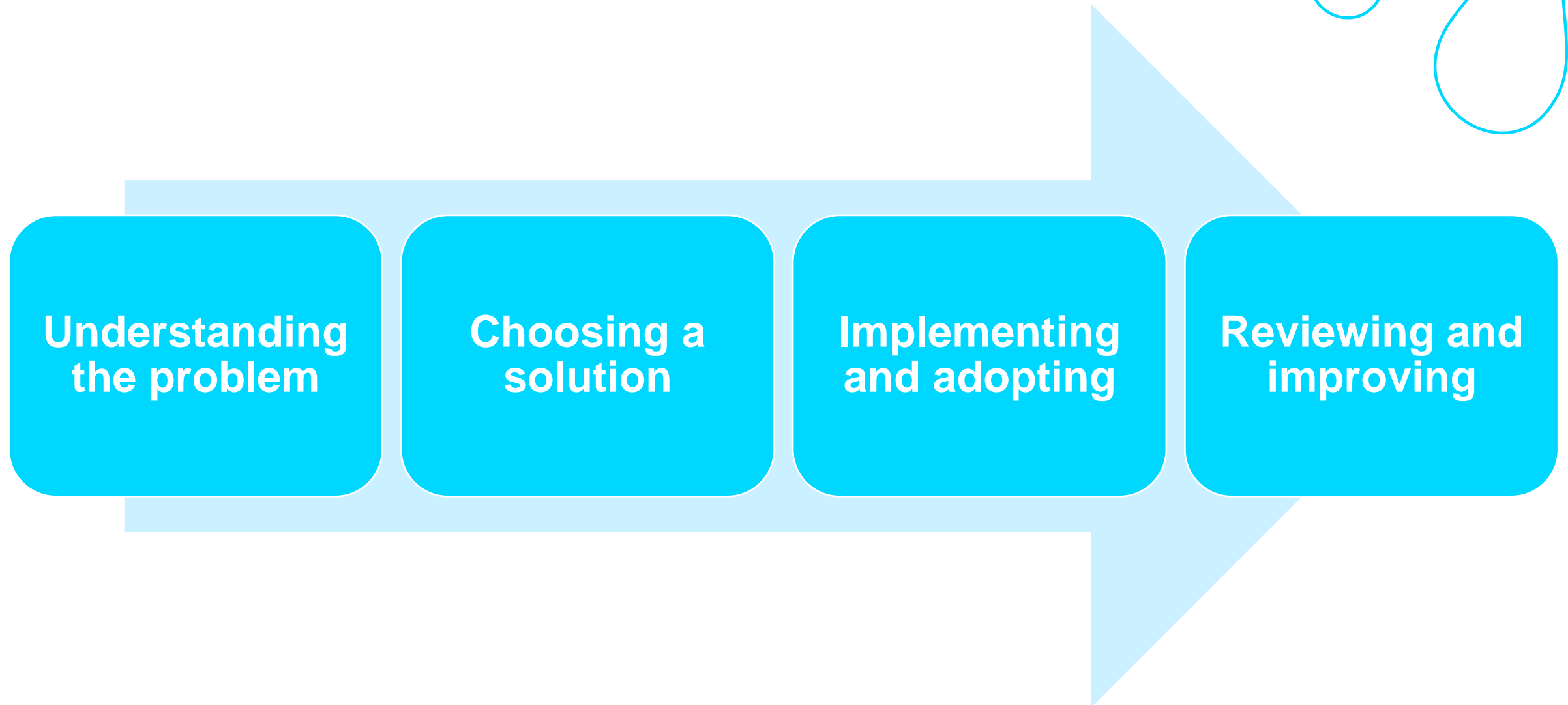


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An approach and things to consider



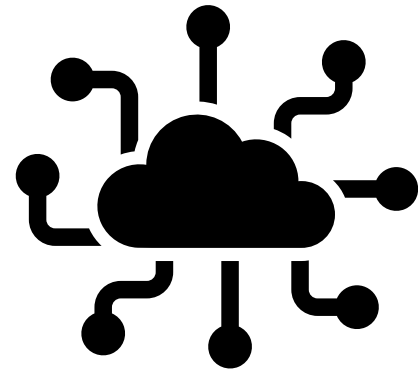
# A simple approach



# Understanding the problem

Things to consider

- What problems are you trying to address?
- What will solving them achieve?
- How do you want to decide on your course of action?



# Choosing a solution

Things to consider

## 1. Functionality needed

- High level, detailed MoSCoW or 'best fit'
- What are future plans – 3-5 year timeline?

## 2. Ease of adoption

- Usability, training and support
- Integration and migration – APIs and approaches

## 3. Non-functional requirements

- Security and compliance – standards and regulation
- Availability and business continuity

## 4. Benefits case

- Productivity and quality – reduced admin costs, ability to take on more work, greater overall profitability, consistency, business continuity
- Cost savings – local hosting and support, printing, administration, existing software
- People – recruitment, retention, stress
- New costs – make sure you understand the year 1 and likely future costs





# Implementing and adopting

Things to consider

## 1. Can you learn from others?

- Vendors
- Testimonials, case studies, reference sites, recommendations – being realistic

## 2. User Training & Onboarding

- What training options are there?
- Is there a comprehensive onboarding programme?
- What support is available?
- Cultural and long-term fit

## 3. Change Management

- Consider having a trial or a pilot program – perhaps with super-users or ‘champions’
- Develop a change management/implementation plan along with the software provider to address any resistance to change (they've done this many times before!)
- How will the software integrate with your existing tools/processes? Does it need to?
- How will you ‘migrate’? Do you need to?



# Reviewing and improving

Things to consider

## 1. How will you know you are realising the benefits planned

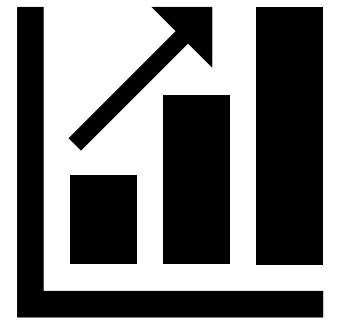
- Have internal checkpoints on the implementation and adoption plan
- Have some metrics you are happy with – qualitative and quantitative

## 2. Engaging with the vendor and their tools

- Feed into the product roadmap
- Use the support channels and tools, eg 1:1, knowledge base, training
- Make proficiency part of continuing competence / CPD

## 3. Plan for further change and improvement

- Of the product
- Of your usage of it



# Closing views

- Purpose of LawTech / LegalTech is beneficial to all
- Technology ought to be a key enabler of business strategy
- Opportunities undoubtedly exist – for firms, clients and in technology partnering
- There is lots going on and some change is inevitable – it would be wise to devote some resource and lean on what is happening elsewhere
- AI is potentially really impactful – the question ought to be how to approach and use
- Common approaches based on good practice and lessons learned will optimise the chances of success





# Q & A

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