

# Bridging law and technology

As law firms invest more in IT, how is new technology changing the role of the professional support lawyer?

**By Joanna Goodman in association with Thomson Reuters**

Law firms are investing heavily in technology, with significant IT budgets spread across multiple systems and applications. On the knowledge management (KM) front, many on premise solutions and online resources are designed to facilitate legal research, which was traditionally done by professional support lawyers (PSL). Others involve process automation, where firms are recognising the value of increasingly smart productivity tools, some of which involve an element of artificial intelligence (AI). But technology is far from replacing PSLs. Conversely, as legal service providers focus sharply on technology as a driver of competitive advantage, PSLs are moving up the law firm value chain, managing the interfaces between technology, processes and people and acting as a bridge between lawyers and the technology function that supports the business.

“Technology has freed up PSLs from routine tasks, enabling them to concentrate on their core role, which is to help lawyers provide the firm’s clients with the best mix of advice, service and value,” says Carol Aldridge, head of KM at Burgess Salmon. Aldridge underlines the symbiotic nature of PSLs’ relationship with technology. “It’s not just about technology changing what PSLs do; PSLs are also instrumental in identifying the firm’s technology needs and engaging lawyers in using its IT resources.”

Burgess Salmon’s KM system is focused on sophisticated search capability and business support tools including client relationship management (CRM) and business intelligence (BI). Aldridge credits the widespread use of the system to PSLs who contributed to its design and are making sure the lawyers in their practice areas and sectors can access the resources they need. In terms of technology, PSLs are tasked with ensuring lawyers know what tools and technologies are available and understand how and when to use them. They identify and select IT resources and are critical to rolling them out across the business. And they often organise IT training. The latest addition to the Burgess Salmon IT toolkit was a proof reading and citation checking tool.

## Moving up the value chain

Traditionally, the PSL role mostly involved finding and disseminating the firm’s knowledge resources, conducting legal research and delivering precedents, know-how and other relevant documents to lawyers when they needed them.

“We have a proactive approach to tech which makes it easier to access the firm’s knowledge, expertise and resources,” says Aldridge. “Our PSLs are experienced lawyers who add value by bringing together content and support to help their teams deliver the best mix of advice, service and value to their clients. Technology has taken away some of the legwork and freed them up to focus on what that means.”

PSLs work closely with partners and practice groups and know their teams and their clients well. They can look at the precedents and technologies and decide on the best combination for particular matters. They add value by applying expertise rather than simply bringing various documents and materials to the attention of their practice and sector groups. “That’s a big change and it makes the PSL role more strategic and more fulfilling,” Aldridge explains. “The other consequence is that it makes the role more diverse as different practice areas and clients want different kinds of support, tailored to their specific requirements. That means the PSLs have less of a common base of activities than they had previously, when their roles were more similar.”

“When it comes to providing lawyers with knowledge and know-how, technology has shifted the balance from push to pull and moved the PSL role up the value chain,” observes Simone Pearlman, head of legal knowledge at Herbert Smith Freehills (HSF). At HSF, PSLs are central to IT-led KM and collaboration projects.

These include upgrading the firm’s SharePoint know-how database to create collaboration spaces, and introducing messaging apps like Yammer. “Email is not the best way to share knowledge in a big organisation where collaboration in the digital space is increasingly important,” explains Pearlman. “We are piloting Yammer and our knowledge team will be heavily involved in encouraging users to use it. Lawyers’ favourite means of communication is email and PSLs are at the forefront managing the change to messaging apps. Our desire would be to apply messaging in a way that facilitates access to knowledge, instead of sending a general query out by email.”

Sophisticated search capability, such as Solcara Legal Search from Thomson Reuters, supports collaboration by enabling lawyers in practice, sector and project groups as well as cross-practice teams working on specific matters to organise search results into virtual folders that can be shared across various internal collaboration platforms – another reason to move lawyers away from email to alternative collaboration and messaging tools that offer easier flexibility and scalability across the business.

Another factor that has changed the role of the PSL is the availability of online knowledge resources such as Practical Law which give lawyers instant access to the latest legal developments and precedents which can be combined with current awareness products that send relevant updates straight to people's desktops. "Where they used to have much more of an information gathering role, our PSLs now focus on adding technical expertise and value. This has been a gradual change, partly prompted by the availability of online resources."

This means PSLs need enhanced skill sets. "Our PSLs are high-value legal and technical experts. They also get involved in management decisions. For example, some are involved in practice area business development plans and advising partners on trends in the market and sectors that affect their practice," adds Pearlman. "You can't get that tailored expertise from an online service."

Solcara Legal Search federated search technology allows lawyers to search across all a firm's internal and external resources – bringing together external precedents and relevant, up-to-date sector information with internal know-how from across the firm. This is particularly relevant as more firms are subscribing to multiple external research sites.

## Automating know-how

Document automation has become part of the new normal in legal. At the higher end of the market it boosts margins and enables firms to price more competitively, particularly as automated processes are scalable, so once they are set up, they allow firms to handle large volumes of work without requiring additional staffing.

David Halliwell, Pinsent Masons' director of knowledge and innovation delivery is also happy to rely on external services for legal updates and precedents. And he emphasises that KM is more than precedents and automation. "Our lawyers understand that KM doesn't just mean creating a few precedents and automating a first draft. It means building all that into a technology-driven process that embeds the firm's knowledge. That is where the best legal artificial intelligence tools are heading and it is where our PSLs are focusing their efforts."

"Our partners recognise that legal service delivery is a process," explains Halliwell. "It may be a sophisticated process or one which involves large elements of creativity, but every transactional dispute or deal and every piece of regulatory advice involves a process. Lawyers understand that we are able to deliver them legal knowledge when and where they need it rather than them having to find it. The skill of the PSLs is in making sure that the right knowledge is available at the right part of the process. Technology is changing their role so that as the more standardised work gets embedded in the process, they have greater ability to facilitate uncovering the cutting-edge market practice from our client-facing lawyers."

Pinsent Masons' PSLs (or practice development lawyers (PDLs)) work with lawyers to identify and understand clients' requirements. Knowledge capture is a key part of their role. "As we are advising clients and changing the way clauses are drafted, transactions are structured or disputes arguments are run in response to client requirements, changes in law or market practice the PDLs ensure that information is embedded into our knowledge tools," says Halliwell. "That's what they should always be doing rather than creating precedents."

Pinsent Masons has automated over 800 contracts using Contract Express. This development was driven by the type of work the firm does, which includes handling fixed-price contract reviews for major clients. In order to do this, PDLs require a blend of legal expertise and technology skills. "They have to understand how the technology works, but they also need to understand how contract structures work and apply a much more process driven approach than putting a contract together. They therefore have to be more technically capable."

Firms' reliance on online resources and automated processes mean that PSLs need to be tech-savvy – not just in terms of understanding the firm's IT resources and empowering lawyers to use them, but in order to identify opportunities to leverage new technology in ways that help the firm stay ahead of the innovation curve.

Claire Stripp, head of learning & talent development at Browne Jacobson, agrees that the PSL role has become more technology focused. She believes that lawyers' use of technology generally will accelerate when generations shift in law firms. "A few years ago we were told that Gen Y would change the way we practice law, as young tech-savvy lawyers demanded new ways of working, but this never happened and most firms could be making better use of technology. PSLs are the link between lawyers and technology, and a key part of their role is identifying how tech can deliver what lawyers need. Because they understand both law and technology, they can identify how technology could be applied to particular legal issues."

## Technology-led client services

Technology has shifted the PSL role from gathering and disseminating information to a more strategic level, bringing together the firm's legal, technical and technological resources to identify and deliver on clients' requirements. They also require technology skills as they are involved in creating platforms for tailored and innovative services that help build and maintain competitive advantage. What is often forgotten is that PSLs are first and foremost specialist lawyers.

"PSLs act as a bridge between IT and the business," explains Pearlman. "They've been at the coal face as lawyers and they are also technical experts. Not many lawyers are tech-savvy and most IT people need to learn how lawyers work in order to apply the best solutions."

Aldridge agrees, adding that the sector expertise plays to PSLs' strength as lawyers as they can add value in a more focused way. At Burges Salmon one PSL is focusing on providing clients with e-learning while another is developing value-added services to help a high-profile retail client leverage a small legal department.

## Leading change

Like other businesses, law firms need to respond to the dynamic technology landscape, and as lawyers and technologists, PSLs are ideally placed to manage change. At Burges Salmon, the PSL contribution framework includes leadership and change management. "Lawyers who have learned to use technology can explain to other lawyers far better than anyone else how to get the best out of that technology," says Aldridge.

At Browne Jacobson, Stripp believes that engaging lawyers in technology is a business-critical element of the PSL role. "Plenty of law firms are investing in technology that supports management and drives innovation, but I don't see so many lawyers using it effectively in the day-to-day practice of law," she says. "We were expecting Gen Y to do that, but we are not yet seeing young, tech-savvy lawyers finding new ways of doing things. So it's down to PSLs to lead the change."

Right now, intuitive user interfaces can help to engage lawyers who may be less tech-savvy by providing them with an easy way into the firm's knowledge resources. For example, Solcara Legal Search offers a single log-in so that users can access their firm's subscriptions as well as internal documents and public sites in a fast and straightforward way without having to log into different systems and remember multiple passwords.

At the Practical Law Knowledge Management Forum 2016, one presenter read out a list of new technologies and asked who was using them, and responses from attendees mostly from top 50 law firms showed that although most firms are looking into AI and other cutting-edge tech, so far there are only a few early adopters. The signs are that technology will not be replacing lawyers or PSLs any time soon. In fact, from the PSL perspective, advances in technology are likely to further enhance their strategic position in the business as enablers of technology, innovation and change.

## Contact us for more information:

**Email:** [legalsolutions.uki@thomsonreuters.com](mailto:legalsolutions.uki@thomsonreuters.com)

**Visit:** [legalsolutions.thomsonreuters.co.uk](http://legalsolutions.thomsonreuters.co.uk)

### **Thomson Reuters**

Thomson Reuters is the world's leading source of news and information for professional markets. Our customers rely on us to deliver the intelligence, technology and expertise they need to find trusted answers. The business has operated in more than 100 countries for more than 100 years. For more information, visit [www.thomsonreuters.com](http://www.thomsonreuters.com)