

Transparency: Beyond the Extranet

Julie Kremer

Enterprise Technology Strategist
Microsoft

Deborah McMurray

CEO and Strategy Architect
Content Pilot LLC

Jon Parish

Sr. Client Systems Analyst/Project Coordinator
Pillsbury Winthrop Shaw Pittman LLP

Steve McHargue, Moderator

Senior Consultant
Project Leadership Associates

Panelists

Julie Kremer, Enterprise Technology Strategist
Microsoft

Deborah McMurray, CEO and Strategy Architect
Content Pilot

Jon Parish, Senior Client Systems Analyst/Project Coordinator
Pillsbury Winthrop Shaw Pittman LLP

Steve McHargue (Moderator), Senior Consultant
Project Leadership Associates

Agenda

- Introduction
- Changing Client Demands
- Social Media and Other Tools
- How Extranets Add Value
- Build a Bridge to 2020: The Right Steps to Manage Change

Introduction

- What is an extranet?

A secured access web application that is jointly used by both our law firms and those that work with us.

- What is transparency?

The degree to which our firms appear integrated with and governed by our clients.

Changing Client Demands

- What are clients looking for?
 - Efficient solutions to their particular legal needs
 - Quick answers to questions and access to experts – without obstacles
 - Specific technology solutions to business needs that are closely related to their legal needs and that advance business goals
 - Integration with their regular work and tailored to their particular business
 - Predictable, easier to understand (and lower) costs

Changing Client Demands

- July 2010 ILTA Extranet Survey Results
 - Nearly half of respondents reported adding features in direct response to client requests*
 - Custom forms, lists/reports, content and databases
 - Billing, budget and WIP information
 - Case intake, case management and decision support tools
 - Sharing with multiple law firms
 - Q&A forum with attorneys
 - Competitive intelligence reports
 - Subpoena tracking tool
 - Integration with Outlook

Social Media & Other Tools

- Blogs, wikis
- Microblogging
- News Aggregators
- Enterprise Search
- Mash ups
- Real-time collaboration and communication

How Extranets Add Value

- Build your extranet around clients' *strategic* goals
 - Reduce cost, reduce risk, market expansion/domination
 - Integrates the law firm with the client and enhances and increases customer loyalty
- Time savings results in cost savings
 - Enable effective and efficient collaboration 24/7
 - Automation reduces transaction time
- Business-style tools (Word docs, workflows)
 - Create a familiar working environment
- Status/Transparency
 - Reporting tools give clients a higher level of awareness of their legal situation

How Extranets Add Value

- Differentiates your firm from your competitors
 - Jointly scope the features/functionality of each extranet with your client
 - Design friendly and intuitive user interface that maintains visual integrity as it grows
 - Don't add features, feeds, etc. that they don't want
 - Collaboration features must be front and center
 - Quantify hard and soft cost savings to your clients at least annually
 - Track client use and benefits to each user in the legal dept

How Extranets Add Value

- July 2010 ILTA Extranet Survey Results:
 - Document management/sharing
 - Shared calendars and contacts lists
 - Status/progress tracking, case management
 - Less email proliferation
 - Improved efficiency and reduced costs (travel, postage, time, copying, etc.)
 - Collaboration/communication
 - Transparency (docket information, invoices, unbilled time, case notes, etc.)
 - Customized solutions to meet the needs of the client/case

Building a Bridge to 2020

- What will/must change?
 - Change must be client-driven, client-demanded
 - Automated extranet creation
 - Integration with disparate systems
- Proliferation of more highly specialized legal applications that focus on a particular type of transaction
- Now and in the future, it's about dynamic, data-driven applications.

Building a Bridge to 2020

- How?
 - Establish measurable goals
 - Generate awareness of value-add to clients
 - Invest in tailored applications
 - Wider scale adoption for best applications
 - Think strategically
 - What applications would improve your business? What applications will improve your clients' business?
 - Consider off-the-shelf products

Building a Bridge to 2020

- Impediments?
 - Attorney mindset
 - Firms aren't thinking strategically
 - Legal ethics
 - Law firm culture
 - Varying levels of attorney tech savvy
 - Right mix of IT resources
 - Education

Wild Guesses for the Future



Final Thoughts

- What is beyond the extranet?
- What is transparency success?

Questions?

Julie Kremer

Enterprise Technology Strategist, Microsoft

juliekre@microsoft.com

Deborah McMurray

CEO and Strategy Architect, Content Pilot LLC

mcmurray@contentpilot.net

Jon Parish

Senior Client Systems Analyst/Project Coordinator

Pillsbury Winthrop Shaw Pittman LLP

jonathan.parish@pillsburylaw.com

Steve McHargue

Senior Consultant, Project Leadership Associates

SMcHargue@projectleadership.net