ILTA's 2023 Technology Survey

Q1.1 **ILTA'S 2023 TECHNOLOGY SURVEY**

Section 1: INTRODUCTION

Over the last several decades, in each of these introductions to the Survey, we have told our readers and users, time after time, that the ILTA Technology Survey offers vital information for our industry.

And this has never been more true. For our partners, members, and those in all facets of legal technology, these last few years, and this year, have been among the most challenging we have ever faced.

2023 has seen us look at the user of the survey more than ever. Our survey volunteer team, staffed with technologists from every corner of legal, have tried to step into their shoes, to look at the problems they had to solve to even get to this point. We then tried to imagine how they would use the tech they currently have, the tech they will have over the course of this year, and we've had to imagine what their end of the year and into the next year will have.

We know many of our member firms use this survey to help tackle budgets, to help plan for staffing and IT needs, and much more. We hope that we can continue to help you fill that need, while looking ahead to how you use technology, and how different products or services can help you achieve your specific need. Our review of product names, uses, and more was more extensive and far-reaching than ever.

Last year, with 541 firms providing input, and with our analysis by entity size, we again knew that the survey provided substantive data, but we also knew that some questions had to be retired. To that end, many questions were replaced, and in their place are new topics and sections that will allow your firm to see the changes in the marketplace.

 A wholly new section on emerging technologies has been added. We're working to continue to position the survey to help our member firms find solutions to the problems of the future, now. We hope that you will find the 2023 Technology Survey useful and adapting to these changing times. As always, we look to expand our questions and answers to best incorporate how you, ILTAns, are using the Survey. Thank you for your continued participation and usage of the Survey.

If you'd like to share the questions with others on your team, we've included a PDF of all the questions included in the online survey XXILTAs_2023_Technology_Survey.pdf.

Editor's Note: At ILTACON 2023 (Orlando), we again will be offering an in-person session on the Technology Survey. This session will allow our members and partners a chance to again talk with our volunteer team, ask questions, and open the floor for feedback, and for new topics for possible Survey inclusion. ILTA continues to solicit member and partner feedback for this Survey in new and innovative ways and we strongly believe that this open dialogue, with members and partners has increased the useability of this Survey.

FEATURE: Table of Contents

A Table of Contents (ToC) button is provided on the bottom of each page to allow you to easily jump between sections. You can also access the Table of Contents sidebar using the icon on the top left of each page. Click the icon to open the Table of Contents and click the icon again to close the Table of Contents. Within the ToC, a check mark next to a section indicates you viewed all questions in that section, but it does not necessarily indicate that you answered all questions. Please review each section to ensure you answered all questions prior to final submission. Select the "Next or Save" button (on the bottom right of each page) to save your responses before continuing to the following page or exiting the survey.

 We sincerely appreciate your time in sharing an overview of your technology landscape. Please use the "Next or Save" button to proceed.

Q1.2 **Required Information:**

ILTA believes that clean, clear data is an integral part of the Technology Survey. This year, we ask that you note the current number of attorneys in your firm; the data is not attributed to specific firms, but is used in the firm-size charts. This is a required question and without this data, you will be unable to fully submit your 2023 Technology Survey and will be ineligible to receive a final copy at no cost. We thank you for your participation.

Please provide a numeric response to the following questions regarding your firm.

(NOTE: THIS IS A REQUIRED QUESTION. You must answer provide a response in order for your submission to be valid.)

- ○ Number of lawyers: _____

- ○ Number of **total** users: (answer should include number of lawyers)

  _____

- ○ Number of offices: _____

Q2.1 Section 2: INFRASTRUCTURE

Q2.2 Which PRIMARY server operating system does your firm use?

○ None/Not applicable

○ Windows Server 2012

○ Windows Server 2016

○ Windows Server 2019

○ Windows Server 2022

○ Other (please specify) _____

Q2.3 Which PRIMARY server operating system is your firm currently deploying on NEW servers?

○ None/Not applicable

○ Windows Server 2016

○ Windows Server 2019

○ Windows Server 2022

○ Other (please specify) _____

Q2.4 Which PRIMARY brand of server is your firm currently deploying?

○ None/Not applicable

○ Cisco

○ Cloud/Virtual

○ Dell

○ HP

○ Lenovo

○ Nutanix

○ Other (please specify) _____

Q2.5 What PRIMARY Hyperconverged Technology does your firm use?

○ None/Not applicable

○ Cisco HyperFlex

○ HPE SimpliVity

○ Nutanix

○ VMWare EVO

○ VMWare vSAN

○ Other (please specify) _____

Q2.6 What percentage of your physical servers are Hyperconverged Technology?

Move slider to indicate response.

	0 10 20 30 40 50 60 70 80 90 100
% Hyperconverged Technology	━━━━━┃━━━━━

Q2.7 Which PRIMARY brand of SAN (storage area network) solution does your firm use for very high-capacity disk storage?

○ None/Not applicable

○ Dell Compellent

○ Dell EMC

○ Dell EqualLogic

○ Dell PowerVault

○ HPE MSA/3Par

○ HPE Nimble

○ NetApp

○ Nutanix

○ Pure Storage

○ Other (please specify) _____

Q2.8 Which brand(s) of video conference system(s) does your firm use in conference rooms?

(select all that apply)

- ☐ None/Not applicable

- ☐ Cisco/Tandberg

- ☐ Crestron

- ☐ Lifesize

- ☐ Logitech

- ☐ Microsoft Teams

- ☐ Poly (Polycom)

- ☐ Zoom Room System

- ☐ Other (please specify) _____

Q2.9 Which Video Conferencing Software (Desktop, Laptop, Tablet, Phone) does your firm use?

(select all that apply)

- ☐ None/Not applicable

- ☐ BlueJeans Meetings from Verizon

- ☐ Cisco Webex

- ☐ GoTo Meeting

- ☐ Lifesize

- ☐ Microsoft Skype for Business

- ☐ Microsoft Teams

- ☐ RingCentral

- ☐ Zoom

- ☐ Other (please specify) _____

Q2.10 Which unified communications technology does your firm currently use, or which are you considering, evaluating, or planning to implement?

(select all that apply)

☐ None/Not applicable

☐ 8x8

☐ Cisco Unified Communications

☐ Microsoft Teams

☐ Mitel (Shoretel)

☐ RingCentral

☐ Zoom

☐ Other (please specify) _____

Q2.11 Which PRIMARY server virtualization platform does your firm use?

○ None/Not applicable

○ Citrix Hypervisor

○ Microsoft Hyper-V

○ Nutanix AHV

○ VMWare

○ Other (please specify) _____

Q2.12 Which software distribution tools does your firm use for automating software installations and updates?

(select all that apply)

☐ None/Not applicable

☐ Desktop Central (ManageEngine)

☐ Ivanti Endpoint Manager

☐ Kaseya

☐ Lansweeper

- ☐ Microsoft Deployment Toolkit (MDT)

- ☐ Microsoft Group Policies

- ☐ Microsoft MEM (Microsoft Endpoint Manager/Intune)

- ☐ Microsoft MEM (Microsoft Endpoint Manager/SCCM)

- ☐ Microsoft WSUS

- ☐ Ninite

- ☐ NinjaOne

- ☐ PDQ Deploy

- ☐ Quest Kace

- ☐ SolarWinds

- ☐ Custom, scripted setup routines (e.g., MSI, setup.cfg)

- ☐ Other (please specify) _____

Q2.13 Which PRIMARY remote-control software for helpdesk does your firm use?

- ○ None/Not applicable

- ○ BeyondTrust Remote Support (Bomgar)

- ○ Citrix Shadow feature

- ○ ConnectWise Control

- ○ Desktop Central (ManageEngine)

- ○ GoToAssist (GoTo)

- ○ GoverLan

- ○ Microsoft MEM (Microsoft Endpoint Manager)

- ○ Microsoft Remote Desktop/Remote Assistance

- ○ Proxy Networks Proxy Pro

- ○ Solarwinds DameWare Remote Everywhere

- ○ Splashtop

○ TeamViewer

○ VNC

○ Other (please specify) _____

Q2.14 Which remote access technologies does your firm provide for users?

(select all that apply)

☐ None/Not applicable

☐ Azure Virtual Desktop

☐ Citrix (mobile device, laptop, desktop)

☐ GoToMyPC (GoTo)

☐ LogMeIn Pro (GoTo)

☐ Microsoft DirectAccess

☐ Microsoft Remote Desktop Connection (device-to-PC)

☐ Microsoft Remote Desktop Services (device-to-Terminal Server)

☐ Outlook Web Access

☐ Remote Access VPN (mobile device, laptop, desktop)

☐ TeamViewer

☐ VMware Horizon/View (VDI)

☐ Other (please specify) _____

Q2.15 Which PRIMARY VPN product does your firm use?

○ None/Not applicable

○ Checkpoint Secure Remote Access

○ Cisco AnyConnect

○ Fortinet Forticlient

○ Palo Alto Global Protect

○ Sonic Wall Global VPN Client

○ ZScaler Private Access

○ Other (please specify) _____

Q2.16 Which VPN features does your firm use?

(select all that apply)

☐ Always On

☐ On-Demand

☐ Split DNS

☐ Other (please specify) _____

Q2.17 Which software-defined WAN (SD-WAN) Vendor(s) does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Cisco SD-WAN

☐ Cisco Meraki SD-Wan

☐ Citrix

☐ Fortinet

☐ HPE Aruba (formerly Silver Peak)

☐ Lumen (CenturyLink)

☐ Palo Alto

☐ VMWare

☐ Other (please specify) _____

Q2.18 Which brand(s) of network switches does your firm use?

(select all that apply)

- ☐ None/Not applicable
- ☐ Cisco
- ☐ Dell
- ☐ Extreme Networks
- ☐ Fortinet
- ☐ HPE (Aruba)
- ☐ Juniper
- ☐ Meraki
- ☐ Netgear
- ☐ Ubiquiti
- ☐ Other (please specify) _____

Q2.19 Which brand(s) of Wireless Access Points (WAP) does your firm use?

(select all that apply)

- ☐ None/Not applicable
- ☐ Cisco
- ☐ Cisco Meraki
- ☐ D-Link
- ☐ Fortinet
- ☐ HPE (Aruba)
- ☐ Juniper
- ☐ Linksys
- ☐ Ruckus
- ☐ Ubiquiti

☐ Other (please specify) _____

Q2.20 Which Network Access Control (NAC) product(s) does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Aruba ClearPass Policy Manager

☐ Auconet Business Infrastructure Control Solution (BICS)

☐ Cisco ISE

☐ Extreme Networks Extreme Management Center

☐ Forescout Platform

☐ Fortinet FortiNAC

☐ Huawei iMaster NCE-Campus

☐ InfoExpress CGX

☐ Ivanti NAC

☐ macmon Secure macmon NAC

☐ Netshield

☐ OPSWAT MetaAccess NAC

☐ Portnox Clear

☐ Ruckus Cloudpath Enrollment System

☐ Other (please specify) _____

Q2.21 Which software does your firm use for hardware/software inventory control?

(select all that apply)

☐ None/Not applicable

☐ Freshworks (FreshDesk, FreshService)

☐ LanSweeper

- ☐ Microsoft Access

- ☐ Microsoft Excel

- ☐ Microsoft MEM

- ☐ PDQ Inventory

- ☐ Quest Kace

- ☐ ServiceDesk Plus (ManageEngine)

- ☐ Spiceworks

- ☐ TrackIt! (BMC)

- ☐ Custom/Developed in-house

- ☐ Other (please specify) _____

Q3.1 Section 3: DESKTOP/LAPTOP HARDWARE AND OPERATING SYSTEMS

Q3.2 Which PRIMARY workstation operating system does your firm use?

- ○ None/Not applicable

- ○ Windows 10

- ○ Windows 11

- ○ Other (please specify) _____

Q3.3 Excluding remote access use, how does your firm PRIMARILY deliver the desktop internally to users?

- ○ None/Not applicable

- ○ Citrix Virtual Apps (XenApp)

- ○ Citrix Virtual Desktop (XenDesktop)

- ○ Locally installed applications on traditional physical devices (desktops/laptops)

- ○ Microsoft Remote Desktop Services

○ Microsoft Virtual Desktop (Azure/Windows Virtual Desktop)

○ VMWare Horizon (VDI)

○ Other (please specify) _____

Q3.4 Which provider add-ins does your firm use to help manage or enhance thin-client or virtual desktop infrastructure (VDI)?

(select all that apply)

☐ None/Not applicable

☐ Citrix Unidesk

☐ Ivanti

☐ Liquidware (ProfileUnity/UEM, Flexapp, Stratusphere)

☐ Microsoft FSLogix

☐ Tricerat ScrewDrivers

☐ Other (please specify) _____

Q3.5 Which PRIMARY brand of **Desktop** computer is your firm currently deploying?

○ None/Not applicable

○ Dell

○ HP

○ Lenovo

○ Other (please specify) _____

Q3.6 Which PRIMARY brand of **Laptop** computer is your firm currently deploying?

○ None/Not applicable

○ Dell

○ HP

○ Lenovo

○ Microsoft

○ Other (please specify) _____

Q3.7 When selecting laptops, what are your firm's **top three** most important criteria?

(select three choices from list below)

☐ Battery Life (hours of time)

☐ Brand

☐ Docking features and ports

☐ Durability/Service

☐ Keyboard/Touchpad

☐ Memory (more)

☐ Operating System (Windows, MAC OS)

☐ Price

☐ Processor

☐ Screen Size

☐ Tablet

☐ Weight

☐ Other (please specify) _____

Q3.8 Approximately what percentage of lawyers in your firm use laptop computers in place of desktop PCs or thin clients (please estimate if needed)?

Move slider to indicate response.

	0	10	20	30	40	50	60	70	80	90	100
% of attorneys											

Q3.9 Approximately what percentage of professional staff in your firm use laptop computers in place of desktop PCs or thin clients (please estimate if needed)?

Move slider to indicate response.

	0 10 20 30 40 50 60 70 80 90 100
% of professional staff	

Q3.10 Which wireless video display technology product(s) does your firm use?

(select all that apply)

- ☐ None/Not applicable

- ☐ Apple AirPlay/Apple TV

- ☐ Barco Clickshare

- ☐ Chromecast

- ☐ Cisco Proximity

- ☐ Crestron Airmedia

- ☐ Intel Wireless Display WiDi

- ☐ Mersive Solstice

- ☐ Microsoft Wireless Display Adapter

- ☐ Miracast / Wi-Fi Alliance

- ☐ Zoom

- ☐ Other (please specify) _____

Q4.1 Section 4: OFFICE APPLICATIONS

Q4.2 Which PRIMARY office application software does your firm use?

- ○ None/Not applicable

- ○ Microsoft 365 Business (all versions)

- ○ Office 2016

○ Office 2019

○ Office 2021

○ Other (please specify) _____

Q4.3 Which office application suite do you expect to be your firm's PRIMARY office application suite 12 months from now?

○ None/Not applicable

○ Microsoft 365 Business (all versions)

○ Office 2016

○ Office 2019

○ Office 2021

○ Other (please specify) _____

Q4.4 Which PRIMARY macro and template package does your firm use?

○ None/Not applicable

○ BEC LegalBar

○ BigHand Document Creation (previously BigHand Create and PayneGroup (BigHand))

○ Crowther Consulting

○ Infoware Word LX

○ Litera Create (formerly Legal MacPac, Innova, and Forte)

○ ProLaw

○ Custom/Developed in-house

○ Other (please specify) _____

Q4.5 Which PRIMARY paragraph numbering solution does your firm use in Microsoft Word documents?

○ None/Not applicable

○ BEC LegalBar

○ BigHand Document Creation (previously BigHand Create and PayneGroup Numbering Assistant)

○ Crowther Consulting

○ Infoware Word LX

○ Litera Create (Litera Numbering, TOC, DocID, Litera Forte, Litera Innova, and Litera DocXTools)

○ Native Microsoft Word numbering

○ Custom/Developed in-house

○ Other (please specify) _____

Q4.6 Which additional document assembly or document automation tools (other than macro and template packages and/or templates and numbering) does your firm use to accelerate the creation of documents?

(select all that apply)

☐ None/Not applicable

☐ Automated Civil Litigation (ACL)

☐ BEC Assemble-It

☐ HighQ Document Automation

☐ HotDocs

☐ IPDAS (Autodocs)

☐ Litera Check (formerly Contract Companion, Litigation Companion, Best Authority, and DocXtools Companion)

☐ Native Microsoft Word Tables of Authority

☐ Thomson Reuters Contract Express

☐ Thomson Reuters Drafting Assistant

☐ Custom/Developed in-house

☐ Other (please specify) _____

Q4.7 Which document comparison (e.g., redlining) software does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Litera Compare (compareDocs, ChangePro, DocXTools Compare, Workshare Compare)

☐ Native Microsoft Word Track Changes

☐ NetDocuments ndOffice ndCompare

☐ Power PDF Advanced (Kofax)

☐ Other (please specify) _____

Q4.8 Which PRIMARY metadata checking/removal software does your firm use?

○ None/Not applicable

○ BEC MetaReveal

○ BigHand Metadata Management (previously Scrub or PayneGroup Metadata Assistant)

○ Litera Metadact (includes Microsystems 3BClean, DocsCorp cleanDocs, and Workshare Protect)

○ Microsoft Document Inspector

○ Mimecast

○ Custom/Developed in-house

○ Other (please specify) _____

Q4.9 Which PRIMARY scanner workflow software does your firm use to automate document routing processes?

○ None/Not applicable

○ AccuRoute (Upland/Omtool)

○ Kofax eCopy ShareScan

○ Kofax Equitrac

○ KwikTag

○ PaperCut

○ ScanQ/nQ Zebraworks

○ uniFLOW

○ Custom/Developed in-house

○ Other (please specify) _____

Q4.10 Which PDF editing and redacting software does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Adobe Acrobat Standard/Professional/DC

☐ Foxit Phantom PDF

☐ Kofax Power PDF

☐ Nitro PDF Pro

☐ pdfDocs (DocsCorp/Litera)

☐ Other (please specify) _____

Q4.11 Which PRIMARY conference room scheduling/management tool does your firm use?

○ None/Not applicable

○ AskCody

○ Condeco

○ EMS Legal (Accruent)

○ Full-Service Room Scheduling/FM:Systems (formerly Meeting Room Manager)

○ Native Microsoft Outlook

○ Rendezvous (NFS)

○ Resource Scheduler (Asure Software)

○ Custom/Developed in-house

○ Other (please specify) _____

Q4.12 Which Microsoft Teams Features has your firm deployed?

 (select all that apply)

☐ None/Not applicable

☐ Approvals

☐ Audio conferencing (E5 license or add-on SKU, i.e. dial-in option)

☐ Calendar

☐ Chat and collaboration

☐ Chatbots with virutal MS Agents

☐ File sharing

☐ Online meetings

☐ Polling

☐ Phone system (E5 license or add-on SKU)

☐ Shifts

☐ Stream

☐ Task management/Planner

☐ Viva Suite

☐ Other (please specify) _____

Q4.13 Which Microsoft Power Platform(s) are you using with Microsoft Teams?

(select all that apply)

☐ None/Not applicable

☐ Microsoft Dynamics

☐ Power Apps (low code app development)

☐ Power Automate (no code workflow automation)

☐ Power BI (analytics)

☐ Power Virtual Agents

☐ Other (please specify) _____

Q4.14 Which Microsoft Teams governance policies is your firm using?

(select all that apply)

☐ None/Not applicable

☐ Bring your own Encryption Key (BYOK) for O365

☐ Classification Labels

☐ Encryption with Azure Information Protection

☐ Enforced naming conventions

☐ Limitations on who can create Teams

☐ Restrictions on the ability to add guests on a per-team-basis

☐ Retention policies

☐ Security/Ethical walls enforcement/integration

☐ Sensitivity Labels

☐ Other (please specify) _____

Q4.15 Does your firm use a Cloud Access Security Broker (CASB) to secure Microsoft Teams or SharePoint Online?

○ None/Not applicable

○ Yes

Q4.16 Which PRIMARY Cloud Access Security Broker (CASB) is your firm using?

○ DUO MFA sits in front of Office 365 and Teams

○ Forcepoint

○ iBoxx

○ Microsoft Cloud App Security

○ Microsoft CASB

○ Microsoft Platform

○ MS Authenticator

○ Netskope

○ Zscaler

○ Other (please specify) _____

Q4.17 Does your firm enforce encryption of externally shared Microsoft Teams documents?

○ No, my firm does not enforce encryption of externally shared documents

○ No, my firm does not allow externally shared documents

○ Yes, via Microsoft Azure Information Protection

○ Yes, other (please specify) _____

Q4.18 How does your firm configure Microsoft Teams for client work?

○ None/Not applicable

○ Ad hoc as needed

○ One Team per client with channels for each matter

○ One Team per matter

○ Other (please describe) _____

Q4.19 Does your firm use private and/or public Microsoft Teams?

○ None/Not applicable

○ Private

○ Public

○ Both

Q4.20 How does your firm provision Microsoft Teams?

○ None/Not applicable

○ Manually

○ Power Automate

○ Third-Party tool

○ Other (please specify) _____

Q5.1 Section 5: DOCUMENT MANAGEMENT SYSTEM (DMS)/ENTERPRISE CONTENT MANAGEMENT (ECM)

Q5.2 Which PRIMARY document management system (DMS)/enterprise content management (ECM) system does your firm currently use?

○ None/Not applicable

○ iManage Work

○ Microsoft SharePoint

○ NetDocuments

○ Netdocuments Worldox (previously Worldox)

○ OpenText

○ Other (please specify) _____

Q5.3 Are you using a Sharepoint DMS product (e.g. Epona)?

○ Yes (please specify) _____

○ No

Q5.4 Where are your DMS/ECM libraries PRIMARILY located?

○ Cloud/SaaS

○ Co-located data center

○ On-premises

Q5.5 Does your firm plan to replace its DMS/ECM in the next 12 months?

○ None/Not applicable

○ Yes, to product undecided

○ Yes, to iManage

○ Yes, to NetDocuments

○ Yes, to Other (please specify) _____

Q5.6 Does your firm plan to migrate your CURRENT DMS/ECM to the cloud version in the next 12 months?

○ No/Not applicable

○ Already cloud

○ Yes

○ Yes, but it is a multi-year project

○ Other (please specify) _____

Q5.7 What reason(s) does your firm have for NOT using a cloud-based DMS/ECM?

(select all that apply)

☐ Cost

☐ Integration with third-party tools

☐ Low priority

☐ Other more important projects underway

☐ Patriot Act

☐ Security concerns

☐ Other (please specify) _____

Q5.8 What reason(s) does (or did) your firm have for choosing to move to a cloud-based DMS?

(select all that apply)

- ☐ DR/BC
- ☐ Improved accessibility/remote access
- ☐ New features
- ☐ Predictable annual costs
- ☐ Reduce maintenance
- ☐ SaaS model
- ☐ Security concerns
- ☐ Total Cost of Ownership
- ☐ Other (please specify) _____

Q5.9 Which policy restrictions does your firm have in place for storing data on network drives outside of a DMS/ECM?
(select all that apply)

- ☐ None/Not applicable
- ☐ All data on network drives must be organized by client number or name
- ☐ Ethical walls
- ☐ Users may load data on private drives
- ☐ Users may load data on shared drives
- ☐ Other (please specify) _____

Q6.1 Section 6: EMERGING TECHNOLOGIES

Q6.2 Please share any new-to-market and emerging desktop applications your firm is experimenting with or that you see as emerging players.

_____

_____

Q6.3 Is your firm using generative AI tools (ChatGPT, Dall-E, Harvey, etc.) for business tasks?

○ Yes

○ No

Q6.4 Which generative AI tools is your firm using?

(select all that apply)

☐ ChatGPT

☐ Dall-E

☐ Harvey

☐ Other (please specify) _____

Q6.5 What do you believe generative AI tools will be used for in the next 12 months at law firms?

 (select all that apply)

☐ For fun, not for work

☐ Creating initial drafts of documents

☐ Summarizing complex documents

☐ To brainstorm ideas

☐ To write/troubleshoot code

☐ To assist in writing presentations

☐ To assist in creating graphics or pictures

☐ To assist in writing alerts or email notifications

☐ For generating strategic ideas

☐ Other (please specify) _____

Q6.6 What is your firm's level of interest in investigating or piloting Harvey.ai (a legal-specific GPT-based platform)?

○ Unknown

○ Already underway

○ On the waiting list

○ Not interested yet

○ Other (please specify) _____

Q6.7 What official policy does your firm have on the use of ChatGPT or other Generative AI tools?

○ None/Not applicable

○ No official policy but warnings/ethics tips have been issued

○ We have a policy not to use it for client research or document generation

○ We have a policy against any use of these tools on Firm systems

○ We encourage users to experiment with it.

○ We are actively using a Generative AI tool in practice (Harvey, ChatGPT, Google Bard, etc.)

○ Other (please specify) _____

Q6.8 What is your firm doing to monitor/block/familiarize the workforce on Generative AI?

(select all that apply)

☐ Nothing/Not Applicable

☐ We offer periodic learning sessions to users about Generative AI

☐ We encourage users to experiment with these technologies but not with client work

☐ We have active projects or "proof of concepts" underway with generative AI

☐ We established a GAI review council or task force

☐ We issued a warning about using this technology for client work

☐ We have published a formal policy against use of Generative AI at the present time

☐ We force a pop-up on the OpenAI/ChatGPT site warning users about use of the product for client work

☐ We block use of ChatGPT from Firm systems

☐ Other (please specify) _____

Q6.9 Does your firm employ any chatbots?

(select all that apply)

☐ No, and we have no plans to implement any chatbots at this time

☐ No, but we plan to in the next 12 months

☐ Yes, we have active chatbots we developed in-house

☐ Yes, we have active chatbots built for us by a third-party

☐ Yes, we have purchased pre-built chatbots

Q6.10 How are you using chatbots?

_____

_____

Q6.11 Which pre-built chatbots are you using?

_____

_____

Q6.12 Where do you expect your firm/organization to land on the adoption curve for the Metaverse?

○ No opinion

○ Innovators

○ Early Adopters

○ Early Majority

○ Late Majority

○ Late Followers

○ Subject to Client Request

○ Other (please specify) _____

Q6.13 What is your personal feeling about the Metaverse as a legal industry business opportunity?

○ Silly and a waste of resources

○ Like the Web (1.0) in the early 90's – unclear but interesting

○ The "Wild West" but promising

○ Important enough to speculate/participate

○ Clearly an important business opportunity – not to be missed

○ Other (please specify) _____

Q6.14 What is your personal feeling about Web 3.0 in general (blockchain, smart contracts, NFTs, DAOs, DeFi, etc.) as a legal industry business opportunity?

(select all that apply)

☐ Fragmented and as yet unclear

☐ Already offering scattered business opportunities to the practice

☐ Should be a strategic focus for the firm/organization

☐ Already a key focus for the firm/organization

☐ An obvious business opportunity – not to be missed

☐ Other (please specify) _____

Q6.15 What do you believe the Metaverse and immersive VR will be used for in the next 12 months at law firms?

(select all that apply)

☐ For fun, not for work

☐ Recruiting

☐ Meetings with clients

☐ Internal meetings/collaboration

☐ Training

☐ Arbitration/Mediation

☐ Courtroom animations or demonstrative exhibits

☐ Mock Trials

☐ Other (please specify) _____

Q7.1 Section 7: PRACTICE MANAGEMENT

Q7.2 Which PRIMARY ethical walls software does your firm use?

○ None/Not applicable

○ iManage Security

○ iManage SPM

○ Intapp Walls

○ Litera Prosperoware (previously Prosperoware)

○ NetDocuments

○ NetDocuments Worldox (previously Worldox)

○ OpenText Security

○ ProLaw

○ Custom/Developed in-house

○ Other (please specify) _____

Q7.3 Which PRIMARY all-in-one solution for practice management (including some combination of document management, document assembly, contact management and/or docketing) does your firm use?

○ None/Not applicable

○ ActionStep

○ CASEpeer

○ CenterBase

○ Clio

○ Cosmolex

○ LEAP

○ MyCase

○ PracticePanther

○ ProLaw

○ RocketMatter

○ Tabs3

○ ZolaSuite

○ Other (please specify) _____

Q7.4 What is your firm's strategic approach to selecting and implementing enterprise-wide systems?

○ Best-of-breed applications for specific requirements

○ Enterprise platform(s) as a base for a number of applications

○ Both best-of-breed applications and enterprise platforms

○ Other (please specify) _____

Q7.5 Which of the following providers has your firm considered when developing an "enterprise" or "platform" approach?

(select all that apply)

☐ None/Not applicable

☐ BigHand

☐ Fulcrum GT

☐ iManage

☐ Intapp

☐ Litera

☐ nQueue

☐ Thomson Reuters

☐ Other (please specify) _____

Q7.6 Which PRIMARY conflict-of-interest management software does your firm use?

○ None/Not applicable

○ Aderant Expert Conflicts

○ Coyote Analytics

○ iManage Conflicts Manager (formerly Elegrity E-Valuate)

○ IntApp Conflicts

○ Juris (LexisNexis)

○ OpenText LegalKEY

○ Orion

○ ProLaw

○ SurePoint

○ Tabs3 Practicemaster

○ Thomson Reuters Elite or 3E

○ Custom/Developed in-house

○ Other (please specify) _____

Q7.7 Which contact management/marketing/business development software does your firm use?

(select all that apply)

☐ None/Not applicable

☐ ContactEase

☐ Constant Contact

☐ Hubspot

☐ Intapp OnePlace Collaboration and Content

☐ IntelliPad (Versys Corp.)

☐ InterAction

☐ Microsoft Access Database

☐ Microsoft Dynamics

☐ Microsoft Outlook

☐ ProLaw

☐ SurePoint

☐ Custom/Developed in-house

☐ Other (please specify) _____

Q7.8 Which products does your firm use for digital dictation?

(select all that apply)

☐ None/Not applicable

☐ BigHand

☐ Dragon (Nuance)

☐ ExpressScribe

☐ Mobile device native dictation functionality

- [ ] Native word processing dictation

- [ ] Olympus

- [ ] Philips

- [ ] Winscribe

- [ ] Other (please specify) _____

Q7.9 Which PRIMARY learning management system (LMS) does your firm use?

- ( ) None/Not applicable

- ( ) Capensys (now part of Wilson Allen)

- ( ) LegalMind (Traveling Coaches)

- ( ) Savvy LMS

- ( ) TutorPro

- ( ) UniversitySite (Profiscience)

- ( ) viLMS (viDesktop)

- ( ) Custom/Developed in-house

- ( ) Other (please specify) _____

Q7.10 Which eLearning software does your firm use?

(select all that apply)

- [ ] None/Not applicable

- [ ] Articulate/Storyline

- [ ] Camtasia (Tech Smith)

- [ ] Capensys (now part of Wilson Allen)

- [ ] Captivate (Adobe)

- [ ] LegalMind (Traveling Coaches)

- [ ] PowerPoint

☐ TutorPro

☐ Other (please specify) _____

Q7.11 If your firm conducts skills assessment, what skills/capabilities do you assess?

(select all that apply)

☐ None/Not applicable

☐ Collaboration

☐ CRM

☐ Document processing

☐ eDiscovery

☐ Email

☐ File management

☐ Information security

☐ Legal research

☐ Spreadsheets

☐ Workflows

☐ Working remotely

☐ Other (please specify) _____

Q7.12 Which web conference and/or webinar hosting services does your firm use?

(select all that apply)

☐ None/Not applicable

☐ BlueJeans Meetings from Verizon (formerly BlueJeans)

☐ GlobalMeet

☐ GoTo Meeting/GoTo Webinar

☐ LifeSize

☐ LoopUp

☐ Microsoft Teams

☐ On24

☐ WebEx

☐ Zoom

☐ Other (please specify) _____

Q7.13 Which Library and Online Research Tools does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Bloomberg Law

☐ Casetext

☐ CourtListener

☐ Fastcase

☐ Findlaw

☐ Google Scholar

☐ Justia

☐ LexisNexis

☐ Local Law Library Online Database

☐ Thomson Reuters Westlaw

☐ Wolters Kluwer VitalLaw

☐ Other (please specify) _____

Q7.14 Which Remote Online Notarization (RON) tools does your firm use?

(select all that apply)

☐ None/Not applicable

☐ DocVerify

☐ DocuSign

☐ E-Notary

☐ Notarize

☐ SIGNIX eNotaryDocx

☐ Other (please specify) _____

Q7.15 Which type of docketing (rules-based calendaring) does your firm use?

○ None/Not applicable

○ General Litigation docketing

○ Intellectual Property docketing

○ Both General Litigation docketing and Intellectual Property docketing

Q7.16 Which PRIMARY **GENERAL LITIGATION** docketing (rules-based calendaring) software does your firm use?

○ Aderant Milana (previously American LegalNet eDockets)

○ BEC Docket Enterprise

○ CompuLaw (Aderant)

○ CourtAlert

○ JuraLaw

○ Microsoft Outlook

○ ProLaw

○ Custom/Developed in-house

○ Other (please specify) _____

Q7.17 Which PRIMARY **INTELLECTUAL PROPERTY** docketing (rules-based calendaring) software does your firm use?

○ Alt Legal

○ Clarivate FoundationIP (formerly owned by CPA Global)

○ CPi

○ Patricia

○ PATTSY WAVE

○ Custom/Developed in-house

○ Other (please specify) _____

Q7.18 Does your Firm push calendar entries directly to the attorney's primary Outlook calendar or do you practice "dual docketing" and push to a separate docketing calendar?

○ None/Not applicable

○ Push to primary attorney calendar

○ Dual docketing

○ Other (please specify) _____

Q7.19 Which PRIMARY document discovery software does your firm use?

○ None/Not applicable

○ Accelerate (Recommind)

○ Brainspace

○ Casepoint

○ CloudNine Concordance

○ CloudNine LAW

○ DISCO

○ Everlaw

○ FTK Central

- ○ iConect
- ○ iPRO | eClipse
- ○ Logikcull
- ○ Nebula
- ○ Nextpoint
- ○ Nuix
- ○ OpenText Insight (Catalyst)
- ○ Relativity / Relativity One
- ○ Viewpoint
- ○ Other (please specify) _____

Q7.20 Which PRIMARY transcript / exhibit management tool does your firm use?

- ○ None/Not applicable
- ○ Adobe
- ○ Case Notebook (LiveNote)
- ○ CaseMap / TextMap
- ○ DepoView
- ○ DISCO
- ○ Eclipse / IPRO
- ○ Everchron
- ○ Nextpoint
- ○ Nuix
- ○ Opus2
- ○ Relativity
- ○ Trial Director
- ○ Other (please specify) _____

Q7.21 Which PRIMARY courtroom presentation tool does your firm use?

○ None/Not applicable

○ Caselines

○ Nextpoint

○ OnCue

○ Opus2

○ PowerPoint

○ Sanction

○ TrialDirector

○ TrialMax

○ TrialPad

○ TrialView

○ Other (please specify) _____

Q7.22 Which PRIMARY paperless prebill (proforma) product does your firm use?

○ None/Not applicable

○ Paperless Billing (Aderant)

○ Paperless Proforma (Elite)

○ Iridium Prebill Manager, now part of BigHand (previously Iridium/Steere Prebill Manager)

○ Proforma Tracker (Wilson Allen)

○ SurePoint (includes Coyote Analytics)

○ Custom/Developed in-house

○ Other (please specify) _____

Q7.23 Outside of document assembly, what other processes has your firm automated?

(select all that apply)

- ☐ None/Not applicable
- ☐ Approval workflows
- ☐ Audit letters
- ☐ Conflicts
- ☐ Docketing
- ☐ Expense capture
- ☐ Filing into DMS/ECM
- ☐ Financial reporting
- ☐ Legal/regulatory compliance
- ☐ Matter intake
- ☐ Onboarding & offboarding
- ☐ Periodic patching
- ☐ Real Estate transactions
- ☐ Trusts and Estates
- ☐ Other (please specify) _____

Q7.24 Which automation tools does your firm use?

(select all that apply)

- ☐ None/Not applicable
- ☐ Automation Anywhere
- ☐ Blue Prism
- ☐ Eggplant
- ☐ JMeter
- ☐ LoadRunner

☐ Ranorex

☐ Selenium

☐ Tricentis

☐ UFT

☐ UIPath

☐ Other (please specify) _____

Q8.1 Section 8: BUSINESS APPLICATIONS

Q8.2 Which of the following solutions being utilized by your firm are currently located in the cloud or are being migrated to the cloud within the next 12 months?

(select all that apply)

☐ None/Not applicable

☐ Accounting or Finance

☐ Case management

☐ Conflict of Interest

☐ Digital dictation

☐ Docketing (rules-based calendaring)

☐ Document Management System (DMS) or Enterprise Content Management (ECM)

☐ eDiscovery and litigation document review

☐ Email

☐ Email archiving

☐ Email security

☐ Human Resource Information System (HRIS)

☐ Intellectual Property (IP) or Trademark Management

☐ Knowledge Management (KM)

- ☐ Learning Management System (LMS)

- ☐ Marketing

- ☐ Microsoft SharePoint

- ☐ Payroll

- ☐ Practice management

- ☐ Project management

- ☐ Records management (RM)

- ☐ Time and billing

- ☐ Other (please specify) _____

Q8.3 Which PRIMARY time and billing (accounting) system does your firm use?

- ○ None/Not applicable

- ○ Aderant Expert

- ○ Aderant Sierra

- ○ Fulcrum GT Snap Billing and Finance

- ○ Juris (LexisNexis)

- ○ Omega Legal (now Aderant)

- ○ Orion

- ○ PerfectLaw

- ○ ProLaw

- ○ SurePoint (includes Coyote Analytics)

- ○ Tabs3

- ○ Thomson Reuters 3E

- ○ Thomson Reuters Elite Enterprise

- ○ Custom/Developed in-house

- ○ Other (please specify) _____

Q8.4 Where is your firm's time and billing (accounting) system located?

○ Cloud (SaaS, hosted and managed by a third party)

○ On-premises (onsite or collocation data centers, directly managed)

○ Self-hosted, AWS

○ Self-hosted, Azure

○ Other (please specify) _____

Q8.5 Do you have any plans to replace your firm's time and billing (accounting) system within the next 12 months?

○ Yes

○ No

Q8.6 Which time and billing (accounting) system have you chosen to replace your current time and billing (accounting) system within the next 12 months?

○ Unknown - Decision not made yet

○ Aderant Expert or Sierra

○ Fulcrum GT Snap Billing and Finance

○ SurePoint (includes Coyote Analytics)

○ Thomson Reuters 3E

○ Other (please specify) _____

Q8.7 Where will the replacement time and billing (accounting) system be located?

○ Cloud (SaaS, hosted and managed by a third party)

○ On-premises (onsite or collocation data centers, directly managed)

○ Self-hosted, AWS

○ Self-hosted, Azure

○ Unknown - Decision not made yet

Q8.8 Which PRIMARY time-entry software does your firm use for DESKTOP (PC or laptop) time entry recording?

○ None/Not applicable

○ Aderant iTimeKeep (formerly Bellefield)

○ Advanced Carpe Diem (previously Tikit)

○ Browser-based solution in native accounting system (e.g., Elite Webview, SurePoint web interface)

○ Intapp Time (includes DTE and DTE Axiom)

○ Native accounting system (e.g., Aderant Expert, Elite Enterprise)

○ Orion

○ Other (please specify) _____

Q8.9 Which time-entry solution(s) does your firm use for MOBILE time entry/recording?

(select all that apply)

☐ None/Not applicable

☐ Aderant Expert - OTG Time

☐ Aderant iTimeKeep (formerly Bellefield)

☐ Advanced Carpe Diem (previously Tikit)

☐ Element55 MakeTime/FastTime

☐ Intapp Time

☐ Orion

☐ SurePoint (web interface, mobile app) (formerly Rippe & Kingston)

☐ Thomson Reuters Elite or 3E

☐ Other (please specify) _____

Q8.10 Which PRIMARY Time CAPTURE Software does your firm use?

- ○ None/Not applicable
- ○ Aderant Expert/iTimeKeep
- ○ Advanced Carpe Diem (previously Tikit)
- ○ Element 55 MakeTime/FindTime
- ○ Intapp Time Capture (including TimeBuilder)
- ○ Iridium SmartTime, now part of BigHand
- ○ Time by Ping
- ○ Other (please specify) _____

Q8.11 How does your firm use any automated business workflow systems?

(select all that apply)

- ☐ None/Not applicable
- ☐ Account provisioning
- ☐ New business intake
- ☐ Conflicts
- ☐ Other (please specify) _____

Q8.12 Which dashboard software does your firm use for lawyers?

(select all that apply)

- ☐ None/Not applicable
- ☐ Aderant Handshake
- ☐ BigSquare
- ☐ Iridium Business Intelligence, now part of BigHand (previously Iridium/Intellistat/EIS)
- ☐ Microsoft Power BI
- ☐ Microsoft SharePoint
- ☐ SurePoint

☐ Tableau

☐ Custom/Developed in-house

☐ Other (please specify) _____

Q8.13 Which PRIMARY cost recovery management (e.g., photocopy/long distance, etc.) software does your firm use?

○ None/Not applicable, we no longer bill clients for these types of expenses

○ None/Not applicable, we track manually

○ Canon Uniflow

○ CostQ/nQ Zebraworks

○ Kofax Copitrak/ERS/Phonetrak

○ Kofax Equitrac

○ PaperCut

○ Other (please specify) _____

Q8.14 Which PRIMARY federated or enterprise search platform does your firm use?

○ None/Not applicable

○ Aderant Handshake

○ iManage Insight (formerly RAVN and/or Autonomy)

○ Lexis Search Advantage

○ Microsoft SharePoint

○ Recommind (OpenText)

○ West KM

○ Custom/Developed in-house

○ Other (please specify) _____

Q8.15 Which data stores are targeted in your firm's enterprise search initiative?

(select all that apply)

- ☐ None/Not applicable
- ☐ CRM (e.g., InterAction)
- ☐ Data in the accounting system (e.g., Aderant, Elite, etc.)
- ☐ Documents in a DMS/ECM
- ☐ Documents on a shared network drive
- ☐ Email in an archive system
- ☐ Email in Microsoft Outlook/Exchange
- ☐ Email in the DM or records system
- ☐ External commercial databases
- ☐ External firm (public) website
- ☐ Human Resources databases
- ☐ Microsoft SharePoint repositories
- ☐ Records management files/databases
- ☐ Training materials
- ☐ Web
- ☐ Other (please specify) _____

Q8.16 Which PRIMARY experience or expertise management/tracking (lawyer expertise) software does your firm use?

- ○ None/Not applicable
- ○ IntApp Experience
- ○ InterAction
- ○ Litera Foundation Firm Intelligence Platform
- ○ West KM
- ○ Custom/Developed in-house

○ Other (please specify) _____

Q8.17 Which project management software does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Asana

☐ Jira

☐ Microsoft Excel

☐ Microsoft Planner

☐ Microsoft Project

☐ Microsoft SharePoint

☐ Smartsheet

☐ Trello

☐ Custom/Developed in-house

☐ Other (please specify) _____

Q8.18 Which PRIMARY Help Desk (trouble-ticket) management software does your firm use?

○ None/Not applicable

○ ConnectWise

○ FootPrints

○ Freshservice/Freshdesk (Freshworks)

○ Intelliteach IQ Track (now Frontline Managed Services IQTrack)

○ Ivanti

○ Jira

○ ManageEngine ServiceDesk

○ Microsoft Outlook

○ ServiceNow (now Frontline Managed Services ServiceNow for Legal)

○ Solarwinds (Web Help Desk, Samanage)

○ Spiceworks

○ SysAid

○ Track-it!

○ ZenDesk

○ Custom/Developed in-house

○ Other (please specify) _____

Q8.19 Which managed print services provider does your firm use?

○ None/Not applicable

○ Canon

○ DTI/Merrill

○ FlexPrint

○ Flo-Tech (now part of FlexTG)

○ HP

○ Kofax

○ Konica Minolta

○ Loffler

○ Pacific Office Automation

○ QRX

○ Ricoh

○ Xerox

○ Other (please specify) _____

Q8.20 Which IT functions does your firm outsource/contract to external service providers (to any degree)?

(select all that apply)

- ☐ None/Not applicable
- ☐ Data Processing/Production
- ☐ Discovery/eDiscovery Management
- ☐ Entire IT Department
- ☐ Help Desk/Service Desk
- ☐ Network/Infrastructure
- ☐ O/S Patch Management
- ☐ Printer Management
- ☐ Quality Assurance/Testing
- ☐ Software Development
- ☐ IT Training
- ☐ Trial Support (hot seat)
- ☐ Other (please specify) _____

Q8.21 Which PRIMARY Change Management software does your firm use for IT Change Control?

- ○ None/Not applicable
- ○ Jira
- ○ Freshworks
- ○ ServiceNow
- ○ Custom/developed in-house
- ○ Other (please specify) _____

Q8.22 Which Contract Management software does your firm use?

(select all that apply)

☐ None/Not applicable

☐ BlackBoiler

☐ Bloomberg Law Draft Analyzer

☐ ContractPodAi

☐ DocJuris

☐ eBrevia

☐ Elevate

☐ HighQ

☐ iManage RAVN

☐ Kira Systems

☐ LawGeex

☐ LegalSifter

☐ Litera Contract Companion

☐ Luminance

☐ Seal Software

☐ ThoughtRiver

☐ Other (please specify) _____

Q8.23 Which PRIMARY Human Resources Information System (HRIS) does your firm currently use?

○ None/Not applicable

○ ADP

○ Ceridian Dayforce

○ iSolved

○ Paycom

○ Paycor

○ Paylocity

○ Ultipro

○ ViDesktop

○ Workday

○ Other (please specify) _____

Q8.24 Which Human Resources Information System (HRIS) components does your firm currently use?

(select all that apply)

☐ Compensation and Benefits

☐ Employee Information Database

☐ Employee Interface

☐ HR Compliance

☐ Payroll

☐ Recruitment and Acquisition

☐ Training and Development

☐ Other (please specify) _____

Q9.1 Section 9: COLLABORATION AND COMMUNICATION

Q9.2 Which PRIMARY email platform and version does your firm use?

○ None/Not applicable

○ Microsoft Exchange 2013

○ Microsoft Exchange 2016

○ Microsoft Exchange 2019

○ Microsoft Office 365 or Exchange Online - subscription service

○ Other (please specify) _____

Q9.3 Which PRIMARY email client does your firm use?

○ None/Not applicable

○ Microsoft Outlook 2010

○ Microsoft Outlook 2013

○ Microsoft Outlook 2016

○ Microsoft Outlook 2019

○ Outlook via Microsoft 365

○ Other (please specify) _____

Q9.4 Which email platform and version do you expect to be your firm's PRIMARY 12 months from now?

○ Microsoft Exchange 2013

○ Microsoft Exchange 2016

○ Microsoft Exchange 2019

○ Microsoft 365 or Exchange Online (subscription service)

○ Other (please specify) _____

Q9.5 Which PRIMARY virus scanning product does your firm use for scanning of inbound email messages?

○ None/Not applicable

○ Barracuda Networks

○ Cisco Ironport

○ Microsoft Exchange Online Protection

○ Mimecast

○ ProofPoint

○ Other (please specify) _____

Q9.6 Which PRIMARY spam detection system does your firm use?

○ None/Not applicable

○ Barracuda Networks

○ Cisco IronPort

○ Microsoft Exchange Online Protection

○ Mimecast

○ ProofPoint

○ Other (please specify) _____

Q9.7 Which type of high-availability email solution(s) does your firm use?

(select all that apply)

☐ None/Not applicable

☐ High availability cloud email solution (Gmail, Exchange Online)

☐ Internally controlled HA/redundant environment

☐ Third party solution (Mimecast, MessageOne)

☐ Other (please specify) _____

Q9.8 How does your firm use Microsoft SharePoint?

(select all that apply)

☐ None/Not applicable

☐ Collaboration

☐ Custom applications

☐ Document management

☐ Enterprise search for content outside of SharePoint

☐ Extranet

- ☐ Firm directory

- ☐ Intranet

- ☐ OneDrive for Business (document/file storage)

- ☐ Workflow

- ☐ Other (please specify) _____

Q9.9 Which of the following third-party packages does your firm use to enhance your SharePoint solutions?

(select all that apply)

- ☐ None/Not applicable

- ☐ Add-in from your DMS vendor (e.g., iManage, NetDocuments)

- ☐ BA Insight (search)

- ☐ Handshake (Aderant)

- ☐ Nintex

- ☐ SeeUnity

- ☐ Other (please specify) _____

Q9.10 Which EXTRANET platform does your firm use?

(select all that apply)

- ☐ None/Not Applicable

- ☐ Accellion Kiteworks

- ☐ Citrix ShareFile

- ☐ Firmex Deal Room

- ☐ iManage Share

- ☐ iManage Work

- ☐ Microsoft SharePoint

- ☐ NetDocuments

☐ Thomson Reuters HighQ

☐ Custom/Developed in-house

☐ Other (please specify) _____

Q9.11 Which INTRANET platform does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Aderant Handshake

☐ iManage Work

☐ Microsoft IIS

☐ Microsoft SharePoint

☐ WordPress

☐ Custom/Developed in-house

☐ Other (please specify) _____

Q9.12 Which PRIMARY type of phone system does your firm use?

○ Firm-hosted VoIP (e.g., Cisco, ShoreTel)

○ Hosted VoIP (cloud solution)

○ PBX/Digital/Non-IP

○ VoIP-enabled legacy PBX (hybrid PBX)

○ Other (please specify) _____

Q9.13 Which brand of PBX/Digital/Non-IP phone system does your firm use?

○ Avaya

○ Mitel/Inter-Tel

○ NEC

○ Other (please specify) _____

Q9.14 Which brand of firm-hosted VoIP phone system does your firm use?

○ Avaya

○ Cisco

○ Microsoft Skype for Business

○ Mitel MiVoice

○ Other (please specify) _____

Q9.15 Which brand of VoIP-enabled legacy PBX phone system does your firm use?

○ Avaya

○ Mitel Inter-Tel

○ NEC

○ Other (please specify) _____

Q9.16 Which provider of hosted VoIP phone services does your firm use?

○ 8x8

○ CallTower

○ MiCloud Connect (ShoreTel Connect, Mitel)

○ Microsoft Teams

○ RingCentral

○ Vonage

○ Zoom/Zoom Phone

○ Other (please specify) _____

Q9.17 Which PRIMARY phone device/instrument does your firm use?

○ Softphone

○ Traditional phone set

○ Both Softphone and Traditional phone set

Q9.18 Which PRIMARY brand of HANDSET, if any, does your firm purchase for your hosted VOIP installation?

○ We don't distribute handsets

○ AudioCodes

○ HP

○ Plantronics

○ Poly

○ Snom

○ Yealink

○ Other (please specify) _____

Q9.19 Which PRIMARY brand of HEADSET, if any, does your firm purchase for your hosted VOIP installation?

○ We don't distribute headsets

○ Apple Airpods

○ Bose Earbuds

○ Evolve

○ Jabra

○ Logitech

○ Plantronics

○ Poly

○ Sennheiser

○ Yealink

○ Other (please specify) _____

Q9.20 Is your primary headset a wired or wireless device?

○ Wired

○ Wireless

○ We offer both

○ Other (please specify) _____

Q9.21 Which Collaboration/Messaging tools does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Cisco Jabber

☐ Microsoft SharePoint

☐ Microsoft Skype for Business

☐ Microsoft Teams

☐ Mitel (MiCollab, MiTeam, Connect, Communicator)

☐ RingCentral

☐ Slack

☐ Microsoft Yammer

☐ Zoom

☐ Other (please specify) _____

Q10.1 Section 10: SECURITY

Q10.2 Which secure file sharing solution(s) does your firm provide to users?

(select all that apply)

☐ None/Not applicable

☐ Accellion

☐ Biscom Transit

☐ Box

☐ Citrix ShareFile

☐ Dropbox Business

☐ iManage Share

☐ LiquidFiles

☐ Litera Collaborate (Litera Workshare, Litera Secure File Transfer)

☐ Microsoft OneDrive

☐ Mimecast Large File Send

☐ NetDocuments Collabspace (previously NetDocuments ShareSpace)

☐ SendThisFile

☐ Thomson Reuters HighQ

☐ Other (please specify) _____

Q10.3 What is your firm's policy on the use of hosted consumer storage/transfer platforms (Dropbox, Box.com, Evernote, etc.)?

○ None/Not applicable

○ Allowed for client-controlled shared data, not allowed for firm-controlled shared data

○ Blocked by technical control

○ Blocked by technical control AND policy

○ Blocked by technical control – require client waiver and policy

○ Blocked by technical control – require GC/Firm management approval for exceptions and policy

○ Restricted by specific technical control (e.g., encryption required, read but not write, etc.)

○ Prohibited by written policy

○ Restricted by written policy (e.g., encryption required)

○ Other (please specify) _____

Q10.4 Which replication hardware or software does your firm use to automate the replication of critical data?

(select all that apply)

☐ None/Not applicable

☐ Carbonite (Double-Take)

☐ Cohesity

☐ CommVault

☐ Datto

☐ Dell Compellent

☐ Dell EMC

☐ Dell EqualLogic

☐ HPE Nimble Storage

☐ Microsoft DFS

☐ NetApp SnapMirror

☐ Nutanix

☐ Unitrends

☐ Veeam

☐ VMware

☐ Zerto

☐ Other (please specify) _____

Q10.5 Where does your firm store server backups?

(select all that apply)

☐ None/Not applicable

☐ Another hard disk

☐ Cloud

☐ Native snapshots

☐ Offline configuration (air gap - isolated recovery storage)

☐ Removable tape

☐ Other (please specify) _____

Q10.6 Which PRIMARY backup solution and/or backup service provider does your firm use to protect server data?

○ None/Not applicable

○ Acronis/nScaled

○ Cohesity

○ CommVault

○ Datto

○ Dell EMC's Avamar

○ EVault

○ Microsoft Data Protection Manager

○ NetApp SnapVault

○ Rubrik

○ Symantec/VERITAS (e.g., Backup Exec)

○ UniTrends

○ Veeam

○ Zerto

○ Other (please specify) _____

Q10.7 Which PRIMARY brand of firewall does your firm use?

○ None/Not applicable

○ Check Point

○ Cisco

○ Cisco Meraki

○ Fortinet

○ Palo Alto

○ SonicWall

○ Sophos (Astaro)

○ WatchGuard

○ Other (please specify) _____

Q10.8 Which web filtering appliance, software system, and/or cloud-based service does your firm use to block harmful or objectionable Web content?

(select all that apply)

☐ None/Not applicable

☐ Barracuda Networks

☐ Check Point Web Security

☐ Cisco Firepower/Sourcefire

☐ Cisco Umbrella (formerly OpenDNS)

☐ Fortinet

☐ Mimecast Total Threat Protection (TTP)

☐ Palo Alto

☐ SonicWall

☐ Sophos

☐ Trend Micro

☐ WatchGuard

☐ Websense

☐ Zscaler

☐ Other (please specify) _____

Q10.9 Which encryption technologies does your firm use as security measures?

(select all that apply)

- ☐ None/Not applicable
- ☐ Automatic email encryption (e.g., Exchange-TLS)
- ☐ Desktop hard drive encryption
- ☐ File server and/or SAN hard drive encryption
- ☐ Laptop hard drive encryption
- ☐ Native DMS/ECM
- ☐ Removable media encryption (e.g., USB drives)
- ☐ Smartphone device encryption
- ☐ User-initiated email encryption service (e.g., Mimecast, Biscom)
- ☐ Other (please specify) _____

Q10.10 Which PRIMARY workstation security software does your firm use?

- ○ None/Not applicable
- ○ Bitdefender
- ○ Broadcom (Symantec)
- ○ Carbon Black
- ○ Cisco AMP
- ○ CrowdStrike
- ○ Cylance
- ○ McAfee
- ○ Microsoft
- ○ Palo Alto Cortex XDR
- ○ SentinelOne
- ○ Sophos

○ Trend Micro

○ Webroot

○ Other (please specify) _____

Q10.11 Which ADDITIONAL endpoint protection tools does your firm use?

 (select all that apply)

☐ None/Not applicable

☐ Bitdefender

☐ Broadcom (Symantec)

☐ Carbon Black

☐ Cisco AMP

☐ CrowdStrike

☐ McAfee

☐ Microsoft

☐ Sophos

☐ Trend Micro

☐ Webroot

☐ Other (please specify _____

Q10.12 Which PRIMARY behavior analytics or application whitelisting end-point security software does your firm use?

○ None/Not applicable

○ Carbon Black (Bit9)

○ Cisco AMP/Sourcefire FireAMP

○ Crowdstrike Falcon

○ Cylance

○ Fortinet ATP

○ Microsoft AppLocker

○ Palo Alto Traps/Advanced Endpoint Protection

○ Palo Alto Wildfire

○ SentinelOne

○ SonicWall

○ Sophos Endpoint Protection

○ Symantec Endpoint Protection

○ Other (please specify) _____

Q10.13 Which ADDITIONAL behavior analytics or application whitelisting end-point security software does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Carbon Black (Bit9)

☐ Cisco AMP/Sourcefire FireAMP

☐ Crowdstrike Falcon

☐ Cylance

☐ Fortinet ATP

☐ Malwarebytes Endpoint Security

☐ McAfee Endpoint

☐ Microsoft AppLocker

☐ Palo Alto Traps/Advanced Endpoint Protection

☐ Palo Alto Wildfire

☐ SonicWall

☐ Sophos Endpoint Protection

☐ Symantec Endpoint Protection (Broadcom)

☐ Other (please specify) _____

Q10.14 Besides encryption and workstation security software, which security measures does your firm have in place?

(select all that apply)

☐ None/Not applicable

☐ Admin/privileged account or password management

☐ Advanced threat protection

☐ Application control/application whitelisting

☐ Biometric identification

☐ Data loss prevention (DLP)

☐ Endpoint port security

☐ End-user password management (e.g., Dashlane, Lastpass, KeePass)

☐ Ethical walls

☐ Intrusion detection and/or prevention system

☐ Managed Security Services Provider (MSSP)

☐ Monitoring for anomalous activity

☐ Multi-factor authentication

☐ Phishing/Social engineering tests

☐ Removing desktop administrative rights

☐ Security Awareness Training

☐ Server log retention/SIEM

☐ Theft-tracking for laptops, smartphones, and/or tablets

☐ Third-party vendor security assessment

☐ Other (please specify) _____

Q10.15 Besides encryption and workstation security software, which NEW security measures were initiated by your firm in the last 12 months?

(select all that apply)

- ☐ None/Not applicable
- ☐ Admin/privileged account or password management
- ☐ Advanced threat protection
- ☐ Application control/application whitelisting
- ☐ Biometric identification
- ☐ Data loss prevention (DLP)
- ☐ Endpoint port security
- ☐ End-user password management (e.g., Dashlane, Lastpass, KeePass)
- ☐ Ethical walls
- ☐ Intrusion detection and/or prevention system
- ☐ Managed Security Services Provider (MSSP)
- ☐ Monitoring for anomalous activity
- ☐ Multi-factor authentication
- ☐ Phishing/Social engineering tests
- ☐ Removing desktop administrative rights
- ☐ Security Awareness Training
- ☐ Server log retention/SIEM
- ☐ Theft-tracking for laptops, smartphones, and/or tablets
- ☐ Third-party vendor security assessment
- ☐ Other (please specify) _____

Q10.16 Which PRIMARY server log retention/SIEM (security information event management) system does your firm use?

○ None/Not applicable

○ Arctic Wolf

○ AT&T Cybersecurity (AlienVault)

○ Dell Technologies (RSA)

○ eSentire

○ Fortinet

○ IBM QRadar

○ LogRhythm

○ ManageEngine

○ Microsoft Sentinel

○ Rapid 7 Insight

○ SolarWinds Security Event Manager

○ Splunk Enterprise

○ SumoLogic

○ Other (please specify) _____

Q10.17 Which password management application(s) does your firm provide to USERS?

(select all that apply)

☐ None/Not applicable

☐ 1Password

☐ Bitwarden

☐ CyberArk

☐ DashLane

☐ Delinea Secret Server

☐ KeePass

☐ Keeper

☐ LastPass

☐ Other (please specify) _____

Q10.18 Which password management application(s) does your firm provide to ADMINISTRATORS?

(select all that apply)

☐ None/Not applicable

☐ 1Password

☐ Bitwarden

☐ CyberArk

☐ DashLane

☐ Delinea Secret Server

☐ KeePass

☐ Keeper

☐ LastPass

☐ Other (please specify) _____

Q10.19 Which phishing, vishing, social engineering, or security awareness program(s) does your firm use?

(select all that apply)

☐ None/Not applicable

☐ Capensys (Wilson Allen)

☐ KnowBe4

☐ Managed service provider

☐ Mimecast Awareness Training (Ataata)

☐ Proofpoint (Wombat)

☐ Traveling Coaches OnGuard

☐ Custom/Developed in-house

☐ Other (please specify) _____

Q10.20 Which PRIMARY multi-factor authentication (MFA) service does your firm use?

○ None/Not applicable

○ Duo Security

○ Microsoft Azure Multi-Factor Authentication

○ Okta

○ RSA

○ Other (please specify) _____

Q10.21 What do you secure with a multi-factor authentication (MFA) service?

 (select all that apply)

☐ None/Not applicable

☐ Admin Shares

☐ AV/Spam Filter Consoles

☐ O365

☐ PowerShell

☐ SaaS tools

☐ Server Access/Lateral Movement

☐ SSO

☐ User Workstations

☐ VPN/Remote Access

☐ Other (please specify) _____

Q10.22 Which PRIMARY email encryption solution or technology does your firm use?

○ None/Not applicable

○ Barracuda Email Protection

○ Citrix ShareFile

○ Exchange-TLS

○ Microsoft 365 Native

○ Mimecast

○ Proofpoint

○ Other (please specify) _____

Q10.23 What are your firm's three biggest security challenges?

(please select three)

☐ Advanced Persistent Threats (APT)

☐ Brute force attacks

☐ Client security requirements/Audits

☐ Cloud apps/Data security

☐ Compliance/Enforcement

☐ Cost of security solutions

☐ Data encryption

☐ Data Loss/Leakage Prevention (DLP)

☐ Email security/Encryption

☐ Implementation of security tools and practices

☐ Insider threats

☐ Least privilege

☐ Limited internal security expertise

☐ Limited security monitoring resources

☐ Malware/Virus/Zero Day threats

☐ Management support

☐ Mobile devices

☐ Multi-Factor Authentication

☐ Password management

☐ Planning/Policies

☐ Portable media/External storage security

☐ Regulations - HIPAA, HITECH, SOX, etc.

☐ Remote access

☐ Social engineering/Phishing

☐ Supply chain

☐ System and data recovery

☐ Unpatched vulnerabilities

☐ User behavior

☐ User education and awareness

☐ Web and browsing security

☐ Other (please specify) _____

Q10.24 How often does your firm run vulnerability scans on your network?

○ Never

○ Daily

○ Weekly

○ Monthly

○ Quarterly

○ Semiannually

○ Annually

○ More than once a year

○ As needed

○ Other (please specify) _____

Q10.25 Which network vulnerability scan tool(s) does your firm use?

(select all that apply)

☐ None/Not applicable

☐ AlienVault

☐ Digital Defense, Inc.

☐ eSentire

☐ InsightVM (Rapid7)

☐ Managed Service Provider/Outsourced

☐ Nessus Professional (Tenable)

☐ Nexpose (Rapid7)

☐ Qualys

☐ Tenable.io

☐ Other (please specify) _____

Q10.26 Which reputation monitoring/threat intelligence service does your firm subscribe to?

(select all that apply)

☐ None/Not applicable

☐ Branddefense

☐ CTM360

☐ DigitalShadows (SearchLight)

☐ IntSights

☐ Mimecast BEP

☐ Recorded Future

☐ SOCRadar

☐ ZeroFox

☐ Other (please specify) _____

Q10.27 What is your firm's policy on the frequency of third-party security assessments?

○ None/Not applicable

○ Annually

○ Every 2 years

○ More than once a year

○ When requested by a client

○ Other (please specify) _____

Q10.28 Which solution does your firm use to assess and manage the security risks of using third-party vendors?

○ None/Not applicable

○ Bitsight

○ KnowBe4 KCM

○ Prevalent

○ Privva

○ Custom/Developed in-house

○ Other (please specify) _____

Q10.29 What actions does your firm take when a user fails a phishing test?

(select all that apply)

☐ None/Not applicable (we don't run phishing exercises)

☐ No action is taken

☐ Automatic retraining

☐ Disciplinary action (up to/including termination)

☐ Up to the discretion of their manager

☐ Up to the discretion of the IT security team

☐ Other (please specify) _____

Q10.30 Which of the following security standards or frameworks has your firm been audited against or certified for?

(select all that apply)

☐ None/Not applicable

☐ CIS Critical Security Controls

☐ HITRUST CSF

☐ ISO27001

☐ NIST CSF

☐ PCI-DSS

☐ SOC (SSAE-18)

☐ Other (please specify) _____

Q10.31 Which, if any, extensions of the ISO27001 certification have you also secured?

(select all that apply)

☐ None/Not applicable

☐ We have secured the ISO27701 (Privacy) extension already

☐ We have secured the ISO27017 (Cloud) extension already

☐ We will be working one or both of these over the next 12 months

Q11.1 Section 11: STRATEGY

Q11.2 During the Hybrid model, what functionality, tools, or technologies have been most helpful with collaboration between your firm's team members (lawyers or staff)?

(select all that apply)

☐ None/Not applicable

☐ Chat (Teams, Jabber, etc.)

☐ Cloud-based systems

☐ Co-editing (O365, Google Docs, etc.)

☐ Document sharing (via Zoom, GoToMeeting, WebEx, etc.)

☐ Email

☐ Mobile devices

☐ Video conferencing (Zoom, GoToMeeting, WebEx, etc.)

☐ Other (please specify) _____

Q11.3 During the Hybrid model, what steps has your firm taken to facilitate printing at home?

(select all that apply)

☐ None/Not applicable

☐ Assistance with configuration

☐ Offered security guidance

☐ Provided paper and toner cartridges (or reimbursed these expenses)

☐ Provided printers (or reimbursed these expenses)

☐ Provided shredders

☐ Other (please specify) _____

Q11.4 What is your firm planning to do differently, or continuing to do differently, with technology or process in the hybrid environment?

_____

_____

Q11.5 Which metrics are used to measure your firm's IT department performance?

(select all that apply)

☐ None/Not applicable

☐ Downtime per month

☐ Help Desk closed ticket feedback

☐ Help Desk ticket resolution times

☐ IT capital costs per lawyer

☐ IT operating costs per lawyer

☐ IT spending as a percentage of revenue

☐ Unscheduled downtime per month

☐ User feedback

☐ User satisfaction surveys

☐ Other (please specify) _____

Q11.6 What are the <u>top three</u> technology issues or annoyances within your firm?

 (select up to three choices)

☐ Change: Keeping up with new versions of software

☐ Change: Managing expectations (users and management)

☐ Change: Users' acceptance of change

☐ Costs: Cost of hosting client data (e.g., litigation cases)

☐ Costs: The general high cost of technology

☐ Costs: High software maintenance costs

- [ ] eDiscovery

- [ ] Email management

- [ ] Information governance

- [ ] Licensing: Software licenses and fee arrangements

- [ ] Phishing/Vishing and/or Social engineering threats

- [ ] Security compliance/Risk management

- [ ] Spam

- [ ] Spyware/Malware/Viruses

- [ ] Staffing-Related: IT staffing issues

- [ ] Storage Needs: Keeping up with storage needs

- [ ] Training: Meeting needs for and/or getting participation in training

- [ ] Vendor competency

- [ ] Workload/Managing project loads

- [ ] Other (please specify) _____

Q11.7 Thinking about the next three to five years, are there technologies or trends you believe will create significant change or be a major factor in the legal technology profession?

_____

_____

Q11.8 Name a technology that your firm delivered within the last 24 months that generated the most positive response from lawyers.

_____

_____

Q11.9 How would you describe the cloud philosophy at your firm?

- ○ Mostly in the cloud

- ○ Cloud with every upgrade

○ Considering cloud

○ Not yet comfortable with cloud

Q11.10 In a Hybrid environment, which tools are you using for patching remote devices managed by the firm?

(select all that apply)

☐ None/Not applicable

☐ Desktop Authority (Quest/Dell/ScriptLogic)

☐ Desktop Central (ManageEngine)

☐ Ivanti Endpoint Manager (LANDesk, Appsense)

☐ Kace Desktop Authority, sold by Quest

☐ Kaseya

☐ Lansweeper

☐ Microsoft Deployment Toolkit (MDT)

☐ Microsoft Group Policies

☐ Microsoft MEM (Microsoft Endpoint Manager/Intune)

☐ Microsoft MEM (Microsoft Endpoint Manager/SCCM)

☐ Microsoft WSUS

☐ Ninite

☐ NinjaOne

☐ PDQ Deploy

☐ SolarWinds

☐ Symantec Ghost (Norton)

☐ Custom, scripted setup routines (e.g., MSI, setup.cfg)

☐ Other (please specify) _____

Q11.11 Is your firm offering support to users to equip home offices?

 (select all that apply)

☐ None/Not applicable

☐ Stipend – same as pre-COVID

☐ New stipend

☐ Staff financial support only

☐ Selected equipment purchase

☐ Office furniture

☐ Other (please specify) _____

Q11.12 How is your firm adjusting to the A/V requirements for remote appearances for hearings/trials/arbitrations/depositions, etc.?
Please explain below:

_____

_____

Q11.13 What are your top three work-from-home security concerns?
(select up to three choices)

☐ Authenticating users

☐ Data leakage via removable media (thumb drive, WD MyCloud, etc.)

☐ Enabling split-tunneling

☐ Equipment provisioning and collection

☐ Family members as "help desk"

☐ Increased use of personal devices

☐ Local printing

☐ Malware on local device

☐ Password sharing

☐ Remote device management (patching, inventory, etc.)

☐ Unsecured home Wi-Fi

☐ Other (please specify) _____

Q11.14 What is your firm's current strategy regarding the paperless practice?

○ Already paperless

○ Sticking with 'paper-lite'

○ Paperless projects underway

○ Working on strategy now

○ Not currently pursuing paperless or paper-lite

Q11.15 Does your firm use any of the tools below to monitor/track employee activity at home?

(select all that apply)

☐ None/Not applicable

☐ ActiveTrak

☐ CleverControl

☐ DeskTime

☐ Hubstaff

☐ Interguard

☐ Staffcop

☐ Teramind

☐ Time Doctor

☐ WorkExaminer

☐ Workpuls

☐ Other (please specify) _____

Q11.16 Where are docking stations (or port replicators) deployed for your organization?

(select all that apply)

☐ None/Not applicable

☐ At user desks, on premises

☐ At user homes

☐ Alongside desktop endpoint

☐ Conference rooms

☐ Shared/hoteling office

☐ Other (please specify) _____

Q11.17 What monitor configurations are you currently deploying?

 (select all that apply)

☐ None/Not applicable

☐ Single standard size monitors (

☐ Single Large Monitors (27" to 40")

☐ Wide screen (>40")

☐ Curved screen

☐ Dual monitors

☐ Three monitors

☐ Other (please specify) _____

Q11.18 What percent of users are using/adopting a hoteling (office sharing) model?

Move slider to indicate response.

	0 10 20 30 40 50 60 70 80 90 100
% of users	

Q11.19 Which PRIMARY application is your firm using to schedule hoteling or desk-booking?

○ None/Not applicable

○ AgilQuest

○ AskCody

○ AppSpace

○ Condeco

○ CXApp Desks

○ EMS Legal (Accruent)

○ FlowScape

○ Full-Service Room Scheduling/FM:Systems (formerly Meeting Room Manager)

○ Joan Desk

○ Kadence

○ Native Microsoft Outlook

○ Officely

○ Office Space

○ Rendezvous (NFS)

○ Resource Scheduler (Asure Software)

○ SpaceIQ

○ Custom/Developed in-house

○ Other (please specify) _____

Q12.1 Section 12: DEMOGRAPHICS

The following questions are critical to our survey. Your individual responses will be submitted directly to our survey host. ILTA will hold as privileged and confidential all information that might identify a respondent with his or her responses, unless the respondent waives confidentiality for specified uses within ILTA. All data published in the survey report will be aggregated to ensure confidentiality. Individual respondents and firms will not be identified nor identifiable in the published survey report.

Q12.2 Please provide the total number of IT staff at your firm but exclude any employees who spend the majority of time in litigation support, library, facilities management, or records management:

Note: If part time staff are used, please add together to provide FTE numbers.

(optional question)

○ Number of IT staff: _____

Q12.3 Please identify the country of your firm's home or main office:

(optional question)

○ Country: _____

Q12.4 Please provide your name:

(optional question)

○ Name: _____

Q12.5 Any additional comments?

Please let us know of new/additional survey questions you believe should be added or other changes that would improve the survey.

_____

_____

_____

_____

_____