The Future of Legal Services
One Microsoft Solution for Legal
• Microsoft 365 for Legal Initiative (Series in Spring 2021)

• There’s No Going Back: Complex Hybrid Work in a Microsoft Environment (Dec. 1, 2021)
• The Brave New World of Compliance in a Teams Environment (Dec. 8, 2021)
• Teams: Your Phone of the Future, Now (Dec. 15, 2021)
• Better, More Inclusive Meetings with Microsoft Teams and Teams Devices (Jan. 12, 2022)
• Architecting Teams for Law Firms (Jan. 19, 2022)
• External Collaboration Best Practices (Jan. 26, 2022)
• How Do I Evolve My Licensing as the Microsoft Product Stack Changes (Feb. 2, 2022)
• **One Microsoft Solution for Legal (Feb. 9, 2022)**

All PowerPoint presentations available at [www.iltanet.org/resources/recordings](http://www.iltanet.org/resources/recordings)
It is not the strongest of the species that survive nor the most intelligent but the ones most responsive to change.

Charles Darwin (1809-1882)
The Listening & Learning Process

- Market Research
- Trend Research
- Research promising ISVs
- Law surveys & insights
- Interviews with external legal professionals
- Workshops

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<td>Horizon Wave</td>
<td>Law firms, Legal Departments, and ALSPs</td>
<td>External Triggers</td>
<td>Processes</td>
<td>Tasks</td>
<td>Detection Questions</td>
<td>Technology</td>
<td>Description</td>
<td>Linkage</td>
<td>Timing/Trends</td>
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<td>60+ use cases in pipeline</td>
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The legal services landscape is evolving

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<th>Client needs and preferences are changing</th>
<th>Pressure to adopt technology is growing</th>
<th>New providers are disrupting the market</th>
<th>Attorney well-being is a concern</th>
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<td>• Increased focus on business outcomes</td>
<td>• Budget pressures fuel desire for new efficiencies</td>
<td>• Alternative legal services providers (ALSPs) and legal tech are disrupting traditional business models</td>
<td>• Teams feel isolated and fatigued due to remote work</td>
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<td>• Disaggregation of legal services gives legal departments control, choice and flexibility</td>
<td>• General counsels are looking for law firms that can collect and deliver data</td>
<td>• Offerings differentiated through state-of-the-art technology</td>
<td>• Organizations are struggling to maintain a consistent culture and onboard new staff in a hybrid environment</td>
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<td>• General counsels treated as businesses with KPIs, not just cost centers</td>
<td>• 2/3 of legal departments say their primary outside firm has made no progress in innovation over the past year(^2)</td>
<td>• About a quarter of ALSPs interviewed say their systems use AI(^1)</td>
<td>• 55% of law firms say attorney well-being is a top challenge(^2)</td>
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\(^{1}\) ALSPs: Alternative Legal Service Providers

\(^{2}\) Data source: American Bar Association, 2021
What are the factors impacting your law firm?

Day-to-day legal professional experience

- Multiple complex, often manual, cross-functional processes
- Time-consuming email management
- Inefficient collaboration through attachments with document control challenges
- Loss of institutional knowledge and relationships due to remote work

Management efficiency and decision making

-Disconnected tools, systems and data
- Lack of visibility into client documents interactions, and satisfaction
-No single view of workstream progress and distribution of tasks
-Lack of systematic performance monitoring and management
Collaborative applications transform the legal experience

Empower attorneys to achieve more
- Integrate and simplify to achieve a seamless experience across your tools, and establish a single source of truth for your data
- Automate and optimize manual processes, including email filing

Personalize client service
- Track client interactions and handle inquiries through a single automated, digitized journey
- Give your teams the right information at the right time with advanced search capabilities and AI powered tools

Enhance practice management
- Gain visibility into workflow progress, staffing, spending and performance through a unified view
- Achieve a clear view of relationships, pipelines, investments, and prospects

Collaborate seamlessly on legal matters
- Grant clients access to self-service tools and portals to reduce the burden of exchanging information
- Create, edit, store, locate, and collaborate through a single document management system, designed for matter organization

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Legacy systems are holding legal services back

**Security vulnerabilities**
For many firms, implementing security measures on prem to match the cloud is too costly to contemplate, leaving client data vulnerable to hacks.

**Disconnected data**
Siloed data systems prevent organizations from realizing the true value of their data, as valuable insights, trends, connections and relationships are missed due to lack of visibility.

**Inefficient collaboration**
Clients increasingly want transparency and real-time updates. Today, most information is shared manually through emails, which is time-consuming and makes document control difficult.

**Time-consuming management**
On-prem servers carry high storage and maintenance costs and demand a great deal of time and expertise from IT staff to configure, manage, and secure.

**Lack of backup and recovery**
On-prem servers are vulnerable to physical catastrophes, like fire, floods, break-ins, or hardware faults and lack redundant copies of data to serve as backups.

**Remote work barriers**
On-prem systems are designed for use in-house. In a hybrid environment, firms need a VPN solution to enable remote work which adds additional complexity for users and IT teams.
The cloud opportunity for legal services

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<th>Secure data</th>
<th>Unified data</th>
<th>Frictionless collaboration</th>
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<td>Client data is protected and monitored 24/7 by a world class security team equipped with cutting edge tools and global threat intelligence.</td>
<td>Firms gain greater visibility through integrated dashboards and can provide clients with quick, insightful service. This unified data system provides a foundation for advanced analytics and AI/ML.</td>
<td>Legal service providers and clients can collaborate frictionlessly, in real time on a shared file. Clients have access to self-service tools like portals, chatbots and automation.</td>
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<th>Simple management</th>
<th>Resilient firms</th>
<th>Attorney mobility</th>
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<td>The IT environment is simpler and less costly, allowing firms to shift focus to strategic initiatives such as adopting automation and establishing new technology driven offerings.</td>
<td>The firm is highly resilient with server redundancy. Firms have limitless scalability and improved application performance and uptime.</td>
<td>Remote workers can seamlessly and securely access information whenever they want it or need it, from any device, with Cloud collaboration tools to build strong connections across distributed teams.</td>
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Prioritized use cases

- Matter (Lifecycle) Management*
- Intake, Triage & Allocation*
- Project Mgmt. Set-up & Closure*
- L&D in Teams*
- Automatic Time Capturing*
- Compliant Billing & Spend Management*
- Automatic Conflict Checks*
- Teams Mgmt. & Governance
- AI-supported Pricing
- Ext. & Internal Collaboration
- Doc. Automation & Workflow
- Automatic Client Relationship Capturing
- Financial Delivery Risk Management
- Sales Intelligence
- Resource & Capacity Management
- Automatic Resource & Skill Profiling*
- Contract Management
- Remote/ Mobile Filing
- Legal Spend Analytics
- Advanced Analytics
- One-Stop Shop Legal Suite
- Managing Legal Outsourcing
- Legal App Store
- Client Experience Management
- Teams for Law

60+ use cases in pipeline
Cloud-Based Legal Practice Management

Matter Management/Document Management

Contract Lifecycle Management

Connected Firm/Dept. Management

Automated Authoring Capability

AI-Supported Research Engine

AI-Supported Text Extraction From Contracts

Dynamics 365

Power Platform

Microsoft 365 + Teams
Thinking about the future of legal service...

1. What of your application portfolio really needs to go away, rather than be migrated to the cloud?

2. How do you think about collaborative applications?

3. How are you thinking about using artificial intelligence to drive new business processes?

4. How do you think about vertical applications? What ISVs and legal tech do you depend on to run you practice?

5. How are you leveraging your data estate to support your digital transformation?

6. What is your cyber strategy and how are you thinking of security as the foundation for your digital strategy?
Virtual briefing and whiteboarding session

Engage with Microsoft executives and engineers
Inspire creativity, content and experiences
Realize new opportunities, scenarios

Envisioning session

Realize new opportunities, scenarios
Shared vision, program of change and roadmap
Focus on value, reduce cost

Visit https://www.microsoft.com/en-us/Legalindustry/