

TRACUMENT SOLUTIONS INC.

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# 2024 LEGAL TECHNOLOGY SURVEY



2024

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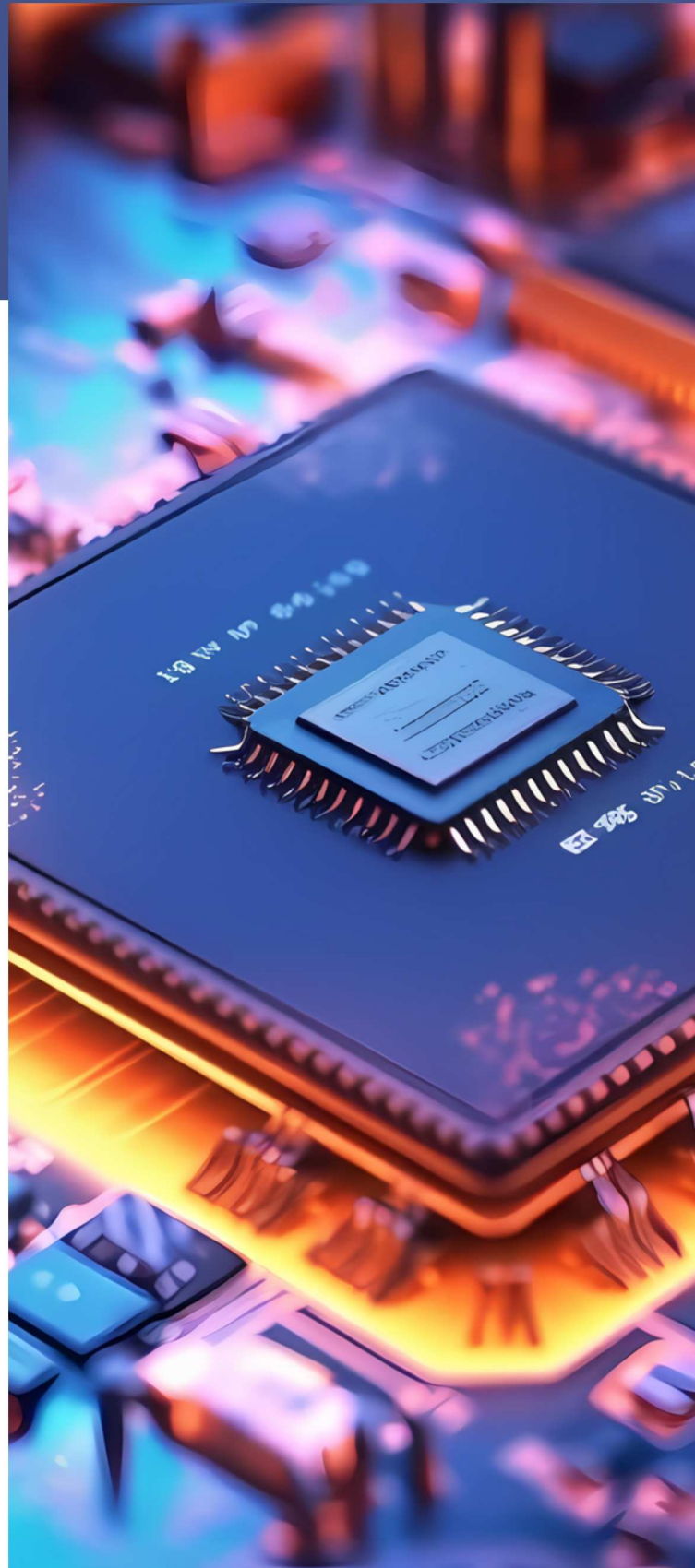
# ABOUT TRACUMENT SOLUTIONS INC

Founded in Vancouver in 2013, Tracument specializes in a web-based suite of solutions designed to optimize document management for legal professionals. Our platform addresses critical concerns around security compliance and client confidentiality, offering a modern alternative to outdated methods like fax, mail, and couriers.

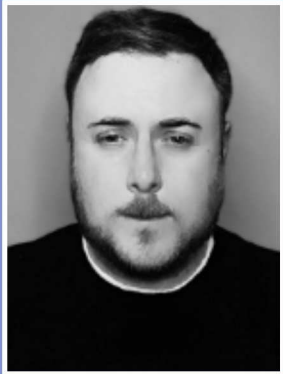
In the legal sector, where human errors and inefficient processes can drain valuable time and resources, **Tracument** introduces automation and centralized control.

Through automation, outsourcing capabilities, and centralized management, Tracument revolutionizes how legal firms operate. Our platform empowers firms with enhanced efficiency and oversight, reducing non-revenue generating tasks.

Our goal is to lead innovation in document exchange within the legal industry, bringing efficiency and modernization that align with advancements seen in other sectors.



## OUR TEAM



David is the CEO and Managing Director of Tracument Solutions Inc. and one of its founders.

He previously ran an Insurance Defence law firm in Vancouver, BC. During that time, his focus was on reducing non-revenue producing staff time and ensuring that all activities undertaken by any level of staff added as much value as possible. He brought in new technology and redesigned processes such that the firm was able to move from a support staff ratio of 1.5 for every lawyer to about 0.75 for every lawyer.

Tracument's platform is an extension of that work.

*David Swadden*

**DAVID SWADDEN**  
CEO & FOUNDER



Heidi has a background in both Economics and Business Administration & Management.

She is responsible for day-to-day operations at Tracument and specialises in process improvements, human resources, and program efficiencies.

Heidi joined Tracument in 2017 and has worked in almost every aspect of the company, making her an excellent resource for staff and clients alike.

*Heidi Fagalde*

**HEIDI FAGALDE**  
OPERATIONS MANAGER

# OUR TEAM



As the company's Director of Client Operations, Linda came to Tracument experienced in both data management software and client services.

She is responsible for planning and managing client projects, and building client confidence. She oversees all aspects of client interaction and leads a strong team in concert with web development to ensure client expectations are met.

Her experience at companies like Primafact, coupled with her aptitude for communication with clients allows her to easily recognize areas for growth.

*Linda Simpson*

**LINDA SIMPSON**  
DIRECTOR OF CLIENT  
OPERATIONS



Bibi has a deep understanding of the effectiveness of communication, and is responsible for creating engaging social media content that showcases Tracument's platform, community, and team.

With a keen eye for detail and a knack for storytelling, her strategic approach ensures that our company's online presence remains vibrant, informative and resonant.

Bibi's ability to seamlessly integrate the technological and communicative realms is a driving force behind effectively translating complex technical concepts into relatable content.

*Bibi Siew*

**BIBI SIEW**  
MARKETING  
& COMMUNICATIONS

# INTRODUCTION

In Canada, the legal industry operates within a framework that blends common law traditions with modern regulatory frameworks and technological advancements.

Technological integration within the Canadian legal sector has been steadily advancing, driven by the need for efficiency, accessibility, and security. Law firms are increasingly adopting cloud-based practice management systems, electronic document management solutions, and virtual collaboration tools to streamline operations and enhance client service delivery. Moreover, advancements in legal tech have catalyzed the emergence of specialized software for case management, e-discovery, and compliance, empowering legal professionals to manage complex cases and regulatory requirements more effectively.

While technological advancements offer significant benefits, there remains a need to navigate regulatory compliance and data security concerns carefully. By balancing tradition with innovation and investing in ongoing professional development, Canada's legal professionals are poised to harness the full potential of technology while upholding the highest standards of legal ethics and client service in the years ahead.



# THE DATA

In our recent survey on legal technology, we collected insights from over 250 legal professionals, revealing key trends in the industry.

Notably, 43% of respondents are between the ages of 35 and 50, showcasing a wealth of experience. A striking 60% hold positions as Law Clerks or Legal Assistants/LAA, highlighting their pivotal role in legal tech. Additionally, 35% of respondents are from firms with 26 or more lawyers, highlighting significant input from larger legal organizations. Impressively, nearly 47% of respondents have been with their firms for more than eight years, reflecting deep industry experience.

This data provides a compelling snapshot of how legal technology is impacting various roles and firm sizes, offering valuable insights for industry professionals.



## Top Practice Area

Ontario is the leading region, with 64.44% of participants reporting from there.



## Tenure

The largest percentage of participants, 46.67%, have more than 8 years of experience.



## Position

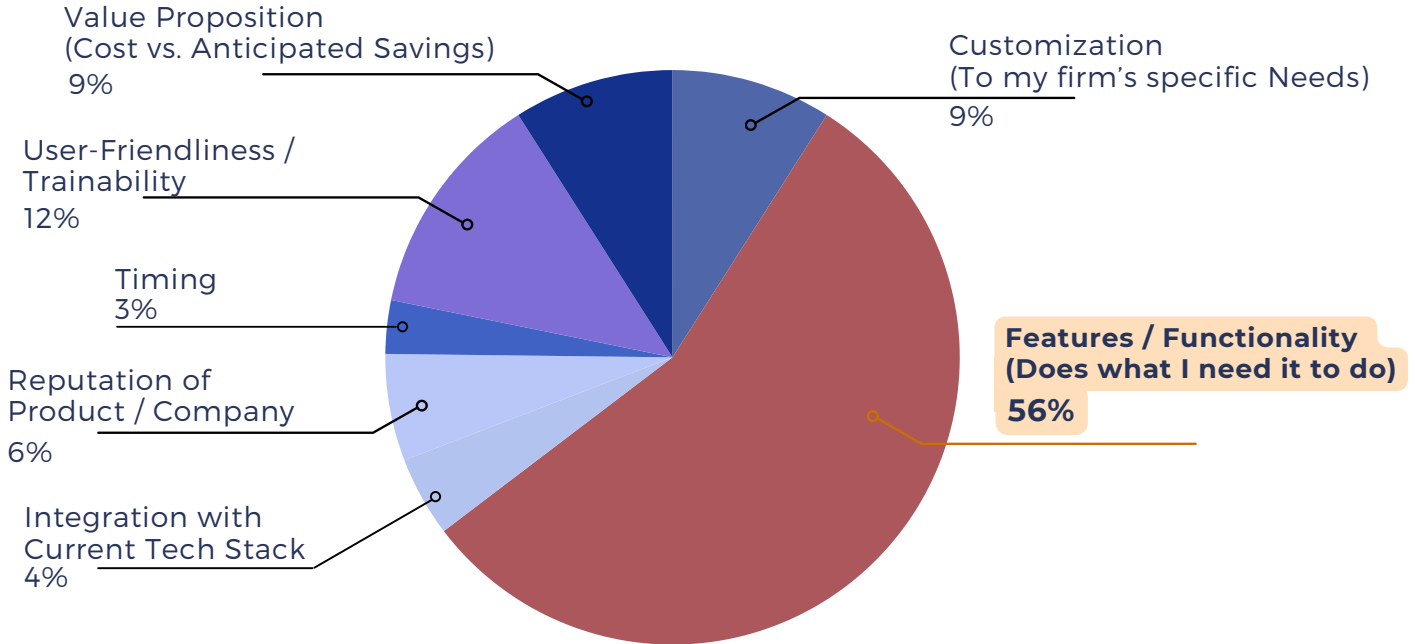
Law Clerks make up 30.37% of the participants, while Legal Assistants/LAA constitute 28.15%.

## SURVEY QUESTIONS

In our recent survey on legal tech trends for 2024, we gathered valuable insights into the experience levels of professionals in the field. This data sheds light on how seasoned and emerging experts are engaging with the latest technological advancements. Here's a breakdown of the key findings from the survey.

# ACQUIRING TECHNOLOGY

## WHAT IS THE LARGEST INFLUENCE ON YOUR DECISION WHEN CHOOSING NEW LEGAL TECH FOR YOUR FIRM?



## WHAT KEY FACTORS WOULD INFLUENCE YOUR DECISION TO ABANDON YOUR CURRENT LEGAL TECH SOLUTIONS?

**MOST LIKELY TO INFLUENCE**



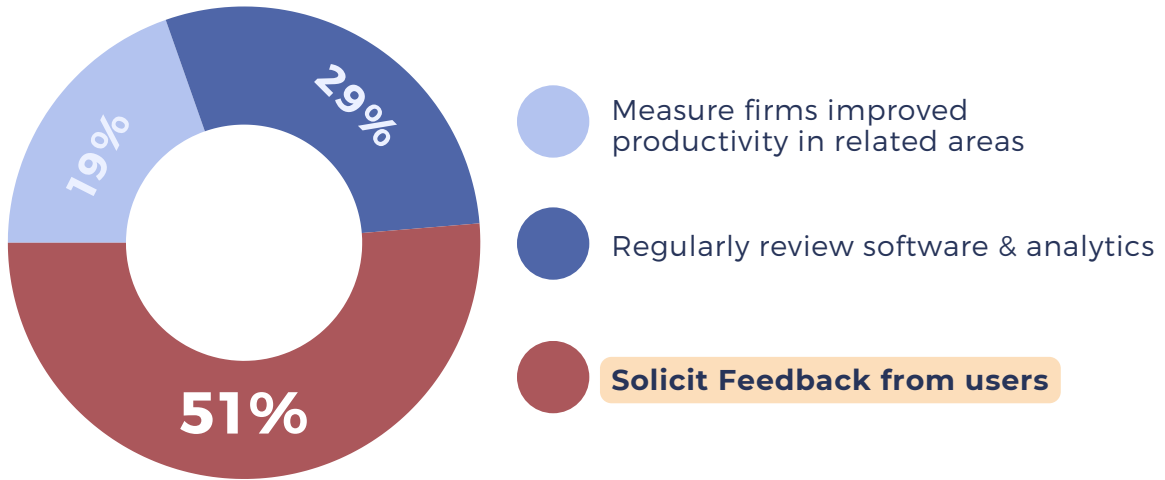
**LEAST LIKELY TO INFLUENCE**



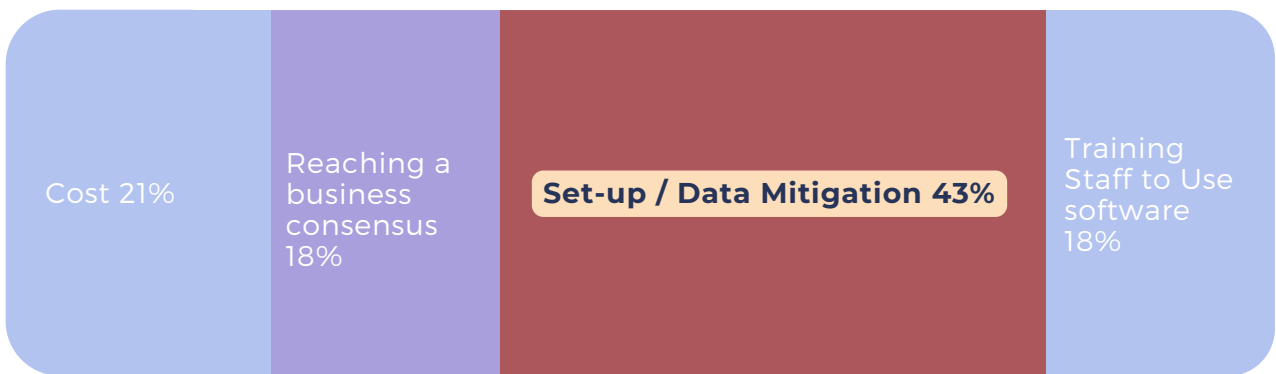


# ACQUIRING TECHNOLOGY

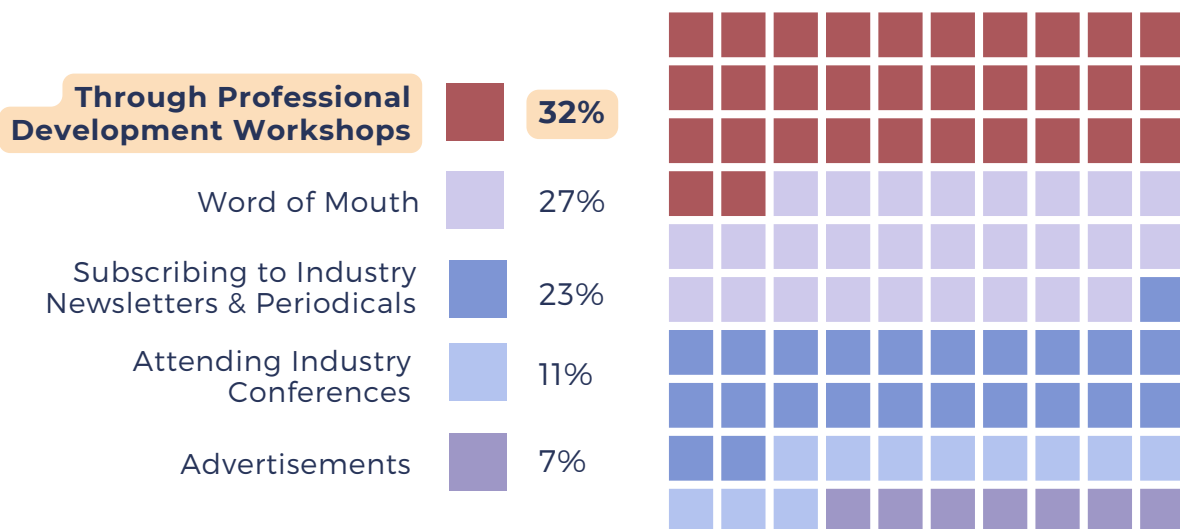
## HOW DOES YOUR FIRM EVALUATE THE EFFECTIVENESS OF LEGAL SOFTWARE SOLUTIONS AFTER PURCHASE?



## WHAT IS THE MOST CHALLENGING ASPECT WHEN PURCHASING AND IMPLEMENTING NEW LEGAL SOFTWARE SOLUTIONS?



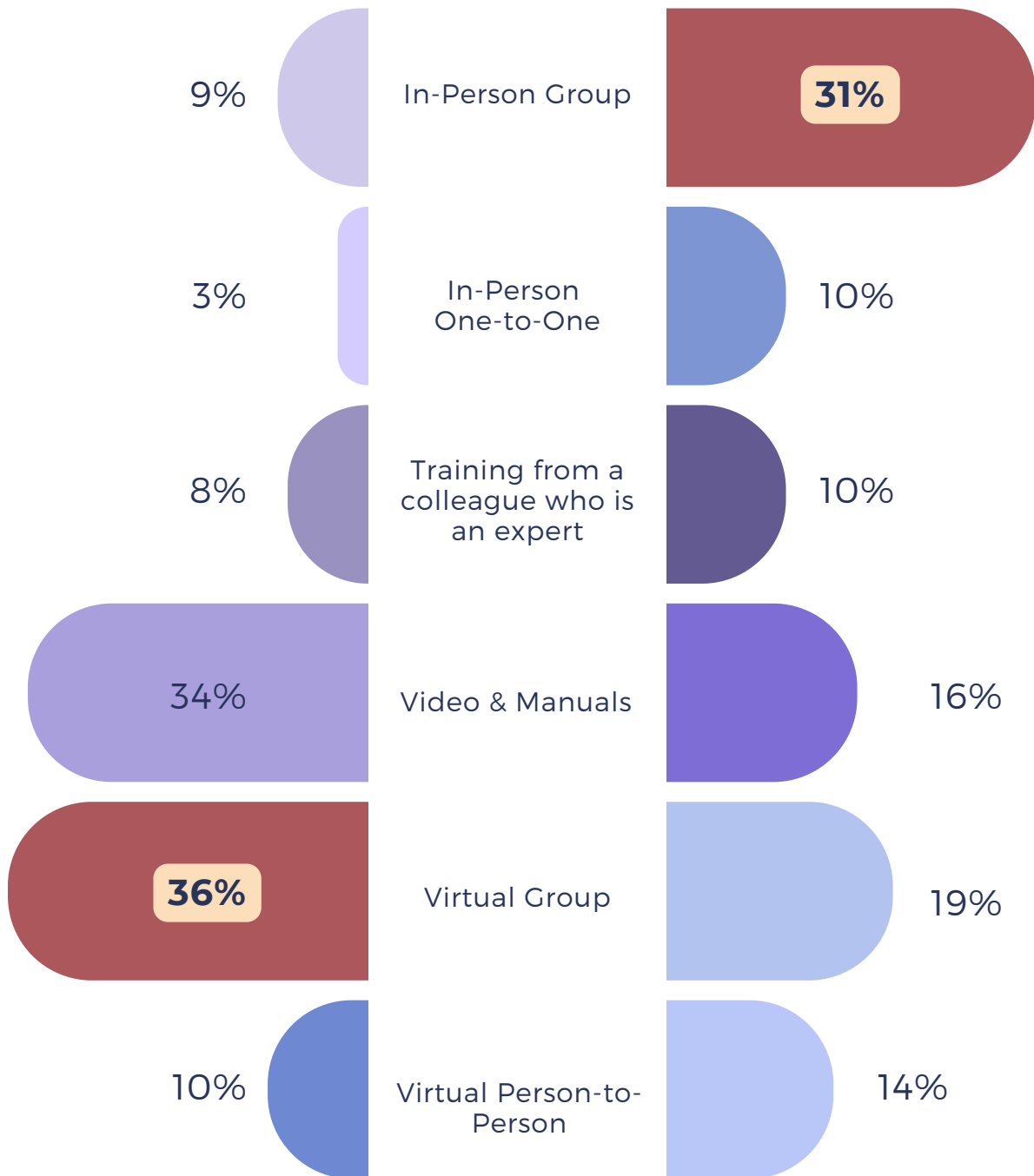
## HOW DO YOU STAY INFORMED ABOUT NEW TECHNOLOGIES RELEVANT TO THE LEGAL INDUSTRY?



# TRAINING

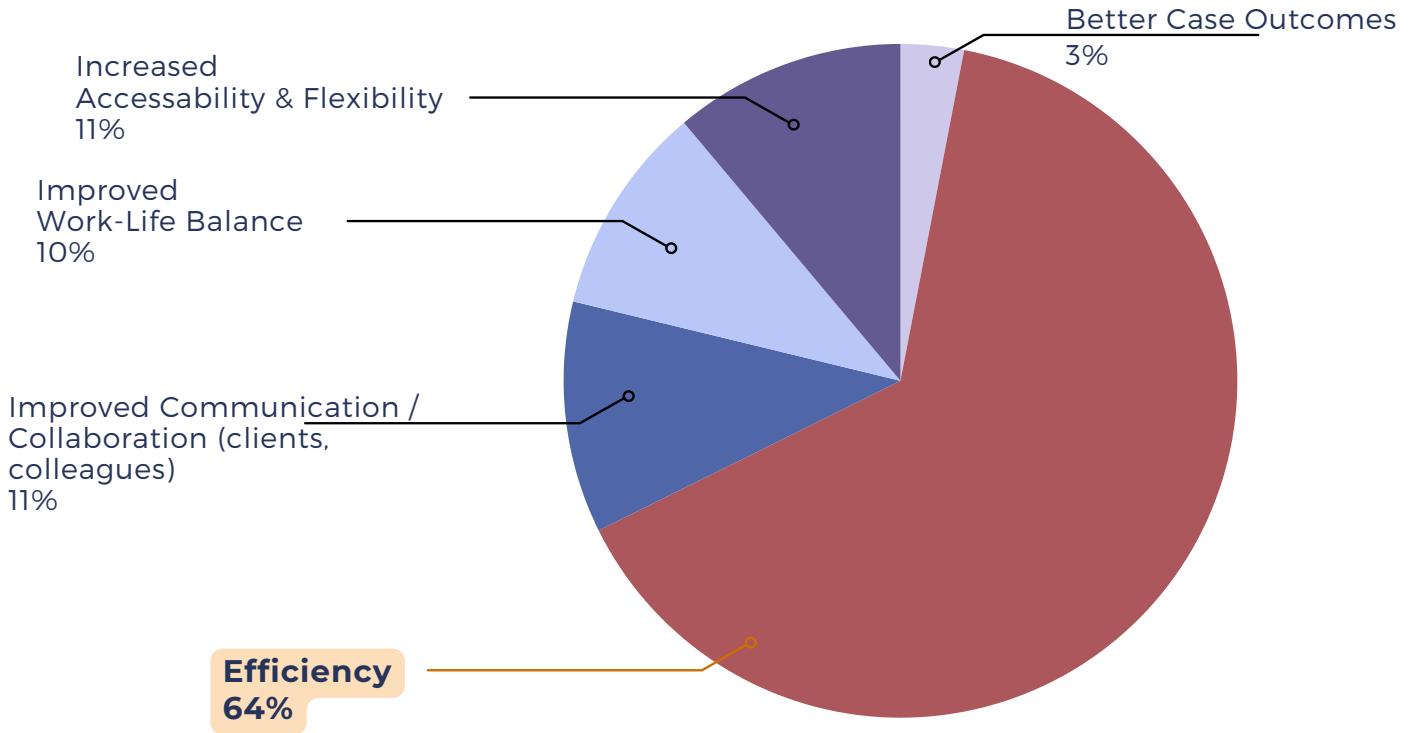
THINKING ABOUT THE \*WORST\* EXPERIENCE(S) YOU HAVE HAD WITH TRAINING, NEW TECHNOLOGY OR SOFTWARE WHAT FORM DID IT TAKE?

THINKING ABOUT THE \*BEST\* EXPERIENCE(S) YOU HAVE HAD WITH TRAINING, NEW TECHNOLOGY OR SOFTWARE WHAT FROM DID THE IT TAKE?

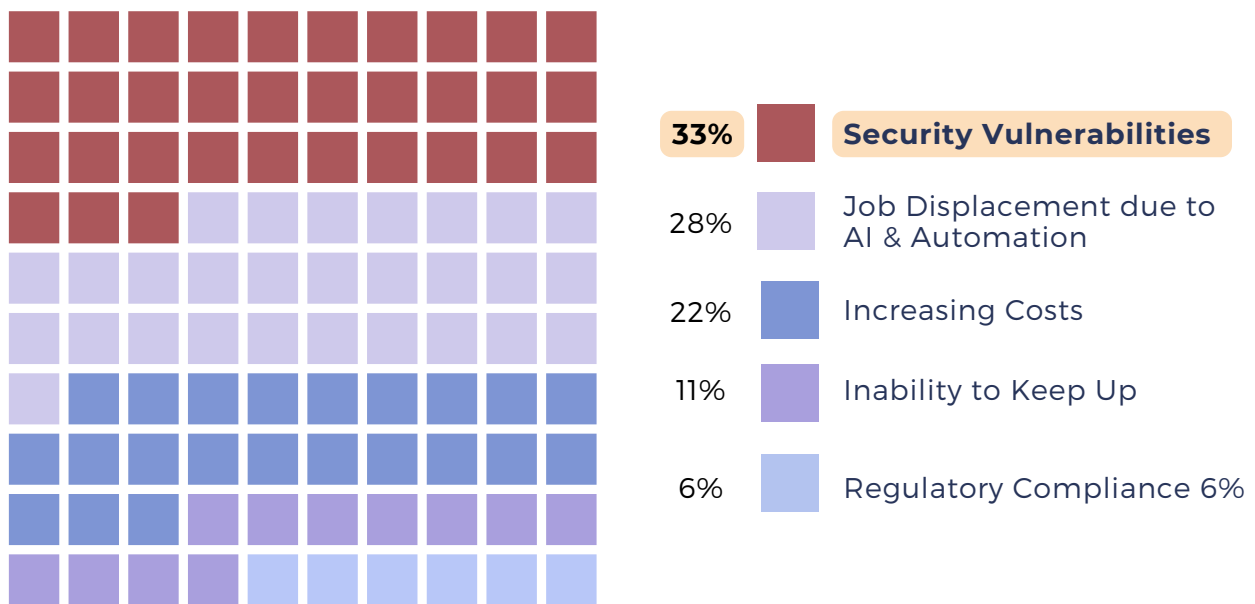


# FUTURE TECHNOLOGY

## WHAT IS THE \*BIGGEST BENEFIT\* YOU EXPECT FROM FUTURE LEGAL TECH ADVANCEMENTS?



## WHAT IS YOUR \*GREATEST CONCERN\* REGARDING EMERGING LEGAL TECHNOLOGIES?



# CURRENT TECH USE

**RANK THE FOLLOW 9 TYPES OF LEGAL TECH IN TERMS OF MOST TO LEAST CRITICAL TO YOUR FIRM/PRACTICE**



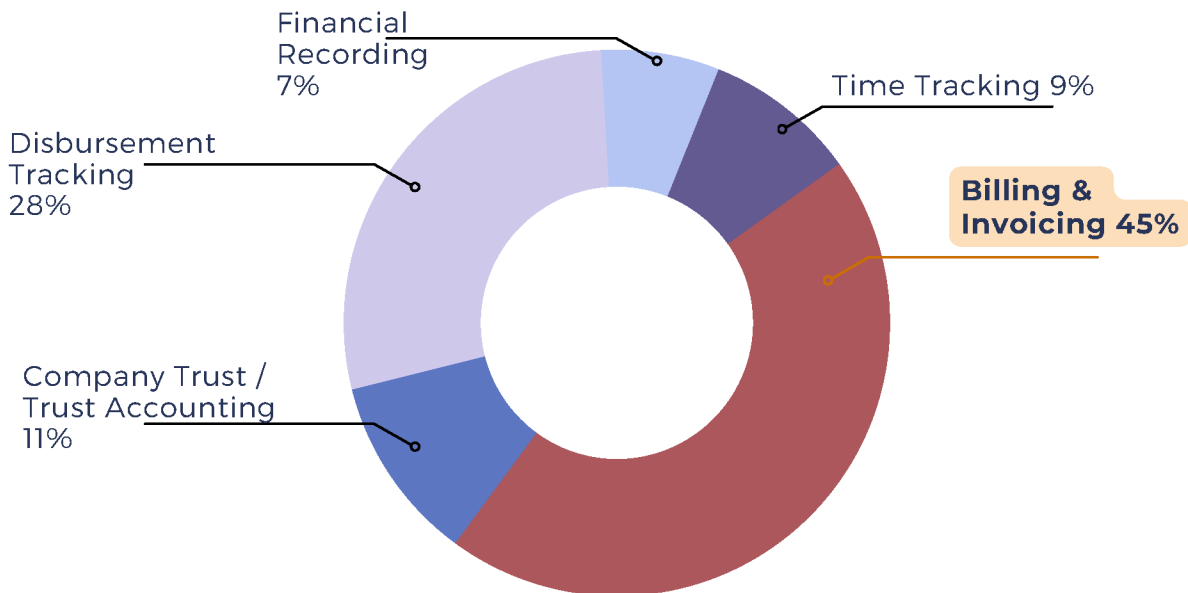
**NOTE:** We have removed PRODUCTIVITY SOFTWARE from the list as this software is widely used and does not reflect the specific, advanced legal tech tools and trends that are the focus of our survey.

# ACCOUNTING SOFTWARE

## DO YOU USE/HAVE ACCOUNTING SOFTWARE THAT YOU USE REGULARLY?



## WHAT IS THE MOST IMPORTANT THING THAT IT DOES?



### Billing & Invoicing

This suggests that users prioritize financial transaction management capabilities, particularly those related to billing and invoicing, over other functionalities. This could imply that effective and accurate billing processes are crucial for the users' operations, highlighting the system's role in ensuring smooth financial transactions and record-keeping.

# ACCOUNTING SOFTWARE

## HOW SATISFIED ARE YOU WITH THIS ACCOUNTING SOFTWARE?



## TOP 10 ACCOUNTING SOFTWARE PROGRAMS BEING USED

1. **PCLAW**
2. **Soluno**
3. **Ghost Practice**
4. **Acumin**
5. **LEAP**
6. **QuickBooks**
7. **CosmoLex**
8. **Prolaw**
9. **Proclaim**
10. **Xero**

## WHAT DO YOU WISH IT DID OR DID BETTER?

### 1. Better Integration

- Connect with case and document management systems.
- Ensure compatibility with other firm software.

### 2. User-Friendliness

- Create a more intuitive and visually appealing interface.
- Simplify navigation and customization options.

### 3. Enhanced Speed and Efficiency

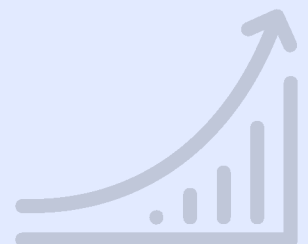
- Improve performance to reduce lag, especially with multiple users.
- Speed up loading times and access to essential functions.

### 4. Advanced Billing and Invoicing Features

- Offer more options for recurring invoices and automated reminders.
- Enhance billing processes and integration with current platforms.

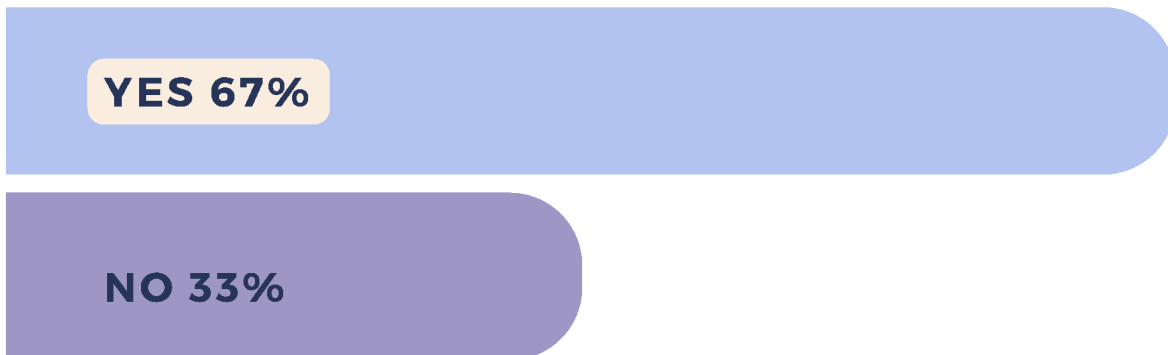
### 5. Improved Reporting & Tracking

- Provide more flexibility in generating various reports.
- Enhance time and transaction tracking capabilities.

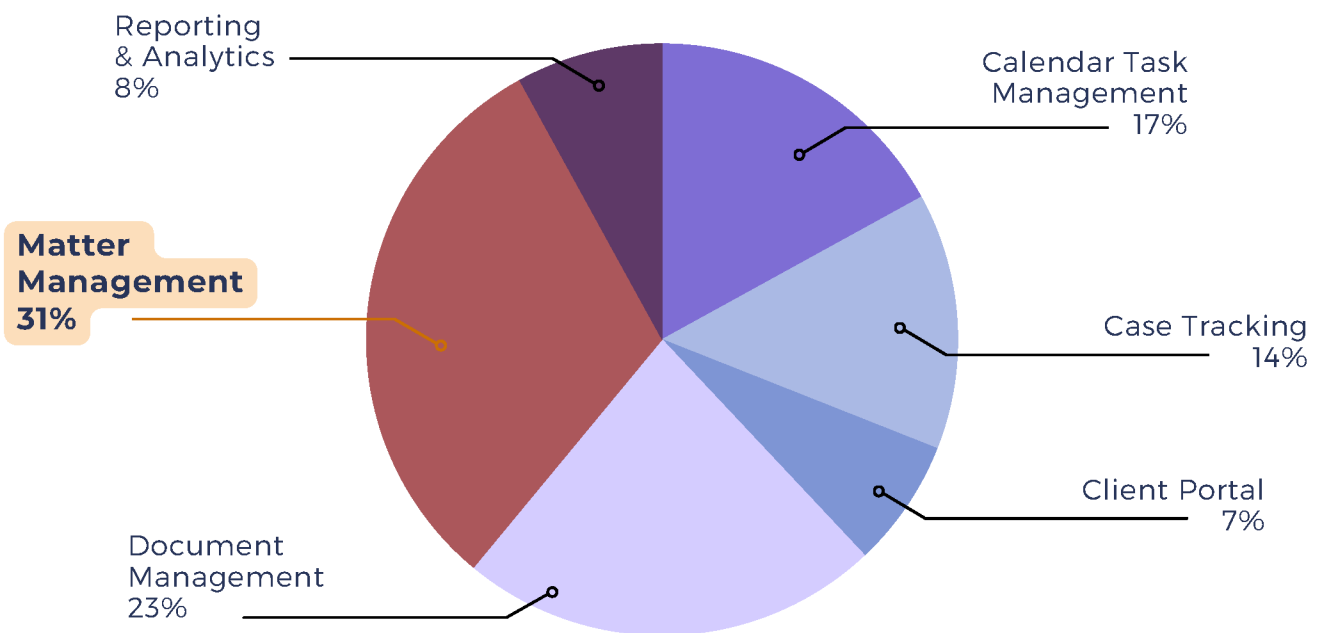


# CASE MANAGEMENT SOFTWARE

## DO YOU USE/HAVE CASE MANAGEMENT SOFTWARE THAT YOU USE REGULARLY?



## WHAT IS\* THE MOST IMPORTANT\* THING THAT IT DOES?



### Matter Management

The trends indicate a strong emphasis on matter and document management, highlighting the need for effective case and document handling solutions. Additionally, calendar task management and case tracking are crucial for maintaining efficiency and organization. The importance of reporting and analytics suggests a shift towards data-driven decision-making, while the client portal underscores the need for improved client communication and transparency.



# CASE MANAGEMENT SOFTWARE

## HOW SATISFIED ARE YOU WITH YOUR CASE MANAGEMENT SOFTWARE?



## TOP 10 CASE MANAGEMENT SOFTWARE PROGRAMS BEING USED

1. Filevine
2. Clio
3. GhostPractice
4. PrimaFact
5. Amicus
6. Prolaw
7. MyCase
8. Time Matters
9. Outlook
10. PracticePanther

## WHAT DO YOU WISH IT DID OR DID BETTER?

### 1. Better Integration

- Seamless connection with essential tools and systems (e.g. CRM, ERP, email clients, Google Chrome).
- Improved data flow and less manual data entry.

### 2. Improved User Experience

- More intuitive and visually appealing interface.
- Easier navigation and user-friendly design.

### 3. Advanced Collaboration Tools

- Real-time editing, commenting, and task assignment.
- Support for multiple users editing documents simultaneously.

### 4. AI & Automation Features

- Use of AI for legal research, document review, and predictive analytics.
- Automation for document production, management, and follow-ups.

### 5. Customizable Reporting & Time Management

- Advanced, customizable reporting tools for detailed insights.
- Enhanced time tracking and deadline management features.



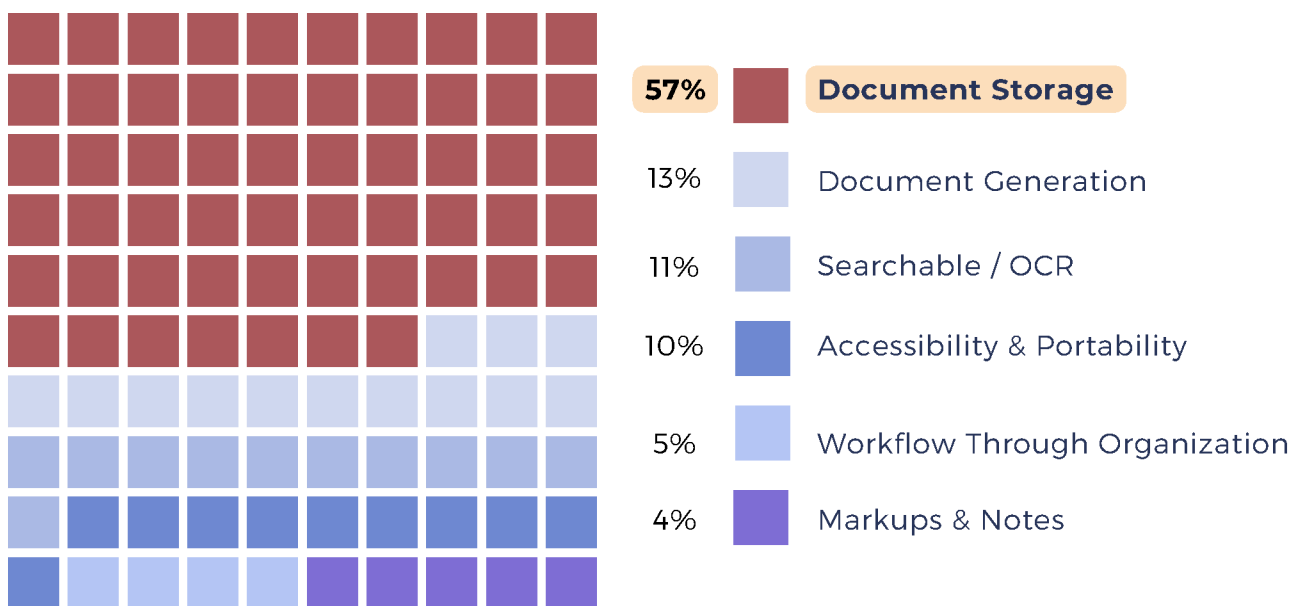


# DOCUMENT STORAGE & MANAGEMENT SOFTWARE

DO YOU USE/HAVE DOCUMENT STORAGE AND MANAGEMENT SOFTWARE THAT YOU USE REGULARLY?



WHAT IS \*THE MOST IMPORTANT\* THING THAT THIS SOFTWARE DOES?



## Document Storage

The trends indicate a strong emphasis on document management capabilities, including storage, generation, and search-ability. These functionalities are crucial for enhancing efficiency, security, and accessibility in legal practice. Additionally, there is a notable need for features that support workflow management and remote accessibility, reflecting the evolving nature of legal work environments.

# DOCUMENT STORAGE & MANAGEMENT SOFTWARE

## HOW SATISFIED ARE YOU WITH YOUR DOCUMENT STORAGE AND MANAGEMENT SOFTWARE?



## TOP 10 DOCUMENT STORAGE AND MANAGEMENT SOFTWARE PROGRAMS BEING USED

1. **Primafact**
2. **Filevine**
3. **DocuWare**
4. **Microsoft SharePoint**
5. **Google Workplace / Drive**
6. **Clio**
7. **LEAP**
8. **ProLaw**
9. **Mircrosoft OneDrive**
10. **Worldox**

## WHAT DO YOU WISH IT DID OR DID BETTER?

### 1. **Better Integration**

- Seamless connections with legal practice software, including case management systems, email platforms, and productivity tools.
- Improved integration with existing systems to streamline workflows.

### 2. **Improved Performance & Reliability**

- Prevent freezing, crashing, or lag, especially with large documents or extensive searches.
- Faster uploading, downloading, and processing of documents.

### 3. **Advanced Search & Organization**

- Advanced search options like full-text, metadata, and in-document searches.
- Enhanced document organization with consistent naming and indexing.

### 4. **User-Friendly Interface**

- A more intuitive and visually appealing interface.
- Easier navigation and quicker document handling.

### 5. **Mobile & Cloud Capabilities**

- Full functionality on mobile devices for managing documents on the go.
- Centralized, cloud-based storage for secure access and collaboration.

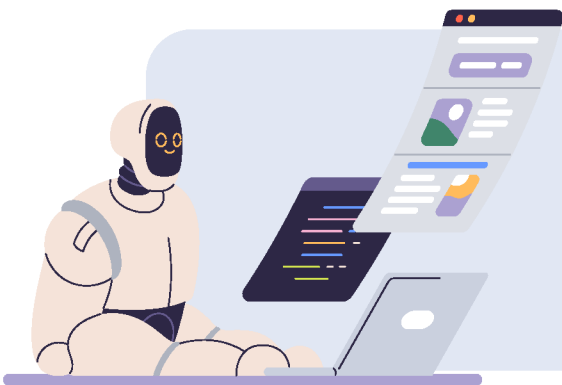


# SPECIALIZED SOFTWARE (AUTOMATION)

DO YOU USE/HAVE AUTOMATION SOFTWARE THAT YOU USE REGULARLY?

YES  
56%

NO  
44%



While many prefer or rely on manual processes, a substantial portion recognizes the value of automation tools. The notable gap between users and non-users indicates potential for growth in automation adoption, provided barriers such as cost, lack of awareness, or resistance to change are addressed.

## WHAT TASKS / PROCESSES DO YOU FREQUENTLY AUTOMATE? (TOP 4)

### 1. Sending Requests, Letters, Documents & Reminders

- Request letters
- Sending documents/large files
- Sending automated reminders & notifications

### 2. Document Generation & Management

- Document generation
- Automating document approvals & case progression tracking
- Document preparation and sending

### 3. File & Case Management

- Case management tasks

### 4. Financial & Transactional Tasks

- Tracking billable hours and expenses
- Payroll processing and employee timekeeping
- Paying invoices

# SPECIALIZED SOFTWARE (AUTOMATION)

## HOW SATISFIED ARE YOU WITH YOUR SPECIALIZED SOFTWARE (AUTOMATION)?



## TOP 10 SPECIALIZED AUTOMATION SOFTWARE PROGRAMS BEING USED

1. Tracument
2. ACL
3. MyCase
4. PracticePanther
5. Clio
6. Otter AI
7. Microsoft Power Automate
8. Asana
9. MedChart
10. Unity and Appara

## WHAT TASKS / PROCESSES DO YOU WISH YOU COULD AUTOMATE?

### 1. Document Generation & Management

- Document generation
- Document summary
- Preparing letters/accounts
- Sending documents, etc.

### 2. Billing & Financial Processes

- Invoicing/billings
- Cheques
- Posting disbursements
- Payroll processing & employee timekeeping

### 3. Compliance & E-Discovery

- Automating compliance audits
- E-discovery "ingestion" of digital materials
- Other e-discovery tools, etc.

### 4. Project & Client Management

- Project management tasks
- Automating client onboarding processes
- Dashboard reporting, etc.

### 5. Other Tasks

- Analyzing data
- Creating content
- Responding to emails, etc.



# DATA REVIEW

In this section we will examine the role of technology within law firms.

Technology has become integral to modern legal practices, however, integrating technology into law firms comes with its challenges. Overcoming these challenges requires a strategic approach

Our aim is to provide helpful insights and practical advice relating to technology for legal professionals and firms looking to succeed in today's ever-changing legal industry. In this section, we delve deep into the insights gathered from our survey. Through analysis and careful consideration, we've distilled these findings into a series of compelling observations.



# FROM PURCHASE TO PROFICIENCY

# 01

Implementing new software for your firm—you know it's no small feat. From weighing costs to gaining team buy-in and finally navigating the setup phase, there are numerous hurdles to clear. In fact, our recent survey highlighted that a whopping **43% of respondents find setup and data migration to be the most daunting part of the process**—far outweighing concerns about initial costs. It's a bit like that Jerry Seinfeld joke: “According to most studies, people’s number one fear is public speaking. Number two is death. Does that sound right? This means to the average person, if you go to a funeral, you’re better off in the casket than doing the eulogy.”

## UNDERSTANDING THE SET-UP STRESSES

When it comes to integrating new legal tech into your practice, the challenges of setup and data migration can feel like scaling Mount Everest. Here’s why:

- **Complexity vs. Cost:** While the financial investment is significant, the complexity of setting up software often proves to be the more formidable challenge. Legal professionals require systems that seamlessly integrate with existing workflows and databases—a tall order for many software solutions.

For instance, consider a law firm transitioning to a new case management software. The software needs to seamlessly integrate with their existing CRM system, document management tools, and billing software. Each integration point introduces potential points of failure if not carefully managed, such as IT teams working to resolve compatibility issues, delaying the rollout and frustrating end-users.

- **Fear of Disruption:** Legal practices thrive on efficiency and reliability. Any disruption during the setup phase—from data migration hiccups to downtime—can ripple through daily operations, causing stress and frustration.

A boutique law firm specializing in intellectual property law faced considerable downtime during the migration to a new cloud-based document management system. The interruption in access to critical case files led to delays in client communication and affected case deadlines. This highlighted the importance of thorough testing and contingency planning to minimize disruption during transitions.

## 01 FROM PURCHASE TO PROFICIENCY

- **Skill and Support:** Even with the right software in hand, ensuring your team has the skills and support needed for a smooth transition is crucial. Without adequate training and guidance, the learning curve can feel steep and daunting.

A larger firm transitioned to a new e-discovery platform and invested in comprehensive training sessions for their litigation team. By focusing on practical case scenarios and hands-on exercises, the firm empowered their attorneys to confidently navigate the new software's features, ultimately boosting productivity and client service.

## YOUR ACTIONABLE GUIDE TO SOFTWARE SETUP

To help you navigate these challenges with confidence, we've put together a handy checklist for setting up legal software effectively. It includes points on:

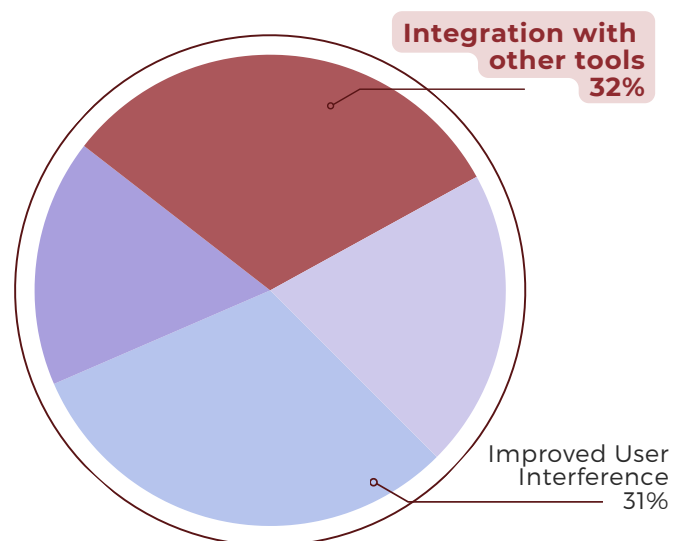
<b>Assess Needs</b>	Clearly define what you need the software to accomplish. Involve key stakeholders early to align goals and expectations.
<b>Research and Demo</b>	Don't settle for the first option—research thoroughly and request demos to see the software in action. Ensure it fits your specific requirements.
<b>Evaluate Integration</b>	Compatibility with existing systems is key. Ensure the software integrates smoothly with your current technology stack.
<b>Plan Data Migration:</b>	Develop a detailed plan for transferring data. Test migrations in a controlled environment to identify and address potential issues before going live.
<b>Training and Support:</b>	Invest in comprehensive training for your team. Provide ongoing support to address any questions or challenges that arise post-launch.

Download the full buying guide [here](#).

## FUTURE TECHNOLOGICAL WISHES

In addition to the immediate challenges of setting up legal tech, our survey also explored legal professionals' aspirations for the future of technology in their practices. Looking ahead five years, respondents shared their top technological wishes, highlighting key areas where they hope to see significant advancements:

- **AI Significantly Increases Quality of Work:** Legal professionals expressed a strong desire to leverage artificial intelligence (AI) to enhance the quality and accuracy of their work. This includes AI applications that can predict case outcomes based on historical data, automate repetitive tasks such as contract review, and optimize workflows to increase efficiency and productivity.
- **Automation of Routine Tasks:** Automation continues to be a priority for legal professionals looking to minimize time spent on clerical and administrative tasks. By automating routine processes, legal teams can redirect their focus towards more strategic and creative work that adds greater value to clients and the firm.
- **Enhanced Collaboration and Integration:** Improved integration between different software systems and enhanced collaboration tools are seen as essential for fostering seamless communication and workflow across teams and departments. Legal professionals seek technologies that facilitate real-time collaboration, document sharing, and project management, ensuring smooth operations and client service delivery.
- **Technological Efficiency Improves Work-Life Balance:** A prominent wish is the implementation of technologies that streamline processes and reduce workload, ultimately improving work-life balance. Legal professionals aspire to use technology to achieve more flexible work arrangements, allowing for better time management and a healthier work-life integration.
- **Firm Works 100% Digitally:** The vision of transitioning to complete digital operations resonated strongly among respondents. This includes embracing remote work capabilities and digital collaboration tools to enhance efficiency, reduce operational costs, and adapt seamlessly to changing work environments, such as those brought about by global events.





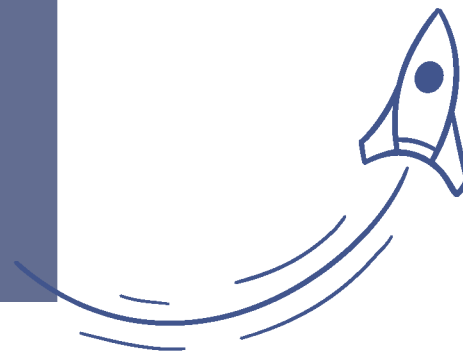
## THE FUTURE

These aspirations reflect a collective vision among legal professionals to harness technology's transformative potential fully. By embracing AI for enhanced decision-making, promoting digital transformation for operational agility, and prioritizing automation and collaboration tools, legal firms can position themselves at the forefront of innovation.

As we navigate the complexities of today's legal landscape, understanding these future technological wishes provides valuable insights into where the industry is headed. By aligning strategic goals with evolving technological capabilities, legal professionals can pave the way for continued growth, efficiency, and client satisfaction in the years to come.

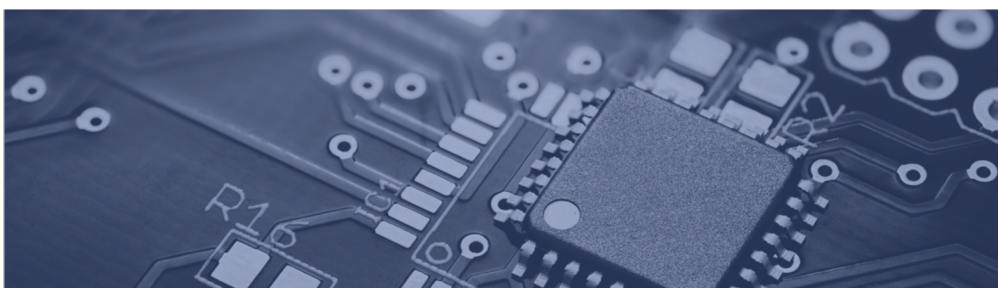
## EMBRACE THE CHALLENGE

While the journey of purchasing and setting up legal software may have its hurdles, it's also an opportunity for growth and enhanced efficiency within your firm. By focusing on meticulous planning, thorough research, and proactive support, you can navigate these challenges with confidence. Here's to embracing the challenge and leveraging technology to propel your practice forward!



## KEY TAKEAWAYS:

- 1. Setup Overcomes Cost Concerns:** The setup phase, particularly data migration and system integration, often poses greater challenges than the initial cost of software. Legal professionals need solutions that align seamlessly with their existing workflows to avoid disruptions.
- 2. Plan for Disruption:** Any software transition can disrupt daily operations. To minimize this, thorough testing and a well-structured migration plan are crucial, along with contingency measures to address potential downtime.
- 3. Invest in Training:** Proper training and ongoing support are essential to ensure your team can confidently use the new software, reducing the learning curve and enhancing productivity.



# MASTERING IMPLEMENTATION

## 02

Is implementation truly the scariest part of legal tech adoption, or is it all just a case of nerves? Let's break it down.

On one hand, transitioning to new software involves more than just flipping a switch. It means retraining your team, ensuring seamless integration with existing systems, and sometimes facing unexpected hurdles along the way. It's no wonder **42% of our survey respondents flagged it as the most daunting phase**—sometimes even more anxiety-inducing than the initial costs!

*Imagine it: you've finally chosen the perfect software to streamline your processes and boost productivity. The contracts are signed, the fees settled, and then... implementation day looms large. Cue the collective gulp!*

### **So, what separates the winners from the worriers?**

Good implementation is more than just installing software—it's a well-planned strategy that ensures a smooth transition and maximizes the benefits of your investment.

It involves:

- **Thorough Planning:** Mapping out clear objectives and timelines, involving key stakeholders from the outset.
- **Comprehensive Training:** Equipping your team with the skills and knowledge they need to navigate the new technology confidently.
- **Effective Communication:** Keeping everyone in the loop, from partners to paralegals, to ensure transparency and buy-in.
- **Flexibility and Adaptability:** Being prepared to adjust strategies as challenges arise, ensuring minimal disruption to daily operations.

Ensuring successful implementation of new legal technology rests squarely on the proactive measures law firms take to prepare and support their teams. Firstly, investing in comprehensive training is paramount.

By providing tailored training sessions and resources that cater to varying levels of technological proficiency among staff, firms can ensure that everyone is equipped to effectively utilize the new software.

## 02 MASTERING IMPLEMENTATION

Establishing a robust support network is equally crucial; having dedicated support personnel or a helpdesk available to address queries and troubleshoot issues promptly can alleviate uncertainties and keep workflows running smoothly. Regular monitoring of progress and performance metrics allows firms to gauge the effectiveness of the implementation strategy and make necessary adjustments as needed. By fostering an environment that values continuous improvement and adaptation, law firms can navigate the complexities of implementation with confidence and maximize the benefits of their technological investments.

### HOW EMPLOYERS CAN CHAMPION SMOOTH IMPLEMENTATION

Employers, listen up! Your role in fostering a positive implementation experience is crucial. Here's how you can lead the charge:

- **Set Clear Expectations:** Communicate the benefits of the new technology and the expected outcomes to motivate your team.
- **Encourage Feedback:** Foster a culture where employees feel comfortable providing feedback and suggesting improvements.
- **Celebrate Milestones:** Recognize and celebrate achievements and milestones throughout the implementation process to maintain morale and momentum.

### LET'S LIGHTEN THE LOAD

Feeling overwhelmed? Dive into our [checklist](#) to guide you through the implementation journey step-by-step.

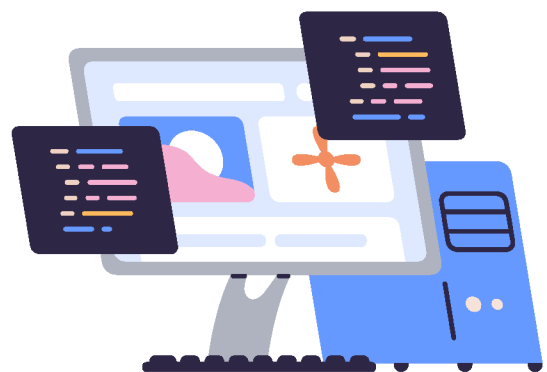
Need a morale boost? Share your implementation success stories or challenges in our community forum—it's a safe space to swap tips and support fellow legal pros.

### CONQUERING IMPLEMENTATION WITH CONFIDENCE

Fear not, brave legal warriors! While implementation may have its share of challenges, with careful planning, proactive support, and a dash of determination, your firm can navigate the tech landscape with confidence. Embrace the journey of transformation, and watch as your firm not only adapts to change but thrives in it.

Have insights or stories to share about your own tech implementation adventures? Drop a comment below—we'd love to hear from you!

### Happy implementing!



# TRAINING — A ONE SIZE DOESN'T FIT ALL CONCEPT

# 03

When it comes to training in legal tech, one size definitely does not fit all. Our recent survey uncovered a fascinating spectrum of experiences and preferences among legal professionals when it comes to training methods. Frustratingly, the ideal training method for some is a nightmare for others. Today, let's dive into why training isn't a cookie-cutter affair and explore what makes for both the best and worst training experiences.

## THE MOST POPULAR TRAINING EXPERIENCES

From our survey, it's clear that the top-rated training experiences for legal professionals are In-Person Group sessions, Videos and Manuals, and Virtual Group settings. So, what sets these experiences apart?



**In-Person Group:** Many legal professionals appreciate the dynamic nature of in-person group sessions. These gatherings foster engagement through real-time interaction, allowing participants to ask questions on the spot and receive immediate feedback. The personal touch and ability to collaborate face-to-face enhance the overall learning atmosphere.



**Virtual Group:** Virtual group settings, utilizing platforms like Zoom or Microsoft Teams, offer a blend of convenience and engagement. Features such as screen sharing, breakout rooms for collaborative tasks, and real-time polling enhance interactivity. Participants appreciate the flexibility to join sessions remotely, fostering inclusivity and accommodating varied schedules.



**Videos and Manuals:** Surprisingly, video-based training coupled with comprehensive manuals also ranked highly. Clear, concise presentations and easy-to-follow visual aids help learners grasp concepts effectively. Plus, the flexibility to revisit materials at one's own pace caters to different learning styles, ensuring retention of crucial information.



## THE FLIP SIDE: THE LEAST POPULAR TRAINING EXPERIENCES

It may (or may not) surprise you to learn that two of the most popular training methods are also the least preferred. This can be frustrating for those charged with keeping their firm's users up-to-date. Virtual Group sessions and Videos and Manuals emerged as the least preferred methods among participants. What went wrong?



### Lack of Interaction and Engagement

- Virtual settings limit interaction, causing disconnection and reduced engagement, making it harder to stay focused and participate.



### Session Length and Attention Span

- Virtual sessions often feel lengthy for legal professionals, leading to Zoom fatigue and reduced attention and retention.



### Difficulty in Communication

- In virtual environments, real-time questions or clarifications are harder to ask, leading to frustration and hindering the learning of complex legal tech concepts.



### Quality of Presentation

- Poorly delivered sessions, unclear instructions, and subpar materials detract from the learning experience.



### Impersonal Nature

- Virtual trainings can feel impersonal, lacking the personal connection and rapport that often enhance learning. Establishing a sense of camaraderie and collaboration is crucial for effective training outcomes.

## WHAT CAN LAW FIRMS DO?

To ensure effective training that resonates with all team members, law firms can take proactive steps:

- **Tailor Training Methods:** Offer a variety of training formats to accommodate different preferences and learning styles.
- **Enhance Engagement:** Incorporate interactive elements such as live Q&A sessions, group activities, and hands-on exercises to foster engagement.
- **Provide Clear Communication:** Ensure instructions are clear, materials are high-quality, and trainers are accessible for questions and support.
- **Evaluate and Adjust:** Continuously gather feedback to refine training programs and address areas of improvement.

## PERSONALIZING THE LEARNING EXPERIENCE

What can a firm do when a large block of their staff prefer being trained in a virtual group session while another large block of their staff view this as the worst way to be trained?

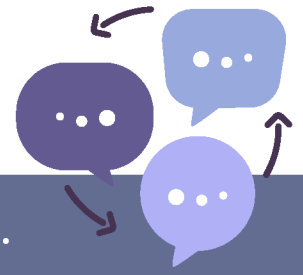
The answer lies in personalizing the training experience.

Look for technology vendors who offer multiple training paths, including do-it-yourself training materials, group sessions (whether in-person or by video), and even one-on-one training for those who need it. If your preferred vendor does not offer these solutions, it may be worth investing in developing them internally. Look to create one or a few individuals who are experts in the technology and can deploy training within your firm as needed.

## THE LOVE-HATE RELATIONSHIP WITH VIRTUAL GROUPS

Why do virtual group sessions evoke such mixed feelings? On one hand, the convenience of joining from anywhere, the ability to access recordings for review, and the use of interactive tools like breakout rooms can be appealing. These features cater to flexible schedules and diverse learning preferences, making training more accessible than ever before.

However, the drawbacks are equally significant. The impersonal nature of virtual interactions, coupled with technical glitches and the challenge of maintaining engagement over long sessions, can detract from the overall learning experience. Participants may feel isolated, struggle with distractions, or find it harder to build rapport with trainers and peers.



### Did you know...

That around **83% of employees** spend up to 1/3 of their workweek in meetings?

- CEOs spend 72% of work time in meetings.
- Upper management spends 50% in meetings.
- Middle management employees spend roughly 35% of their time in meetings.
- 45% of employees admitted to feeling overwhelmed by attending too many meetings.

According to [Flowtrace Collaboration Diagnostics](#)



# WHY FEEDBACK ALONE ISN'T ENOUGH

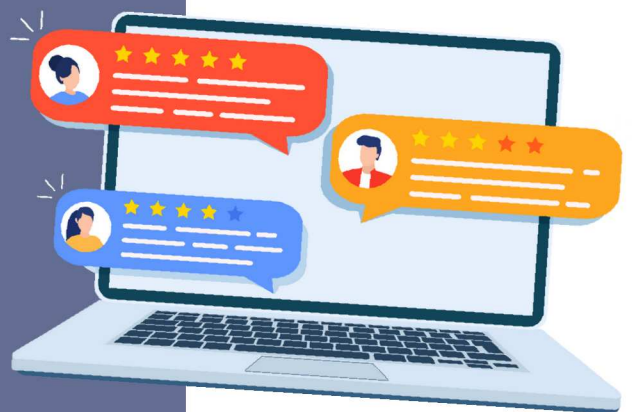
# 04

As technology continues to evolve, law firms are increasingly faced with the challenge of integrating new tools and software into their practice. However, many law firms still rely primarily on post-implementation user feedback to evaluate the effectiveness of new technologies. **While feedback is valuable, it is not the most effective method for determining the true value of technology investments.** Instead, law firms should establish clear, objective goals and measure the effectiveness of technology against these benchmarks. This approach ensures a more accurate assessment of the technology's impact and aligns technological adoption with the firm's strategic objectives.

## THE LIMITATIONS OF RELYING ON FEEDBACK

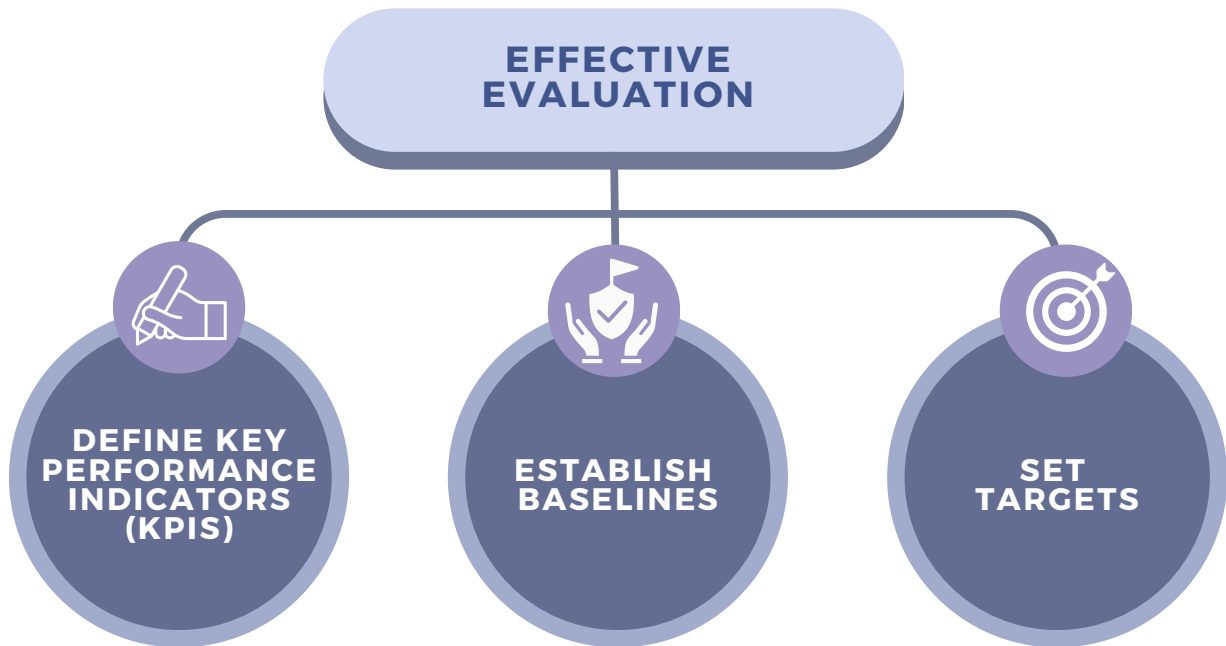
Feedback from lawyers and staff is undoubtedly important, as it provides insights into the user experience and potential issues with new technology. However, relying solely on subjective feedback has several limitations:

- 1. Bias and Variability:** Feedback is inherently subjective and can be influenced by individual preferences, resistance to change, or isolated negative experiences. This variability can obscure the overall effectiveness of the technology.
- 2. Lack of Context:** Feedback often lacks context about how the technology impacts broader business goals. A tool that some users find cumbersome might still deliver significant efficiency gains or cost savings at the firm level.
- 3. Short-Term Focus:** Feedback tends to focus on immediate experiences rather than long-term benefits. The true value of technology may become apparent only over time as users become more proficient and the technology integrates fully into workflows.



## THE CASE FOR OBJECTIVE GOALS

To overcome these limitations, law firms should adopt a more structured approach to technology evaluation. This starts with setting clear, objective goals that align with the firm's strategic objectives. These goals provide a benchmark against which the effectiveness of the technology can be measured. Here's how to do it:



Once your goals are set, define clear **KPIs** to track progress, such as task completion times, billable hours from automation, or reduced admin work.

Before implementing new technology, establish **baseline metrics** for each KPI. This provides a point of comparison to measure the impact of the technology over time.

Set **realistic** targets for each KPI based on the anticipated benefits of the technology. These targets should be ambitious but achievable, providing a clear goal for the technology to meet or exceed.



## MEASURING EFFECTIVENESS

With objective goals and KPIs in place, the next step is to systematically measure the effectiveness of the technology against these benchmarks. This involves collecting and analyzing data to assess whether the technology is meeting its targets.

Here's how:

- **Data Collection:** Implement systems to collect data related to your KPIs. This might involve using analytics tools, time-tracking software, or custom reporting features within the technology itself. Ensure that data collection is consistent and accurate.
- **Regular Reviews:** Conduct regular reviews of the data to track progress against your targets. This might be done monthly, quarterly, or at other appropriate intervals, depending on the nature of the technology and the firm's goals.
- **Adjust and Optimize:** Use the insights gained from data analysis to adjust and optimize the use of the technology. If the technology is not meeting its targets, identify the reasons and take corrective action. This might involve additional training for users, adjusting workflows, or even reevaluating the suitability of the technology.
- **Long-Term Assessment:** In addition to regular reviews, conduct a more comprehensive long-term assessment to evaluate the overall impact of the technology. This should consider both quantitative data and qualitative feedback, providing a holistic view of the technology's effectiveness.

### REAL-WORLD APPLICATION: A CASE STUDY

Consider a law firm that decides to implement a new software—in this case we will use our own platform, Tracument—with the goal of increasing research efficiency and accuracy. Here's how they might apply the approach outlined above:

- **Identify Strategic Objectives:** The firm's strategic objective is to improve the efficiency and accuracy of collecting third-party records, freeing up clerks and LAAs to focus on higher-value tasks.
- **Define KPIs:** Relevant KPIs might include the average time spent on a request, the number of errors or failures to complete a request on time, and firm satisfaction with the amount of time and hard cost spent collecting the documents.
- **Establish Baselines:** Before implementing the new platform, the firm collects data on current third-party record collection times, error rates, and firm satisfaction.
- **Set Targets:** The firm sets targets for a 75% reduction in research time, a 50% reduction errors or unsatisfactory outcomes, and a 20% increase in overall satisfaction scores.
- **Measure Effectiveness:** After implementing the platform, the firm collects data on these KPIs at regular intervals. They find that record collections times have decreased by 80%, errors have been reduced by 60%, and satisfaction scores have increased by 25%.
- **Adjust and Optimize:** Based on the data, the firm identifies areas where further improvements can be made, such as additional training for staff to fully leverage the platform's capabilities.

### KEY TAKEAWAY

Relying solely on feedback to evaluate new technology in law firms is insufficient due to its subjectivity and short-term focus. Instead, firms should set clear, objective goals aligned with strategic objectives, defining KPIs to measure effectiveness. By establishing baselines and targets, firms can better assess technology performance. Regular data collection and analysis against these KPIs allow for informed adjustments, ensuring technology investments align with the firm's goals. This data-driven approach supports continuous improvement and long-term success.

# AI: FRIEND OR FOE?

The rise of artificial intelligence (AI) has sparked both curiosity and concern among legal professionals. The question on many minds is: should professionals in the legal industry be worried about AI taking their jobs? Joining us for this discussion is none other than ChatGPT.

**An Unexpurgated Article Written Entirely by ChatGPT**

## UNDERSTANDING THE SITUATION:

- **Current Impact:** AI is already being used in legal research, document review, contract analysis, and other routine tasks. This can potentially reduce the need for junior lawyers or paralegals in certain roles.
- **Complex Tasks:** However, tasks requiring complex legal reasoning, client interaction, strategic planning, and advocacy are less susceptible to automation in the near term.

## ADVICE

1. **Skill Diversification:** Broaden your skill set beyond routine legal tasks. Focus on skills that complement AI, such as strategic thinking, emotional intelligence, negotiation, and complex problem-solving. These are areas where human lawyers excel and are less likely to be replaced by AI.
2. **Embrace Technology:** Familiarize yourself with AI tools used in the legal field. Being tech-savvy can make you more valuable as it allows you to leverage AI for efficiency and accuracy in your work.
3. **Continuous Learning:** Stay updated with industry trends and advancements in AI. Continuing education in emerging technologies and their legal implications can help you stay ahead.
4. **Client Relationships:** Invest in building strong client relationships and understanding their unique needs. Personalized legal advice and empathy are areas where human lawyers have a distinct advantage over AI.
5. **Adaptability:** Be prepared to adapt to changes in the industry. This might involve shifting to different practice areas or adopting new roles within legal tech companies.
6. **Ethical Considerations:** As AI becomes more integrated into legal practice, consider the ethical implications of its use, such as data privacy and algorithmic bias. Being proactive in addressing these issues can set you apart.

## 05 AI: FRIEND OR FOE?

While there are legitimate concerns about job displacement due to AI in the legal industry, there are also significant opportunities for those who adapt and embrace technology. By focusing on developing unique skills that complement AI capabilities and staying informed about technological advancements, you can position yourself well for the future of legal practice in Canada.

### ..... The Above Section Written by ChatGPT .....

#### Questions for Employers:

- How does our firm plan to integrate AI into our current workflow?
- What tasks or processes are we considering for automation using AI?
- How will AI impact the roles and responsibilities of our legal team members?
- What measures are in place to upskill or reskill employees in response to AI adoption?

#### Questions for Employees:

- How will AI affect my current role and day-to-day tasks?
- What opportunities will AI bring for professional growth and development?
- How can I prepare myself to work alongside AI technologies effectively?



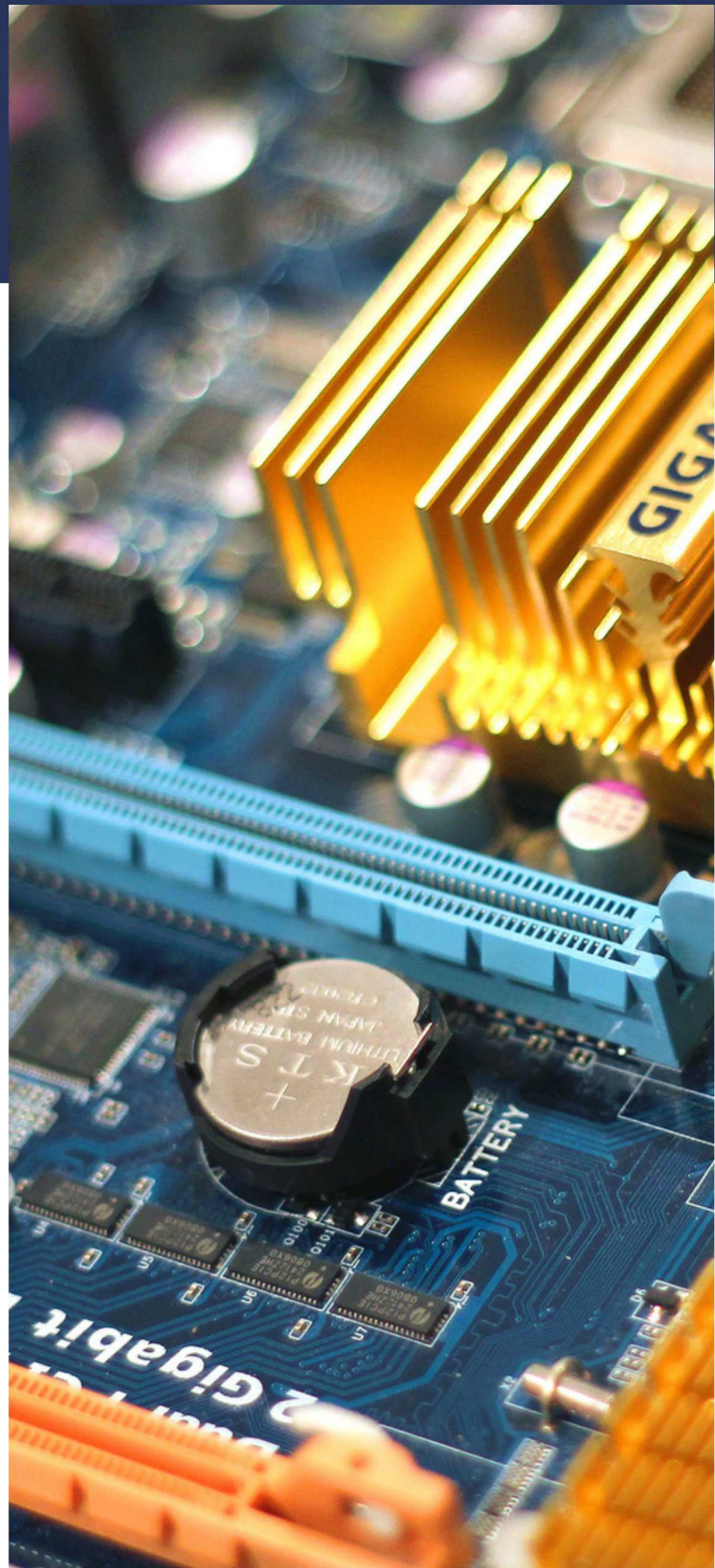
# FINAL THOUGHTS

This report examines the entire lifecycle of technology adoption in law firms, from purchasing and training to gathering feedback, while addressing the significant impact of AI on the legal industry.

Technology is constantly evolving, and law firms must adapt their use of it to remain competitive. The challenge is not just in how technology changes the field, but in how firms can effectively wrangle it to their advantage.

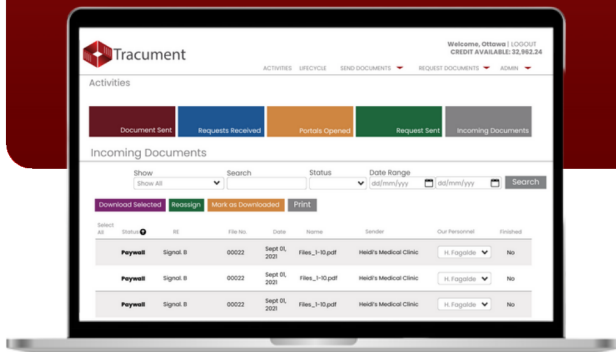
Implementing new technology, particularly tasks like data migration, can be daunting. The process involves extensive research, rigorous training, and ongoing analysis to ensure the technology meets its goals. It's so challenging that some may consider abandoning the effort altogether and go back to when pen and paper were the only way to work.

However, perseverance is key. The right technology, once adopted, can transform your practice, leaving you wondering why you didn't start sooner. So, stay the course—success is within reach.



## WHAT WE DO

# Purpose Built for Your Organization



Want to see how it works?

[Book a Call](#)

Tracument is a web-based platform that centralizes and automates the process of sending, receiving, and collecting documents. We can improve morale and reduce human error. Our platform saves considerable time and material cost while increasing cost recovery revenue for your firm. In 2022, **65.22% of all respondents who gave their firm five stars use Tracument in their practice.**

Over the past two decades, most firms have moved to store documents paperlessly, however, their methods of sending and receiving documents have lagged behind with very little progress—sensitive material is still emailed, CDs with images are even now written and couriered, faxes are still sent with confirmations still printed, and mail output requires an expensive mailroom or reception station. These methods are inefficient and outdated, but until now were the best available.

You can even outsource time-consuming functions like collecting third-party records to Tracument, saving your firm enormous amounts of time and turning non-revenue-producing staff time into a disbursement.

Additionally, if your staff are working from home, they lose access to many of these office services, making Tracument absolutely vital. 13.68% of respondents called Tracument the most useful software in their office before the pandemic. **During the pandemic, this number rose to 38.22%—more than any other software listed.** Give your staff the tools they need to work from home effectively, and increase their productivity significantly wherever they are located.