Legal Geek 2019 – Thoughts for the in-house market

Several of the Kites were at the Legal Geek event in London last week. We attended the in-house focused sessions, where there was a variety of speakers from in house legal teams and suppliers.
We picked up several themes:

- **Where should an in-house team start when they want to try and be more efficient?**
  - The starting point has to be to try and identify what is taking the team's time at the moment. Even a simple process for identifying and categorising incoming work can quickly generate information which will enable the team to assess what they should focus on in order to generate efficiencies. It may be a question of identifying one type of simple query/document for review which could be turned into a self-service product, freeing up resource for higher value work.
  - Several speakers talked about having processes for sending work to the legal team which enabled workloads and worktypes to be monitored. It could be a simple spreadsheet, but ideally it would be an online form which the business would complete, enabling work to be appropriately routed. It was stressed that there was a need for careful management of the change process in the business if this kind of initiative is going to be adopted.
  - Undertaking a major change, such as outsourcing a significant chunk of work can be a challenging project, but the delegates were encouraged to be brave – major improvements don't come about by being cautious.

- **How do in-house teams manage demand, whilst making sure that they are involved with the issues that they should be involved with?**
  - Some of the representatives from very small in-house teams talked about using social chat tools like Slack to respond openly to legal queries, so that others could use the responses as self-service.   Clearly there are risk issues here, and it might take more work to produce the initial response, but it could build into a repository of responses to common queries which would be useful points of reference for the business without having to take up lawyer time.
  - Several people talked about self-service for common types of task, like simple automated documents.

- **What technology solutions?**
  - A recurring theme was that in-house teams should be thinking in terms of platforms, not products. Stitching lots of point solutions together with a need for manual input of data when going from one solution to another creates too many opportunities for error and doesn't necessarily generate greater efficiency.   Finding the right platform is not easy and demands a mindset which accepts that the solution may not be perfect, but will be worthwhile if it can achieve a good chunk of what is required.
  - Starting small with a platform that provides an online 'front door' to the legal department is a good first step.
  - Several contributors recommended using the IT products the business already has. One example involved using the organisation's AP process to create a low-tech legal spend management system (essentially just by adding a requirement to specify the legal work type when requesting a Purchase Order), providing useful data for further analysis of where efficiencies could be found.
  - It was stressed (echoing our experience) that investment in legal tech/innovation is not just about cash spend, it's about getting buy-in and adoption from the top down. Project management and communications are, as always, crucial.

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