



A new definition of excellence

Derek Schutz, product manager at Aderant, says new ways of working require new levels of transparency and trust

Aderant's annual Business of law survey, out later this month, reveals some interesting data concerning business continuity in the early days of Covid-19. In spite of entertaining examples of CIOs raiding electronics stores, and buying every laptop in sight, the truth is that only 8% of firms admit they were "somewhat unprepared" or "completely unprepared" for full-scale work from home.

So in retrospect, firms and their employees were 90% 'there' when it came to full-scale work from home capabilities, such as laptops and reliable wifi. But what new security risks were posed when everyone went remote? With a growing need to share documents

and information with clients securely, new standards of security became a full-time endeavour. Virtual private network (VPN) access and cloud-based solutions powered by Amazon Web Services immediately come to mind as gold standards. Essentially, it comes down to having a new definition of excellence in law firms with regard to internal security protocols.

For secure sharing and collaboration with clients, leveraging all existing technologies and capabilities within Office 365 and SharePoint Online ensures that client data is delivered securely. Providing collaboration and portal options to many clients, not just a select few, can directly impact on a firm's ability

to provide transparency and trust, retain business, cross-sell additional services, and to compete for new business. Aderant Drive allows a law firm to create secure, scalable collaboration portals for all its clients.

The shift to self-serve

Law firms are treasure troves of information, documents and data. Lawyers need fast and easy access to that information, without distraction. Other staff are no longer sitting directly outside their offices, ready to provide them with the matter and financial data they need. Remote work requires them to have a self-serve ability, not just so that they can find that critical information, but also so that it remains relevant, timely and accurate. Out of necessity, and often with a lack of long-term vision, firms have joined together a patchwork system of legacy applications to try to provide lawyers with what they need. Many firms are now trying to incorporate Microsoft Teams as a collaborative space for lawyers and their practice groups. That may be 'good enough' for now in terms of connection and communication, but redefining excellence should mean going a step further.

Aderant Handshake uses more than 40 external data connectors to create a single source of truth, providing access to all a firm's internal data, plus a 360-degree view of the client through one digital dashboard. These customised digital dashboards help lawyers to filter out the data 'noise', enabling them to deliver self-service and the transparent status of all client matters, including budgets, filings and the names of the lawyers and staff who are delivering a service, to name a few.

On top of increased security and providing lawyers with the ability to surface data where they work, firms' clients are also requesting online access to their matter

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information and documents 24/7, expecting the same transparency and automation they receive from other service providers. Best-in-class firms use best-in-class technology to service their clients. Effective knowledge management tools help firms to manage their data and documents, surfacing the most relevant items for lawyers and staff. And secure client portals aggregate that information into a personalised view for clients. This single view, accessible anywhere, at any time, makes life much simpler for lawyers and clients alike as they get information immediately, when and how they want it.

With deployment simplicity, just about anyone in the firm can deploy a legal client portal with Aderant Drive. By removing the cumbersome burden of time and effort expected of the IT department in creating the portals, every client can be treated as though they are part of a key-client programme. Imagine being able to deliver a custom portal to all new clients at intake, ensuring security and a level of trust from the beginning of the relationship.

There is a collective optimism that science will allow us to see the pandemic in the rear-view mirror in 2021. Research indicates that firms were more prepared than originally thought for navigating the current crisis, but many challenges lie ahead when it subsides.

Redefining excellence should be right at the forefront of law firms' plans, especially surrounding security, access to critical systems and data, and self-serve capabilities for both lawyers and their clients. ▀

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