

# Legal Technology Core Competencies

Sue Pasfield, Founding Director

# Question 1

Please vote now

If you were a client instructing a lawyer,  
what type of lawyer would you prefer:

**A: One who is very competent with IT  
systems**

**B: One who is reasonably good with IT, but  
delegates work efficiently to their  
secretary**

**C: Not concerned about lawyer's use of IT as  
long as they were good with law**

# Who is Capensys

- Full-service training organization
- 100+ years combined experience in law firms
- Creators of Goal-Based Learning Approach
- Sponsors of LTC4™
- Developers for the Suffolk/Flaherty audit



# What is LTC4™?

- Legal technology core competencies
- A coalition of leading law firms that has created an industry standard
- Target audience
  - Support staff
  - Associates
- Positive attitude - certification rather than assessment
  - Offering CLE/CPD where possible
- Preparation for technology audit for fee-earners

# Founding Steering Group

- McGuireWoods LLP
- Munger, Tolles & Olson LLP
- Kramer Levin Naftalis & Frankel LLP
- Littler Mendelson, P.C.
- Ford Harrison LLP
- Squire Sanders (UK) LLP

# Expanded Steering Group

- DLA Piper
- Orrick
- Morgan Lewis
- Winston & Strawn
- Hunton & Williams
- Day Pitney
- Shearman & Sterling
- Sutherland & Asbill
- Cozen O'Connor
- Pillsbury
- Borden Ladner Gervais

# The LTC4™ Process

- Determine core competencies
- Determine generic / firm-specific best practices
- Select core applications
- Arrange by workflows – fee-earners and staff
- Agree on scenarios
- Natural progression – included preparation for the Suffolk/Flaherty technology audit

# Why Core Competencies?



## Question 2

### Core Competency Programmes

**A: Do you already have a core competency programme**

**B: Are thinking of adopting a core competency programme**

**C: Have not considered it at all**

# What's in it for your firm?

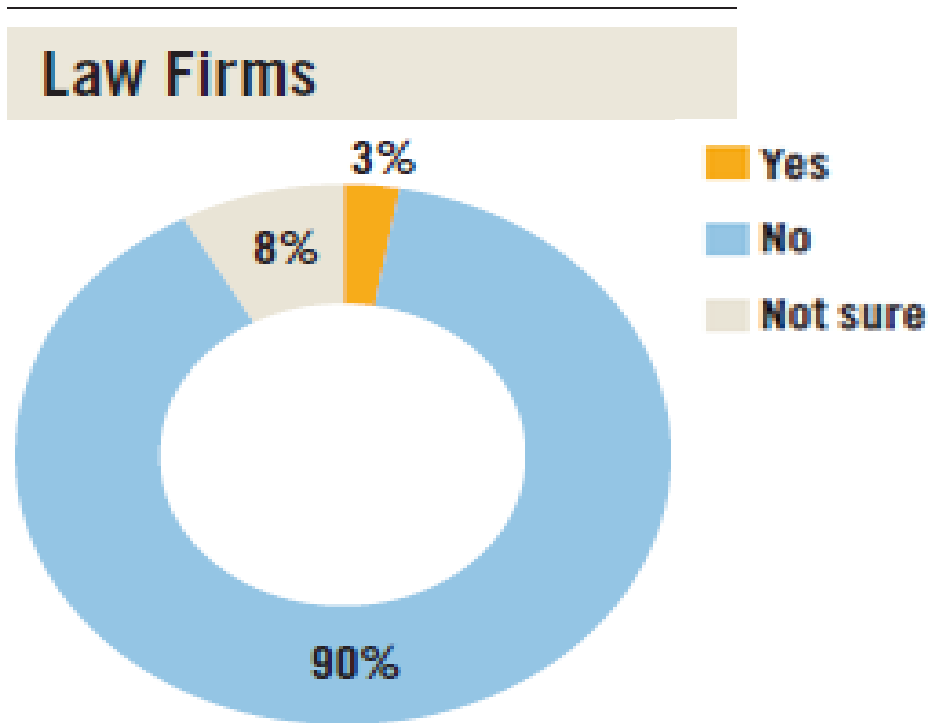
- LTC4™ has established an industry standard
- Provides increased skills to support higher fee-earner/staff ratios
- Provides increased flexibility among staff
- Assures clients of technical competence (certification)

# What's in it for your firm?

- Improves competitive advantage
- Addresses increased demand for technical competence by clients and AFAs
- Improves productivity (Neochange 17% loss)
- Reduces write-offs of “wasted time”
- Improves Billing – 40% underestimate bills
- Reduces risk of being fired for poor document quality

# What's in it for your firm?

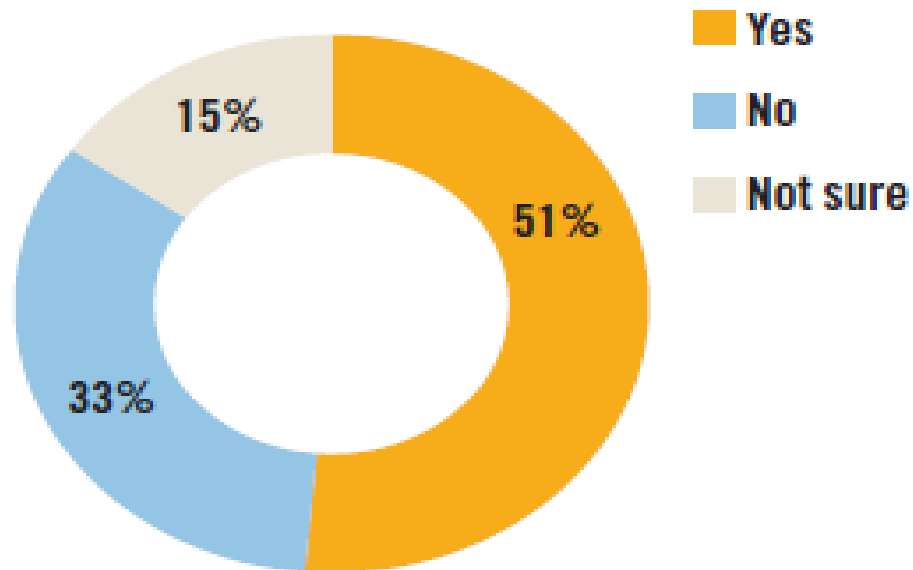
**Have you ever been fired by a client for sub-par document quality or delivery?**



# What's in it for your firm?

**Have you ever been fired by a client for sub-par document quality or delivery?**

## Legal Departments



## Question 3

- Please vote now

**Have you implemented Assessments?**

**A: Yes**

**B: No**

# Why up-skill vs. assessment?

# “Humane” skills improvement





# User-centric focus



- ✔ Reduce fear
- ✔ Create positive climate

# What are the keys to success?

# Past issues

- Application-centric as opposed to workflow-based
- Not always legal-specific
- Focused on MS Office applications
- One-time exercise, not on-going
- Time / resource intensive to review and analyse the results

# Proven success factors

- Market positively
- Introduce gently
- Build up incrementally
- Tie into appraisal / reward structure
- Automate the process
- Provide CPD credit (if possible)
- Measure productivity improvements

# Why use workflows?

# Why Workflows?

- Provides more context for learning
- Makes content more relevant
- Increases retention of knowledge
- Allows addition of best practices
- Provides more flexibility – Lego blocks

# LTC4™ workflow-based competencies

## Available...

- Document Production
- Managing Electronically Stored Documents/Emails
- Collaborating with Others: E-Mailing and Sharing Documents

## In Development...

- Time and Billing
- Mobile Devices for Lawyers
- Working with Clients (CRM)
- More as required....









# Sample workflow



## **.LTC4™ KnowledgeChecks - Document Production** LTC4™ KnowledgeChecks for the core competencies of Document Production

\* Does not include items assigned multiple times.

Items      All | [Current](#) | [Completed](#)

- 

**Updating an Existing Document - LTC4™ KnowledgeChecks**  
 A client has recently changed their company name and have sent you a document that needs updating. Using the Find and Replace feature, you can update the company name throughout the document. This will provide consistency in the document's paragraph formatting. After you print a copy of the document for your own records, you can delete the original document.
- 

**Customizing Word 2010 to Maximize Efficiency - LTC4™ KnowledgeChecks**  
 You want to work in Word 2010 as efficiently and quickly as possible, so you'd like to customize the Word Ribbon to make it easier to use. You can add direct formatting to text. Finally, you'd like to know how on-demand tabs let you to access the features you need, depending on the task you are working on.
- 

**Styling in Word 2010 - LTC4™ KnowledgeChecks**  
 You're collaborating on a document with one of your clients. You want to ensure document stability and promote consistency in the document's appearance rather than using styles. You'd also like use the Style Area to see which styles have been applied to paragraphs in a document. You can remove the styles and then add the styles to the Quick Styles Gallery for easy access.
- 

**Working with Complex Word 2010 Documents - LTC4™ KnowledgeChecks**  
 You've received a complex Word 2010 document that you need to format. To make the text of the document flow smoothly, you need to have different headers, footers, and page numbers, you want to insert and change the format of section breaks. Finally, you want to ensure the page numbers, headers and footers need to be edited to be certain they include the correct information. Finally, you want to ensure the page numbers are correct.



# Sample LTC4™ KnowledgeCheck

















## Updating an Existing Document - LTC4™ KnowledgeChecks

A client has recently changed their company name and have sent you a document that needs updating. Using the Find and Replace features in Word, you want to ensure that all text relates to the new name. You also want to apply styles to provide consistency in the document's paragraph formatting. After you print a copy of the document for your own records, you want to e-mail the document to the client for review.

\* Does not include items assigned multiple times.

Items      [All](#) | [Current](#) | [Completed](#)

-   [KC-FSITE-Saving A Single Email Attachment As A New Version Of A Document](#)
-   [KC-WD10-Finding Text in the Document](#)
-   [KC-WD10-Replacing Text in the Document](#)
-   [KC-WD10-Applying a Style Not in the Quick Styles Gallery](#)
-   [KC-WD10-Applying a Style in the Quick Styles Gallery](#)
-   [KC-WD10-Printing Documents and Parts of Documents](#)
-   [KC-WD10-E-Mailing a Document from Word](#)

Document Production

Courseware by Capensys Ltd.

## KnowledgeCheck

PRINTING DOCUMENTS

Take the challenge...

*The Scenario...*

### Printing documents and parts of documents

The client prefers to use Track Changes in Word instead of a comparison application. You've made changes to the document, and now you need to Print Preview the document, and print a list of the changes.

How would you do that?

⏪ ⏩ 🔊 🔍

## KnowledgeCheck

SEARCHING FOR AN E-MAIL  
MESSAGE BY AUTHOR

*Take the challenge...*

The  
Scenario...



### Searching For An E-Mail Message By Author

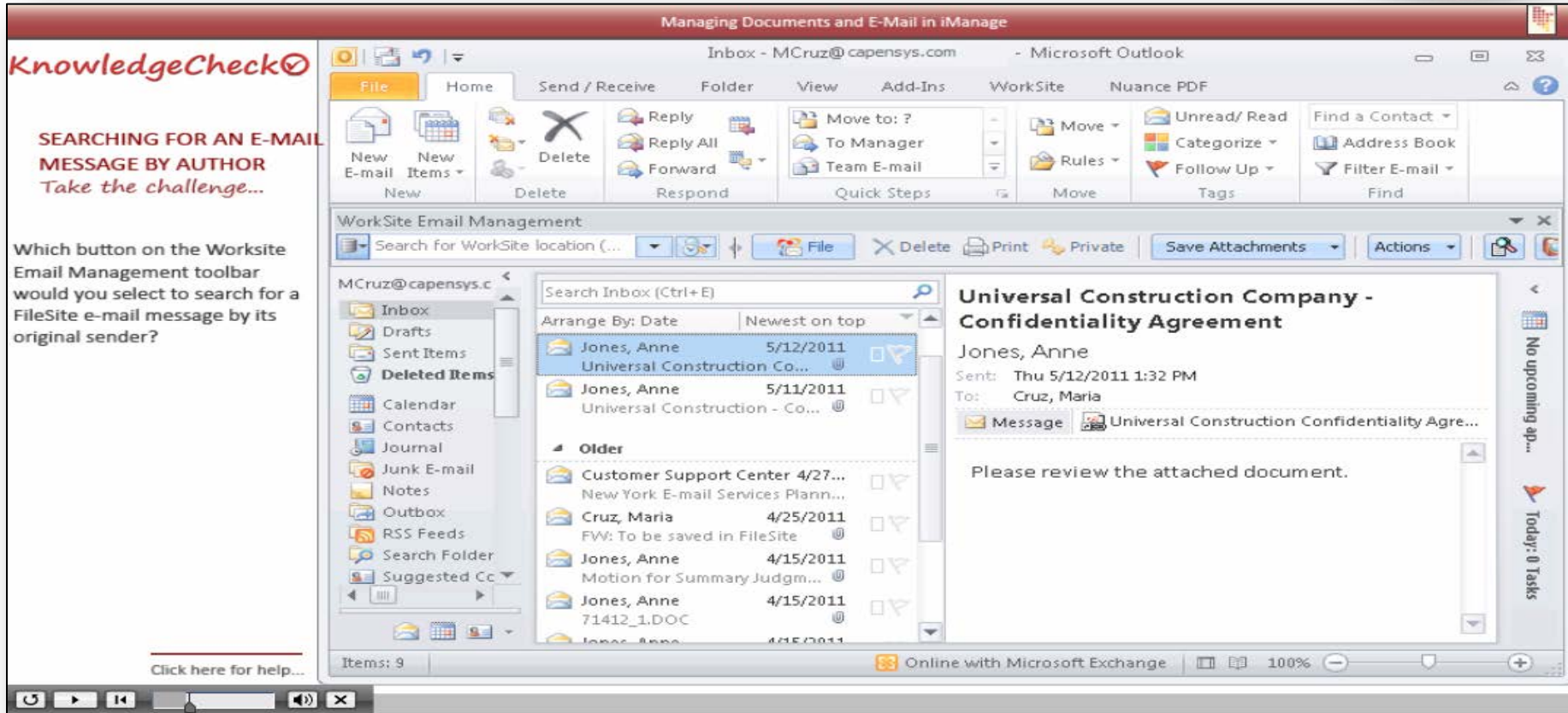
You need to locate an e-mail message you received from a client. You don't remember when you received it, but you know who sent it.

How do you search for an e-mail in FileSite by the sender's name?

## KnowledgeCheck

**SEARCHING FOR AN E-MAIL MESSAGE BY AUTHOR**  
*Take the challenge...*

Which button on the Worksite Email Management toolbar would you select to search for a FileSite e-mail message by its original sender?



The screenshot shows the Microsoft Outlook interface. The title bar reads "Managing Documents and E-Mail in iManage". The main window title is "Inbox - MCruz@capensys.com - Microsoft Outlook". The ribbon includes "File", "Home", "Send / Receive", "Folder", "View", "Add-Ins", "WorkSite", and "Nuance PDF". The "WorkSite" tab is active, showing a toolbar with buttons for "File", "Delete", "Print", "Private", "Save Attachments", and "Actions".

The left sidebar shows the folder list for "MCruz@capensys.c":
 

- Inbox
- Drafts
- Sent Items
- Deleted Items
- Calendar
- Contacts
- Journal
- Junk E-mail
- Notes
- Outbox
- RSS Feeds
- Search Folder
- Suggested Cc

The main pane shows a search for "Jones, Anne" in the "Inbox". The results are arranged by date (Newest on top):
 

| From                    | Date      | Subject                           |
|-------------------------|-----------|-----------------------------------|
| Jones, Anne             | 5/12/2011 | Universal Construction Co...      |
| Jones, Anne             | 5/11/2011 | Universal Construction - Co...    |
| <b>Older</b>            |           |                                   |
| Customer Support Center | 4/27/...  | New York E-mail Services Plann... |
| Cruz, Maria             | 4/25/2011 | FW: To be saved in FileSite       |
| Jones, Anne             | 4/15/2011 | Motion for Summary Judgm...       |
| Jones, Anne             | 4/15/2011 | 71412_1.DOC                       |

The selected email is from "Jones, Anne" with the subject "Universal Construction Company - Confidentiality Agreement". The preview pane shows:
 

Universal Construction Company - Confidentiality Agreement  
 Jones, Anne  
 Sent: Thu 5/12/2011 1:32 PM  
 To: Cruz, Maria  
 Message: Universal Construction Confidentiality Agre...  
 Please review the attached document.

[Click here for help...](#)

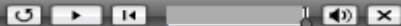
KnowledgeCheck®

PRINTING DOCUMENTS

## Quiz Results

You Scored: **6**Maximum Score: **7**Correct Questions: **6**Total Questions: **7**Accuracy: **86%**Attempts: **1**

Congratulations, you know this topic well.

[Review Quiz](#)[Finish](#)

Can LTC4™ workflows help prep for the Suffolk/Flaherty audit?

# Let's hear your experience...

Which of you has heard of the  
Suffolk/Flaherty Tech Audit  
(Kia Motors General Counsel)

It's heeeeeeere....





# Audit goals per Suffolk/Flaherty

- Deliver a test of fee-earner skills using basic, generic business tech tools such as Microsoft Office and common legal apps
- Reduce wasted “busy” time (and money) spent on simple tasks








# Audit update

- Audit owned by Suffolk university
- All inquiries/suggestion about audit to Suffolk
- Content of audit based on Flaherty audit and crowdsourcing @ [www.legaltechaudit.com](http://www.legaltechaudit.com)
- Capensys to provide content for online, automated pilot audit
- Audit released to pilot group in early 2014

# Capensys / LTC4™ audit prep goals

- Help firms **prepare** for the audit in a positive, immediate and useful way
- Increase awareness of the benefits of up-skilling fee-earners
- Introduce core competencies for fee-earners as a general benefit and/or preparation for audit

# Up-skill for the audit - tutorials

| Package  | Status                                  | Score       |       |
|--|---|-------------|-------|
|  <b>LTC4™ Tutorials – Time-Saving Skills for Attorneys</b><br>Learn how to save time when you're preparing exhibits.  | In process                              |             |       |
| * Does not include items assigned multiple times.  |   |             |       |
| Items  | All   <u>Current</u>   <u>Completed</u> | Status      | Score |
|   <b><u>Bulk Conversion to PDF</u></b><br>The court requires that all exhibits be in PDF format. Some of them are currently in PowerPoint or in PDF in Windows Explorer.         |   | Passed      | 100%  |
|   <b><u>Applying OCR to a PDF-Document</u></b><br>A document is in PDF format, but, because it was scanned and faxed, the text is in the form of images and document searchable. |   | Passed      | 100%  |
|   <b><u>Creating an Embedded Index</u></b><br>The document is searchable, but the information in it needs to be found very quickly. You need to i                                |   | Not Started | -     |



# Now is the time...

We are approaching a  
Tipping Point  
for technology training in law firms

# Now is the time...

A simple change in attitudes to training  
can lead to increased  
efficiency and profitability

# Now is the time...

- Implement an up-skilling program
- Be prepared for the audit





# Thank you!

- ① Interested in joining LTC4™ ?
- ① Please contact us to find out more about LTC4™  
Core Competencies and preparation for the audit

[info@capensys.com](mailto:info@capensys.com)