

Moving from technology competence to adaptability

Using legal technology is such a fundamental requirement for the modern lawyer that it should no longer be necessary to talk about the need to improve basic skills.

However, conversations with technology training and service desk professionals paint a worrying picture in which some of the most commonly used desktop applications are not being used to their full potential simply because of lack of knowledge. Time pressures keep lawyers from training just as the need to function effectively and efficiently have never been more important.

Given the increased pace of technological change, trainers are increasingly aware that what they need to teach is **self-sufficiency and adaptability** - to enable lawyers and staff to adapt to a constantly changing tech environment with confidence.

As firms use Microsoft 365 there are many areas where the functionality it offers are under-used or not clearly understood. Inevitably this will only increase.

- For example, co-editing in M365 has been available for years but is rarely used
- Far too few lawyers understand that using Excel (or better yet Power BI) to manipulate data and to quickly perform and adjust calculations can be extremely efficient once its functionality is understood
- Managing matter-related documents and emails in a way that makes them available both in the office and when working remotely is critical and avoids risk
- Using document versioning and tracking changes saves time and frustration
- Without a good understanding of how a document is structured and how styles are used a legal document can be a minefield
- How many legal professionals understand Word styles and know how best to use the Format Painter to apply them?
- Saving emails to the Document Management system ensures a complete client record exists in one place, and is possible whether you use iManage or NetDocuments yet firms struggle to get adoption of email filing best practices
- Cyber security and data protection risks associated with poor tech skills include headline grabbing and business ending vulnerabilities

In her excellent recent webinar Ivy B Grey of Wordrake outlined the duty of technology competence like this:

- ♣ For any client representation, a lawyer must be competent
- ♣ Competence includes substantive knowledge and practical skills
- ♣ Practical skills include business and technical skills
- ♣ The minimum requirements are ever-increasing, the tools are ever-changing

LTC4™ is a not-for-profit organisation aiming to improve skills across the industry and offers 10 individual Learning Plans via its website together with assistance with assessment towards Certification. Law firms, legal departments and law schools across the world have become part of the coalition and can use these Plans to structure their training programmes and work towards individual **LTC4™** certification for their employees – there are two streams one for attorneys and another for support staff. Certification is key – assessment methods can vary and LTC4™'s own Certification Pod is there to help formulate the best method for each firm.