



Designing a Technology Ecosystem That Supports Your Firm's Growth and Innovation

Actionstep

Session format

- 1 Assessing your technology ecosystem**

- 2 Building the right foundation**

- 3 Assess against tech ecosystem characteristics**

- 4 How intuitive automation supports a law firm's tech ecosystem**

- 5 Q&A wrap-up**



Learn how to:

- Assess your law firm's current technology infrastructure
- Identify pain points
- Define clear goals for technology integration



Acquire the skills to:

- Map out your ideal tech stack
- Find areas for automation and integrations
- Create a visual representation of your ideal tech infrastructure



Understand ways:

- Intuitive automation can help streamline workflows, reduce manual tasks, and enhance productivity



From tech stack to tech ecosystem

A **tech stack** is simply all the platforms, tools, software, and hardware solutions your firm happens to use.

From tech stack to tech ecosystem

A **tech ecosystem** is a curated set of tools that work together seamlessly to share data, automate tasks, and efficiently track and complete workflows, balancing automation with the right kind of human effort.





Step 1. Create a tech inventory

Marketing / Lead Generation

HubSpot

Client Intake

Conflict Check

Time Tracking

Case / Matter Management

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Document Management

NetDocuments

Client Portal

Client Accounting

Office Accounting

Billing

Document Assembly

Email Management

Word Processing / Creation

Microsoft Word

Knowledge Management

Legal Research

Security

Payments

Forms and Precedents

Diction

Digital Signature/ Identification

DocuSign

Intake

Client Comms

Docketing

Step 2. Categorize the purpose of your tech stack

Use for tool

Name of tool

G
W
B

← Area of
functionality

Growth Management

Lawyers and staff have the tools to win clients, deliver modern legal services efficiently, and achieve profitability in the digital age.

Work Management

Legal professionals and staff work faster and more effectively with real-time communication, streamlined workflows, task automation, and more.

Business Management

Firm leaders gain insight into multiple performance areas for more informed decision-making and precise financial management.



Step 3. Identify pain points in your current tech stack

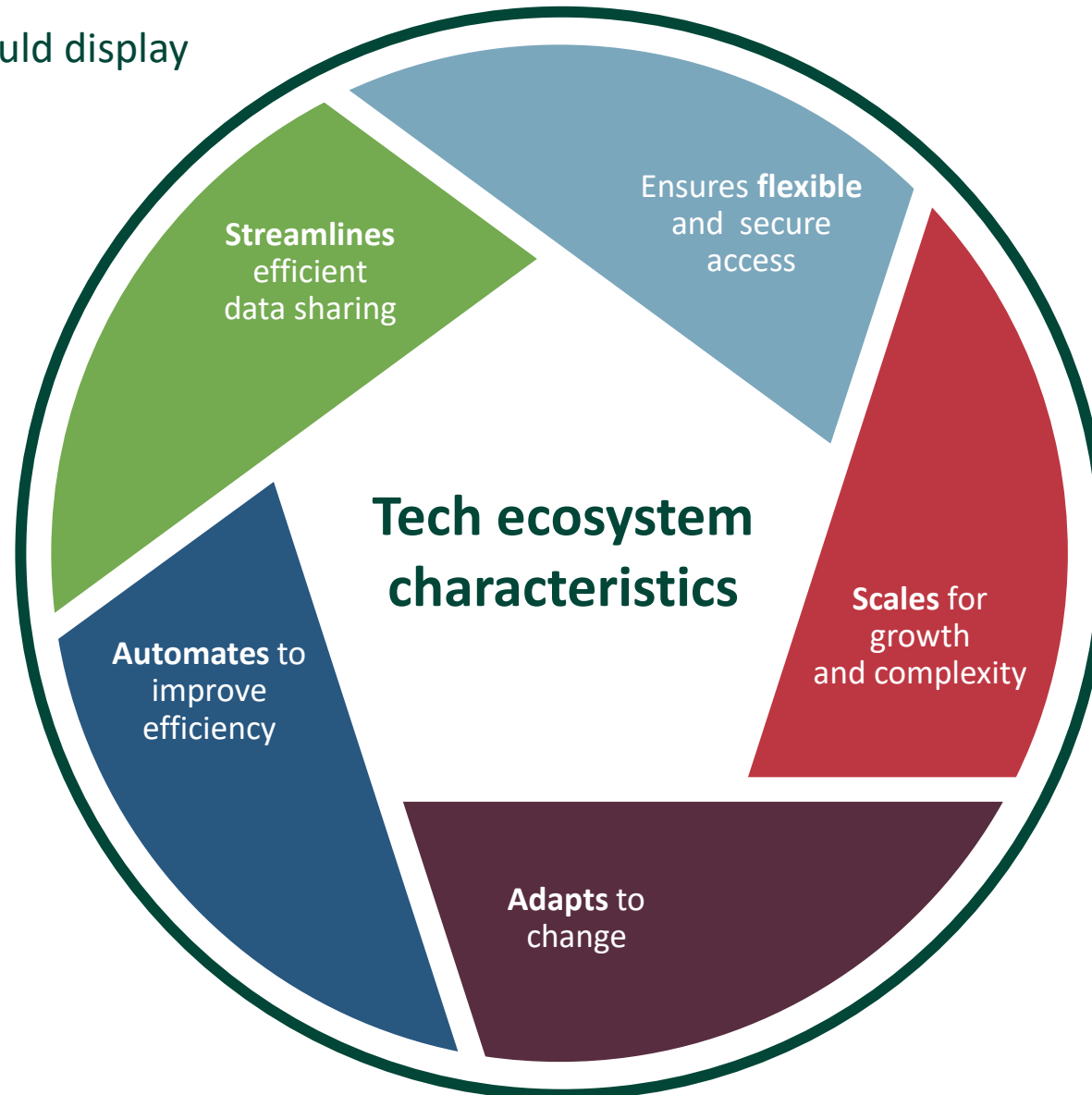
Look at the buckets of grouped technology and look for gaps.

Write your top three business goals.

Does the category of tech you've invested in to date support your goals?

Step 4. Assess against tech ecosystem characteristics

Your firm's tech ecosystem should display these five characteristics



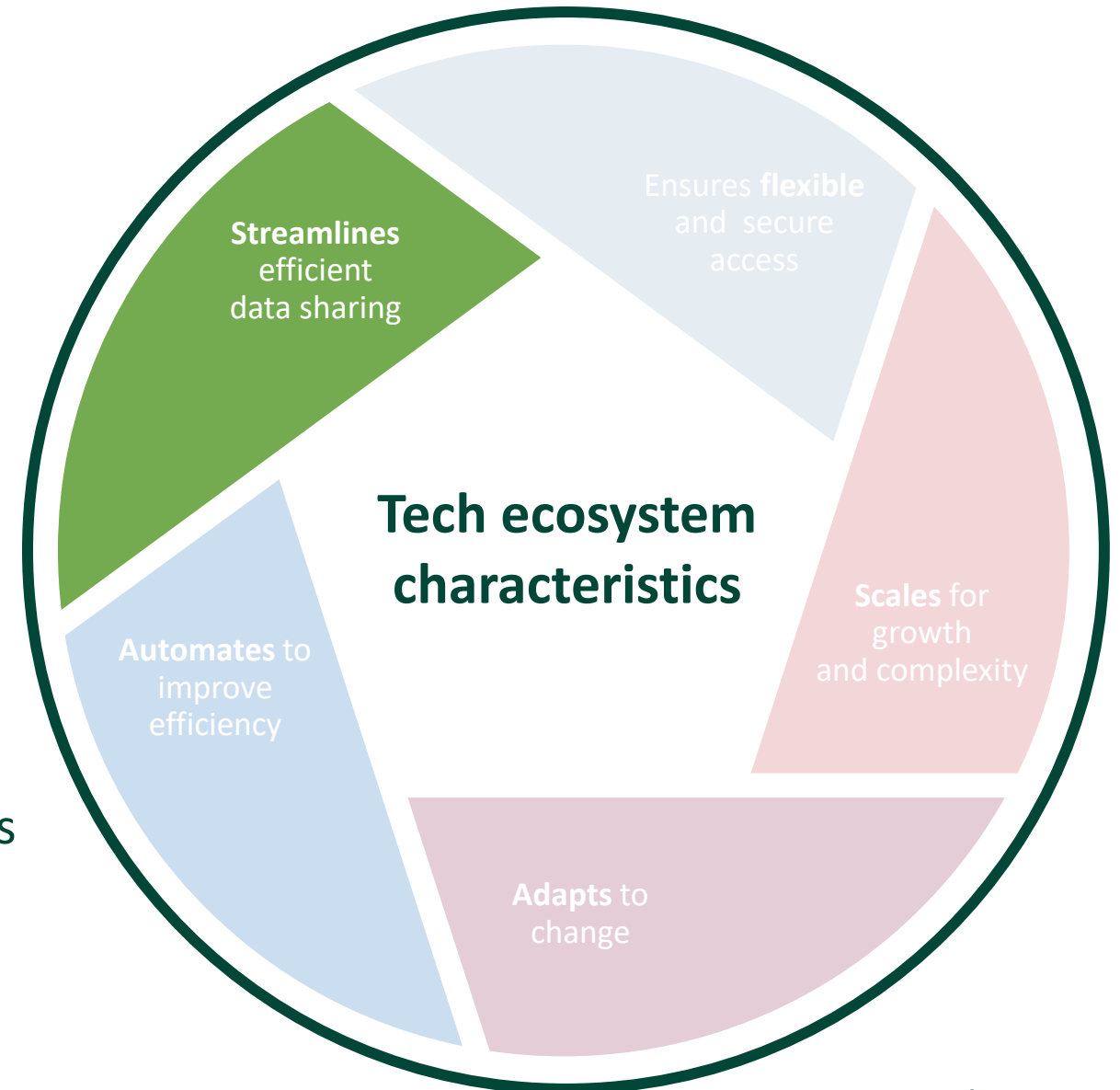
STREAMLINED

■ Focus on overall core functionality ***THEN*** add niche point solutions

- Fewer systems to integrate allows systems and data to be more easily managed
- Avoid overlapping functionality – creates confusion

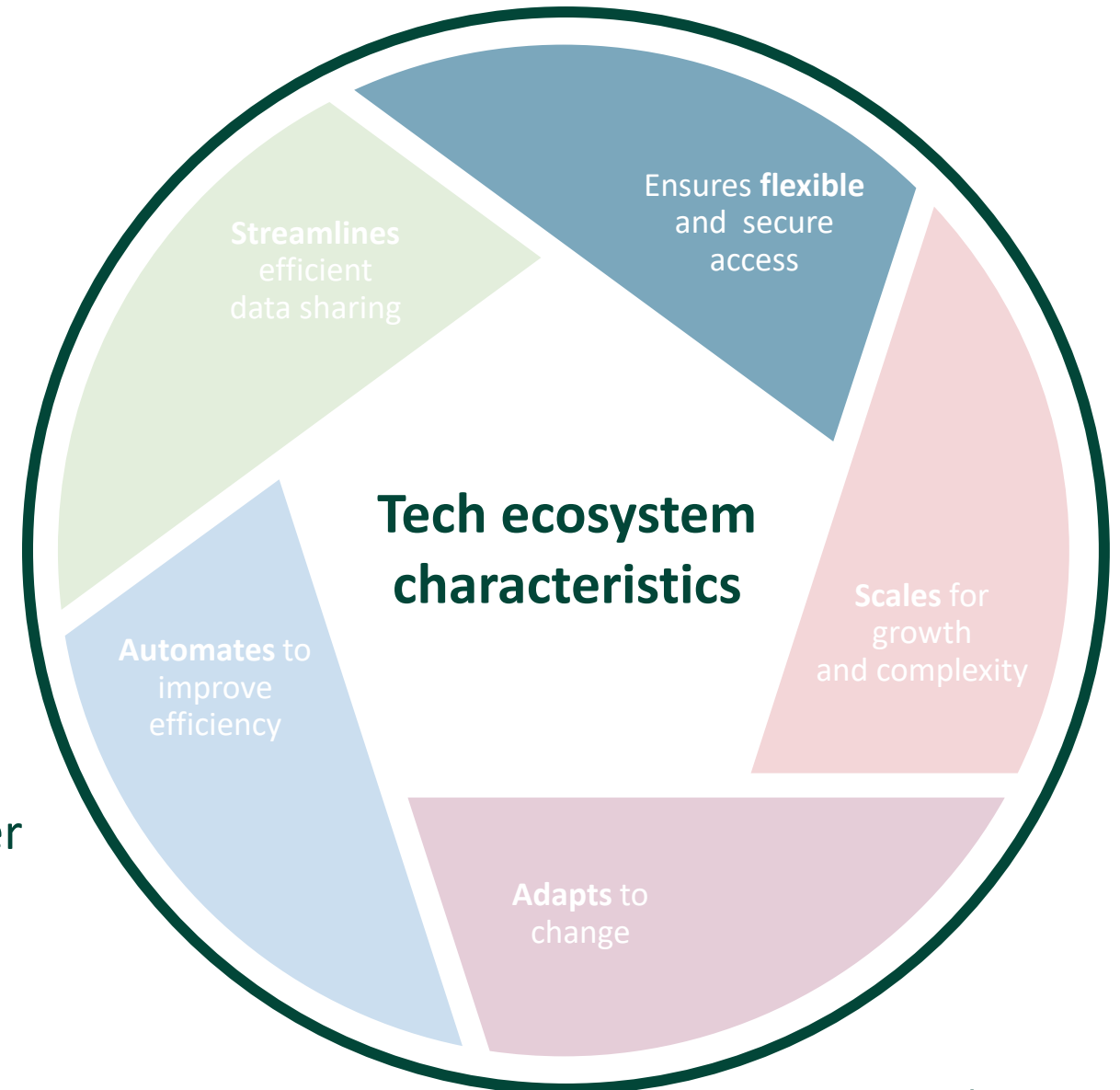
■ Look for:

- Multi-functional systems
- Deep integrations with essential tools
- Similar market focus areas



FLEXIBLE

- Access from anywhere (office, court, home), flexible delivery model (SaaS)
 - Enable remote work while staying in control of activity.
 - No downtime for software updates
- **Look for:**
 - Tech that's always adding new features and improvements
 - Compatible with any device / browser
 - Extendable through expansive integration library, open API



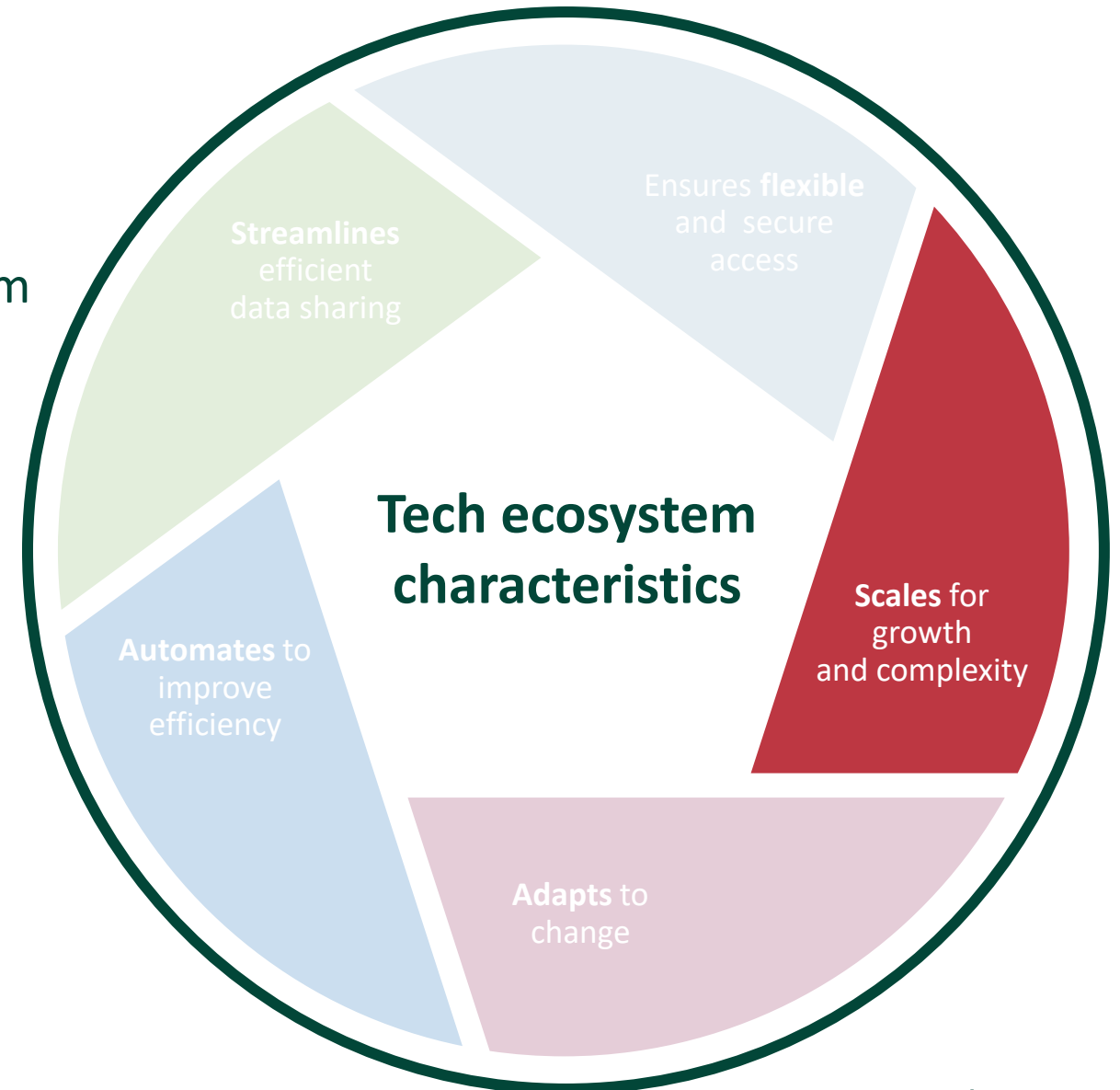
SCALABLE

■ Never outgrow your ecosystem

- You should have the ability to grow and change – without limitations from your software

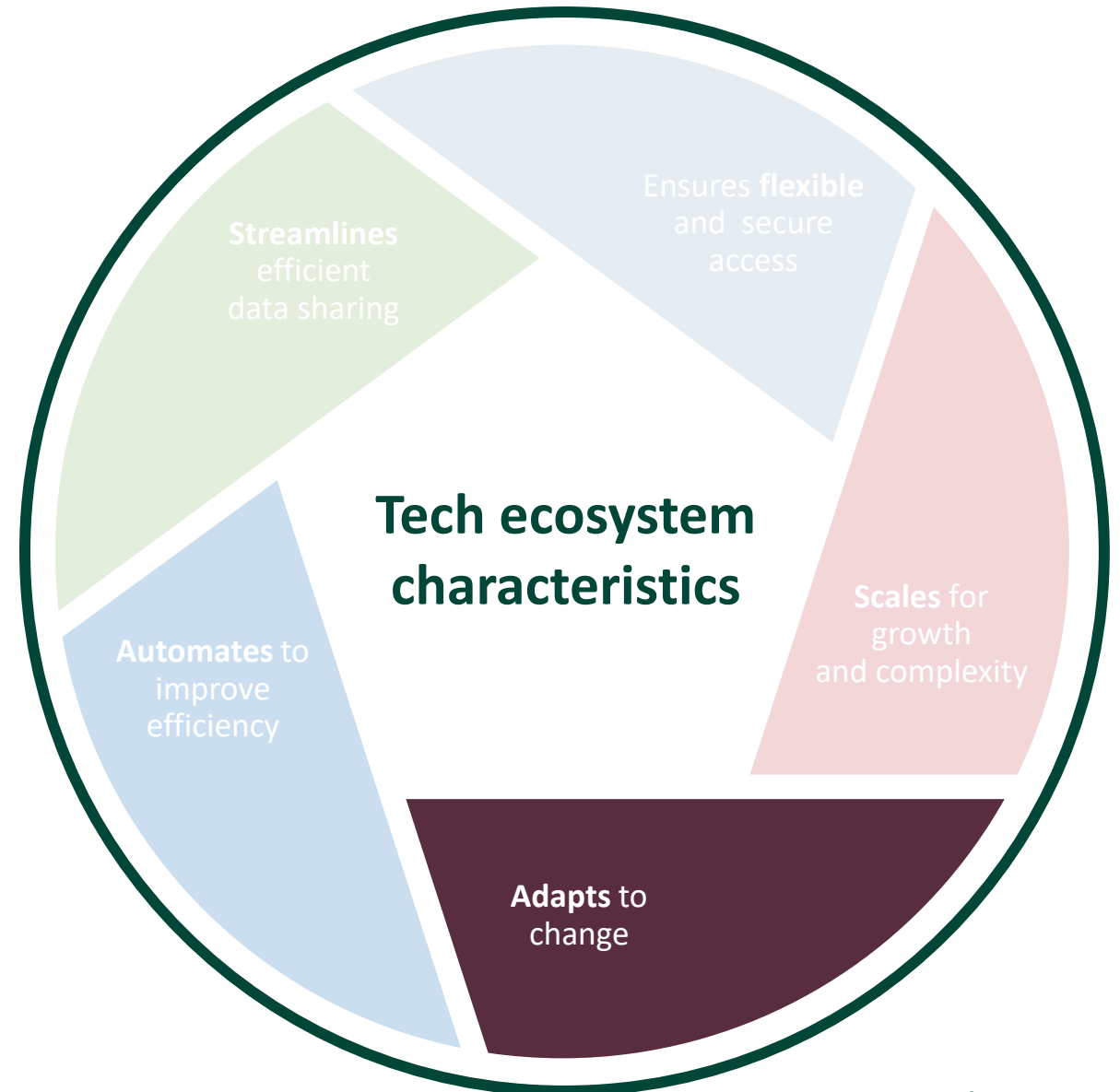
■ Look for:

- Tech that adapts as your firm grows and evolves
- Add individual users as needed
- Handle data volume & complexity
- Accommodate required integrations



ADAPTABLE

- No two firms are the same, like no two ecosystems are the same
 - You should have the flexibility to continuously improve your processes and adapt your tech ecosystem to your firm
- **Look for:**
 - Customizable workflows and screen layouts
 - Permission controls
 - Custom reporting and dashboards



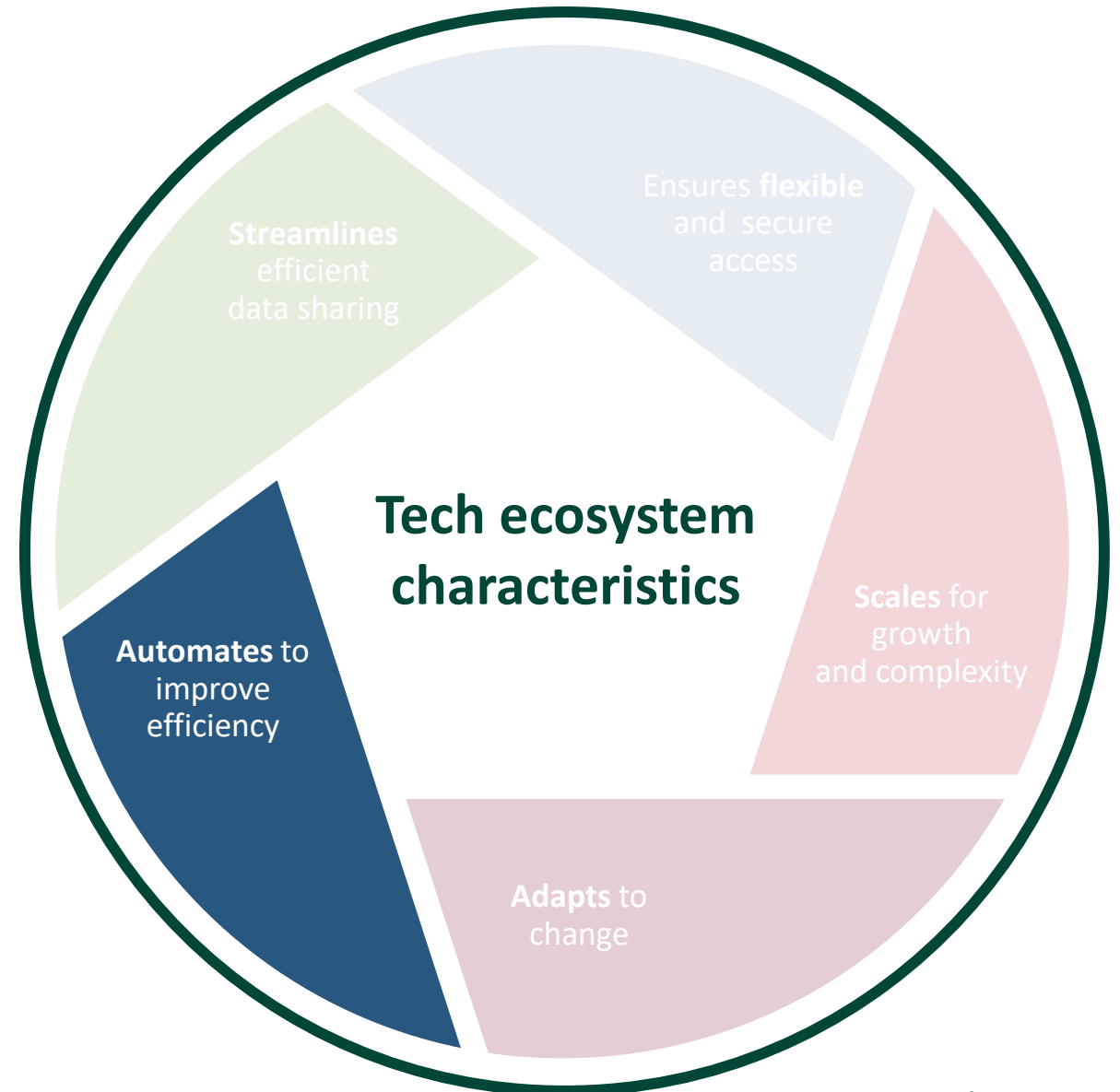
AUTOMATED

■ Automation = efficiency

- Can your tech stack automate documents, emails, tasks, trust accounting, data collection, client account transactions, and more

■ Look for:

- System-wide workflow
- Document, email, task, and data automation
- Triggered and aggregate billing



Step 5. Map out your ideal technology stack

- Must-haves
- Nice-to-haves
- Bottlenecks and redundancies
- Opportunities for automation and improved workflow
- Exploring compatible integrations



Step 6. Envision your highly functioning tech ecosystem





Questions?

Get in touch!

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