



## Legal I.T. – Top Tips for dealing with Legal Professionals

Although the legal world is becoming increasingly more aligned with the way in which general business and industry works and manages itself, there still remain some unique challenges for an I.T. person working within the industry. One of these is the fact that we have the joy of dealing with legal professionals (LPs), who are often maligned by us 'geeks'; as I'm very sure we are by them. But often the problem does not lie with the legal professionals, but rather with how we interact with them, both technically and personally. With this in mind here are some Top Tips to bear in mind when dealing with such folks.

### 1 – Know that fast prototyping and agile development is good.

These LPs, - and I know it's a generalisation - but sometimes they're not very good at 'visualisation' and 'concepts'. They deal in words and legal facts, not theoretical 'concepts' (though the best of them undoubtedly can). I've almost lost count of the number of demonstrations

I've been in for systems that can be configured and customised to meet the lawyer's exact needs, but despite this being explained to them up front, when they initially see the 'vanilla' product the inevitable comment is "We don't do it like that". And that mantra will keep being repeated until the software or product actually 'does do it like that'. So to help get there then fast prototyping and agile development (as opposed to huge 'waterfall' projects) work well in the legal industry, because of the ability to iteratively and quickly change things and obtain feedback. Plus, they get to see the progress you're making and are happy to know things are approaching 'the way we do it'. And the happier they are then the happier you'll be.

### 2 – Define all the information and get it confirmed.

The two key words are 'define' and 'all' (obviously). I.T. and the LPs, who are generally very clever, speak different languages; LPs speak in legal terms and I.T. in process and technical terms; and we all use shorthand which we assume will be understood. It's vital therefore to define and translate the legalese into terms you can work with. And try and get all the information. I once produced an elegant piece of code to produce complex tax calculations; it was a thing of beauty once I'd understood the legal process and translated it into a coded process. Well, it was a thing of beauty until I was asked "What about partial terminal year calculations?" Now I never knew there was such a thing, so didn't ask, and no-one had

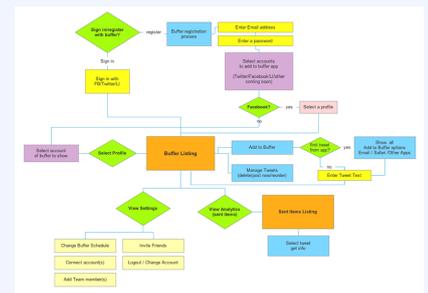


told me, because all the LPs in that team assumed that everyone else knew about such things. So by the time I'd changed the code to accommodate it, then my elegantly designed code structure became a spaghetti plate of bastardised kludged up wretchedness (which thankfully I never had to amend). So always ask 'is there anything else?' - get it all. And very importantly, get your understanding confirmed by the LPs before you design or write anything.

### 3 – Don't hide behind or blame I.T. processes

We all know that there are very good reasons for having change control and help desk systems and work scheduling and resource planning etc. in I.T. In part, they're there to prevent the type of chaos that would result if we constantly acceded to the LPs requests to 'Just F\*ing Do It!' But too often it's easy to hide

behind such processes and never interact with the LPs; it's all done by e-mail and work flow, and generally LPs are slow to respond to such automated communications. But by relying on that you're just a name in a phone directory and you'll never directly interact with them. So use the systems as they should be used, but don't be afraid to pick up the phone or go and see them to obtain more information and clarification (see above). But whatever you do, don't blame the processes, "Oh, it's the stupid rules, I can't do it without a change control", because that's the equivalent of saying "Computer says No" – And LPs hate that! So always explain to the LPs the business rationale of why such things are needed. In other words "Computer may say No, but it's because of the following business reason..."





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### 4 – Learn from the LPs and become a legal subject matter expert.

Yes, you're in I.T. because that's what you want to do, not be a lawyer. But I.T. does not exist in a vacuum and it's there to serve and benefit the business. And without knowledge of the business, then come the next downturn or merger then you're just another 'generic techie' who is nothing but a cost overhead. But if you learn from the LPs and become their 'go to' person, who understands their legal process and business context then you're much more likely to



have a good career in Legal IT. And as we move more and more towards what people are calling Legal AI then there's no way you'll ever get on board that particular gravy train without understanding the business side of things. I firmly believe one way that people, both I.T. and LPs, will best be protected from 'The rise of the robots' is to be part of the revolution itself. But without subject matter expertise then the chances of joining the revolution and avoiding the guillotine are minimal.

### 5 – Develop your Egos

Now I don't mean 'develop an ego' as in being egotistical. I mean it in the Freudian sense of Egos being a facade that the Id (the core personality) uses to deal with particular situations. A failing of mine can sometimes be my quirky sense of humour – if I see a pun can be made, or a joke cracked, then I'm the guy to do it; whether it's funny or not. And this was raised to me as a perceived lack of gravitas which could hold me back when dealing with Partners. So I had to learn to develop an Ego, a particular persona to use when dealing with such LPs. Now this didn't change who I am or make me subservient, it just modified the way I dealt with and acted in certain situations. So try and develop your Egos to help you deal with LPs in a way that they will feel is appropriate and which will make them comfortable. Many senior LPs are 'alpha' personalities. More importantly they're alpha personalities who either own, or are close to those that do own, the business. So if you want to get into the sort of contest that involves some type of measurement and euphemisms for genitalia, then remember one of two things will happen. The first is that you'll 'lose'; the second is that even if you 'win' then you'll not be forgotten ... or forgiven.



### 6 – Remember that your 'user' has a user too

Let's be honest ... LPs can be 'difficult' users. But remember that they have users too; they're called clients, and at the end of the day the clients pay all your wages. Now in Big Legal these are not just any clients; the relationship with the firm can be valued in the millions, so not someone we want to



upset. And it's generally when there is a demand from a client that needs to be met that our LPs can be most difficult. So it's always useful when dealing with our LPs to ask 'Are there any client implications?' Often this may not be obvious from the first interaction. I was once asked why four people at once could not edit the same Excel spread sheet, and a strident demand that I make it possible ... as if! A stupid request I thought, preparing to tell the Partner that it was not possible and only one person could edit it ... but before doing that I checked further and asked why they possibly wanted such an impossible thing to happen. And as it happened the edits had to be completed by the end of the next day due to a completion deadline for a key client, and there was no way one person could do all the edits in the time available, hence the demand. Obviously that didn't change the fact that the file could not be multi edited; so I used a sophisticated and highly technical solution called 'copy and paste' to split the file into four and recombine it to meet the deadline. So always remember that sometimes the pressure you're being made to feel from an LP is probably coming from somewhere else.

Now this list is not exhaustive, though it is based on real experience (some good and some not so good; But hey, I'm not bitter. I'm bitter ... and twisted. Just kidding there; see what I mean about the humour ...) and I'm not suggesting that the way to a good career in Legal IT is to become servile.

No, I think that if you want to specialise in the market and not just be a 'disposable generic techie' then the key for a good and lasting career within Legal IT is to be as professional as possible and to think outside of your own particular set of circumstances.

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