

## 9 IT tips for Trainee Lawyers

A discussion document written by Elizabeth Miles, CEO and joint founder of Iken Business Ltd

This document was inspired by my Twitter friend [@BrianInkster](#) of [Inksters Solicitors](#), who sent out the following tweet to people in his legal network:

*"A word of wisdom please for Trainee Summer School. Preparing talk on IT use by Trainee Solicitors. What would you tell them?"*

So here are a few things that I would say to new legal trainees. The early ones focus on personal areas of work, with the later ones broadening out to a wider business perspective.

### 1. Your documents and emails are no longer your own

As a student you have probably used MS Word to write coursework and assignments and communicated via email and social networks. As a private individual you have been able to organise your IT systems to suit yourself.

That's about to change – at least as far as your working life is concerned.

From now on your business documents and emails are not your own: they belong to the case, and your clients' and firm's well being depends on the content.

Ideally your firm will have systems to make sure that documents and emails are filed in a consistent manner in the context of the relevant case and matter, rather than in personal folders defined by you. There may be document management systems in place, or case and matter management software.

You may find this constraining at first, but it's essential for the good of the business that you adopt the corporate approach to filing and naming.

**DISCUSSION POINT:** Why is this essential? Explore the potential problems that could arise if each lawyer in a firm has their own system for storing their emails and documents.

## 2. Decide whether, or to what extent, dictation (if available) is appropriate for you

You are the new generation. You have used word processing to write coursework and essays. You can probably type content at least as quickly as you can think (which is all that's required).

In your firm there may be older practitioners who (in their day) wrote essays with a pen and have never learnt to type at the speed at which they think. It is possible that you will experience a clash in cultures. Points of view I have heard within a single organisation range from:

*"It's a waste of my professional time to type. After all I am not a copy typist and I have a secretary to do that for me";* to

*"We must cut non rechargable costs and reduce the ratio of support staff to professionals, so lawyers are going to have to do more of their own typing"*

Each firm has its own secretarial support policies, and it's not my place to challenge these. However you may like to look at my [costs & benefits analysis on the subject](#) .

Whatever the policy of your firm you will need to work within it, but do keep an open mind. Your career will span forty years during which mechanisms for producing the written word will radically change.

You might also like to consider speech recognition software. In my opinion [Dragon Naturally Speaking](#) became highly usable at version 9 and I flirt with it from time to time. Be wary, however: it's all too easy to make throwaway comments during the dictation process, so do check the final text for any such unwanted inclusions.

**DISCUSSION POINT** Do you expect to have the services of a secretary or typist? Are you secretly looking forward to this? What are your views on typing your own letters and documents? What do you think of this [cost benefit analysis](#)?

## 3. Time recording

I'm afraid you are just going to have to do it. It's the means by which you get paid. It isn't all bad news however as it's also the way you can demonstrate to the powers that be how hard you are working.

Either get over it or escape into a corporate in house team.

As you have to do it anyway it's probably best not to leave time recording until the end of the week. If you do you will probably have to record that you spent an hour doing time recording itself. Possibly your systems won't allow you to procrastinate anyway: I know of one legal software application that sends you an SMS message at a specified time each day if you haven't recorded sufficient time.

You may have opportunities to use time recording for your own purposes. There may well be reports that can help you track your workload and performance against targets and that can assist you when your work is being reviewed by supervisors.

**DISCUSSION POINT:** Apart from billing clients, list out the sorts of management information that will be available to managers as a consequence of time recording. How do you think they can use this information to develop and manage the business?

#### 4. Don't be intimidated by geek speak

If you don't understand the explanations that your IT providers and support people are giving to you that's not your fault. After all you wouldn't be where you are today if you weren't an intelligent person capable of understanding complex ideas.

Any IT person communicating with end users should be capable of explaining what they mean in language the end user can understand, and that's all there is to it.

If you run into trouble in this area, ask the Geek to write down what they mean. The chances are they will see for themselves why their communication is inadequate. If this doesn't work try writing down your own understanding of what has been said and give that back to the Geek so they can confirm whether your understanding is correct or not.

(By the way, end users of legal services sometimes feel this way about their lawyers, so make sure you do as you would be done by!)

And while we are on the subject, always make sure you control the mouse when you are being trained at your desk top. You won't learn nearly as well if the trainer controls the mouse and just shows you what to do.

**DISCUSSION POINT:** Can you remember any situations where people have used Geek Speak in explaining something to you? How did you cope with this? What could you have done to help the other person communicate more effectively?

#### 5. See your work in the context of the big picture

There are a lot of things that go on in your firm apart from what you do. Good coverage of the business processes in a typical legal practice are covered in the Law Society (England and Wales) [Lexcel Quality Standard](#). Although Lexcel accreditation only takes place in England and Wales similar business processes are likely to be in place in firms across the world, so it's a good checklist.

Apart from management of individual cases and clients the Lexcel standard deals with practice-wide processes such as supervision, knowledge management, marketing, business and resource planning. There's even a section on IT.

As part of your induction your firm is likely to cover its operational approach, but it would be good to look at the Lexcel standard (or your local equivalent) and use it as a checklist to make sure you understand how IT is used in your firm to underpin each operational area, and how you fit in.

**DISCUSSION POINT:** Examine the [Lexcel standard](#) (or your local equivalent) and make a list of the IT systems you might expect to find in a legal practice to support the operations of the business. When you have done this imagine how you, as a trainee, might be expected to engage with these IT systems.

#### 6. IT is not an end in itself. It's just a tool

Some years ago, I was asked whether I was "one of those people who love computers", to which I replied: "you might as well ask me if I love my washing machine. If the clothes come out clean I don't ask too many questions."

I have since designed and worked on several computer applications for business, and I still hold the view that users of our software should get clean results and not need to ask too many questions.

This isn't to say that you shouldn't be interested in new technologies: just that you should typically examine them in terms of the added value to your business as well as to you as an individual.

**DISCUSSION POINT:** To what extent is an iPad useful to: a lawyer; the lawyer's firm? What are the pros and cons? Have you any experience of situations where the IT tail has wagged the business dog?

### 7. Be on the look out for improvements

One of the biggest joys I have had as a software engineer is to see people using software I have made to solve problems I hadn't thought of. It's amazing how human beings can take tools of all kinds and stretch them to be useful in new situations.

Yes, you may be a junior trainee, but you also bring a fresh view of what is going on and you may be able to see better ways of doing things with the existing IT systems. This could be an opportunity for creativity, especially if you have an interest in IT.

Tread carefully, however. Your first responsibility is to your clients and your legal work. Any suggestions you want to make must be communicated to the right people in a positive way. Don't make changes unilaterally and without consultation with colleagues and the people in charge.

At its best the use of IT should be part of an evolutionary spiral of continuous improvements: a change in IT drives a change in culture, which in turn generates ideas for IT improvement .... and so on. Typically 1/3 of the improvement and effort will be due to technology and 2/3 due to operational and cultural changes.

As you go, keep a personal mental checklist of up to 10 key areas where IT or operational procedures could be improved to help you do your job better, and be prepared to share this.

**DISCUSSION POINT:** Imagine up to 5 ways in which IT could potentially be used to help you be as efficient as you possibly can be when you start work as a trainee. This is blue skies thinking: you can be creative as you want to be. When you start work, see how much of your wish list is already in place.

### 8. Develop a healthy scepticism of IT fashions

The IT industry has a habit of creating "must have" terminology from time to time. Historically examples include "Artificial Intelligence"; "Portal"; "Web Based"; to name but a few.

Once created, the big boys begin to define what is meant by a "True ... (eg Web Based System)", thus creating the impression that they alone can provide what is truly meant by the term, whilst their competitors can only provide a poor relation.

The latest such term is "Cloud".

Now I am not at all sure whether the term "Cloud" can be called a brand in the true sense, because I don't think it's owned by anybody.

However, inasmuch as a brand is about the feelings and associations created in the audience when they hear or see the term, my personal opinion is that the word "Cloud" leaves a lot to be desired.

Do lawyers really want to put their privileged and sensitive information into a foggy place where you have to grope around to see what you are doing? Probably not. In my experience the one thing lawyers want in their legal software is clarity, which is not exactly synonymous with the word “Cloud”.

This isn't to say that some of the underlying technology isn't useful.

If by “Cloud” you mean: a centralised secure location; managed by people you trust; from which you can remove your data if needs must; and that you can access privately in real time from wherever you are (at home, on a train, abroad, in a hotel room, in court etc) - then you might begin to see the value in it.

The important thing with any new IT fashion is to be open minded. Assess its potential in terms of your business improvement objectives. Take the bits that are useful to your business and reject the bits that aren't. However, don't be bullied into believing that you will be left behind if you don't adopt the latest technology NOW. You won't be.

**DISCUSSION POINT:** Have you ever been an early adopter of new technology? Did the reality meet your expectations? What good experiences have you had with the latest IT fashions, and have you ever been ‘over sold’?

### 9. Make sure you get what you want from IT

At some stage in your career you may well be asked to participate in the procurement of new legal software applications, or improvements to existing ones. This is a situation where the horse (your business) must be put firmly in front of the cart (the IT solution).

At a first meeting any salesperson worth their salt will be more interested in hearing about the business problems you are trying to solve rather than in demonstrating their wares. When they do eventually demonstrate this should be in the context of your stated objectives (which are personal to your business) and the conversation should be two-way. If the offering is a good fit you should be able to envision how the product could meet your needs and discuss how it will solve your problems.

So to make sure you end up getting what you want you need to be well prepared. Here is a checklist:

Business purpose. What has brought you to the point of looking at new systems? What are the current problems you are trying to solve?

- Benefits of solving the problem: What would it mean to you and your business if these problems could be solved? What would be the quantitative benefits? What would the qualitative benefits be?
- Costs of inaction: What will happen if you don't make these changes?
- Functionality: In an ideal world what will the new system be able to do for you? (Make a detailed list).
- Business case: How much is it worth to your business to solve these problems? How soon would you need to realise the benefits to have justified the expense?

At this stage the focus is on “what” you want to achieve rather than “how” it can be achieved.

Once you have finished on the lists get them reviewed by colleagues and ask them to check for the 3 C's: Correctness and Consistency are relatively straightforward but Completeness is less so, because it's always harder to think of what might be missing than check what's present.

Write all of this up into a table with three columns. The first will be a reference number, the second your statement of "what" is required and the third will be ready for a response provided by suppliers as to "how" their offerings deliver your requirements. This can be used to compare and score different products, and the selected supplier's response can be bound into a schedule in the contract for supply.

**DISCUSSION POINT:** For fun. You will need a holiday at some point in your training. Go through the 5-point checklist above and create a requirements specification for your holiday. Make sure you don't select the actual holiday until you have created the specification!

#### 10. ? One for you ...

People reading this document will have their own ideas about what they would say, if asked, so I will be interested to receive your comments ....



#### About Elizabeth Miles

*Elizabeth is a founding Director and CEO of Iken Business Limited. Established in 1992, Iken Business is a leading provider of Case Management software solutions, as well as IT consultancy.*

*Elizabeth holds a BSc in mathematics and an MSc in decision processes. She has spent over twenty years in the software industry including working as a consultant for Oracle. Elizabeth is passionate about meeting customer needs and delivering intelligent, high quality solutions.*