

5W's The Smart Legal App "TSLA" – Lawyers Edition

A 21st Century Law Firm Management System

By Peter Fingar

"Any intelligent fool can make things bigger and more complex... It takes a touch of genius – and a lot of courage to move in the opposite direction." --E. F. Schumacher.

Donald Norman pioneered the field of cognitive science and went on to break new ground in cognitive engineering and user-centered design. He was the first to use the title of *Customer Experience Architect* while an Apple Fellow. User-centered design involves simplifying the structure of tasks, making things visible, getting the mapping right, exploiting the power of constraints, designing for error, and explaining affordances (the action possibilities that are readily perceived by an actor in accordance with the actor's goals, plans, values, beliefs, and past experiences).

It's all about mapping the system image to the mental models of the users. In the practice of law, traditional business processes do not effectively support, in fact, often inhibit the free-range thinking and intuitive thinking the legal process requires of its best practitioners. When there are 52,000 law firms and 1.2 million lawyers in the US, plus associated staff, not getting it right continually contributes to an increasingly muddled overall legal system.

5W's "The Smart Legal App – Lawyers Addition" fits into a new technology category for unpredictable and difficult to manage events. Moreover it is not a generalized workflow or process management system: it's specific to the practice of law and includes vital aspects such as institutional memory across many dimensions. The product works like the individual user works, and stores all the institutional memory for all users to access immediately and in the future as the organization grows.

It's not the usual document management system law firms are generally using. It goes far beyond to provide dynamic task management and worker collaboration where every worker in a case requires his or her own unique views, tasks and alerts depending on the roles being played. Perhaps as important, it is the precursor to 5W's "The Smart Legal App – Jurisdictional Edition" which addresses the increasingly convoluted interactions *among* legal entities that must work together effectively to address a given business problem.

What's a Smart Process App? Andrew Bartels, a Forrester vice president and principal analyst said companies need more adaptable apps that can help them address what he called "messy and unpredictable processes and collaborative activities" that are central to any business. "Business executives want Smart Process Applications (SPAs), a new generation of applications that are being created specifically for those collaborative business activities."

Forrester makes the distinction between transactional process apps and SPAs: transactional process apps tend to have standardized processes and little collaboration, whereas SPAs have a greater degree of collaboration as well as decision-making by the participants. If that was all, then this would just fall into the case management category, but an important focus of SPAs is that they are packaged applications for a specific activity: contract lifecycle management, customer support, procurement and the like. Bartels described them as filling in the gaps between the transactional apps, rather than using email and spreadsheets to bridge those gaps. He refers to these apps as "making people smarter," which is a slightly awkward way of saying that they provide *informational context for human decision-making*, providing

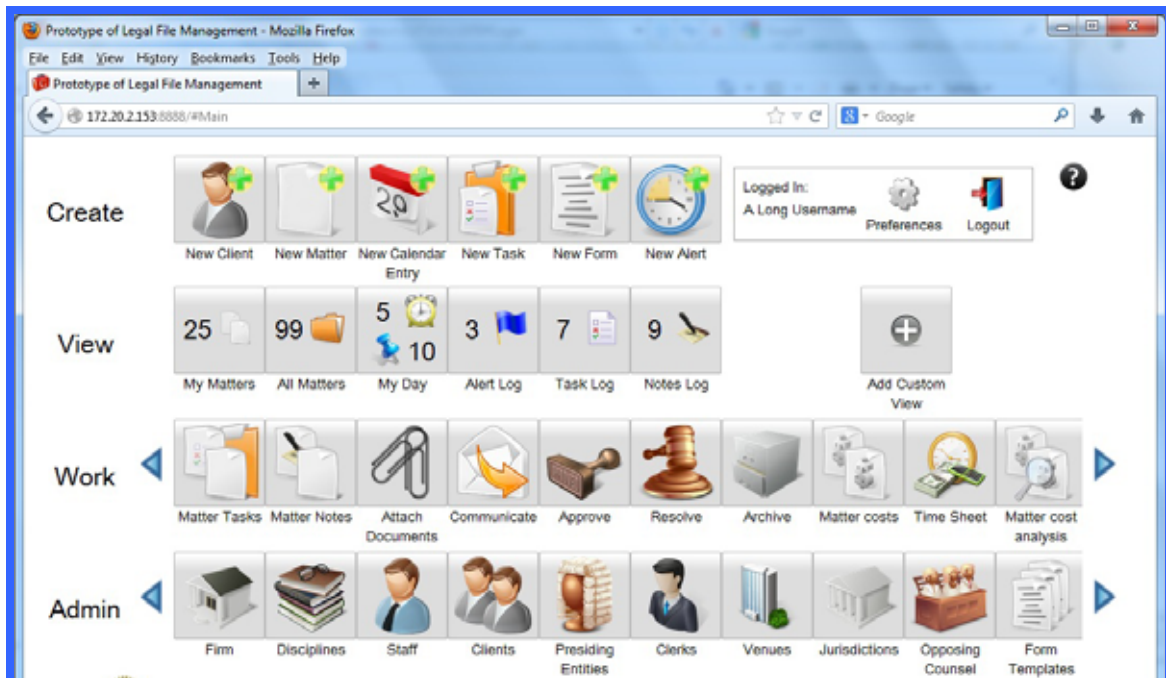
the right information to right people at the right time to do their work. 5W calls this type of design use of “Human Intuition Enabling Quick Links”.

It’s amazing the ROI that these SPA’s can offer organizations with being able to handle those processes that have constant exceptions and are loosely structured. That has been the challenge that traditional process and document management has had in the past; though they can handle most of the business process exceptions they are not designed for *specialized*, unstructured domains, such as today’s legal world.

Think *Mobile first*. Attorneys and their staffs no longer sit behind a desk using a PC; they are constantly on the go, using tablets and smart phones. Wherever they may be, whether it’s onsite at a client location or at the court house, when they receive important information they need to immediately engage the process in real time. Smart Process Apps have the ability to let attorneys and their staffs travel wherever, whenever they go so that the process time is greatly lessened --and effectiveness will surely sky rocket because of it.

And it’s all in the Cloud via secure SaaS; nothing to install locally, no capital expenditure.

So here we are in the 21st century with law firm *next practice*. Though legal systems have always been far behind in the world of digital enablement and many are still in the stone ages of client/server apps, the future of the law firm has arrived-- in the Cloud. It’s just not evenly distributed. Here is what it looks like:



This snapshot is from Peter Fingar, analyst, author, management advisor, former college professor and CIO who has been providing leadership at the intersection of business and technology for over 40 years. Peter is widely known for helping to launch business process management (BPM) with his book, *Business Process Management: The Third Wave*. He is a sought-after keynote speaker and his latest of 13 books is about the use of distributed intelligence in business--in the Cloud. www.peterfingar.com