

WORKBOOK

From tech headaches to tech ecosystem

Design a technology ecosystem that supports your firm's growth and innovation

This workbook will help you to map out your current tech infrastructure, evaluate what your greatest areas of need are, and uncover what is causing friction in your processes.

You will then be able to build out the ideal tech ecosystem to support your firm's business goals and client service ambitions.

STEP 1

Map your current tech infrastructure

Use the table below to map out **key tools** you use to carry out important functions at your firm.

STEP 2: Identify (by circling the letters at the end of the line) which area of functionality each tool sits within to help you identify your areas of greatest need:

Growth management (G) - Lawyers and staff have the tools to win clients, deliver modern legal services efficiently, and achieve profitability in the digital age.

Work management (W) - Legal professionals and staff work faster and more effectively with real-time communication, streamlined workflows, task automation, and more.

Business management (B) - With free-flowing data and analytics tools, firm leaders gain insight into multiple performance areas for more informed decision-making and precise financial management.

Marketing / Lead Generation	G W B
Client Intake	G W B
Conflict Check	G W B
Time Tracking	G W B
Case / Matter Management	G W B
Document Management	G W B

Word Processing / Creation	G W B
Knowledge Management	G W B
Legal Research	G W B
Digital Signature / Identification	G W B
E-Discovery	G W B

STEP
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Client Portal	G W B
Trust Accounting	G W B
Office Accounting	G W B
Billing	G W B
Document Assembly	G W B
Email Management	G W B

Search (Title, Registration,etc)	G W B
Docketing	G W B
Security	G W B
Payments	G W B
Client Comms	G W B
Dictation	G W B

STEP
3

Identify pain points in your current tech stack

Add up the number of circles in each of the three areas of functionality from the previous pages.

G

W

B

The results will show you which areas are best supported.

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Write your top three business goals.

1.

.....

2.

.....

3.

.....

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

Not at all

It could be better

Yes, it's a great fit

.....

.....

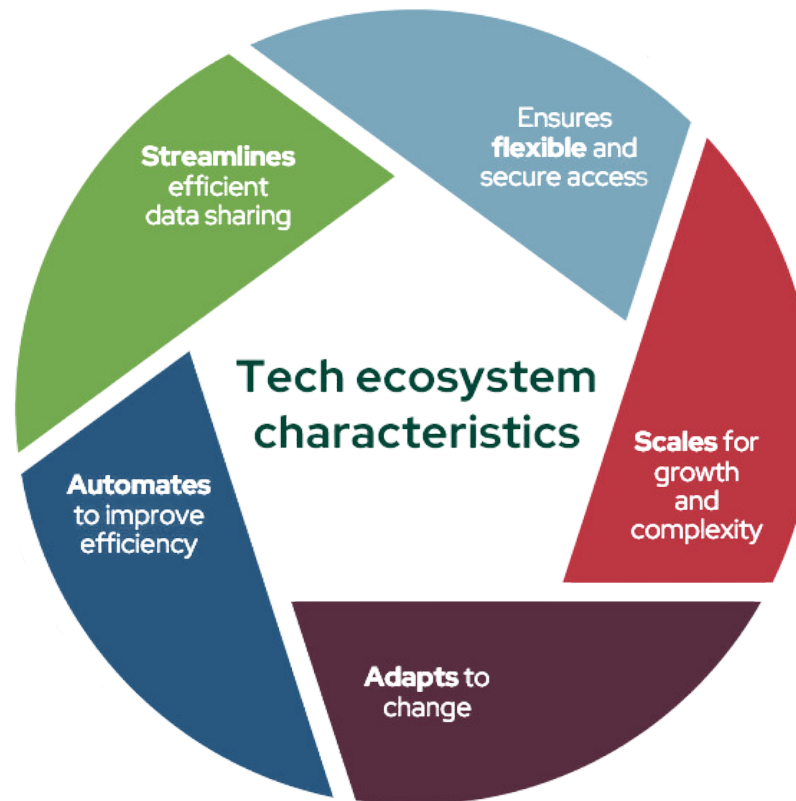
.....

STEP
4

Assess against tech ecosystem characteristics

Review your current tech inventory. What elements/tools are meeting these key characteristics of a great ecosystem?

Write them down below next to the characteristics and indicate what gaps in key areas of growth, business, and work management are hindering your firm from achieving goals or just don't fit in here.



Tech ecosystem example

This is an example of a well-structured tech ecosystem that forms an ecosystem for your firm's data and functionality.

Actionstep is the PMS that underpins the entire ecosystem. You're starting with a product that has the majority of functionality in one platform (covers everything in the green boxes).

Layer your on-point solutions that have unique, specialist, or additional functionality, that integrate via cloud, and share data, so it feels seamless to use.

The purple boxes can function out of the PMS, DMS, and Office Suite.



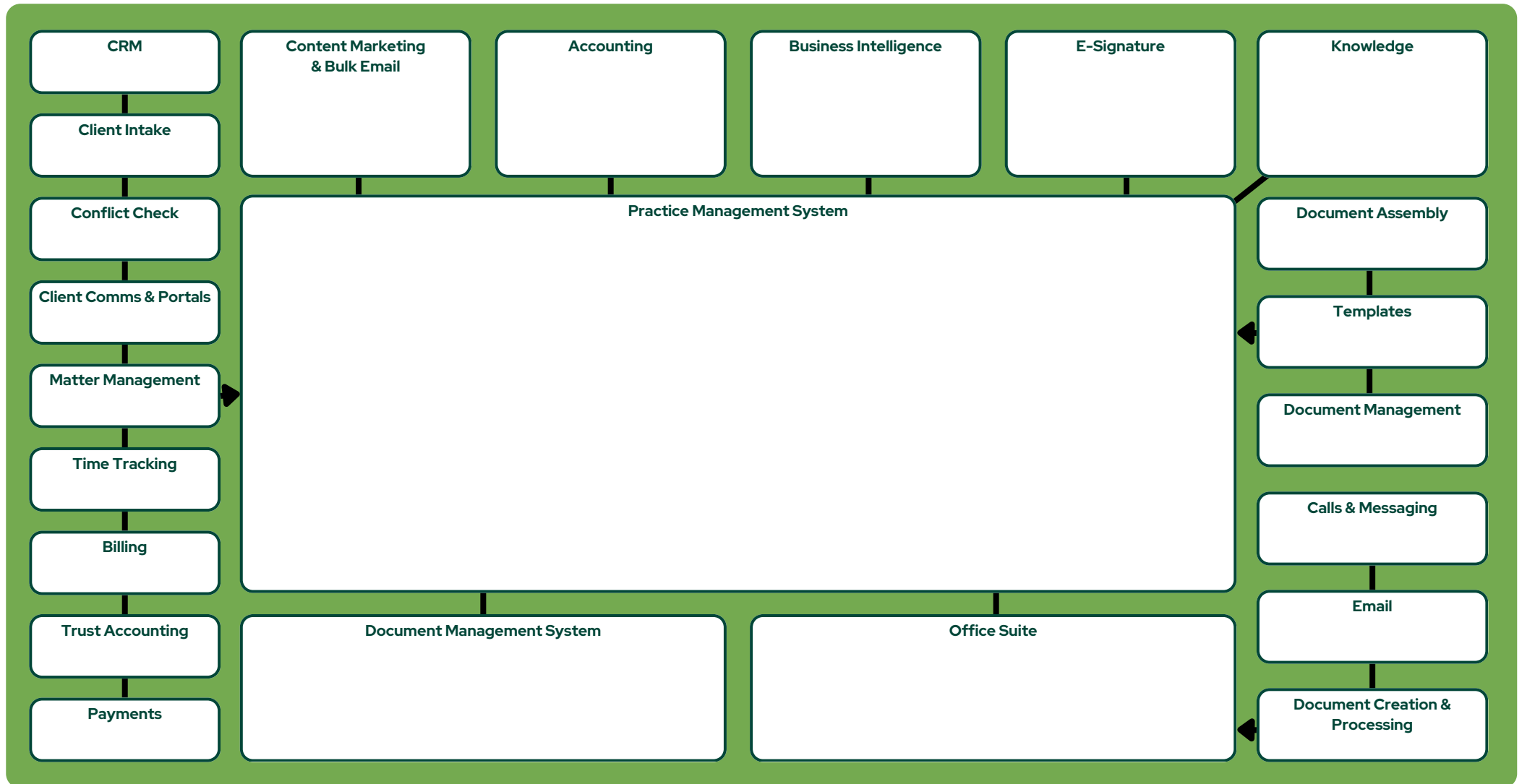
We've added a complementary system using NetDocuments as the DMS (the functions in the blue boxes seamlessly integrate with Actionstep).

We've added Microsoft Office Suite as the office product (the functions in the orange boxes seamlessly integrate with Actionstep).

STEP 6

Create your ideal tech ecosystem

Now you have assessed your current tech infrastructure, identified how these link to firm goals, and if they fit in the characteristics of a great tech ecosystem, it's time to create your own ideal tech ecosystem. This will help you remove points of friction in your practice and enable you to fulfil your law firm's goals.



Notes

A large, rounded rectangular box with a thin black border, containing ten horizontal dotted lines for writing notes. The lines are evenly spaced and extend across the width of the box.

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**Congratulations on designing a
tech ecosystem that supports
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**For more information on
Actionstep, scan the QR
code or visit actionstep.com.**

Actionstep
Build Your Firm Advantage