From Paper Maps to GPS: Reimagining Legal Workflows for the Data-Driven Age

Expert guidance for moving your organization incrementally from static and inefficient workflows to dynamic workflows to support efficient and adaptive processes.

This publication is a product of a cohort of industry experts led by The Cowen Group and sponsored by Lineal delving into the evolving challenges and potential solutions associated with reimagining rigid and inefficient workflows into dynamic solutions that support streamlined and adaptive operations.

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The legal industry stands at a transformative crossroads...

The legal industry stands at a transformative crossroads. Think of traditional legal operations as navigating with a paper map—effective in its time but slow, reactive, and prone to detours. Now, imagine leveraging a GPS system that anticipates challenges like changing traffic and weather patterns, adapts in real-time to your preferences, and improves with every journey.

It's easy to forget this today, but the journey from paper maps to mobile GPS navigation was not straightforward – it was a bit bumpy with a few detours along the way. Early digital maps were incomplete and often inaccurate, leading to navigation errors, which sometimes led to disaster. Integrating GPS receivers into mobile devices was complicated by battery constraints, signal reception issues, and the need for seamless interaction with user interfaces. Additionally, the shift required massive data collection to create accurate and detailed maps, which raised privacy concerns.

Overcoming these challenges involved significant investment in infrastructure, including satellite constellations and mapping data platforms, as well as advancements in software algorithms for route optimization and traffic prediction. Today, people are so used to using GPS systems for navigation that many don't even **know how** to use a paper map!

How can we apply the success of today's interactive GPS solution to legal workflows? It starts by reimagining those workflows to what they can be to dynamically adjust to the needs of today – and tomorrow. In this paper, we'll explore four considerations for your organization to reimagine its legal workflows from the static and inefficient workflows many organizations struggle with today to the dynamic workflows they need to capitalize on today's data driven age.

Obstacles to Transitioning to Dynamic Workflows

As was the case with the evolution from paper maps to GPS systems, transitioning from static, inefficient workflows to dynamic, data-driven legal workflows can be a bumpy road with numerous detours. Hey, if it was easy, we wouldn't need this paper to discuss how to do it!

During January 2025, Lineal engaged a team of experts over several discussions to share the challenges they face today in keeping legal workflows streamlined and dynamic to support ever-changing organizational legal needs. These professionals donated their time, sharing experiences and providing observations based on decades of experience in law firms, corporations and government entities addressing legal practice and legal technology challenges.

Obstacles to transitioning to dynamic workflows identified by the team of experts include:

1. **Resistance to Change:** Many legal professionals are accustomed to traditional, static workflows and may resist adopting new technologies and processes. Even when they are initially receptive to the possibility of changing workflows and technologies, keeping the momentum going can be challenging.

   "When you talk about change and innovation, everyone's reaction is: 'rah, rah'! But when you say, I'm going to change how you do your job, then they say: 'Oh, no, start with someone else'." - Gail Gottehrer, Fresh Del Monte

   "Involving attorneys from the beginning helps ease tensions and concerns of not knowing what to expect. Incorporating technology, the change management aspect and the feedback loop make it easier to drive success. Once it's successful, they become advocates to help other people get involved." - Byong K. Kim, Seyfarth Shaw LLP

2. **Integration Challenges:** Integrating new technologies and systems with existing infrastructure can be complex and require significant time and resources. Some legal teams lack the technical expertise needed to implement and manage new technologies effectively.

   "We are going through a period where cost savings and other drivers are causing the sunset of standard applications – sometimes with a transition path and sometimes without one." - Larry Briggi, IBM

3. **Data Silos:** The flip side to the key driver of digital transformation and data volume is that much of the business-critical data is often scattered across different departments and systems, making it difficult to get a holistic view and derive actionable insights.

This fragmentation:

- **Hinders Collaboration:** Prevents different teams from working together effectively and leveraging collective knowledge.
- **Limits Data Visibility:** Obscures a comprehensive view of legal risks, trends, and opportunities.
- **Impedes Automation and AI:** Reduces the effectiveness of AI and automation initiatives, as algorithms require access to consolidated and well-structured data to learn and provide valuable insights.

How extensive is the impact? 76 percent of organizations say that data silos hinder cross-departmental exchange, and 74% see this as a competitive disadvantage. Another recent report says employees lose 12 hours a week chasing down data located in data silos.

"Seeing the full landscape can be one of the most difficult challenges. Partnerships with key stakeholders in and outside of the legal organization, such as information governance and business technology, is crucial." - Mike Mendola

How to overcome obstacles to transitioning to dynamic workflows?

Resistance to Change   Data Silos   Integration Challenges

Overcoming the obstacles keeping organizations from transitioning to dynamic, data-driven legal workflows requires organizations to transform their approach to the challenges they face. During the course of the discussions, the team of experts identified several success factors to conquer these challenges and foster an environment of continuous improvement in their organizations.

Four Success Factors for Reimagining Legal Workflows

After hours of experience sharing, idea generation and collaboration by the team of experts regarding how to reimagine legal workflows, four success factor themes kept emerging in discussions:

1. *Understand Key Drivers for Evolving Legal Workflows*

Understanding the drivers behind the need for evolving and dynamic workflows is essential for legal teams looking to keep up in a rapidly changing landscape. Those key drivers include:

Growing Internal Client Demand

- Clients are becoming more sophisticated in their use of data and have higher expectations for proactive, data-driven legal advice.
- Legal teams must adapt to these demands by delivering more strategic and informed counsel.

Leveraging New Technologies

- AI and advanced analytics offer enhanced data accessibility and opportunities for increased efficiency.
- Utilizing these technologies allows for more proactive decision-making and optimized workflows.

Impact of Digital Transformation

- Industries are experiencing an unprecedented increase in data volume due to ongoing digital transformation.
- Effectively harnessing this data can provide valuable insights to support strategic legal decisions.

"Digital transformation is continuing, which means that the digital manifestations of everyone's workflow, no matter what they do in any organization, are largely going to be data driven." - Gordon Moffat, Tennessee Attorney General's Office

Navigating Evolving Regulatory Landscapes

- Changes in data privacy and cybersecurity regulations require legal teams to maintain compliance while managing risks.
- Agile and adaptable workflows are necessary to navigate these complexities successfully.

These changes require agile and adaptable workflows to maintain compliance and mitigate risks, further emphasizing the need for dynamic legal processes.

2. *Pinpoint Opportunities for Automation*

To drive impactful change, it's important to identify specific processes that are both low-risk and high-impact, making them ideal candidates for automation. Focusing on these areas minimizes disruption while delivering significant benefits. Examples of potential opportunities for automation include:

Improving Data Reuse

- Enhances productivity by streamlining information retrieval and application.
- Reduces redundant efforts and increases consistency across legal tasks.

"We might not see the same custodians repeatedly, but repeated processes around data types – like frequent use of photos – provides value, especially for companies like ours." - Nirav Shah, The Home Depot

Automating Privilege Assessments

- Accelerates the review process, increasing efficiency.
- Improves accuracy and compliance, protecting sensitive information and reducing human error.

Making Legal Processes More Reportable and Actionable

- Enhances decision-making and strategic planning through better data visibility.
- Facilitates more informed and proactive legal strategies.

"What I'd love, in addition to avoiding inconsistent document productions, are ways to glean insights from data we produce in response to subpoenas. Automating that process is low risk and potentially very high value, because if you can identify a pattern from the data that helps you head off a class action, that's a multi-million dollar find." - Gail Gottehrer, Fresh Del Monte

Implementing automation in these strategic areas enables legal departments to operate more efficiently and effectively, leveraging technology to create a more agile and responsive legal function.

3. *Focus on Incremental Successes*

As was the case with the evolution to GPS systems, progress often isn't straightforward. Consider identifying and launching pilot programs that demonstrate the value and feasibility of identified automation initiatives on a smaller scale. By focusing on iterative progress and achieving incremental successes, legal teams can:

Showcase Tangible Benefits Without Overwhelming Stakeholders

- Demonstrates the value of proposed changes clearly and effectively.
- Allows stakeholders to see real-world impact without feeling overburdened.

Promote Testing and Refinement

- Encourages testing solutions in real-world scenarios.
- Facilitates refinement and adjustment, minimizing risk.
- Builds confidence in new processes through gradual adoption.

Utilize Smaller, Focused Pilot Projects

- Provides valuable insights and data for strategic adjustments.
- Allows for fine-tuning of implementation strategies before full-scale rollout.

Demonstrate Early Wins for Stakeholder Buy-In

- Essential for gaining stakeholder support and securing funding.
- Incremental successes create momentum and validate the initiative's value.
- Builds a compelling business case by showcasing return on investment and productivity gains.

"I would love to standardize, simplify, and automate to the extent possible our process for responding to RFPs." - Dan Lantry, Sonova Group

Implement Strategically Selected Pilot Projects

- Targets specific pain points or high-priority areas for maximum impact.
- Engages decision-makers by addressing their most relevant challenges.
- Fosters a culture of innovation and supports successful, scalable implementation.

This phased approach not only reduces resistance to change but also ensures that larger initiatives are built on a solid foundation of proven success.

4. *Build and Leverage Champion Networks*

Identifying and leveraging "champions" within internal teams, external partners, and service provider networks is key to building a program that effectively drives change, fosters innovation and keeps the momentum going. These champions are influential advocates who understand the vision and are a supportive environment that embraces change and encourages innovative problem-solving.

Internal champions can:

- Help bridge communication gaps between teams
- Inspire team members
- Provide valuable feedback on new processes and technologies

Their firsthand experience and credibility within the organization uniquely qualifies them to effectively advocate for change and motivate others to adopt new approaches.

"I noticed that key characteristics or attributes that I think make for strong champions are a lot of "C" terms, like clout, credibility, a creative mindset to help you brainstorm, concrete thinking to help you figure out how to apply these ideas, and cross departmental/cross functional." - Zeynep Ersin, Seyfarth Shaw LLP

Externally, engaging champions within partner organizations and service provider networks facilitates collaborative problem-solving and knowledge sharing. These external experts can bring:

- Fresh perspectives from having analyzed problems from a different point of view
- Industry insights based on experience over a wide range of projects with different clients experiencing unique challenges
- Innovative solutions tailored to the needs of clients that enhance internal initiatives

Building a network of advocates who share a common goal of driving positive change fosters a culture of collaboration and continuous improvement, ultimately driving more successful and sustainable outcomes.

Evolving Legal Workflows

Identify Key Drivers	**Pinpoint Automation Opportunities**	**Focus on Incremental Successes**	**Build Champion Networks**
Understand the need for evolving workflows	Identify processes and data silos for automation	Implement pilot programs for iterative progress	Leverage champions to overcome resistance

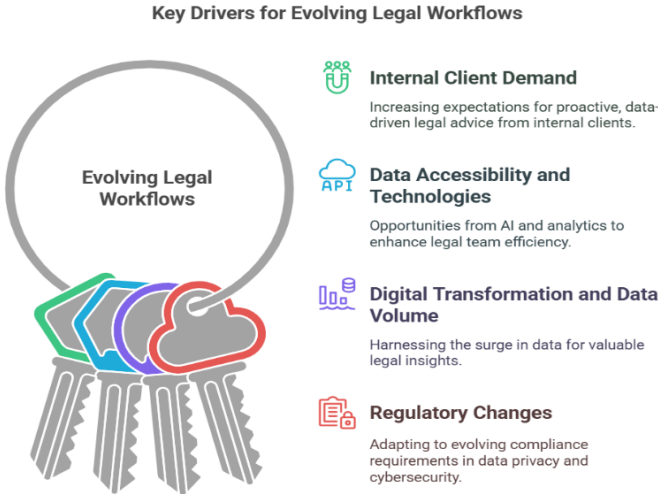# Understanding Key Drivers for Evolving Legal Workflows

To keep up in today's data-driven age, legal teams need to recognize and embrace important key drivers behind the push for more dynamic and adaptable workflows. Several factors are driving the need to reimagine legal workflows:

- **Internal Client Demand:** Legal teams are facing increasing pressure to provide more proactive, data-driven advice to internal clients, who are becoming more sophisticated in their data use and expectations.

  "I want to know how technologies like the transportation management system run. All these technologies have legal and regulatory implications. I want insight into that from the beginning." - Gail Gottehrer, Fresh Del Monte

- **Data Accessibility and New Technologies:** The rise of new technologies, such as AI and advanced analytics, combined with increased data accessibility, presents opportunities for legal teams to become more efficient and proactive.

- **Digital Transformation and Data Volume:** The ongoing digital transformation across industries has led to an explosion in data volume. This data, if harnessed effectively, can provide valuable insights for legal teams.

- **Regulatory Changes:** Evolving regulatory landscapes, especially in areas like data privacy and cybersecurity, necessitate agile legal workflows to ensure compliance.

  "We are heavily regulated in the medical field, with many different regulations. So, understanding where our data is and mapping that has definitely been a driver of change in looking at how that plays into securing data and using it effectively." - Allison Jones, McKesson/CoverMyMeds

Key Drivers for Evolving Legal Workflows

Evolving Legal Workflows

Internal Client Demand
Increasing expectations for proactive, data-driven legal advice from internal clients.

Data Accessibility and Technologies
Opportunities from AI and analytics to enhance legal team efficiency.

Digital Transformation and Data Volume
Harnessing the surge in data for valuable legal insights.

Regulatory Changes
Adapting to evolving compliance requirements in data privacy and cybersecurity.

Pinpoint Opportunities for Automation

To effectively capitalize on these key drivers, legal teams should strategically identify specific low-risk, high-impact processes and data silos as potential candidates for automation and consolidation. By targeting these areas, organizations can achieve quick wins while minimizing disruption and risk, building momentum toward transitioning from static, inefficient workflows to dynamic, data-driven legal workflows. Examples of automation opportunities identified by the team of experts include:

- **Automating Responses to Request For Productions (RFPs):** The need to standardize and automate the response process for RFPs was identified as an area of opportunity. The need to build a library of questions and answers was mentioned, and AI solutions like contract management tools were suggested.

- **Historical Tracking of Privilege Designations:** Another opportunity discussed was tracking privilege designations and information about privileged actors, so that information can be used from matter to matter, saving time and reducing inconsistent privilege classifications.

   "During a review, you're going to learn things about privileged actors but delete that data after the matter is closed. Instead, keep it, save it, reuse it to minimize outside counsel time to do the same thing over and over." – Brian Stempel, Lineal

- **Automating Search Across Disparate Data Collections:** The need to be able to automate searching across several data collections, some of which are contained within legacy solutions was another example discussed by the experts.

   "Our organization has amassed a specific type of digital material since the 1990s. Necessarily, this involves the integration and search of multiple legacy systems and formats when needed for litigation. This is a huge opportunity for reuse and automation." – Gordon Moffat, Tennessee Attorney General's Office

- **Leveraging Key Statistics to Drive Decision Making:** The ability to collect statistics of litigation activities and use them to drive decision making for future litigations is another example that was discussed.
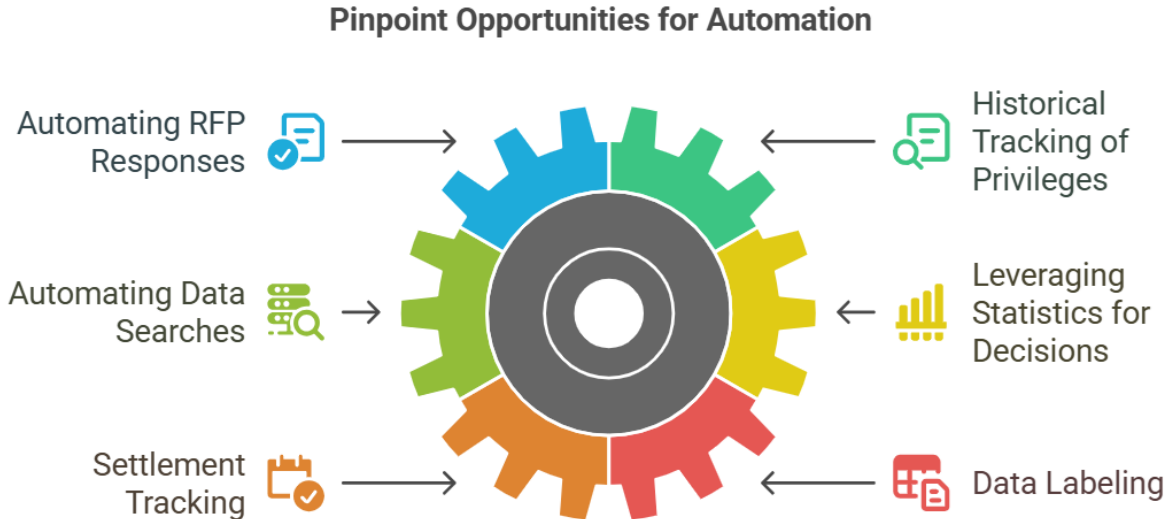
   "We collected 88 million Slack messages for discovery last year. But only one tenth of one percent of those messages were produced. When you look at the volume and the effort made with results of virtually nothing. Without those kinds of analysis and stats, you don't know where to research for additional improvements, or how to work towards something more narrow before you get to review." - Larry Briggi, IBM

- **Settlement Tracking and Workflow:** Another automation opportunity identified was tracking past settlements to identify potential settlement bars and potentially reduce the value of class action lawsuits.

"In addition to wage and hour class actions, we face individual wage and hour claims at the state level. Being able to easily access historical data to determine whether an individual claimant was part of an overlapping class action settlement enables me to assert a settlement bar to that subsequent claim and avoid paying twice." - Gail Gottehrer, Fresh Del Monte

- **Data Labeling:** Another example discussed was labeling data from start to finish in order to budget better, assess risk, and assess volume more efficiently.

"We have various data task forces within the discovery solutions group, one of them is data scripting and analytics. We're working on what I would call a data labeling project, which is to assign a particular data or document set from the organizational enterprise level a label that can be carried through the EDRM model. It's an ambitious undertaking." – Zviad Guruli, WilmerHale

Pinpoint Opportunities for Automation

Automating RFP Responses

Automating Data Searches

Settlement Tracking

Historical Tracking of Privileges

Leveraging Statistics for Decisions

Data Labeling

Focus on Incremental Successes

"Scale starts with small, and starting small with this workflow reimagination is smart. It's about how do we start smaller for you and how do you just get a pilot going?" – David Cowen, The Cowen Group

To use a baseball analogy, it's not always the home run that wins games – it's often the ability to string hits together. Effectively implementing automation initiatives often starts by identifying and launching pilot programs that demonstrate the value and feasibility of these changes on a smaller scale. By focusing on iterative progress and achieving incremental successes, these pilot projects allow legal teams to showcase tangible benefits without overwhelming stakeholders.
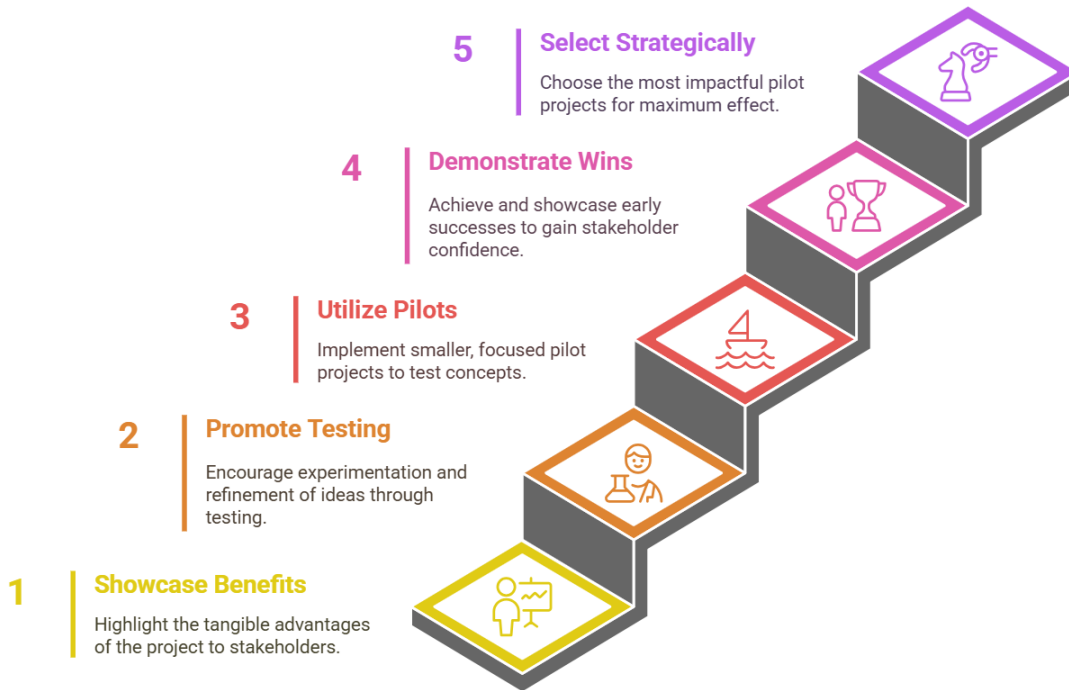
"When new technology rolls out, it's like we almost have 'Techno-FOMO' – we don't want to miss out. So, we're tempted to jump in without taking a step back to slow down and really vet the technology first and analyze and assess the risk before we roll new technology out. We need to first assess the risk and determine whether the technology really fills a need as is and fits into our existing technology suite offerings or whether it requires additional development or other work to make it useful." – Ravan L. Roddy, Zoetis

This approach provides stakeholders with a clear understanding of the real-world impact of the proposed changes while preventing them from feeling burdened by extensive overhauls. Additionally, pilot programs create an environment for testing and refining solutions in practical scenarios, enabling necessary adjustments and minimizing risks. This gradual adoption builds confidence in new processes, ensuring a smoother transition to broader implementation.

Demonstrating early wins through these initiatives is important for gaining stakeholder buy-in and securing funding for larger projects. By strategically selecting pilot projects that target specific pain points or high-priority areas, legal teams can maximize impact, effectively engage decision-makers, and address their most relevant challenges.

"We solve problems by making it feel very much like what you're already doing while infusing something better, more effective, and reusable along with that process. If your attorneys really feel comfortable with search terms and they know how to negotiate them cheaply and effectively, great. Build a technological offering behind that so that you get to a defensible outcome that is risk averse and cost effective, that leverages the output they're used to while also combining with new things." - Jeanne Somma, Lineal

Focus on Incremental Successes

5 | **Select Strategically**

Choose the most impactful pilot projects for maximum effect.

4 | **Demonstrate Wins**

Achieve and showcase early successes to gain stakeholder confidence.

3 | **Utilize Pilots**

Implement smaller, focused pilot projects to test concepts.

2 | **Promote Testing**

Encourage experimentation and refinement of ideas through testing.

1 | **Showcase Benefits**

Highlight the tangible advantages of the project to stakeholders.

Build and Leverage Champion Networks

Humans still drive success. Successful implementation of AI and automation in legal workflows necessitates a human-in-the-loop approach, combining the power of technology with human expertise and judgment.

"I think we've continued to sort of drill the point home that, even with automation and AI, it's all still very much a 'human in the loop' approach. We've automated this, we've done that, we've put in the software, but there's always some level of human intervention along that workflow." - Suzanne Dinsmore, Harman International

"With so many stories out there in the industry about fake case citations and people trusting the bots too much, we've been stressing the importance of having humans in the loop to our team." - Byong K. Kim, Seyfarth Shaw LLP

Identifying and leveraging "champions" within internal teams, external partners, and service provider networks is key to building a program that effectively drives change and fosters innovation. These champions are influential advocates who understand the vision and are a supportive environment that embraces change and encourages innovative problem-solving. Internally, champions can help bridge communication gaps, inspire team members, and provide valuable feedback on new processes and technologies. Their firsthand experience and credibility within the organization uniquely qualifies them to effectively advocate for change and motivate others to adopt new approaches.

Externally, engaging champions within partner organizations and service provider networks facilitates collaborative problem-solving and knowledge sharing. These external experts can bring fresh perspectives, industry insights, and innovative solutions that enhance internal initiatives. Building a network of advocates who share a common goal of driving positive change fosters a culture of collaboration and continuous improvement, ultimately driving more successful and sustainable outcomes.

"I've got key vendors that I partner with, and it's a serious partnership. We have weekly meetings. We brainstorm when something comes up for me. Those vendors are spending time with other customers, so I'm interested in what they are finding and what they are doing, so that I can sit with my in-house attorneys and say, 'here's what people are thinking, here's what people are doing.'" - Larry Briggi, IBM

"I greatly value the opportunity to learn from and share with this talented group of innovators, thinkers, and challengers of the status quo. As a lawyer leading a lean team, I have come to appreciate that it is essential to (i) lean into the uncomfortable, (ii) recognize 'failures' as stepping stones to incremental progress, and (iii) be active in a community of champions and leaders who are passionate about tackling the challenges of rapidly changing paradigms." - Dan Lantry, Sonova Group

What Does Success Look Like?

We asked the team of experts: "If you had a 'magic wand', what do you most want to see next?" Their answers included:

- **Seamless data integration:** A unified view of legal and business data, breaking down silos and facilitating comprehensive analysis.

  "We're starting to capture a lot of data in legal that we didn't historically capture. If I had a magic wand, I could mature that data – then we could really start to be predictive around data by connecting it to the data that is mature, like litigation, regulatory and complaint related data." - Jeremiah Weasenforth, Edward Jones

- **Automated workflows:** Leveraging AI and other technologies to automate repetitive tasks and free up legal professionals for higher-value work.

- **Redistribution of workflows:** Right-sizing tasks by leveraging technology and external partners to streamline operations and optimize resource allocation.

  "My magic wand is leveraging technology to move certain ALSPs up the value chain and do more work internally from a cost perspective but also allow the lawyers to do more lawyer work internally." - Nicole Langston, Barclays

- **Board-level recognition:** Elevating the importance of data-driven legal strategies to the board level to ensure adequate resources and support.

  "C-Suite buy in is a momentum multiplier. C-Suite support fuels momentum for not only resources, but support and commitment within the Legal Organization. This momentum attracts talent and partners necessary to take the next steps and carry success forward." - Mike Mendola

What Does Success Look Like?

Board Recognition
Ensuring leadership support for legal strategies

Data Integration
Combining diverse data sources for unified analysis

Workflow Redistribution
Optimizing task allocation with technology and partners

Automated Workflows
Using technology to streamline repetitive tasks

Summary of Takeaways

There are several **obstacles to transitioning to dynamic workflows** for legal teams, including resistance to change, integration challenges, and data silos. Many legal professionals are accustomed to traditional, static workflows and may be hesitant to adopt new technologies and processes. Additionally, integrating new systems with existing infrastructure can be complex, requiring significant time, resources, and technical expertise that some legal teams may lack. Another challenge is the presence of data silos, where information is scattered across different departments and systems, hindering the ability to gain a holistic view and derive actionable insights. Overcoming these obstacles is essential for successfully adopting more flexible and efficient workflows.

There are **four success factors for reimagining legal workflows**. They are:

1. **Understand Key Drivers for Evolving Legal Workflows:** Understand what's driving the need for evolving workflows and transitioning to dynamic workflows.
2. **Pinpoint Opportunities for Automation:** Identify specific, low-risk, high-impact processes and data silos to consider automating and consolidating.
3. **Focus on Incremental Successes:** Consider pilot programs and focus on small steps and iterative progress.
4. **Build and Leverage Champion Networks:** Identify and utilize internal and external "champions" to overcome resistance to change and keep the momentum going.

Much like a mundane caterpillar transforms into a beautiful butterfly, **1)** understanding key drivers, **2)** pinpointing opportunities for automation, **3)** focusing on incremental successes, and **4)** building and leveraging champion networks enables a legal team to transform static and inefficient workflows into efficient, adaptive and dynamic workflows for today's data-driven age! Let the metamorphosis begin!

Transforming Legal Workflows Through Innovation and Collaboration

Current Workflows
Static and inefficient

Identify Drivers
Understand the need for change

Find Automation Opportunities
Pinpoint low-risk, high-impact processes

Implement Incremental Changes
Focus on pilot programs and small steps

Build Champion Networks
Leverage support to drive momentum

Dynamic Workflows
Efficient and adaptive processes