The Legal Intelligencer

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EXPERT OPINION

Law Firms (and Lawyers) Innovating for Clients Right Now

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Law Firm Marketing and Business Development

By Stacy West Clark

Is your firm doing any of this? Why not?

I admit to reading about 25 periodicals (still love that hard copy) and thousands of emails a week from firms around the country. I am a "news junkie" for sure. Nothing gives me more pleasure than reading about something new a law firm has launched that is paying dividends. To me, when law firms innovate, they are taking a considered "deep dive look"—into what clients **want and need now**—because of a new law, compliance requirement, a trend and more.

In doing so, they create a value-added benefit to clients and demonstrate their expertise and command of the area. The firms appear "battle ready" to take on a case on point and handle it with deep experience. The creation of a **new** and timely resource for clients' shouts: "email us now, contact us now. We are ready to help you." As a result, the new tool or program creates business development opportunities.

I thought I would shine a light on a few of them that recently came across my desk. Kudos to the teams behind their creation:

Large Law Firms

Seyfarth: According to Lorie Almon, firm chair and managing partner, "it is no longer possible to have a truly client-centric approach to legal service delivery without being innovative. We have a responsibility to provide clients with ever-improving insight, transparency, and efficiency, whether through advanced technology or re-imagined processes. We're constantly asking ourselves: 'How can we improve our clients' experience and drive greater value, as our clients define it?' That mindset is how we help our clients stay one step ahead."

Toward that end, the firm has created two platforms with 100% focus on what clients have asked for—both of which have created real dividends for the Seyfarth. As Almon explains:

- **Seyfarth AI (sAI) Chat for Seyfarth Link.** "Seyfarth Labs, our in-house technology team, has recently launched Seyfarth AI (sAL) Chat for Seyfarth Link. It is an innovative GenAI chatbot designed to transform client experience through] seamless interaction, advanced document analysis, and robust security measures. Engineered with our clients' perspective in mind, sAI provides real-time assistance navigating and finding documents and content in our firm's client collaboration platform. Its intuitive interface ensures that users can ask questions, request clarifications, and receive detailed, accurate responses promptly. sAI empowers our attorneys and clients to gain deeper insights into their documents by summarizing key points, identifying critical information, and highlighting potential areas of concern. To ensure the highest level of security, sAI employs advanced encryption protocols and secure data handling practices, safeguarding client information against unauthorized access and breaches."
- **Trademark Clearance Solution.** Seyfarth Labs, devised the trademark clearance intake solution with Seyfarth attorneys, which extends well beyond any other tool in streamlining a complex, detail-focused process. Trademark clearance has traditionally been a time-consuming and expensive process, but critical to protecting the enormous value of a brand worldwide, making it a high-stakes process. We've designed a tool called the trademark

clearance solution tool to greatly facilitate, for large brand owners, the organized management of a sizable trademark clearance function to ensure the right mark is searched in the right way at the right time, for the right cost, with consistency, a dependable workflow, and transparency. This solution is built as an additional module that integrates with the firm's award-winning Seyfarth Link client portal and syncs with its basic components of a status database, document repository, trademark docketing data, and dashboards."

Dechert: Open for participation by all personnel in the firm, Dechert created an "Idea Bank" to stay on the forefront of delivering excellent client representation. Said the firm: "This platform is available to all personnel to share with the wider community innovative ideas aimed at elevating the firm's service offering and delivery, as well as improving the experience of working at Dechert. The entire community can review the idea and show their support through the "like" feature. The firm also hosts Dechert Spark Tank, a competition among colleagues, where participants submit ideas and the "finalists" share their ideas in more detail through a pitch video. Viewers vote for their favorite idea and the firm funds the implementation of the winning one."

Co-chair of Dechert, Dave Forti said "Dechert has a long history of innovation, consistently investing in technology and fostering an innovative mindset to deliver exceptional client service. Thanks to the creativity and dedication of our people, we've introduced a modern, data driven intranet that provides targeted content for a person's role and office, allows for personalization to their favorite sites, tools, and information, and enables collaboration. Additionally, our financial services lawyers recently partnered with data scientists and interaction designers to co-develop internal and client-facing solutions to enhance deal management and document drafting. As we celebrate our 150th anniversary, it's clear that our peoples' relentless innovation helps drive our enduring success."

Polsinelli's "Executive Orders Resource Centers": Kansas City based 1,000-lawyer Polsinelli, recently launched its Executive Orders Resource Center. According to the firm, "this resource is designed to provide a central location for clear accessible summaries of recent executive actions and their potential implications on business operations."

Said Ryan Thurber, co-chair of Polsinelli's executive action working group said: "Our Executive Orders Resource Center and the accompanying spreadsheet have been very well received by clients, especially by those in highly regulated industries such as health care. It was our most viewed practice page on the firm website in March, so it is clearly filling a need. The pace and scope of the developments makes it hard for many clients to stay on top of everything, so they are thankful for this one-stop solution we're providing them. Clients are also discovering, day by day, how interconnected so many areas of law and their operations are—grant funding, imports/exports, immigration, labor and employment—the list goes on. These executive actions touch nearly all facets of our clients' operations, and one of the benefits Polsinelli brings is the ability to address each of these issues under one roof."

Other law firms that have jumped on the executive orders bandwagon to other extents—not necessarily forming resource centers and data trackers—but still demonstrating that they are ready to advise clients like Polsinelli include Norton Rose, Fulbright, Snell & Wilmer and Davis Wright Tremaine.

Smaller Law Firms

The largest firms certainly have the internal resources to create a lawyer's vision (ergo a website or team) for what innovaton clients need. But I am seeing great strides from smaller firms too. Here are two examples: (Both are clients).

- **140-plus lawyer firm Post & Schell** recently became one of only a few Pennsylvania law firms to have successfully completed a System and Organization Controls (SOC) 2 Type II audit that certifies that the firm meets the SOC 2 Trust Services Criteria for the Security, Availability, and Confidentiality categories set by the American Institute of Certified Public Accountants (AICPA) with zero exceptions. This takes a tremendous amount of effort but is well worth what it says to clients and potential clients. Said firm president and chief executive officer A. James Johnston, "As a service organization, is it critical to provide our clients and partners with the highest levels of trust, security, and transparency. The SOC 2 Type II certification affirms that our firm's controls meet a stringent standard for mitigating risks to security, availability, and confidentiality. It also assures our clients and partners that shared data and communications are protected." Developed by AICPA, the SOC 2 information security standard is an audit report on the examination of controls relevant to the trust services criteria categories—security, availability, processing integrity, confidentiality, and privacy. A SOC 2 Type II report describes a service organization's systems and whether the design of specified controls meets the relevant trust services categories and assesses the effectiveness of those controls over a specified period. Said Johnston: "SOC 2 certification demonstrates to clients, potential clients and lateral candidates a law firm's commitment to safeguarding sensitive client and business data and upholding high standards of privacy and security."

- **Lance Nelson heads the highly regarded Pennsylvania law firm's MacElree Harvey's large family law department.** He has made it a practice to constantly increase his number of personal touches to clients, referral sources, friends and more. One tool he has used successfully is LinkedIn—for just a few minutes each day. It allows him to effectively and easily strengthen relationships with his connections. And it works. You might say that using LinkedIn is not innovative—but what Lance does with it—is. His special sauce: Lance comments, with enthusiasm, on what his connections are doing, on what his team at MH is doing and on information that may help others in their business or personal life. Lance does not just hit the “like” or “share” buttons. He comments on why a post is important in a genuine and likable way. His personality comes through along with his effort to shed a positive light on others accomplishments. I do not know another attorney using LinkedIn in such a personal and effective way religiously and that is why I call it innovative—on the simplest level. He is innovating his practice development efforts by making LinkedIn posts mean something and do something. As he says, LinkedIn “allows me to stay in touch with clients, classmates, friends and colleagues around the globe. I use it. I take pride in commenting on, in a personal way—their achievements and posts and let them know I have taken the time to read what they have shared on the platform. In addition, I regularly search for information that could help people—not related necessarily to a legal development. And I spread the word about my team's accomplishments. I have found that I get the most interest in posts or comments involving nonlegal topics: personal accomplishments, charitable causes, and inspirational stories or ideas. Perhaps that is because people want to work with lawyers who care about, and help, other people —not just look for the next case or client. In the last couple of months, I have had two-three clients who either messaged me on my LinkedIn account or said that is how they found me.”

Regale me with your innovations. I would love to shine a light on what you are doing that is novel and helpful to clients.

Stacy West Clark *has been helping Pennsylvania, New York, Delaware and New Jersey lawyers and law firms succeed in growing their practices for more than 25 years. She is a former attorney with Morgan Lewis & Bockius and was the firm's first director of client relations. For free articles on numerous business development and marketing topics, as well as more information about Clark and her work, go to www.stacyclarkmarketing.com.*
