

Connecting Your Legal Ops Technologies for Better ROI: APIs and Beyond

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C L O C
CORPORATE LEGAL OPERATIONS CONSORTIUM



Agenda

- What is a Legal Technology Stack?
- Benefits of Integration
- Types of Software Integration
- API: Your Secret Sauce?
- Integration Readiness Assessment
- Real World Examples:
 - X: Integrating SimpleLegal with Patent Management
 - Splunk: Integrating SimpleLegal with Accounts Payable
- Questions

What is a Technology Stack? And Why Do I Care?

- Your legal tech stack is a term for the totality of legal software (typically cloud-based) that your legal team utilizes.
 - Technology continues to advance at a pace that is often hard to keep up with.
 - Legal has not historically been the best at purchasing software.
 - Today, technology is vital to business success... and integrating that technology could be your competitive advantage.

Tech is Required to Run Your Department



Benefits of Integration



Access to
Data



Cost
Savings



Time
Savings



Better
Collaboration

Types of Software Integration

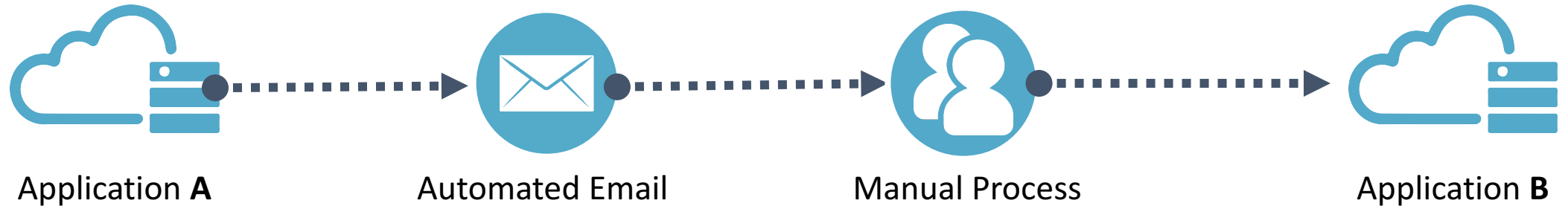
✓ Email

✓ File Based

✓ API

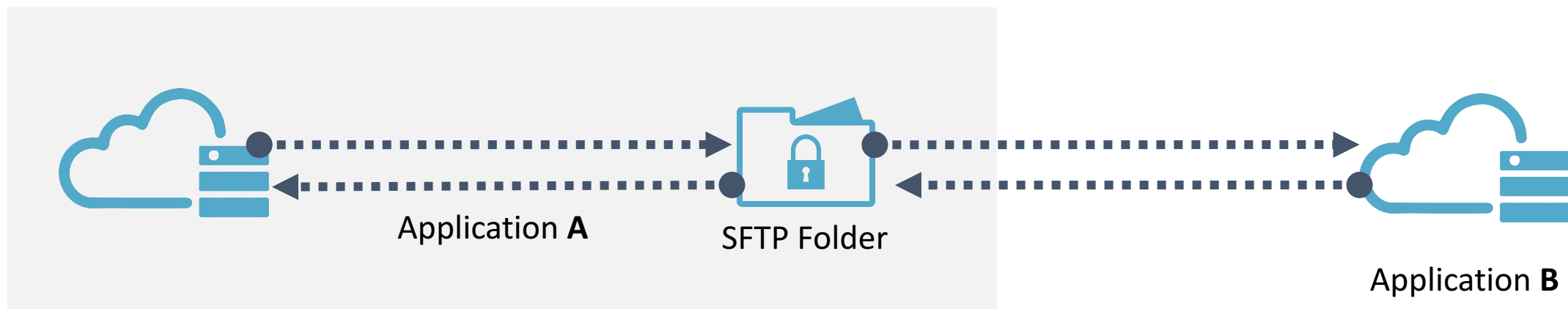


Email Integration



- When to Use:
 - No IT development available
 - Integrating into an existing manual process that can't be modified
 - When the transfer can be weekly or monthly
- Things to Consider:
 - Can only be one-way
 - Requires manual intervention
 - Less secure and prone to errors (spam, email blockers, etc.)

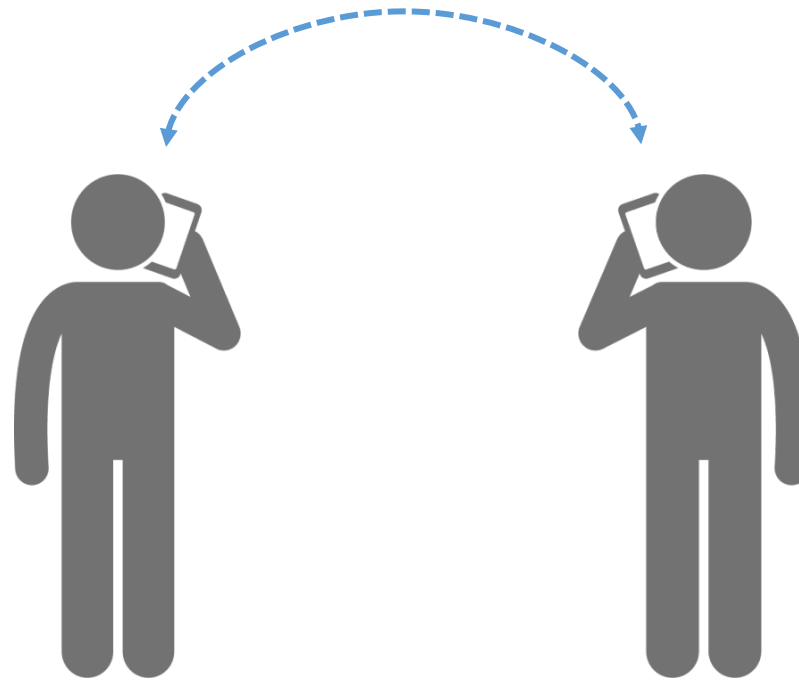
File Based Integration



- When to Use:
 - Looking for something more automated than email (but there are limitations)
 - Works well for files
- Things to Consider:
 - File structure updates can be difficult
 - Manual coordination between upload and download processes

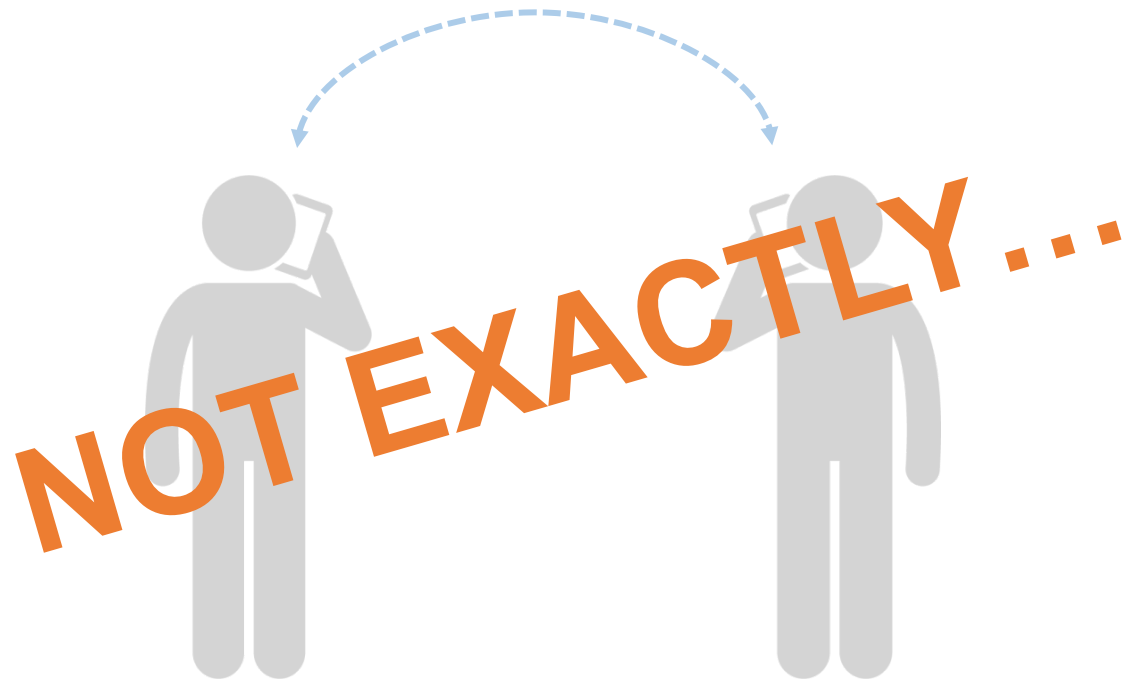
API 101: How Does it Work? How Do I Talk About It?

An application programming interface (API) acts as the universal communication channel for these technologies, allowing them to 'connect'.

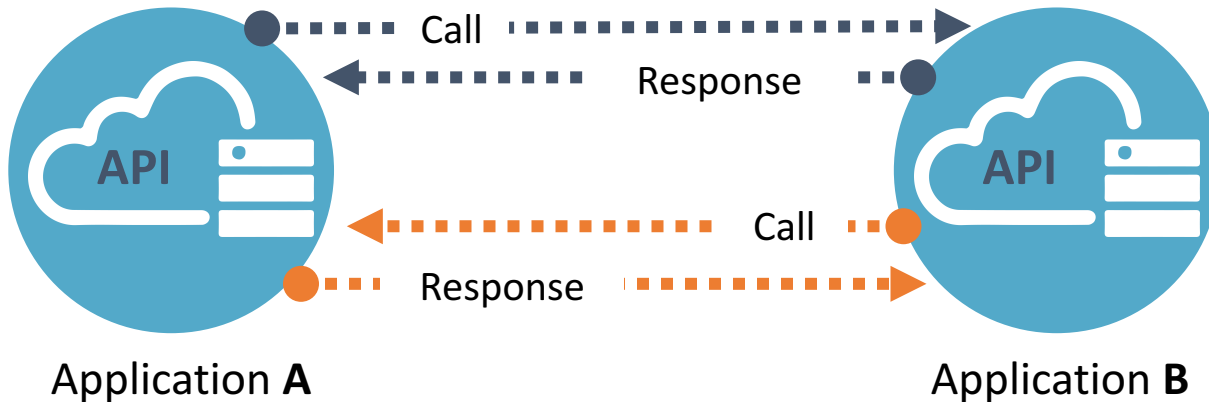
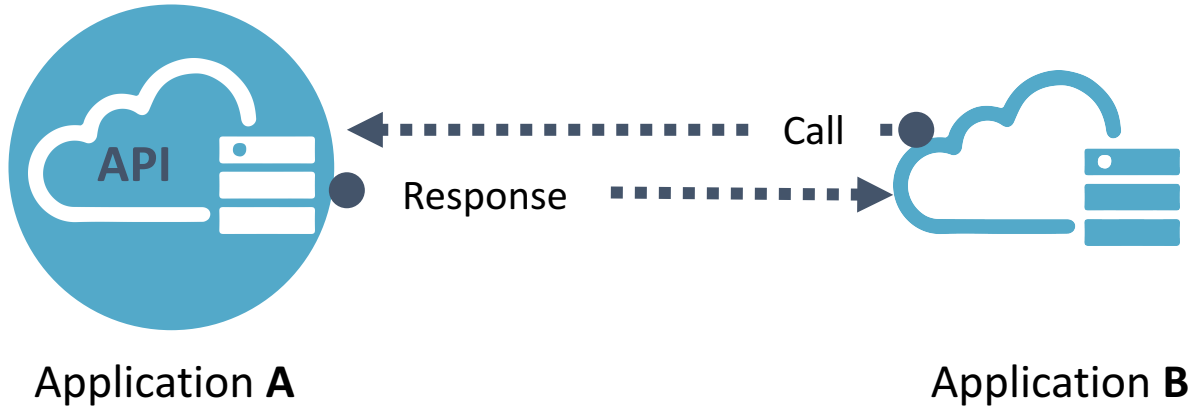


API 101: How Does it Work? How Do I Talk About It?

An application programming interface (API) acts as the universal communication channel for these technologies, allowing them to 'connect'.



API Integration



■ When to Use:

- Updates are secure and immediate
- Minimal disruption

■ Things to Consider:

- You may have to apply the business logic

Key API Features and Considerations

- How complex is it?
 - There still may be setup required (not just like turning on google calendar sync)
- Just because 2 applications have an API, doesn't mean they can just 'talk to each other'
 - Only 1 application needs to have API
- Not all API's are created equal
 - Is it documented?
- Standard vs custom integrations – Ask the right questions!

Think about how future tools will play with your current solution(s)

APIs: Your Secret Sauce?

- Why is it better?
 - More frequent
 - Fewer systems involved
 - Fewer people involved (less chance of errors)
- When an API may not be an option for you:
 - You're on an old system
 - You don't have the resources needed (internal IT, developers, etc.)

Your Integration Playbook

A Takeaway Resource for You!



Integration Readiness Assessment

STEP 6	Finalize integration Method	Discuss pros and cons of API vs. flat file integration. APIs are more costly to build initially, but allow for real-time data transfer as well as easier maintenance. Flat files are a lower cost option, but more difficult to modify. They also transfer data once/day vs. real-time.
STEP 5	Prioritize systems for integration	Which integrations should be in-scope and which ones will have the most benefits? Understand if any systems are changing in the near future which may impact when you decide to integrate. Many integrations can happen after go-live.
STEP 4	Understand current integrations/technology	Which systems already integrate with other systems? Is there documentation showing how they integrate? Provide IT with documentation for the new system integration options.
STEP 3	Involve IT	Identify an IT resource who can assist with the evaluation and build. Ideally this would be someone who has built integrations at your company in the past.
STEP 2	Determine need for integration	How often do the systems need to interact? How many ebills do you process per week? How often do you have new patent matters?
STEP 1	Identify potential systems for integration	Common integrations: A/P (Oracle, SAP, Netsuite, Coupa), IP/Patent, and Legal hold.

Integration Readiness Checklist

The following checklist includes the key questions to consider as you evaluate integrations between systems in your Legal department. Many integrations can occur after go-live and require help from IT, so it is best to evaluate which integrations will have the most benefits and prioritize.

Step 1: Identify potential systems for integration

- Which systems are involved in your Legal eBilling process? *Common systems include: Legal Hold/HR, Document Management, Matter Management, eBilling, IP/Patent, A/P systems such as Oracle, SAP, Netsuite, Coupa).*

Step 2: What is the interaction frequency and direction between systems?

- What is the transaction volume/frequency between each system? *E.g., How many invoices do you need to send to A/P per week?*
- Is the interaction one-way or bi-directional?

Step 3: Involve IT

- Who is the IT business owner for each system?
- Have they been involved in any integrations within the Legal Dept systems previously?
- If not, is there an IT resource that can speak to other integrations with your A/P system?

Step 4: Understand current integrations/technology

- Which Legal systems already integrate with another system?
- Is there internal documentation showing how they integrate?
- Ask your solution providers the following questions:
 - Do you offer both API/flat file options?
 - Can you provide documentation on the various integration options?
 - Is the file format standard or can formats be customized/tailored?
 - What will our IT team need to do (e.g. requirements, dev, testing)?
 - What are the costs for each type of integration?
 - How long does each integration take to set up?
 - What systems do you typically integrate with?

Step 5: Prioritize

- Are any of the systems going to be upgraded/changed in the near future? *This allows you to avoid integrating twice.*
- Which integration will save you the most time?
- Is there a strong understanding of what is needed on your side for the integration with each system?

Step 6: Finalize integration method

- Has your company used API integrations in the past?
- Do you need real-time data transfer (API) or is once per day/weekly sufficient (Flat file)?
- Is flexibility to make changes more important (customer-side development / less dependency on the vendor) or is internal resource availability limited (e.g. vendor-side development / less dependency on the customer team).
- Have you evaluated the costs for each type?

It's Time to Connect Your
Legal Technology for the
Ultimate System of Record



e-Billing & Matter Management as Foundation

Integrations

Finance

Engineering
/ R&D

Marketing

Sales

HR

ERP

*Invoices
Payments
Accruals*

Patent & Trademark Management

**Contract
Management**

HRIS
*Users
Authority*

Workflow Management

Document Management

Legal Reporting & Analytics

e-Billing & Matter Management

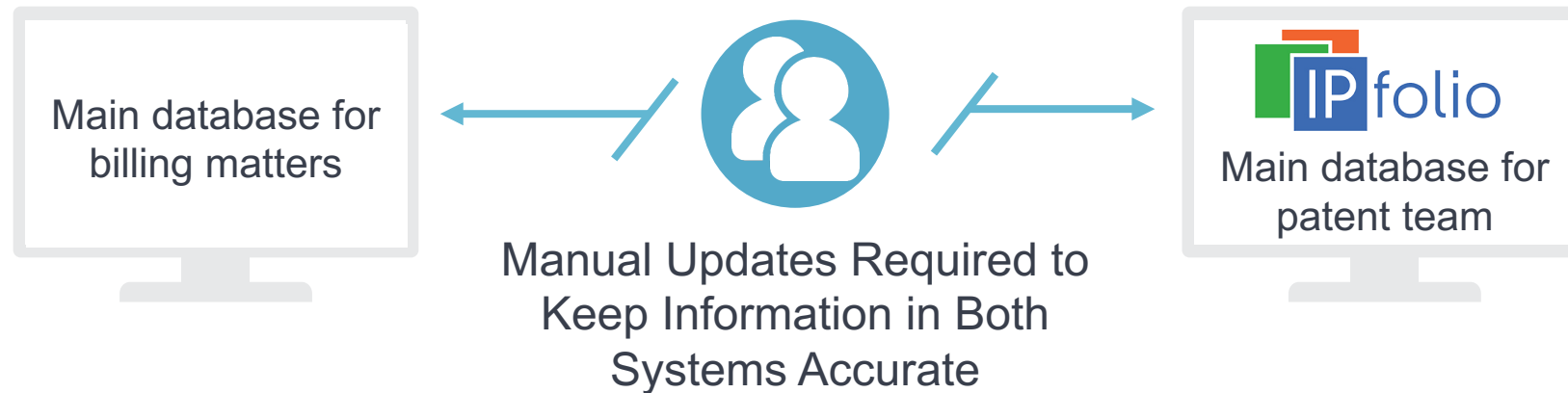
Real World Example

Integrating SimpleLegal & IPfolio at X

Chris Manning, Legal Operations



Process Before Integration



Goal: Automated updates and ability to pass data between two systems

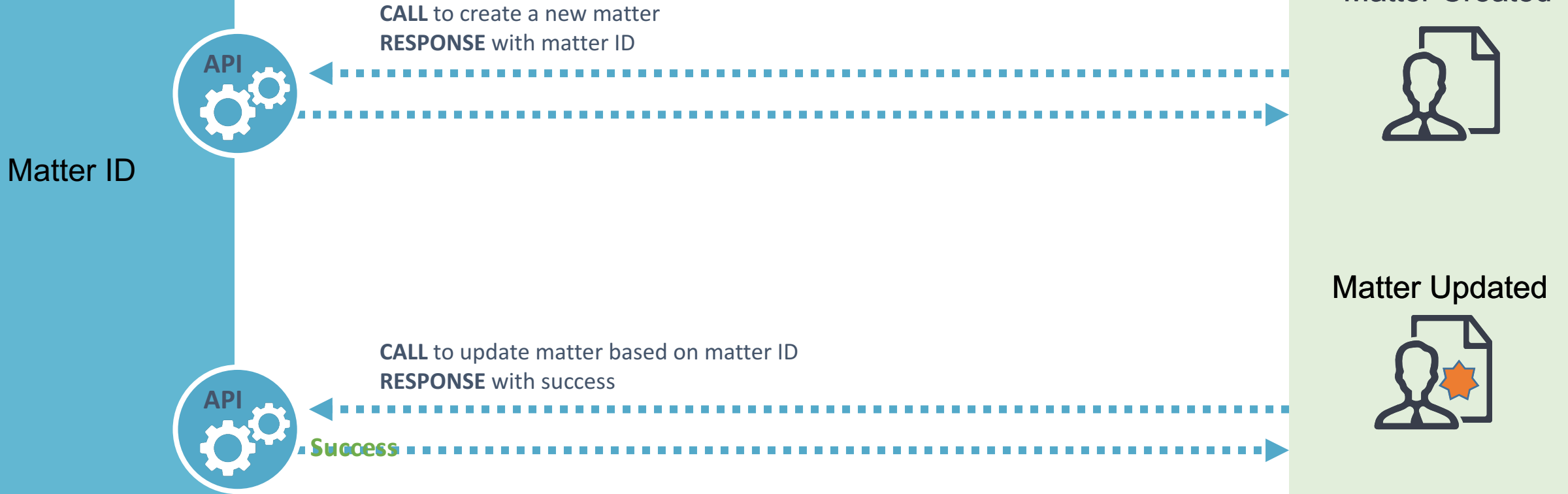
Software Players: SimpleLegal, IPfolio

Teams Involved: Legal, IP, IT

The Solution

Leverage pre-built integration between SimpleLegal and IPfolio to automatically create and update matters





Matter ID is unique identifier across systems

Benefits

- Time savings – several hours each week!
 - Creating new matters
 - Updating matters
- Automated updates in the background
 - Change in one system is passed to the other
 - No more weekly manual updates
- Key information accessible in one system, instead of having to look at multiple systems
- Can easily add new fields to track if desired (thanks to SimpleLegal and IPfolio partnership)

4 Lessons Learned

1. Standardization is key – think about naming formats, punctuation, etc.
2. Decide what metrics are important upfront
3. Have all stakeholders involved – this includes your vendors
4. One-off changes and troubleshooting infrequent errors are painless

Real World Example

Integrating SimpleLegal & NetSuite at Splunk



Theresa Chang, Director of Legal Operations
Sean Keough, Senior Finance Manager



Process Before Integration

- 100% Manual
- AP team manually entering invoices into NetSuite
- Required double approval of invoices by legal
- Accruals process was not ideal

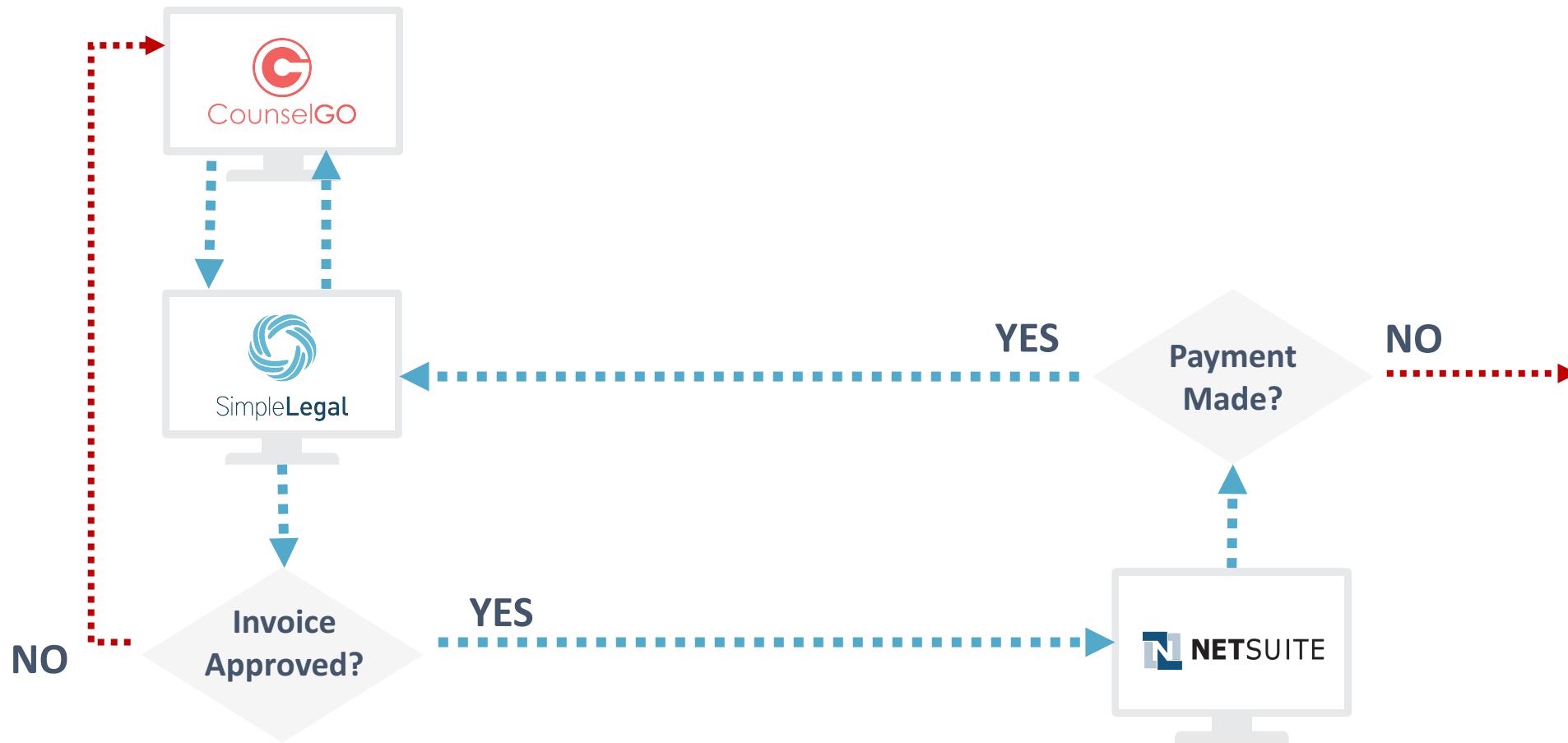
Email outside counsel → put numbers into specific format → manually send to Finance

Goal: End-to-end automated solution

Software Players: SimpleLegal, NetSuite

Teams Involved: Legal, IT, Finance, AP, SOX

What We Wanted to Automate



The Solution

Splunk built a script to call the SimpleLegal API to:

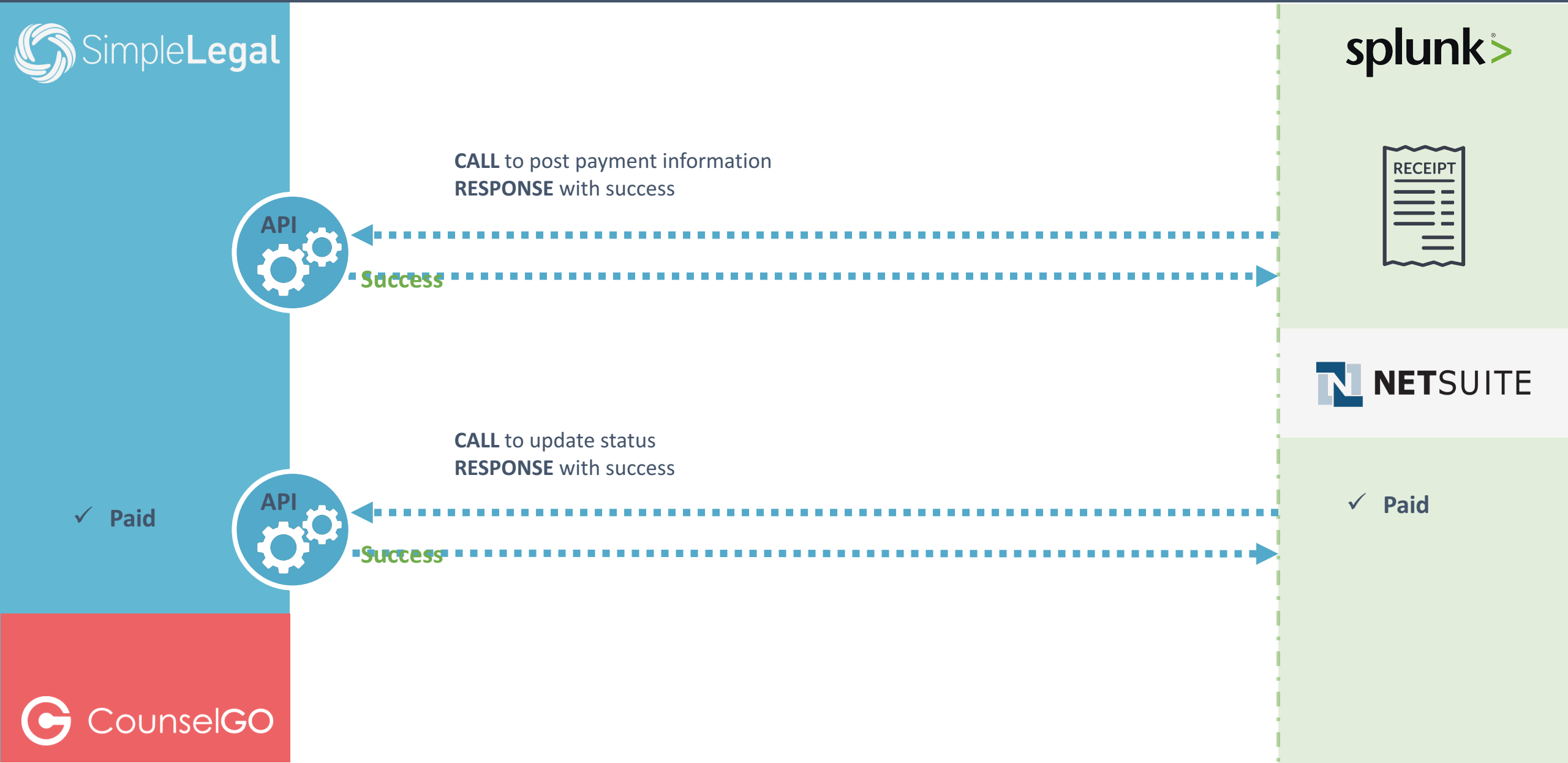
1. Send approved invoices to NetSuite
2. Update SimpleLegal with payment information from NetSuite



1. Send approved invoices to NetSuite



2. Send payment information to SimpleLegal after payment cycle



Benefits

- Massive time savings
- No more manual effort or double approvals needed
- Better security and control
- Increased visibility across multiple departments
- More intuitive process and technology for all users
- Outside counsel gained visibility into payment status

5 Lessons Learned

1. Identify key stakeholders and their specific needs
2. Spend time understanding any nuances
3. Communication – early and often!
4. OK to question the status quo
5. Resources may already be available internally

Navigating Conversations With Accounting

- Try to ensure information is shared in the same format as before
 - Accruals format remained the same, so there wasn't any concern or change to their process
- “If we do this with legal, won't other departments need their own solution too?”
 - Legal departments are unique
 - Provide data to show it is common (and a best) practice
- Have them talk with their peers
- Keep them in the loop
 - No surprises
 - Communicate often

Questions?



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