

Legal Tech: The Digital Transformation of Sticky Notes and Other Relics

Technology, Privacy, and eCommerce



Why do so many lawyers (myself included) continue to use sticky notes, yellow legal pads, and manila files when software applications serve the same purposes more efficiently?

I suspect the familiarity of these items provides a sense of psychological safety. They're like mental security blankets that ease the turbulence of digital disruption.

But it's easier than we might think to step fully into the digital world with confidence!

The digital tools below can help us let go of our security blankets and achieve more of the advantages digital transformation has to offer — the many benefits of which even extend to preserving Earth's natural resources.

Look around and see our digital environment as it truly is: a robustly collaborative workplace with convenient automations that reliably save time and effort.

Scrap the sticky notes and rely on integrated software and automated reminders

The ubiquitous canary yellow Post-it® notes were quite the modern innovation when 3M released them in 1980. Today, we might cringe at the headaches that can ensue when sticky notes are accidentally knocked off their perches.

We now have easier and more reliable ways to capture and share information. Software integrations allow your company's systems to automatically exchange up-to-the-minute information such as important dates, client and matter details, and directives for action.

For example, when you integrate your customer relationship management (CRM) database with contract management software, you ensure your contracts always contain the most recent client contact details and that your CRM database always includes the latest contractual information.

Digital tools do more than track milestones and send automatic reminders about upcoming events. They can also automatically notify everyone who needs to take action. You're spared the hassle of drafting multiple emails and looking up who needs to receive which directives. The software knows all, even when dealing with thousands of contracts and to-do items over decades.

Sticky notes may always retain a special place in the office. But they can't come near to matching the efficiency of a swift, automated alert system with instant data exchange.

Chuck the yellow legal pads and rely on digital information capture

First, kudos to us all for translating our scribbled notes into virtual memos to the file. It was a great first step *30 years ago.* Extra kudos to those who eventually stopped printing the memos, too!

But today, writing on legal pads is an unnecessary extra step. Digital tools allow us to flag and capture important information more easily. Virtual workrooms, real-time chat and video functions, and shared discussion boards with project management features encourage multidisciplinary and cross-functional collaboration and promotes accountability. Productivity flourishes while the dialogue, data points, and information you would normally jot in your legal pad can be instantly captured as permanent recordings and saved in auditable digital trails.

Meanwhile, data collection forms enable you to standardize virtually any type of information you want to capture. Easily push captured data anywhere it's needed among your integrated systems. Throw a little analytics in the mix and soon you start seeing things in a whole new light.

Data-driven conclusions and their supporting data can travel around the world in seconds. Compare that to a lawyer standing in their office clutching a fistful of ripped-out yellow note pages. But hey, at least a legal pad makes a nice coaster!

Powerful search features make real and virtual manila files obsolete

Most of us have saved, sorted, and sought files organized in a virtual folder structure for decades, which itself was built to mimic physical file cabinets. Even with the ability to perform Google-like searches within a company's systems, business professionals still spend an average of 23 percent of their time searching for information. Shocking no one, researchers found that two people will not choose the same name for the same concept 80 percent of the time, causing a mismatch between the search terms used and the information sought. We've had years of fun with creative games like "Guess the Name of the File."

Thankfully, now machine learning techniques can identify, tag, and classify documents and data for us to significantly improve our search results. AI and natural language processing tools convert unstructured video and audio files into searchable content, too. We can sort search results by specific fields, such as a department, date range, or type of document.

Chatbots and voice-activated systems help locate what we're looking for — even in multiple languages. Some tools offer recommendations based on previous search queries and similar user

profiles. I don’t know anyone who will be sad to play their last game of “Guess the Name of the File”!

Seeing digital transformation clearly

Embracing digital transformation delivers many benefits. Cutting paper use in US offices by a mere 10 percent would reduce greenhouse gas emissions by 1.45 million metric tons — the equivalent of taking 280,000 cars off the road for a year. When you save a ton of paper, you also save 17 trees, 6,868 gallons of water, 4,000 kilowatts of power supply, and 63 gallons of fuel.

It’s smart to transition now to help save Earth’s natural resources. But also do it for yourself. Relinquish old security blankets that block your full access to digital ease and efficiency. It’ll help clear your vision and enable you to readily spot more opportunities as you lead your firm into the digital future.

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Mack is also an award-winning (such as the prestigious ACC 2018 Top 10 30-Somethings and ABA 2022 Women of Legal Tech) general counsel, operations professional, startup advisor, public speaker, adjunct professor, and entrepreneur. She co-founded SunLaw, an organization dedicated to preparing women in-house attorneys to become general counsels and legal leaders, and WISE to help female law firm partners become rainmakers.

She has authored numerous books, including Get on Board: Earning Your Ticket to a Corporate Board Seat, Fundamentals of Smart Contract Security and Blockchain Value: Transforming Business Models, Society, and Communities. She is working on her next books: Visual IQ for Lawyers (ABA 2024), The Rise of Product Lawyers: An Analytical Framework to Systematically Advise Your Clients Throughout the Product Lifecycle (Globe Law and Business 2024), and Legal Operations in the Age of AI and Data (Globe Law and Business 2024).