



A made-up scenario from Jamie Wodetzki's presentation *A Day in the Life of Tomorrow's Lawyer*, at the Legal XML e-Filing Seminar jointly hosted by the Australian Institute for Judicial Administration and the Victorian Society for Computers and the Law, Melbourne, October 2001.

Meet Xanthe¹, Future Lawyer...

Xanthe wakes up at 8 o'clock and checks her palm pilot for details of the day ahead. No meetings till 11am, so there's no need to hurry into the office. She wanders to the study to check for overnight email, and to confirm that nothing else requires urgent attention. A permanent broadband connection to the web means she's always logged into the firm portal, and can quickly see if urgent tasks have appeared in her to do list. There's a couple of new tasks due by the end of the day, but nothing unexpected.

A revised draft of the IP due diligence report for Project Bravo has been flagged for Xanthe's review, so she prints a custom copy, with only the latest changes and comments marked up – something to read on the train to work. The online deal room is updated to record that Xanthe is reviewing and working on the report for the rest of the morning.

Reading the latest draft, Xanthe notices that a new issue has arisen in relation to regulatory approvals for drugs being developed by Beta Corp, the company her client wishes to acquire. As soon as she arrives at the office, Xanthe asks Jim, a junior lawyer, to research the issue and draft a few paragraphs for the report.

It's now 10.30, and Xanthe has time for a few calls before her 11.00 meeting...

Two calls are sitting high in her to do list, so Xanthe clicks on the "Call Fred" message, and activates the matter on her integrated browser-based desktop. A matter summary pops up, with a list of active documents and issues. Fred is a client defending a trade mark infringement action, and the defence is due for filing today. Bringing the latest draft up on her screen, Xanthe can see Fred's final comments, sent through overnight. As this is happening, the time & billing system automatically records the fact that Xanthe has started working on Fred's matter, and updates the online statements that Fred sees when he logs into the firm portal. After 10 minutes on the phone, Xanthe and Fred have agreed the last few changes, and Xanthe confirms that the defence will be filed later that afternoon.

Next, Xanthe puts in a quick call to Charlie, an established biotech client with a large portfolio of patents and technology licensing deals. As it happens, Charlie is responding to an alert he received the day before, advising of an extension to the patent term in Japan.

¹ This being a paper on the benefits of XML, the star really needed a name starting with X...



Xanthe knows about the alert, because it was copied to her as relationship manager for Charlie...

How did this alert come about? Flashback to the day before...

New laws pass, and an alert is sent to Xanthe's firm marked up in XML. On receipt, the firm's KM systems identify the alert and perform an automated search of affected materials in all relevant document and knowledge repositories. That system then forwards the alert to the nominated owners of forms, precedents, opinions affected by the new laws, attaches a warning to those materials, and notifies all owners/users of live matter related docs (marking up the affected parts of their documents). The system also prompts key lawyers to send the alert on to affected clients, with a summary of the impact on them, and a suggestion to call and discuss what needs to be done. The system also updates the client profile and automatically post relevant information in their client portals. Clients subscribing to this update service might also be billed automatically...

Meanwhile, back in the office...

...Xanthe confirms that the alert will have an impact on a number of Charlie's Japanese licensing deals, and agrees to review the documents before going further. Xanthe notes that the contract management system records 8 agreements dealing with Japanese patent rights, some of which appear to have expiry dates prior to the expiry of the full term. She asks Charlie to consider whether he wants to extend all deals on their current terms, or take a different approach in some cases. They agree to meet later that week. Once again, the billing system records the call, and a room booking is automatically logged.

Xanthe goes into her 11.00 meeting... It's a first meeting with Gretel, the regional general counsel of a major multinational. Xanthe is joined by the firm's trade practices and employee relations experts, and they're each armed with a report of key issues and recommendations for improving compliance at Gretel's company.

The report was auto-generated by the firm's client profiling software... which the managing partner had run through in an earlier meeting. This software asks a series of Qs about the client, it's key issues, it's business, and so on, and uses the answers to populate data in the PMS, CRM, and other systems. It also generates a report recommending how the firm will work to solve key problems, and copies that to the lawyers whose profiles best match the needs of the client... hence Xanthe's presence at the meeting.

Going into the meeting, Xanthe and her colleagues already know that:

- Trade practices compliance and industrial action have been key issues for Gretel's company in the last 12 months



- Negative media reports have hurt their share price
- Gretel is not happy with her old lawyers
- They were not pro-active, and this was seen as a major contributor to the recent problems

Having agreed a set of actions to review and improve compliance, Gretel then mentions an article in the paper regarding risks of online liability facing corporates, and asked if there was a sample email & web usage policy she could look over. Although not her speciality, Xanthe knows that a smart system had been built for most common policies, and is able to find and run through the key questions with Gretel on the spot. She zaps a draft into Gretel's palm pilot, and she's on her way. Gretel is very happy.

Meanwhile, Jim does a targeted search in the firm's knowledge base, seeking information on Aust regulatory approval for drugs which already have approval overseas. He also does a specific search for info on this topic that appears in due diligence reports. A number of useful resources on the issue turn up, including an internal memo of advice from a month earlier, and two other due diligence reports in which the issue has been mentioned. Jim decides to call the authors of each report, but the firm's HR system shows that one of them is on leave. He calls the other, confirms that their issues are the same, and that the relevant paragraphs can be reused without any complications.

Xanthe meets Jim later in the day. She incorporates his section on drug approvals, then makes a few other changes of her own. The revised draft is then made available in the online deal room, and an alert is posted to other members of the team. As this is a global transaction, the draft report is automatically translated and made available to team members in Paris and Zurich in their native language.

Xanthe then settles the defence in Fred's IP infringement case, before lodging the documents online via the court's e-filing system. This all happens smoothly via a link from the firm's case management system, and doesn't require anything more than a confirmation of key details. Lodgement fees are automatically paid and billed back to Fred's account as a disbursement.

Late in the afternoon, while watching some live video streaming of a parliamentary committee hearing, Xanthe falls asleep...

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October 2001