

Managed Service Provider or Legal Integrator:

Which One Can Best Manage Your Law Firm's IT Environment?

Keeping the IT infrastructure and all applications up-and-running at peak performance 24x7 is critical to just about every business—but particularly so in the legal industry where billable hours function as the primary driver of revenue. If servers and applications crash or operate at slow speeds, lawyers can't ply their trade, and clients can't receive the legal services they require. Besides crippling your firm's ability to generate billable hours, systems and applications that stop working also damage your reputation with your clients.

The key to leveraging your IT infrastructure and legal specific applications so they serve as assets for your firm and to prevent them from hindering day-to-day business workflows is to take a proactive Managed Services approach. This involves around-the-clock monitoring of your systems and applications to identify any potential performance issues before they negatively impact your environment. It also involves managing your environment so that changes and updates to systems and applications proceed smoothly and to ensure and that any problems that do arise are resolved as quickly as possible.

The primary Managed Services challenge lies in finding the right technology resources that can support the varied infrastructure and applications that typically exist at a legal firm—which comprise as many as seven separate technology layers. It takes a unique set of skills to cover the entire spectrum. Sometimes, the professionals with those skill sets can be hired as full-time employees. But most often, law firms will need to turn to an outside partner to solve at least part of the seven-layer Managed Services challenge.

Within this white paper, *All Covered*, the IT Services Division of Konica Minolta, presents an overview of the seven technology layers that legal firms need to manage and for which they must maintain optimal performance. We also discuss the differences between the expertise offered by Legal Integrators and Managed Service Providers in support of these seven layers. Depending on the size and skill set of your internal IT team, it may make sense to partner with one or both types—or perhaps a single IT solution provider that can manage all seven layers.

The Seven Technology Layers That Drive Legal Business Processes

Maintaining the IT network infrastructure and applications so they perform at peak levels presents a complex challenge. Some of the complexity comes from the fact many law firms contend with up to seven technology layers—all of which must be supported effectively in order for the firm to function efficiently. The illustration below depicts those seven layers:



Each of the seven layers is dependent upon the foundational layers below. Any problem that occurs at one layer is likely to bubble up and impact all the layers above. Applications that function within the same layer also impact the entire layer horizontally. Thus, changes made to any infrastructure system or application must be carefully considered for their impact on the other systems and applications.

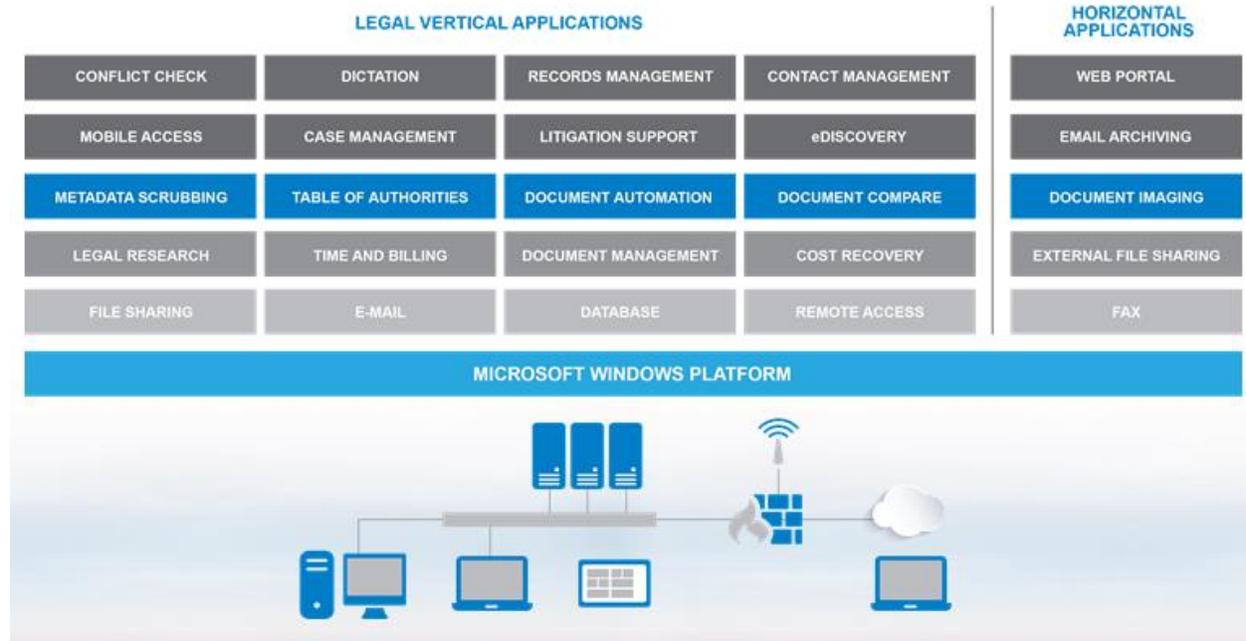
Here's a quick rundown of the seven technology layers that law firms must manage effectively along with examples of the types of systems and applications within each layer:

- **System Layer:** Includes all servers and the network infrastructure (routers and switches) as well as all end-user access points—desktops, laptops, tablets and smartphones.
- **Operating System Layer:** This layer includes the device and network operating systems, such as Microsoft Windows and Apple iOS, on which all the devices in the System Layer function.
- **Base Layer:** This is where enterprise applications common to all businesses operate. This layer includes email, databases, faxing and file sharing as well as the environment through which the applications are accessed, such as Microsoft Outlook.

The first three layers and all their components are common to all industries. Every business relies on these three layers to one extent or another. But as we move into the other layers, the applications specifically pertain to the legal sector, and those in use will vary according to the needs and the size of each law firm:

- **Core Legal Layer:** The Core Legal layer features the document management system and/or a practice management system that drives the primary work flows within the law firm. This layer can also include content sharing, matter-centric data organization, revenue generation & tracking, cost recovery, time & billing, research, and external file sharing. Almost all legal firms deploy applications covering these functions.
- **Workflow Layer:** The applications in-use at this layer and above begin to vary according to the needs of each law firm. Applications at this level typically improve workflow efficiency and the accuracy of data that's produced in formats easy for the staff to process. Workflow layer applications allow you to automate and compare documents while securely providing services such as document imaging and data scrubbing.
- **Practice Layer:** Applications deployed at this level typically address specific client needs while conforming to rule sets that ensure application outputs meet business requirements. This includes applications for case management, litigation support, email archiving and eDiscovery.
- **Specialty Layer:** Not all firms deploy applications in the top layer, but these applications can add significant value to client relationships through unique tools such as content management, records management, client self-service portals, dictation, and conflict-checking software.

Across the four upper levels, law firms usually deploy anywhere from 5 to 15 applications as shown in the illustration below. Maintaining applications across these levels requires specific software integration expertise—even minor changes to one application can impact the performance of all the other applications sequentially.



Evaluating External Partners That Can Manage the Seven Layers

Once your law firm has taken inventory of all the systems and applications that operate within each of the seven layers, it's now time to determine if you want to partner with an external IT solution provider to manage and support the seven layers or if you want to manage several relationships and contracts. While IT solution provider types vary widely in the specific expertise they offer, law firms will want to consider two basic types:

Managed Service Provider: This type is quite common, with Managed Services offered as a staple by a high percentage of IT solution providers. Some providers provision Managed Services from their own data center. Others rely on a third-party data center partner that provides the monitoring hardware and software tools while the staff of the IT solution provider oversees your network.

A leading Managed Services Provider will likely prove adept at supporting the first three technology layers—System, Operating System and Base. Because the technologies across these layers are in-use at most businesses, a Managed Service Provider is frequently exposed to them and can thus offer in-depth expertise.

However, a Managed Service Provider also likely lacks specific expertise in the legal applications that span the top four layers. Should any issues occur at these layers, you will likely need to turn to your internal IT staff or one of your software consultant partners.

Legal Integrator: A Legal Integrator, which is rare compared to a Managed Services Provider, typically focuses its expertise on a leading document management or practice management software solution. They may also offer expertise in the other applications that function across the Core Level as well as legal applications that operate at the Workflow, Practice and Specialty levels. But the partnership that a law firm forges with a Legal Integrator is usually predicated upon the integrator's knowledge and expertise in the document management or practice management software that the firm uses.

Depending on the breadth of expertise that a Legal Integrator offers, its staff may or may not be able to support the lower three levels. The key skills they bring to the table include an in-depth understanding of the legal industry and expert knowledge on how legal applications integrate and depend on each other. For example, a Legal Integrator can efficiently program the software development kits that typically come with Workflow, Practice and Specialty layer applications in order to properly integrate them with your document management and practice management software solutions.

Perhaps most importantly, when it comes to applying a change to one of your applications, a Legal Integrator knows how to configure all of your systems and how to program all of your applications—and then test the changes. This determines if any modifications to one application will negatively impact your other applications—before you go live with the change—so that adjustments can be applied if necessary therefore minimizing the end user impact.

The last thing you want is for a firmware change applied to your time and billing system to cause your email application to malfunction.

Choosing the Best Managed Services Partner for Your Firm

Now that we have delineated the seven technology layers of support that legal firms require and the types of IT partners that can support those layers, how do you decide whether you need a Legal Integrator or a Managed Service Provider to keep your IT environment up and running 24x7?

The first step is to consider who you already have on board for internal resources, and if it makes economical and operational sense to have them manage all or some of the seven layers. Much depends on their skill set and whether it makes strategic economic sense to allocate their time.

Typically, IT personnel with the ability to manage your legal applications either don't possess the skills to manage the lower three layers, or they prefer to focus on application support. Similarly, those with the skills to manage the infrastructure systems and enterprise applications spanning the lower three layers likely do not have the skills to manage your legal applications. They may also prefer to function as IT generalists rather than specialists.

You may discover that your internal IT staff can manage either the lower three levels or the top four levels, but not both sets. It's then just a matter of identifying who you want to partner with to support the remaining levels. The area in which you need help will then dictate whether that's a Managed Service Provider or a Legal Integrator.

Should you decide to partner with a Legal Integrator, you will also need to determine if you can identify just one integrator who can provide expertise on all of your Core, Workflow, Practice and Specialty applications. You may find that you need to partner with multiple integrators who possess expertise in different applications.

Working with just one is best, when possible, so that if any cross-application issues occur, you don't get caught in the middle of the "blame game" where two integrators or multiple vendors point their fingers at each other.

Choosing One Partner with the Expertise to Manage It All

Perhaps the best approach to consider is partnering with a Legal Integrator that also provides a Managed Services offering. Not all Legal Integrators offer Managed Services, so this combination is unique, particularly if you need such a provider that offers nationwide support.

But the search is well worth the effort. Outsourcing the Managed Services function of all seven technology layers to just one IT partner with Legal Integrator skills makes sense from several perspectives:

Less Operational Risk: When law firms rely on internal staff to provide Managed Services for their seven technology layers, they run the risk that their lawyers and legal support staff will be unable to quickly access the help they urgently need if issues occur on weekends and evenings. And even during regular business hours, a well-staffed internal IT team may still get inundated with support issues they simply can't respond to quickly. With always-available IT resources to turn to through an outsourced Managed Services Provider, legal proceedings will not suffer delays due to network and application performance issues.

Greater Practical Experience: IT personnel who work for the Managed Services team of a Legal Integrator have received training specifically geared towards working with a wide range of applications and technologies. They focus on providing Managed Services for legal applications as well as the lower three technology layers, and they know how to resolve system and application issues remotely. They also

receive continuous training to ensure they can support the many new technologies that emerge on a constant basis.

Constant Availability: High-level internal IT resources are typically involved in strategic projects, which is naturally their primary job focus. So their availability for Managed Services activities is limited. And while entry-level IT resources are often assigned to staff Managed Services, they too seem to get pulled into other projects all the time. The result is that lawyers and their support staff can't always access the help they need when system and application issue occur. But when partnering with an outsourced Managed Services provider, availability is never an issue.

Economics: It may not make sense for your firm to invest in internal IT resources that spend any amount of time on Managed Services. This is especially true given that the majority of monitoring and incident resolutions can be handled efficiently by experienced personnel on an outsourced team. For any issues they can't resolve remotely and need to refer back to your internal team, they can still facilitate resolutions by collecting information and summarizing triage efforts.

The economics factor actually addresses multiple evaluation points. This includes the cost of maintaining a dedicated staff to handle Managed Services and hoping the volume of incidents will be enough to justify the headcount. At the same time, the law firm also needs to make sure it does not under-staff Managed Services so as to exceed its capacity and subsequently delay billable activities while users wait for issues to be resolved. By allocating Managed Services to an outsourced partner, both of these issues go away.

Enabling a Focus on Billable Time and Client Relationships

When it comes to Managed Services for IT infrastructures and end-user applications, law firms need to consider coverage for seven technology levels—System, Operating System, Base, Core Legal, Workflow, Practice and Specialty. It's also important to realize that interdependencies exist among all the systems and applications that operate across the seven levels. Each component can impact the performance of all other components.

Effective Managed Services thus requires an in-depth understanding of how all systems and applications interface. Changes to any single system or application require proper planning, testing and execution as well as consideration for on-going maintenance. Failure to do so could cause one or more systems or applications to crash, thus hampering the law firm's ability to function.

A general Managed Services Provider can sufficiently cover the System, Operating System and Base technology layers, and an expert Legal Integrator can sufficiently cover the Core Legal, Workflow, Practice and Specialty layers. But it's best to work with just one partner so the law firm can avoid the "blame game" and turn to just one entity when issues occur.

The ideal approach is to outsource to a Legal Integrator that also offers Managed Services. In addition to gaining access to technical resources with expertise across all seven layers, such a partnership also allows a law firm to capitalize on the risk, expertise, availability and economic factors that make outsourcing Managed Services a logical choice.

Most importantly, doing so will keep the firm's legal and business processes functioning smoothly so that lawyers can focus on generating billable time and maintaining client relationships.

To learn about the Managed Services and Legal Integrator offerings that All Covered provides to law firms, or to discuss other areas to consider when outsourcing to an IT partner, email us at legalteam@allcovered.com.

