

I Am Not a Legal Rolodex

Time to use smart tech to find a smart human lawyer ...

There must be a better way? I catch myself thinking this and saying it out loud regularly. Often, I get approached by people in business, entrepreneurs, solicitors / attorneys / lawyers / barristers and general counsel from all around the world either directly from a phone-call or email, whatsapp, twitter, facebook or LinkedIn message asking “can you recommend a lawyer in XYZ country”? Or, “can you introduce me to a lawyer who has an expertise in XYZ”? Or, “do you know a lawyer who specialises in XYZ and knows their stuff about my industry?”.

Yes, guilty m’lud of having a strong brand presence and being known in the legal world to have a global legal network and community, but, seriously, my friends, I am not a walking legal rolodex.

I am devoted to you all and would dearly love to continue to be able to assist (for free) every one of you who reaches out, but I am sure you will appreciate that, unfortunately, time is money. I must work for a living and earn a crust (which must be paid for). I hope you will appreciate that in juggling the many roles and hats I wear I simply do not have endless hours in a day to reply and/or help in these situations. I am only human.

Now, if I were a robot, or if I had a machine avatar - that would be a different story. However, I am not, and do not. So, what’s the alternative? What’s the solution?

It's obvious. I need to be replaced by technology. But does it exist?

The search for replacing me

To resolve this matter once and for all, in mid-March I reached out to my wonderful LinkedIn global community to help me understand some of the issues legal buyers face and answer a handful of questions¹ before I set about searching for some tech and/or platform ‘out there’ that could replace me and be of real use to my needy community. I was amazed to see the interest in this as the post received over 5000 views in a matter of hours and I garnered a surprising amount of private feedback beyond the publicly available comments.

Out of interest, I will share with you now the questions and answers received from some of the concerned parties which are relevant to my (hopeful) legal rolodex retirement:

1) Which are the most frequent scenarios when you, as a business person or general counsel (GC), ask for a service from a law firm?

a) Adoption of a new law/act/decision/change of state (think Brexit; GDPR; other?) that affects business?

David Blanco Jiminez, Head of Law Patents & Compliance ASEAN / CropScience APAC Regional Counsel at Bayer, Singapore (ex-assistant GC Monsanto) stated *“we require a law firm to help us map out & assess the risks and provide guidance and legal expertise on how to behave to negate or minimise risk exposure (financial, reputational, etc.) of a new law/act/decision/change of a country in APAC (i.e. UAVs/ Drones, ESG – Carbon credits, Cybersecurity, data localisation under new Data*

¹[https://www.linkedin.com/feed/update/urn:li:activity:6909867322048438272/?commentUrn=urn%3Ali%3Acomment%3A\(activity%3A6909867322048438272%2C6909975348352843776\)](https://www.linkedin.com/feed/update/urn:li:activity:6909867322048438272/?commentUrn=urn%3Ali%3Acomment%3A(activity%3A6909867322048438272%2C6909975348352843776))

Privacy Acts of India and/ or China, Compulsory License as a waiver under local Competition Laws, new Digital Laws such as Telemedicine and/ or Telehealth, etc.) that affects any of the Bayer businesses (Pharma, Consumer Health, or CropScience) locally and/or cross border.”

David’s views appear to marry the response received by Sinal Govender and Zakia Khalid.

Sinal, a legal consultant who used to be a “big law” lawyer in South Africa, shared with me that whilst she was in practice, she would receive requests from GCs when they required “*super-specialist expert advice*” in relation to intellectual property, data protection, tax etc. In particular, her assistance was needed when weighing up commercial risks, for example, when a business knows the marketing campaign will attract some legal issues but the business wished to weigh up the costs of those risks against the commercial benefit of having a viral campaign. Often, she would also be sequestered to provide a legal opinion on why there isn’t any contravention of the law.

Zakia Khalid, an ex-in-house legal counsel at Scott & Mears Credit Services Ltd and now freelance solicitor, said that “*in my experience general counsel use services of a law firm generally when they do not have that particular area of expertise within the team; examples are debt recovery and complex litigation matters; property related matters when it comes to leases of offices and also compliance related matters, for example if the company is regulated by the FCA and they have specific compliance requirements they need to implement/adhere to which they are not familiar with.*”

b) A standard / day to day / repetitive / very frequent and time-consuming job to do?

For example, draft a service contract, pursue a debt collection through the court. Is this something that is contracted out to a law firm?

David confirmed this to be so. He expressed that when there is a “*time-consuming job to do or the allocation of in-house legal resources is not cost-effective.*” [For example] “*anti-counterfeit activity, IP registration, pursuing a debt collection through the court, conducting legal research on a very specific topic*”, he is keen to outsource this kind of work to a law firm. And yet, notably, Bayer in-house Legal Operations have been digitised for the last 4 years for most of its day-to-day compliance, data privacy, and contract template generation processes - recognised last year by FT Innovative Lawyers Europe award winners 2021.²

However, Sharan Kaur, a LegalTech consultant and ex-GC at Parabis Law / Royal Sun Alliance, who (like myself) is a staunch advocate for using technology whenever and wherever possible, was quick to point out “*there is less of a drive to send repetitive work to law firms because of a greater drive to keep things in house. Where previously, we would have sent contract review work to external counsel, now we use technology and automation to do the first pass. GCs are hiring legal operations managers to streamline their processes and to be more effective and efficient as a result. That means as GCs we’re not (or less) caught up in the day to day running of the legal department.*”

Sharan also reiterated what Sinal, Zakia and David shared with me; there remains a trend where GCs “*tend to outsource matters requiring deep legal expertise or specialist work, for example, the introduction of DAC 6, contracts containing force majeure clauses especially in light of Covid 19. The*

² <https://www.ft.com/content/7f4fa91b-12d4-4f72-ab2d-8792e89b6282>

impact of Brexit on VAT and import/export duties assessment is another reason to instruct law firms.”

c) When you have zero (or very little) expertise in a certain field of law and/or jurisdiction?

For example, a HQ office needs to establish, or close, a company situated in another jurisdiction?

Lisa Lang, an award-winning general counsel for a public HBCU in the USA, who was keen to help me understand the variety of ways in which GCs procure law firms and lawyers, expressed: *“I may be a bit of an outlier. I work for a public institution in the US. Public institutions must go through a competitive procurement process. Public institutions must justify rates that were set by our General Assembly many years ago (extremely low and not competitive). Outside counsel for litigation is typically retained in consultation with our insurance company (either panel counsel or counsel we have had pre-approved). We have outsourced legal work in the areas of immigration, trademark, and patent.”*

I enquired as to how she may source the ‘right’ law firm and its expertise/specialism, to which she replied: *“When we outsource legal work, we either “piggy back” off of existing contracts (where possible) from other institutions if we don’t have time to take it out for bid or we take it out to the market place using a “request for bid” or “request for proposal” (RFP). There is a strong preference for using local lawyers. Our General Assembly has a “Government Contract Review Committee” that approves our contracts. They frequently push back when we use lawyers outside of Kentucky.”*

Similarly, David expressed that he reaches out to law firms *“when my team or Global Bayer In-House Legal Community have zero (or very little) expertise in a certain field of law and/or jurisdiction; for matters that are outside the “scope of Bayer Life Sciences Industries, e.g. E-Commerce; when our Regulatory or Medical Teams cannot reconcile certain requirements embedded on new laws; And when we need to contribute to a White Paper or Position Paper to provide comments to a new law/regulation (for example Gene Editing, cross-border seed movement, or Regenerative Medicine).”*

He also shared that he looks for external expertise and specialism *“when we are looking for a regionalised, one-stop harmonised approach with law firms who have branch offices in different countries and when we look into secondment options or buy out non-core activities (that is, Corporate Housekeeping, Real Estate, standard HR approach).”*

I can empathise. As I have been approached by my community (business people and GCs) over the years about helping them find secondment solicitors it was a no-brainer to ask my community the following question:

2. As a GC/legal department, do you use a secondment solicitor/attorney/lawyer from a law firm? If 'yes', what do you tend to need them for? Is it a particular type of legal issue?

In relation to secondments Sharan revealed *“it’s usually to backfill a member of the team on extended leave. I’ve also asked for secondments from panel firms who have experience in implementing new technologies and processes. I want to have the ability to call in external counsel on business matters outside legal expertise.”* Sharan explained the reasoning behind this:

“The struggle is and has always been to do more with less. It’s juggling business demands with the needs of the key stakeholder. Lack of process or resources means balls get dropped or that GCs end up spending most of their time firefighting rather than focusing on strategic planning and adding business value.”

Expanding on his initial comment David continued: *“As a Regional Counsel or Head of a Country Cluster Legal Department, I had used a secondment lawyer from a law firm in the past to cover for special projects (merger, divestment, or local integration) or for a temporary increase of workload. For example, we are currently using PwC Legal seconded services for certain aspects of our global divestment projects or local integration following global mergers (Bayer/ Monsanto). As for temporary increase of workload I have resorted to Axiom and/or Lawyers on Demand.”*³

Curious to know what major legal and business issues people and GCs turn to law firms for now and in the future, I asked:

3. What, in your opinion, as a GC or business person, are the major legal issues and/or business issues/problems you still have to deal with on a daily basis? AND, what are the likely problems you envisage in the near, and distant, future?

David ,(wearing his GC hat), shared that he is currently focusing mostly on areas / legislation/ litigation that touch upon the digital transformation, sustainability (that is, ESG, EU Green Deal and new forms of challenges related to Climate Change and Biodiversity) and new forms of R&D (Gene Editing, Cell & Gene Therapy, AI, etc.) affecting the Life Sciences Industry: *“The likely problems I envisage in the near, and distant, future relate to talent acquisition and tap on ‘future-ready’ lawyers as I sense most Law Schools are not fully preparing young lawyers to deal with cross-border legal developments or new areas of law and legal developments (for example, AI Laws, e-commerce, social media. etc).”*

Interestingly, a GC for a bank also shared with me that they tend to have to deal with unexpected things, often to do with poorly worded regulations, or enforceability and cross jurisdiction structures.

My final question related to the reality that when I receive enquiries to assist a business person, lawyer or GC, more often I am asked ‘do you know a lawyer?’ rather than ‘do you know a law firm?’. And so, I enquired:

4. Is it the personal brand (the lawyer person) or the company brand or the fact the lawyer or company use smart tech (product brand - helping drive efficiencies / ergo they ‘get’ it) that attracts you to a particular lawyer, law firm or company?

Shireen Smith, CEO & Founder of IP & Trademark law firm Azrights in the UK, believes *“they are as likely to come to me because of my personal brand (that is, they know me, or were referred by someone else who knew me), as they are to have found my company Azrights through a Google search for the type of service they need.”*

Curious to know more I asked: ‘Do you receive enquiries from abroad in relation to the above? From GCs and business? And how do these from abroad find you?’ To which Shireen replied: *“Yes, I do get business owners contacting me from other countries. They find me through search. Bigger corporate clients invariably come through other trademark and IP lawyers in other countries. They approach me initially and then when we’re acting for their clients, the GC is often copied in and interacts with me directly.”*

³ <https://www.axiomlaw.com/singapore> ; <https://www.lodlaw.com/>

Sharan replied: *“While personal branding helps to some extent, I need to know that my chosen law firms understand my unique challenges from several angles - professional challenges, company challenges and industry challenges. Can they help me beyond legal advice? Do they have a 360° degree understanding of my business challenges? What additional insights can they offer? Providing legal expertise is table stakes. What X factor do they bring to the table?”*

Sinal also shares that right now the personal brand is important but in the future the firm’s tech will also be important. For example, Sinal expressed that *“how the firms tech capabilities integrate with the client’s own platforms”* [and] *“what the cost savings are of using the firm over its competitors (usually based on how efficiently the lawyers manage fees)”* [and] *“how transparent the firm is with information and processes.”*

Like Sinal, Zakia believes it is both. *“I believe tech can save so much basic admin level work which in turn allows more time for lawyers to deal with technical legal aspects of the matter. If they are using tech to drive efficiencies for me it shows the business is looking at ways to improve/grow/support the people doing the work/investing in new tools.”*

Smart Tech, Smart Human

Having conducted some further desk research⁴ and after careful analysis and contemplation, in summary, business people, lawyers and GCs search for a lawyer or a law firm and hire them when they need/want/desire: -

- super-specialist expert advice aka deep legal expertise
- specialist work in a particular industry/sector
- cross-border, multi-jurisdiction, global divestment projects, global mergers advice and assistance (that is, local to global help)
- to understand and comply with a new law/act/decision/change of state
- map out & assess legal risks and provide guidance
- to weigh up commercial risks
- to operate within the law or not be in contravention of it
- compliance related matters/requirements
- And specifically for GCs:-*
- to carry out a time-consuming job, particularly when the allocation of in-house legal resources is not cost-effective
- Secondment solicitors/attorneys to: -
 - backfill a member of the team on extended leave.
 - have experience in implementing new technologies and processes (automation)
 - deal with business matters outside in-house legal expertise
 - cover for special projects (merger, divestment, or local integration) or for temporary increase of workload

Accordingly, if a technology/machine could fulfil ALL of the above criteria then I could be replaced entirely. Hallelujah! I would LOVE to be made redundant!!

⁴ <https://legaltechnology.com/2022/03/16/law-firms-leveraging-technology-for-ultimate-productivity/> ;
<https://www.thomsonreuters.com/en/press-releases/2021/february/alternative-legal-service-providers-are-quickly-becoming-mainstream-for-law-firms-and-corporations-creating-a-14-billion-market.html> ;
<https://www.linkedin.com/in/ann-kryzhanowski-928a52235/> ;
<https://www.lawcoaster.net>

I set about checking out a number of law firm comparison sites, directories and platforms⁵ – Legal Utopia, The Law Superstore, ReviewSolicitors, Solicitor.info, TrustPilot, LegalDrop, Lexoo, Pursuit, BanyanRFP, Lawcadia, Priori, Upcounsel and C4Legal, to name a few.

Unfortunately, none of them appear to fulfil all of my criteria (or my enquiring army or the feedback from my community as noted above) in one place, including a handful of crucial things, such as, global coverage, automation of RFP (make it super speedy for me), and anonymity. It would be nice to have this as optional at least until it would be necessary - aka if I decide to instruct the lawyer / law firm; an obvious requirement from then on.

Rolodex retirement

And then I came across [Lawcoster.net](https://www.lawcoster.net); ironically via a LinkedIn connection⁶ – aka via search on a tech platform ('go digital' is in fact the reality nowadays 'post-covid'). To my surprise and delight it met all of the above criteria (and more). It looks like a recently launched service imho, but it appears to have sexy legs; the platform itself appears to be a hybrid of rules-based with an element of AI tech methinks.

I could search for a law firm globally where lawyer expertise was a selection option, together with standard or complex issues to address. There is a rate and review element. Plus, here's what's really super-cool; it has a kick-ass RFP wizard and I can enquire anonymously - until it's time to select my chosen lawyer / law firm and engage, understandably. Lawcoster has done its homework.

I won't spoil all of the surprises (as there are more) but, if you find yourself in my shoes, that is, being asked to help out a mate or someone who you do not know and have never met but reaches out to you to help them find a lawyer anywhere in the world (such is globalisation and global trading), then send them in that direction. One thing is for sure, I will be!

I can proudly say I am now legal rolodex retired. There IS a far better way. It's beyond time to use smart tech to find a smart human lawyer. I'm saving Lawcoster.net to my favs 😊

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⁵ <https://www.sra.org.uk/consumers/choosing/comparison-services/?blaid=2793389>

⁶ <https://www.linkedin.com/in/ann-kryzhanowski-928a52235/>