

Strategic Legal Technology Blog Post on Clearspire Legal IT Platform

[Reconceiving Lawyer Software for the New Normal \(11/14/2011\)](#)

Last month I wrote a two-part [blog post about the new model law firm Clearspire](#). Subsequently, I had a chance to see [Coral](#), the firm's custom-developed law practice and business management technology platform. I was impressed.

I have evaluated much software over the years. Coming from the large law firm environment, however, I am accustomed to reviewing single-function or loosely-coupled applications. In contrast, Coral is a complete desktop and office environment that encompasses not just document creation / editing and e-mail, but a range of other functions, including real-time communication / collaboration, project management, and financial analysis.

Design Goals

Clearspire had the advantage of starting from scratch. Unlike large law firms, it did not have to graft project management, budget features, and other modern requirements onto legacy systems.

So the firm built Coral from the ground up to meet new client demands for better value, with features to serve clients, lawyers, and the firm's business managers. Key design goals included ease of use for "non-techie lawyers", collaboration within the firm and with clients, scalability, and the ability to break substantive legal work into separately priced and managed discrete activities ("chunks").

Inspired by Apple, Coral emphasizes simplicity, elegance, and intuition. As I described in my prior posts, Clearspire practices virtually, so Coral is not just software, it *is* the office. To support remote work, Coral offers visual cues about colleagues' availability.

Key to Clearspire's business model is managing work chunks (tasks and projects). Coral helps firm lawyers do so with features built around "matter roadmaps", which break matters into phase, activity, and task. The firm identified and retained the services of 12 leading lawyers to build standard roadmaps, investing \$1 million in the effort. These features support the firm's focus on efficiency and aligning interests: each work chunk is priced and measured separately; if work comes in below budget, the client, the firm, and the lawyers share the savings evenly.

System Architecture

Coral is a three-tier stack. At the bottom are systems for document management, records, conflicts, finance, and unified messaging (instant messaging, video conferencing, voice, social

media, and forums). Clearspire licensed 3rd-party software for these functions, customizing some packages so much it negotiated IP grants.

A middle layer integrates and aggregates data from the bottom, providing human resources information systems functionality (including experience location), project management, matter staging and management, and reporting.

The top layer is the user interface: a web-based intranet and extranet. Similar but somewhat simplified interfaces are available across a range of mobile devices. The entire stack runs on a private cloud in a Tier 4 data center (which means fully redundant systems and tight access controls).

The Lawyer Interface and Experience

When lawyers log-in, they see a home page with “my to-do list”, matter list, key updates, and colleagues’ availability. The availability feature, which Clearspire calls “hallways”, signals to lawyers whether colleagues are at their desks and, if so, whether they are available to talk or IM. Coral offers both a geographic and practice view of colleagues. Color coding and icons signal availability (lawyers can control how their availability displays to colleagues).

Most communication is NOT by e-mail; rather it is in wikis or collaboration forums, which means that message exchanges stay organized and are available to anyone who joins the team mid-stream. I find this feature particularly exciting. In 1992, I tried introducing threaded discussion / forum software in a law firm. Though multiple partners tried and liked the forums, none was willing to give up e-mail. Today, with social media arguably uprooting the psychological foundation of e-mail, the stage may be set for Clearspire to move to the next generation of asynchronous text communication.

The document management system is a collapsible hierarchy that breaks work into natural units for a matter, for example, correspondence, court papers, and working papers. This feature looks similar to many large firms’ matter-centric systems. The difference, however, is that there does not appear to be alternate interfaces that let lawyers by-pass the system-designated folders.

Matter roadmaps drive lawyers work. Coral presents each lawyers with his or own customized task list. As lawyers finish one task, the system notes this and presents the next one. While that may sound like Big Brother to some, I think it is essential to standardizing and systematizing practice. Some firms are beginning to assess the cost of allowing each partner to practice in his or her own way. Those that do will most likely find it is high. While many lawyers may consider themselves artisans who need no guidance, clients likely prefer the standardized approach.

Working in concert with the matter- and task-based approach, Coral also presents lawyers with a news feed customized to the matter. Many firms struggle to deliver relevant updates to lawyers. This feature looks very promising but is particularly hard to assess without actually working on matters and seeing what updates appear.

The Client Interface

Clients see a similar but role-appropriate or contextual interface. A client dashboard includes a matter overview and list of lawyers working across matters. Per matter, clients can see an overview, a subset of documents the firm chooses to expose, billing, a chronology, and prior communications. Financial reports are also available.

Conclusions

I was impressed: Coral is better conceived than most law firm software I have seen. Because Clearspire was not constrained by the infamous “installed base”, it built a system that overcomes legacy problems and, as important, meets new needs. In contrast, existing large law firms have a big installed base of users, hardware, and software. They generally face a future of incremental change; developing fully integrated systems could take many years. The cloud may offer firms an alternative but few large firms seem ready to migrate any time soon.

Over the last decade, I have participated in many a discussion about matter-centric systems. I have been skeptical about the value of most instantiations of it. Coral, however, appears to take matter-centric to a new level that seems to make it genuinely helpful to lawyers. Furthermore, knowledge management (KM) is baked-in, with search, wikis, and discussions forums active now and other features planned.

So, does Coral really work as well as I suggest? Will lawyers and the firm be more productive? As with any software discussion / evaluation, answering these questions based on one demo is not possible. From my AmLaw 100 experience, I know that rolling out new versions of standard software is often a challenge – gaining adoption of new ways of working is that much harder. Just as Clearspire has avoided the installed base problem, so too has it avoided the “legacy lawyer” problem. Lawyers who join Clearspire self-select for being open to if not eager to adopt new ways of working. And the firm can also screen for these traits as necessary. Consequently, I expect that lawyer uptake will be very good.