

Beyond The Portal

Five Portal Alternatives for Law Firms & Legal Departments



Introduction

The traditional legal ‘portal’ for communication between firms and clients has not kept pace with the changing needs within the industry and new technologies such as cloud storage and mobile devices. A growing number of law firms and legal departments are looking for alternatives, as evidenced by our interviews with sixteen General Counsels in a variety of industries.

In this white paper, we share our takeaways from these conversations, and discuss alternatives to the standard, outdated portal model. You’ll learn about:

- Why clients expect a digital interface for legal matters
- The history of law firm portals
- What legal departments think of law firm portals
- Five potential alternatives, including the pros and cons of each

Methodology

The team at Lupl sat down with sixteen General Counsels from a wide range of industries and locations spanning from Singapore to San Francisco. We asked a series of questions about how they collaborate with outside counsel and what they find lacking in most portals.

The Need for a Digital Client Interface

Clients now expect the firms they hire to deliver services via some kind of digital interface. This is driven by three major trends:

1. B2C apps have created new expectations for B2B experiences

In 2022, we can access bank services via our phones. Our health data is on our wrists via fitness trackers and smart watches. These developments have impacted client

expectations for legal service providers. They don't want to have to wait 48 hours for a response to an email about a matter.

Few customers would choose a bank without a website, or, for that matter, a mobile app. Why would a client choose a firm that can only be contacted by email?

2. Cloud storage is now mainstream and clients expect to be able to access their work product from anywhere

Cloud technology began as a disruptor of traditional physical hard drives. Now it's the norm for data storage for most purposes, especially as data security constantly improves. There is now no technical or regulatory issue that prevents firms using the cloud for client interaction and data.

3. Clients demand more transparency and efficiency than ever

Legal departments are placing increased emphasis on transparency and efficiency when considering whether to hire a firm or evaluating an existing relationship. A firm that delivers work product via email and doesn't share real-time status updates is unlikely to make the grade in 2022.

Until now, the common wisdom for how firms should address this expectation was 'set up a portal.'

A Brief History of Law Firm Portals

The word 'portal' derives from the Latin 'porta', which means 'gate'. 'Portal' became common parlance at the dawn of the web in the 90s and 00s to describe the gateways that companies like Yahoo were establishing to organize the content and experience of the new frontier of the internet.

Shortly thereafter, law firms began to establish their own portals. These early portals were built on the pre-existing foundations of data room and extranet systems.

This early architecture, from more than two decades ago– a lifetime on the internet– continues to inform the design of portals today.

What Do Clients Think About Portals?

Lupl's research interviews with General Counsels crystalized around the following themes:

1. Eight firms means eight portals and eight passwords

One GC put it like this: *"A lot of law firms come to us and say, 'We're really innovative, we've built a portal'. But portals break down when you have this many law firms and everyone wants you to log into their captive portals. It just doesn't work for us."*

Most legal departments work with more than one firm. Generally, each firm has its own portal, forcing the client to constantly jump between multiple portals, and remember multiple passwords and organizational schemes, just to track basic information. *"Why doesn't my [Firm A] portal talk to my [Firm B] portal?"* asked one GC.

So why don't groups of firms build portals together? It's a nice idea but execution would be an awkward dance fraught with technical and commercial challenges. Which firm would host it? Which would design and maintain it? Which would pay for it?

2. Convenient for the firm, inconvenient for the client

A traditional portal ushers clients into *the law firm's world* – a bit like having them travel across town for a meeting at the firm's office, but without the coffee.

And that's really the problem– the travel, not the coffee. This approach might be convenient for the firm... but not the client. As one GC remarked, *"I'm thinking back to*

a previous law firm. It was more complicated than I was expecting to find what I needed. I remember saying, 'oh, how do I find that portal again?' And then, 'oh, shoot, they made me do a password that's different than my usual passwords.' Then I got logged out. Yeah, can you just send me that damn thing?"

3. More clunky than collaborative

Most portals originated as data rooms or extranets. This legacy is often reflected in their design which centers around document storage, rather than real-time collaboration.

As one GC explained, "Portals are used by most people as a dumb repository. You can do a little bit of live collaboration in them, but no one ever does. And, to be honest, they don't look any different to me than the first data rooms I was using in 2001. It's a well-ordered system, but it's not doing anything very clever."

Portals work well for *pushing* documents and data *from* firm to client. But when the project involves real-time collaboration, portals can feel static and one-dimensional.

4. Long roll-out, extensive human maintenance needs

Many portals can be customized endlessly. But that configurability comes at a significant cost. 'Endlessly configurable' means that some firms configure endlessly.

Several GCs we spoke to noted how long a firm had taken to get a portal set up for them. *"It took our firms three months to set up a portal for us,"* complained one senior lawyer. *"We want something spun up in minutes, not weeks,"* said another.

Even on the law firm side, we spoke to one team who had eight professionals assigned full-time to managing portals. That's a lot of headcount and expense in salaries, especially when the customization alienates clients rather than attracting them.

Alternatives to Law Firm Portals

We asked each GC we spoke to the following question: *“If you could wave a magic wand, what would the ideal platform for law firm collaboration look like?”*

The surprise? Not one of them said, ‘more portals!’ They want something fundamentally different. Time and again the same needs came up:

1. **Speed and simplicity.** GCs want something fast and easy to spin up (minutes, not months) and simple and intuitive to use. *“If it needs training, it’s dead,”* explained one Head of Legal Operations.
2. **Visibility.** Legal departments want better visibility on how firms are handling their matters. *“Who’s doing what and how’s it going? That’s really the question I want answered,”* specified one GC.
3. **Interactivity.** As outlined above, *“Portals are used by most people as a dumb repository.”* This feels outdated to the legal departments we spoke to. They want a platform that facilitates a more collaborative approach with their outside counsel.
4. **Integration.** Legal departments are looking for tools that integrate with their existing systems – whether that’s Slack, Teams, Google Drive, or other platforms they use internally. They want to easily integrate their organization’s own knowledge and process with whatever platform their firm(s) use.

- 5. Mobile-first.** The in-house lawyers we spoke to spend an average of six hours each day on their phones. Their feeling is that most portals are designed for a desktop environment, limiting their ability to access their matters on the go.

Five Portal Alternatives

Let's explore five portal alternatives based on the above criteria. We'll list the pros and cons and suggest approaches to minimize the latter and maximize the former.

1. Email

Pros

- **Familiar.** One GC told us, *"I've spent most of my adult life in Outlook."* Everyone has email and knows how to use it.

Cons

The limitations of email are well-known but, in short:

- **Unstructured.** Emails are thread-centric, not matter-centric, so finding a document or update requires navigating multiple threads.
- **'Noisy.'** Lawyers are drowning in email. We spoke to lawyers with 30,000 unread emails, often getting several hundred new emails per day. This makes it challenging to prioritize important matters within their inboxes.

Recommendation: With the right digital workspace, email can be reduced by 75% or more on legal matters. Look for a tool that allows you to email documents and data into the workspace, rather than necessitating endless chains of replies and file attachments.

2. Enterprise Messaging Tools

Pros

- **Ubiquitous.** These may already be in use within the organization, especially because adoption exploded during the COVID-19 pandemic.
- **Flexibility.** These platforms are sector-agnostic tools which can be used in a variety of scenarios.

Cons

- **Non-comprehensive.** These tools are an important part of most companies' IT stack. But they work best in conjunction with, rather than instead of, a workspace specifically designed for coordinating the documents, deadlines, knowledge and deliverables crucial to firm/client collaboration.
- **Sub-optimal structure.** Messaging tools have conversation-centric rather than matter-centric workspaces, so the updates relating to a given matter may be spread across multiple threads.
- **Bordered.** IT departments often impose limitations on inter-company collaboration between enterprise messaging tools and limit their use to within, rather than outside, the organization.
- **Vulnerable.** Internal law firm rules may sometimes prohibit the use of systems that legal departments may want to use for security reasons.

Recommendation: Ensure that the platform you're considering integrates with your organization's existing enterprise messaging tools.

3. File-Sharing Services

Pros

- **Simplicity.** With just one use case – transferring large files between organizations – people know what these are for and how to use them.

Cons

- **Security Compliance.** Generic file-sharing services often lack the necessary security and compliance measures required for legal matters.
- **Over-simplicity.** As these tools focus primarily on one use case, they lack the ability to bring together all the other moving parts of a legal matter – project management, communications, knowledge, status reports, etc.

Recommendation: Choose a platform with a large file size limit (minimum 50MB per file) and note whether it provides unlimited storage, or charges per MB.

4. Client Matter Management Portal

Pros

- **Client-centric.** Larger corporate legal departments may want to reverse the usual equation and develop their own portals rather than relying on the portals established by the firms they work with. Once built and configured, these portals can be used to manage law firm relationships in one place (from the client's perspective).

Cons

- **Security Compliance.** Many law firms will decline to use a client-developed portal from a security and compliance perspective, as they have limited visibility and control over the system.
- **Expense.** This puts the burden of developing and maintaining a portal on the legal department. For anything other than the largest corporate legal teams, the investment of time and money may not make sense.

Recommendation: Look for a solution that balances the needs of the firm and client, rather than prioritizing one side or the other.

5. Lupl

After thinking through the alternatives above, and spending thousands of hours in joint sessions involving law firms and legal departments, we built [Lupl](https://www.lupl.com).

Lupl is a next-generation matter management and collaboration platform co-developed with the support of legal departments and law firms, and optimized to make communication and collaboration both simple and comprehensive.

The Lupl ‘shared desk’ workspace features:

- **Simplicity.** One platform, one password.
- **Speed.** 57-second setup, no training required.
- **Scope.** Real-time, 360-degree view across matters.
- **Ease.** Drag-and-drop document sharing and collaboration.
- **Flexibility.** Powerful and customizable matter and workflow templates.
- **Compatibility.** Open and integrated – bring your own system.

Summary

The need for an updated, state-of-the-art digital ‘user interface’ for lawyer/client collaboration is glaring.

Portals have served their purpose, but their time has come and gone over the past 20+ years. Our research indicates that their design and architectural limitations are becoming more and more obvious.

Clients are starting to vote with their feet and seek out alternatives. The right tool has the potential to improve and streamline collaboration for both law firms and clients.

About Lupl

What shape do you think legal service delivery will take in the future? We’re confident the answer is Lupl, which we developed in response to the shortcomings of existing alternatives. More than 500 law firms and legal departments have already ditched the portal and experienced a better way with Lupl. We invite you to join them.

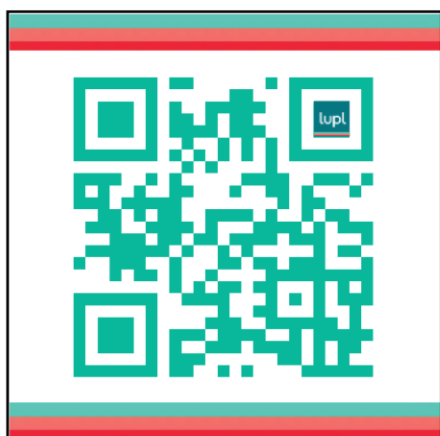
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