



Annual Managing Partners Roundtable: Best Practices are Driven by Technology

New Jersey's top law firms are connecting with the future, adapting to new opportunities to assist clients and make their own operations more efficient.

COMPILED BY MILES Z. EPSTEIN
EDITOR, COMMERCE

LAW FIRMS AND THEIR CLIENTS—and the law itself—must adapt to new technologies. Given the expanded liability caused by the Internet and e-mail or the use of digital evidence or online documentation, *COMMERCE* asked the managing partners of New Jersey's top law firms to discuss the impact of technology on their firms, on their clients and on case law. The following industry leaders participated in this Annual Managing Partners Roundtable:

- Archer & Greiner, P.C. Chief Operating Officer Stacey J. Sinclair, Esq.;
- Cole Schotz P.C. Delaware Office Managing Partner Norm Pernick, Esq.;
- Connell Foley LLP Managing Partner Michael X. McBride, Esq.;
- Day Pitney LLP Managing Partner Stanley A. Twardy, Jr., Esq.;
- Gibbons P.C. Chairman and Managing Director Patrick C. Dunican Jr., Esq.;
- Greenbaum, Rowe, Smith & Davis LLP Co-Managing Partner W. Raymond Felton, Esq.;
- Harwood Lloyd, LLC Co-Managing Partner Curtis J. Turpan, Esq.;
- Hoffmann & Baron, LLP Managing Partner Ronald J. Baron, Esq.;
- Jackson Lewis P.C. Managing Shareholder, Morristown Office, Richard J. Cino, Esq.;
- NPZ Law Group Managing Attorney David H. Nachman, Esq.;
- Riker Danzig Scherer Hyland & Perretti LLP Managing Partner Glenn A. Clark, Esq.;
- Tenaglia Hunt, P.A. Managing Partner John Tenaglia, Esq.



Archer & Greiner, P.C.
*By Stacey J. Sinclair, Esq.,
Chief Operating Officer*

From the legal research we have been familiar with for years to the business analytical tools that inform firm management as to the financial impact of every matter, the evolution of technology influences every level of legal practice. While legal managers have used technology to assist their operations, perhaps the best use of today's technology allows not only legal managers but practice group leaders, and attorneys at every level, to bring efficiency and cost savings to their clients. In this competitive landscape, there is every need to contain costs internally, but to also recognize the needs of our clients to do the same. The increased use of technology creates efficiencies to be passed on to clients—whether that be to provide a centralized document production team, advanced word-processing tools to better meet attorney needs; the use of business intelligence that permits matter budgeting based on historical experience; or integrated in-house, e-discovery support that supports litigation through trial. A decade ago, Archer committed to bringing in-house its own litigation support team, virtually eliminating the need for vendors, streamlining the data management process and working strategically with clients and attorneys every day—resulting in better litigation and trial experiences.



Cole Schotz P.C.
*By Norm Pernick, Esq.,
Delaware Office Managing
Partner*

The "Information Age" challenges how lawyers have traditionally provided legal services. Cole Schotz P.C. believes that new technologies present the opportunity to meet client needs and demands more creatively and efficiently. We have enthusiastically embraced and implemented these historic changes with the goal of being at the head of the pack. Technology has impacted how we collaborate with our clients and with each other, how we interact with adversaries and the courts and how we safeguard those communications. We consistently review our internal workflow and processes to provide the most cost- and time-efficient services. Embracing technology makes us better suited to represent clients than a great many of our competitors who have not made the same infrastructure and training investments. One of the most significant technologies we have employed is electronic discovery. It is now estimated that 98 percent of all data being produced is in electronic form. Cole Schotz provides full-cycle, all-in discovery services, offering start to finish e-Discovery counseling, project management, data processing, analytics, hosting, review and production. We understand how to leverage advanced technology to reduce discovery costs and burdens. We minimize "eyes on" review of every document,

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saving our clients enormous fees without sacrificing quality results.



Connell Foley LLP

By Michael X. McBride, Esq., Managing Partner

As one of the first law firms in New Jersey to launch a Web site, Connell Foley has long recognized the importance of technology in the practice of law. Ultimately, all decisions made by the firm regarding the use of technology come down to how it impacts and best serves the client. We evaluate all potential technology upgrades and implementations—whether a Windows upgrade or a change to our billing software—in light of how or whether it will help us better serve our clients. Technology affects our clients in different ways across different industries; as advisors, we must be able to evaluate when and where we need to make changes to our own infrastructure so that our clients can operate most efficiently and effectively. For example, as e-billing has become more prevalent among some of our key industries, we implemented the necessary software and procedures to offer this option to those clients who request it. Of course, we are keenly aware of the potential risks that new technologies can also present, especially in this day of increasing cyber-attacks. In addition to our in-house Information Technology staff, which regularly monitors the firm's systems, we also utilize consultants with particular industry expertise to investigate any potential risks with new technologies before we move forward with any new implementation.



Day Pitney LLP

By Stanley A. Twardy, Jr., Esq., Managing Partner

We pride ourselves on our lawyers' accessibility and services convenient through the use of technology. We are able to provide services to our clients from anywhere at any time, regardless of the client's location. We have invested in creating a virtually seamless experience

for our lawyers, and will continue to augment our virtual capabilities and keep them secure. Our video systems are able to connect to clients over the Internet, giving us the ability to react quickly to client requests. We also provide enhanced mobility tools for smartphones and tablets to make it easier for attorneys to access client documents and information while traveling. Last year, we implemented a records efficien-



While technology is helping law firms serve their clients, there are still privacy and metadata issues that require advanced planning and "smart" policies.

cy initiative to ensure that all paper records make their way into electronic format to enable us to better interact with a client's demands. In addition, Day Pitney is ahead of the pack in using advanced discovery techniques such as social media preservation tools and predictive coding to help our clients win and reduce costs. Technology should be embraced, not feared, and can change the outcome of any court case. Whether that change is positive or negative depends on a lawyer's ability to use it.



Gibbons P.C.

By Patrick C. Dunican Jr., Esq., Chairman and Managing Director

Businesses operate 24 hours a day, seven days a week. Law firms representing business clients need to be able to respond to clients' needs wherever and whenever they occur. For this reason, Gibbons has invested in technology innovations that provide secure and consistent access for our attorneys, whether they are in the office or on the road, so that they can provide

our clients with seamless, responsive service. Our technology platform provides a variety of ways for attorneys and clients to securely collaborate and share information. We can share files with clients via the cloud through products that create dedicated client portals and extranets. Our attorneys can also be available for video or Web conferencing at any time and from anywhere in the world through programs like Cisco WebEx and BlueJeans, which allow any type of device to connect to another device for conferencing on the go.



Greenbaum, Rowe, Smith & Davis LLP

By W. Raymond Felton, Esq., Co-Managing Partner

The past few decades have brought unprecedented growth in the use of technology in most businesses, and the practice of law is no exception. The Internet, e-mail, computerized legal research, enhanced word processing features and electronic filings provide capabilities that prior generations of attorneys could not have imagined. Still, the benefits of modern technology do not come without costs or risks. Although this is true for businesses in general, certain issues are unique to legal practices, and law firm management and attorneys deal with these concerns regularly. Client confidentiality has always been a hallmark of the attorney-client relationship. In an age where ubiquitous smartphones enable recording and photography, we can rarely be certain of privacy. Mistakenly hitting "reply all" to an e-mail may cost a client the otherwise privileged nature of an attorney-client communication. We constantly caution our attorneys and clients about the care they need to take in this regard. Another concern is the use of metadata or cookies in documents, which can be an unwanted source of evidence. We therefore "scrub" our documents to remove this potential problem. Used wisely, technology is a great benefit to the practice of law. When used imprudently, however, it can cause embarrassment or even harsher consequences.

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Harwood Lloyd, LLC

By Curtis J. Turpan, Esq.,
Co-Managing Partner

Harwood Lloyd uses technology to benefit both its business litigation and transaction clients. On the most basic level, all of our attorneys are available to our business clients virtually 24/7 by cell-phone, e-mail or text. We use litigation tracking programs to maintain a current status of each matter, resulting in our being able to quickly provide the client with up-to-date information. On the federal level and increasingly on the state level, pleadings and other court filings are expedited and simplified with "e-filing" of pleadings and other documents with courts. Through government Web sites, we are able to quickly form new business entities, as well as file online reports required to maintain an entity's ability to do business in New Jersey or other jurisdictions. In litigation and transactional business matters, we use computer-assisted legal research both to research issues and to keep abreast of current developments in relevant areas of the law. Technology also allows us to locate public information relevant to both transactional and litigation matters. In short, the use of technology allows us to provide our business clients with comprehensive representation that is more efficient both as to the substantive work involved, as well as to keeping client costs down.



Hoffmann & Baron, LLP

By Ronald J. Baron, Esq.,
Managing Partner

Identifying the firm's best practices with respect to use of technology in today's world is best answered as a philosophy rather than a list of technical devices and/or software advances which become obsolete as they are named. Simply stated, the firm uses technology to provide the most efficient and convenient legal and business solutions to the client while preserving requisite confidentiality and the highest standards of professionalism. We implement our philosophy

using a cloud-based wide area network (WAN) seamlessly integrating two highly productive tri-state offices; and remote access with all of the firm's operating, management and storage capabilities. This enables instantaneous 24/7 access to documents and communications; and the firm has incorporated an electronic document production package to support litigation and inter partes proceedings. Firm administration has also been technically enhanced by a fully electronic billing system, which ties in directly to



The changing face of "law" is a response to new technologies.

the financial functions of our major clients such that most of the billing can be transmitted expeditiously and "paperlessly." Attorneys and staff are provided maximum flexibility as to work location resulting in maximum convenience and continuous service to our clients—even in the face of hurricanes and snowstorms.



Jackson Lewis P.C.

By Richard J. Cino, Esq.,
Managing Shareholder,
Morrystown Office

Two hallmarks of Jackson Lewis' approach to client service are collaboration and communication. We have successfully leveraged technology to provide clients with easy, real-time access to critical information helping to reduce their risk, increase our efficiency, and meet their business needs. For example, our Affirmative Action & OFCCP Defense Practice Group manages large amounts of confidential employee data for companies preparing affirmative action plans and analyzing workforce trends. In response to clients' increased focus on data security and demand for "greener" alternatives to paper, we created an online "dashboard" environment. This technology

solution provides our clients and attorneys with a flexible, yet highly secure, portal to exchange data, track project workflow, communicate and access past projects, all in real time.



NPZ Law Group

By David H. Nachman, Esq.,
Managing Attorney

The United States continues to be a desirable place for international businesses to create a foundation for expansion. International businesspersons are sophisticated, and they use the power of technology to sell products and services worldwide. Longevity and stability of a foreign business entity enhances new business intracompany transfer (L-1A) visas and Investor (E-2) visas (among others). Technology enhancements allow our staff to quickly and accurately accumulate international business data to prove the likelihood of success of the business affiliate in the United States. Recently, an India-based manufacturing firm sought to bring managers to the United States to work on multi-million-dollar contracts in America and Canada. Since the company is a public company in India, a vast amount of business data had to be transferred to the U.S. Department of Homeland Security, Citizenship and Immigration Services (USCIS). Working closely with the IT staff of the India-based Company (and our internal IT staff), NPZ was able to assemble data and to present it to the U.S. government in an easily "digestible" format, thereby allowing USCIS officers to render a favorable determination on the cases. Harnessing cutting-edge technology and big-data continues to be very friendly to our international immigration and nationality practice.



**Riker Danzig Scherer
Hyland & Perretti LLP**

By Glenn A. Clark, Esq.,
Managing Partner

Much attention has been given to the use of e-discovery and litigation support tools to collect and comb through the surfeit of information gen-

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erated by businesses today. With those tools, however, comes a substantial cost that clients often find difficult to appreciate or anticipate. To address this problem, our litigation teams hold early and candid conversations with clients at the inception of litigated matters to balance the need for relevant information with the cost to obtain the information and process it. More important, the explosion of e-mail communications, document management systems and online information resources has made finding client and firm information increasingly more difficult. To address that problem, improve efficiency and lower costs, the firm has invested in several knowledge management tools to make better use of firm-generated assets, such as pleadings,



The use of technology must be part of a larger plan, so law firms can move all of their operations forward at the same time.

research memoranda, e-mail and letter communications, and online resources. In addition to using CaseMap® and TextMap®, Riker recently began using Allegory®, a cloud-based litigation management software that helps its litigators organize, visualize, cross-reference and locate information found in a variety of documents, media and databases. These knowledge management tools encourage collaboration, sharing of work product and locating precedent, thus benefiting both the client and the litigation team.



Tenaglia Hunt, P.A.

By John Tenaglia, Esq., Managing Partner

Recent technological advances have changed the legal industry. Secure, cloud-based solutions allow us to more efficiently deliver high-value legal services. Leveraging advanced technology enables us to manage our business, clients and matters in a more streamlined and efficient manner, which ultimately benefits our clients. We have been a paperless office for almost 10 years, which is unique for a law firm. We built a sophisticated proprietary software program that not only drives value, but provides a platform for our clients to receive preemptive updates and reports on their legal matters and review imaged case files at the push of a button. Our advanced systems have greatly assisted our clients and, ultimately, our core mission. One example is a client who recently was the victim of financial fraud perpetrated by one of its own third-party vendors. The client had thousands of files that were being turned over to our firm for handling. Our custom-built software program permitted a seamless upload of thousands of files from the client to our system in an efficient and timely manner. Without our proprietary systems, this would have been a logistical nightmare and likely wasted hundreds of man-hours for the client and our firm. ■