Introduction 1

We trace the birth of the original idea for this book to a column we wrote called "The Strongest Links: Instant Messaging Resources" in September 2005 for the ABA's *Law Practice Today* webzine. For some time we had been cowriting the regular monthly column on the best Internet resources for lawyers on a variety of law practice management topics. For fun, and to find a different way to work together, we wrote the column in real time as an instant messaging session using Skype's instant messaging tools—including emoticons and acronyms like IMHO and FWIW. It was cutting edge then. It seems a little quaint now.

Although we were intrigued by how well our column on instant messaging turned out—it's one of our favorite columns—we did not return to Skype or instant messaging as a writing tool. Our writing practices seemed to lend themselves more to asynchronous (not occurring at the same time) rather than real-time collaboration. However, it's also important to note that we never returned to our previous practice of one of us writing the first draft of the column in Microsoft Word and sending it to the other as an email attachment, then the other making revisions and additions and emailing it back as an attachment, and so on until we were done.

In large part, the reason was that in August 2005, the Writely online word processing tool arrived on the Internet. Both of us began using Writely in September 2005, and we began to use it for articles we cowrote with others. Google later purchased Writely in 2006 and renamed it Google Docs, and we consistently used it to write our columns and articles both before and after the acquisition.

We started each column in Google Docs; each of us would add to and edit the column over the course of a few days or a week, working on it whenever we had a little time or a new idea. And an interesting thing happened. The columns started to have a voice that was a combination of the two of us. Dennis recalls a time when he read a paragraph in a column and realized that he could not tell which of us had written or revised it, and that it was better than what either of us would have written on our own.

As we looked at the methods we used to collaborate and started to examine all of the other tools that might be available, we began to realize that technology was evolving toward the development of "social networking" (LinkedIn launched in 2003, Facebook opened to everyone in 2006, and Twitter started us tweeting in 2006) and different collaborative tools. We also saw how the tools we were using, especially Google Docs, had practical implications for the practice of law, not just our writing.

At the time, we both maintained blogs covering legal technology and Internet topics (we aren't quite as zealous now at keeping up the blogs as we were back then). As bloggers, we saw how we and other bloggers were starting to use wikis and other collaboration tools on a regular basis. The "Web 2.0" era of Internet applications was in full swing, and our blogging friends seemed to be trying and recommending Web 2.0 tools on a daily basis. "Web 2.0" also seems like a quaint term these days. "Cloud" is now the standard term. When we wrote about Web 2.0 resources for lawyers in our "Strongest Links" column in January 2006, we were struck by the way innovative solo and small firm lawyers had already experimented with these tools. With low-cost services like Basecamp, these lawyers had done things for themselves and their clients that many large law firms hadn't even tried with the high-end applications they already owned.

Another step in the evolution of collaboration technologies involved Microsoft Office 2007, which became a great example of the way software vendors started to incorporate collaboration features into the standard programs lawyers use every day. Adobe Acrobat 8 also included significant improvements in its collaboration features. In fact, everywhere we looked we found standard legal technology tools with new collaboration capabilities.

At the same time, Wikipedia captured everyone's attention as a new form of collaborative encyclopedia. Several legal wikis followed the Wikipedia model. We saw Microsoft SharePoint, a collaboration tool, becoming the hot topic at legal technology conferences we attended. The explosion of electronic discovery in litigation also required the use of collaborative tools for review, case management, document storage, and other legal tasks.

As we worked with our friends and colleagues on various projects, we saw the value of these tools. We also saw conference calls, webinars, document sharing, and other methods of collaboration becoming more routine

in the practice of law. At the same time, we saw lawyers struggling to learn how to use redlining tools and Track Changes and to deal with the whole issue of metadata in documents. Collaboration tools brought both a new promise and a new layer of challenges to the legal profession. In his annual article on legal technology trends, Dennis highlighted collaboration technologies as one of his top legal trends to watch for in 2007.

So much has happened since then.

The iPhone was unveiled in June 2007. It's now inconceivable to think about collaboration tools without smartphones and mobile apps. Cloud services exploded from a few examples to many, many examples and cloud computing has become a standard choice. Collaboration tools have come and gone. SharePoint might have been the focus of the first edition of this book, but Slack is the hot tool as this edition is written.

Yet some things have not changed, or have continued to evolve.

Collaboration has always been part of the development of legal technology. Developments in electronic discovery continue to drive lawyers, clients, and vendors to work together in new ways. Outsourcing and working from remote locations have also grown in popularity in the legal profession.

We still believe that collaboration technologies and tools are the most important current development in legal technology and are likely to increase in importance for the foreseeable future. As we said in the first edition:

> Legal technology has reached a turning point; it is less about personal productivity and more about using technology to make it easier for people to work together.

This book grew out of that realization. We hope to give you a guidebook to our collaborative future and help you select the tools and strategies that will serve you well now and for years to come, as the collaboration landscape continues to evolve.

We chose to write this book using the collaboration tools we discuss in this book. In the computer business, that is often referred to as "eating your own dog food." In other words, it means having the courage to use your own products. This book reflects our own practical experience using these tools.

For the original book, each of the chapters was written as a separate document on Google Docs. One of us started each chapter, and then both of us revised and finished the chapters on Google Docs. We stored and shared research by sharing bookmarks through Yahoo's MyWeb. We used email much less than you might expect, although it was our primary channel to work with our editors and publishers. We often used Skype instant messaging to discuss new ideas and directions for the book and to divide work assignments. An outline and a couple of simple spreadsheets in Google Docs turned into our project management tools.

When we spoke to each other, we used Skype, especially if we wanted to record our conversation about the book for later use. We used plain old telephone calls when we needed to talk through the division of work, deadlines, and how we planned to write chapters—what to leave out, and more often, what to include. We also spent some time experimenting with the tools we discuss in the book. Our hands-on experience using these collaboration tools provided many of the practical insights and tips you will learn in this book.

Fast-forward nearly ten years. The collaboration landscape has changed tremendously—many of the tools mentioned in the first edition don't even exist anymore (R.I.P. Yahoo MyWeb, for example). But in their place, more tools arrived that fit the new ways people have found to work together. Instead of Skype, we used Slack more often to communicate with each other and share information as we wrote the second edition. We still used Google Docs, but because we were updating an earlier version we did not use Google Docs to create documents from scratch. We found that collaboration tools have evolved to meet the needs of the people who use them, taking advantage of new and better technologies that make working together easier than ever. And we tried some new tools that just didn't work for us, even though they might be great for you. You live and learn.

Here's a preview of what you can expect from reading this book.

Who Should Read This Book?

- Practicing lawyers
- Paralegals, secretaries, librarians, and other legal professionals who work with lawyers
- Executive directors and office managers of law firms and law departments
- CIOs, IT directors, and technology committees of firms making decisions about implementing collaborative technologies
- Clients of lawyers
- Software vendors and others who work with or sell to lawyers

What You Will Learn

- Collaboration technologies now available to lawyers
- Practical tips for using collaboration tools in common settings

- How to select the right tools and understand the issues involved in using collaboration technologies
- Trends and developments in collaboration tools
- How to develop a strategy for implementing collaboration tools in your practice, and make better decisions about what collaboration tools to use in a variety of settings

What We Will Cover

Part II: Getting Started

In this part, you will learn the basics of collaboration and collaboration tools and be introduced to some of the underlying themes of this book. In Chapter 2, we describe how lawyers have reached a crossroads in the use of collaboration tools. We believe these tools are evolutionary rather than revolutionary, but the benefits of using them well might be revolutionary indeed. What lawyers traditionally have used for collaboration has served them well in many cases, but we have reached a point where lawyers and those who work with lawyers must consider new directions, or have those directions chosen for them by others. Chapters 3 and 4 discuss the important distinctions between collaborating inside the organization and outside the organization. Chapter 5 sets out a roadmap of first action steps to consider when you are beginning to use collaboration tools. And Chapter 6 covers the evolving role of social media in collaboration.

Part III: Collaborating on Documents, Online and Off

It's easy to take the simplest form of collaboration—working together on a legal document—for granted. In this part, you will learn about the wide range of ways you can now collaborate on electronic documents and get some practical lessons on how to improve your work processes on this most common of all legal tasks. Chapter 7 explores the many benefits of improving your ability to collaborate on documents. Chapter 8 delivers practical tips and lessons for basic document collaboration, including Track Changes and redlining tools. Chapters 9 and 10 introduce you to the new world of online document sharing and demonstrate how these services can help improve your ability to collaborate on documents with others. Chapter 11 takes a hard look at the potential difficulties and dangers of document collaboration, including backup and security issues.

Part IV: Collaboration on Cases, Transactions, and Projects

While collaboration on documents is useful, it's even more interesting and beneficial in the broader context of cases and transactions. In this part, you

will learn practical ways to use collaboration tools to manage your cases and transactions like projects. Chapter 12 looks at the many benefits of using online collaboration tools in both litigation and transactional matters. Chapter 13 looks at some really simple collaboration tools, which are easy to try without a lot of investment. In Chapter 14 we look at real-time collaboration—from the standard conference call to video conferencing, instant messaging, and beyond. In Chapter 15, we move to a basic building block of online collaboration—holding a meeting on the Internet. Chapter 16 discusses simple project management tools like Basecamp and how legal professionals can use them. Part IV ends with Chapter 17's discussion of a great example of advanced online collaboration—client portals (extranets) and deal rooms.

Part V: Commonly Used Collaboration Platforms

Increasingly, collaboration takes place by means of the Internet, and many of the tools we discuss in this part make use of the online medium. Here we move from the different ways that you might use collaboration tools to the main platforms people use to collaborate. There's no question that email is the dominant platform on which collaboration occurs today, and Chapter 18 takes a look at whether email should remain the primary medium of collaboration and how to use it better. Chapter 19 focuses on Microsoft's SharePoint, perhaps the most-discussed collaboration platform in the legal profession. Chapter 20 expands on Chapter 17 and takes a closer look at the extranet or client portal platform. Chapter 21 looks at Adobe Acrobat, an increasingly ubiquitous tool in the legal profession, and some of the opportunities it offers as a collaboration platform. Chapters 22 and 23 introduce you to the new species of cloud collaboration tools, including Slack, which is important enough to rate a whole chapter. Part V ends with Chapter 24's survey of a wide range of specialty collaboration platforms.

Part VI: Developing a Collaboration Strategy

In this part, we discuss different ways of thinking about collaboration tools, as well as formulating strategies and making decisions for you, your firm, or your organization. In Chapter 25 we cover the features of collaboration tools we consider to be must-haves. Chapter 26 guides you through one of the most interesting aspects of collaboration technologies—many of the worthy tools we discuss in this book are free, and are often equal to or better than paid tools under certain circumstances. Chapter 27 offers important advice for involving clients in your collaboration decisions. Finally, in Chapter 28 we'll provide you with a practical guide to help you formulate your collaboration strategy.

Part VII: Practical Issues, Tips, and Techniques

In this part, we get practical and offer some of our best tips on several key topics. Chapter 29 focuses on the importance of communication within collaboration tools and how to deal with the thorny problem of "silos of information." Chapter 30 addresses ethical, security, and other concerns you should consider carefully before diving into the use of collaboration technologies. Chapter 31 surveys the complex world of ownership, control, and other legal issues involved in using these tools. Although we have a very positive view of collaboration tools, we also recognize it's vital to understand the risks and concerns involved in using them; Chapter 32 addresses the potential pitfalls of using collaboration technologies. And Chapter 33 lists some of our best practical tips for implementing collaboration tools, no matter the size of your firm or organization.

Part VIII: Conclusion

In this part, we pull all of the topics together and offer guidance in three important areas. Chapter 34 presents recommendations for choices of collaboration tools to consider in a wide variety of law practice settings. Chapter 35 recognizes that it's people, not technology, who make collaboration tools work best and offers advice for creating the necessary culture of collaboration within your organization. Chapter 36 ends with a look into the crystal ball and the future of collaboration in the practice of law.

The book's appendices include a helpful glossary of terms, lists of useful resources, and a first-of-its-kind list of legal collaboration tools by category.

In the end, as we discuss in Chapter 35, we found that the particular tools you use are less important than establishing the right culture of collaboration. Having written articles, produced podcasts, and prepared presentations together for several years, we felt this book was a natural step in the evolution of our own collaborative process. We could have used several different tools rather than the ones we chose to write this book, because there are many good choices out there. When you choose your collaboration tools, you will want the ones that best fit your style of collaboration. The tools that evolve out of and mesh with the ways that you already work with others give you the greatest chance for successful projects. Let's get started down that road.