How HighQ makes service delivery an advantage for McCarthy Tétrault

Canadian firm McCarthy Tétrault LLP constantly seeks ways to introduce innovation into its practices and processes. But it's not innovation for innovation's sake. It's client-focused innovation.

"We've long had a department that focuses on client service delivery and innovation, and we're always making sure that we are delivering what clients want, when they want it," says Kathleen Hogan, Director of Education and Knowledge Integration at McCarthy Tétrault . With more than 700 lawyers and 1,600 total employees working across five offices throughout Canada and offices in New York and London, McCarthy provides a full suite of integrated legal services, with specialties including business, litigation, tax, real estate, and employment. One example of client-focused innovation at McCarthy is its five "MT>" divisions. These business lines are designed to offer new ways to serve different verticals of clients. For instance, MT>3, which launched in 2017, focuses on e-discovery and transactional applications of AI; and MT>Version delivers AI-powered legal translation services.

Recently, McCarthy has been exploring yet another way to deliver more client value – Thomson Reuters® HighQ. The firm's clients operate in fast-paced, high-powered industries. That requires McCarthy to provide its services in faster, more streamlined ways. HighQ provides that kind of accelerated collaboration between firms and clients. It's a digital collaboration platform whose multiple capabilities can be configured in numerous ways to fit specific client needs and deliver the ideal client experience. Clients look to McCarthy as partners in their success. And HighQ helps facilitate that partnership in ways that are distinctive to each firm-client relationship.

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Speaking of partnerships: "Thomson Reuters and McCarthy have a longstanding, very warm relationship," Hogan notes. "One of the first things I did when I joined the firm in 2017 was implement Practical Law Canada across the firm." While attending a legal technology conference later that year, Hogan visited a display booth for HighQ. "The demo was amazing," Hogan recalls. "Every time I asked, 'Can it do this? Can it do that?' the answer was always yes. It also looked beautiful, with terrific design sensibility. I went back to my firm and told them, 'We have to buy this.'" HighQ is a "no code" solution. That means it can be configured in different ways for different purposes, from smaller document management solutions to bigger collaboration sites, without requiring heavy coding or specialized knowledge.

In 2020, the firm worked with Thomson Reuters to conduct a proof of concept that could demonstrate how HighQ could help McCarthy further boost collaboration with its clients. The organizations worked together on specific use cases, training, and branding.

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"One of the things that always frustrated me when I was in-house counsel is law firms tend to take information, data, documents, and other files and protect them inside a document management system," Hogan says. "There are good reasons for that relating to client confidentiality and information security. But I would also think, 'But they're my documents. Why do I have to call someone to get to my documents?'"

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As a collaboration platform, HighQ allows firms and their clients to share documents easily. To be sure, there are other such platforms on the market. "But HighQ is focused on the legal vertical," Hogan notes. "It reflects how lawyers do work, and how they work with their clients. Important elements such as audit history are already built in. This is such a seamless way to share our work with our clients."

Hogan also has found that "some legal technology can be quite overbuilt, with too many bells and whistles, and too many ways to do a single thing. But HighQ makes it easy for anyone to learn and use, and you can scale it up and do much more, including financial data reporting and tracking workflows between the firm and the client. It gives clients a deeper, broader view into what's going on in their matters."

Where McCarthy sees HighQ adding value and increasing efficiency is by providing centralized locations and access for the work that the firm and its clients need to accomplish in partnership.

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For instance, legal documents typically go through numerous drafts and reviews. HighQ tools can help both firm and client manage the documents and track where the latest versions are. "We're emailing back and forth hundreds of times a day, and that's not an exaggeration," Hogan notes. "Why are we doing that if we can put a live document in a central place, edit it at the same time, share thoughts at the same time, do workflows at the same time, and in the same place instead of through Zoom meetings or by email?" With HighQ, McCarthy can manage contracts and "tag different aspects of those contracts so that we know when they're expiring," Hogan says. "Or if the law changes, we can update all of the contracts."

This approach can also be used for larger clients that have their own templates and precedents. "It's often quite hard to share them or make sure that they're updated," Hogan notes. "But let's say we could hang on to all of the precedents for the client and we make sure that they're updated. We can put them all in one place and manage them. That's a great service that we could provide to our clients by using HighQ."

McCarthy also is looking to HighQ to create a unified set of templates for types of matters that its lawyers undertake many times in a year. That way, "whenever a matter type comes in, we can just push a button, so to speak, and have a matter site that has that particular matter already laid out," Hogan says.

The proof of concept work also has included using HighQ iSheets to develop client portals that can present and manage financial and portfolio data. As Hogan notes, "data visualization is something that more and more of our in-house counsels are asking for." The data that McCarthy can convert into charts, graphs, and other illustrations using iSheets includes the number of open matters and how many matters a lawyer has closed in the past year. This can provide the firm's lawyers a sense of how long closing a particular type of matter might take. And if one type of matter is open longer than is typical, that would suggest a new approach might be needed.

In 2021, McCarthy will begin taking many of its proof of concept sites live. The site most likely to go live first will be used by the MT>Ventures business line, which provides serial entrepreneur clients with services including legal advice and networking connections. In time, this HighQ-powered site could include questionnaires to help clients address the common legal issues that entrepreneurs face, such as choosing a jurisdiction for incorporation.

McCarthy also hopes to launch a HighQ-based site within its MT>3 e-discovery business line that would allow lawyers and their clients to improve litigation case management. The site's data visualization capability would be able to help clients see how well their casework is performing compared to the project's budget.

In sum, McCarthy Tétrault will be introducing HighQ to its already extensive client service capabilities. As Hogan puts it, "HighQ is now part of our spectrum of innovation."

About McCarthy Tétrault

This nationwide Canadian firm is constantly searching out new ways to better serve its diverse client base. The multiple capabilities of HighQ are allowing McCarthy lawyers and staff to work in closer partnership with those clients — and with each other.

To find out how you can combine secure document exchange with the best enterprise social collaboration and publishing tools, visit **tr.com/HighQ**.

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