Alison Monahan: Welcome back to the Law School Toolbox podcast. Today, we're excited to have Colin Levy, author of *The Legal Tech Ecosystem*, here with us to talk about legal technology and the law. Your Law School Toolbox host today is Alison Monahan, and typically, I'm with Lee Burgess. We're here to demystify the law school and early legal career experience, so you'll be the best law student and lawyer you can be. Together, we're the co-creators of the Law School Toolbox, the Bar Exam Toolbox, and the career-related website CareerDicta. I also run The Girl's Guide to Law School. If you enjoy the show, please leave a review or rating on your favorite listening app. And if you have any questions, don't hesitate to reach out to us. You can always reach us via the contact form on LawSchoolToolBox.com, and we would love to hear from you. With that, let's get started.

Welcome back to the Law School Toolbox podcast. Today, we're excited to have Colin Levy, author of *The Legal Tech Ecosystem*, here with us to talk about legal technology and the law. Welcome!

Colin Levy: Thank you for having me.

Alison Monahan: My pleasure. Well, to start us off, can you give our listeners just a little bit of information about your background, so they have some context here?

Colin Levy: Absolutely. So, I've been a lawyer now for over a decade, primarily focused on technology and the tech space. I have worked for a variety of different companies of different sizes, and a couple of times, including currently, as the only lawyer for the company. And it's been a lot of fun, especially as I have gotten more and more passionate about technology and how it's impacting the law. And I really was drawn to that from essentially witnessing when I was first becoming a lawyer, the lack of tech and how that seemed to be in sharp contrast to how technology was impacting so many other industries. And yet, the legal industry seemed to think of itself as somehow immune to these broader changes impacting society at large.

Alison Monahan: No, I think that's super interesting. I remember many moons ago, my very first legal job. I had been a programmer before I went to law school, and so they, on a Friday afternoon, dropped a whole bunch of physical documents on my desk, and were like, "Okay, so we're going to need you to stay here over the weekend, with a highlighter. You're going to highlight these words, you're going to put them into a spreadsheet. We'll check back with you on Monday." And I literally turned to the guy and I'm like, "Have you ever thought about OCRing these?" He's like, "What is that?" I'm like, "We could just scan them, basically, and have

a computer read these." And they're like, "Oh, I don't think you really understand our business model." So, that was eye opening.

Colin Levy: I'm sure. I'm sure.

Alison Monahan: Yeah. So, I think this is something that is definitely a super interesting and timely topic. If people want to find out more about you and more about the book, where can they do that?

Colin Levy: Sure. Well, the book can be found on Amazon, so that's very easy. It's available via Kindle, paperback, and hardcover. In terms of me, they can find me on LinkedIn, under my name, on Twitter/X/whatever you want to call it, under my name. I'm also on Instagram, although I would say that primarily if you're following me on Instagram, you're going to see photos of cats and more cats, primarily. And yeah, those are the best places to find me, as well as my website – colinslevy.com. And I'm currently going to be announcing some exciting changes to it, potentially end of this year, early next year.

Alison Monahan: Nice. Well, my Instagram is full of bread photos. So, it is what it is. Before we dive in, tell us a little bit about this book. What was your goal in writing it?

Colin Levy: Yeah. So, the book started out as a mess of just random thoughts that I had about legal tech written down on various formats, outlines, what have you. And I really was compelled to write it for a couple of reasons. One is, I like to write. Two, I like to help people. And three, I often get asked, "How can I find my way in legal tech? What is legal tech? Why should I care about it? What is going on in the space?" And so, that all kind of brought me to the idea of writing a book about it, and trying to make it a sort of thematic, high-level introduction to the space because I didn't want to overwhelm people. I also didn't want to go into too much detail because I didn't want the book to be a thousand pages long. So, I really intended to be a thematic, high-level overview to kind of whet your appetite, if you will, about legal tech. And then hopefully, once your appetite has been sufficiently engaged, to get you to follow up with respect to various areas you may want to pursue in further depth.

Alison Monahan: Right, I think that makes sense. And you talk about "the legal tech ecosystem". What do you think of when you're thinking of this ecosystem?

Colin Levy: That's a great question. And the way I think about it is, technology by itself is not really the big change maker. It's people who use the technology and the ways in which that technology is used. So the way I look at it as an ecosystem is

people, process, and technology all working together. They all benefit from each other and all impact one another. And so, sort of like any other ecosystem. There are different ways in which it grows, evolves, devolves. So, that's the way I approach it and the way I sort of organized the book was around that idea of all these things being interconnected and interdependent.

Alison Monahan: I think that makes sense to me. I definitely have the programmer mindset, so I love things like Zapier, where I can just have a process that does things for me. But I think that process piece is kind of what's missing in a lot of the law aspects just because people aren't necessarily that technical. So, I think more people think, "Oh, I'll just buy this product and it'll solve my tech problem for the time being." But then they realize nobody's using it, or they're not using it the way they thought they would use it. I think of document management systems from my days in BigLaw, where everybody hated these, they were never being used properly. They were very powerful, but that process piece was lacking.

Colin Levy: Yeah, absolutely. I kind of have this problem all the time. I call it the "shiny key syndrome". Basically, people see the shiny thing and think it's somehow going to fix all their problems. And yet, technology is not a panacea. It's not going to fix all your problems; may not even be the right solution for you. It really comes down to you understanding exactly what your problem is, what a solution to that problem looks like, and using the answers to those two questions then to determine where to go from here, as opposed to skipping over that and saying, "Oh, my friend told me about this great tech, I think it could be really helpful. Let me go buy it and then it'll just suddenly just do everything I've ever wanted." That is just not the case.

Alison Monahan: Yeah, we've kind of encountered that. Lee – my business partner – has a friend who's super techie and he's like, "Oh, you guys should get this, you guys should get that." I mean, they're all good ideas, but honestly, after a year or two of paying for most of these subscriptions, we've kind of looked at it and said, "We're not really using this, are we?" Maybe we don't need to be paying for it. So, I think that's super key. How has this ecosystem developed, say, over the last, 20-ish, 30 years?

Colin Levy: Sure. Well, it started out, I think, with people wanting to kind of make their lives easier through essentially automating very lightly, or sometimes even more complexly their processes, to then using technology to help gather and analyze data, to then combining both of those things, to then generate new knowledge and new ways of looking at things. So, it's been, I think, an ongoing evolution with technology always leading the way, of course, and then process not that far behind, and then lawyers further behind there. And I think it's been an evolving

haphazard journey at times, because I think that technology overall tends to be far in advance of everything else that happens. So, I sometimes will get asked, "How can I keep up with tech as a legal professional?" and my suggestion is, "Well, you're never going to really keep up with it, per se." So, I don't think that's necessarily the right mindset to go into it with. I think rather it's important to just keep it ahead of you and in mind, meaning never lose sight of it, so you know sort of where you are respective of where technology is. And therefore you can always keep learning and adapting. I think trying to keep pace is just a lost cause in some ways, just because technology continues to advance far quicker than most anticipate, or sometimes even may desire.

Alison Monahan: Right. And I think it's unlikely that most lawyers are really going to be early adopters out on that curve. I mean, maybe a few, but most of them are probably kind of after the middle point of the curve, and maybe even behind it.

Colin Levy: Right, yeah, that is very true. I mean, lawyers… I think the joke goes, "No lawyer wants to be the first to do something." They'd rather be the second or third or the fourth. They don't want to be the last, they don't want to be the first. They want to be somewhere in that squishy little middle.

Alison Monahan: Right, which, fair enough. The book's forward suggested something I thought was pretty interesting. I was wondering about your thoughts on it, which is that legal departments – I would assume you could extrapolate this to other types of legal – are really having to do more with less. Do you think that's accurate, and if so, what's driving this?

Colin Levy: I think legal departments always have had to do more with less, meaning less money, less people than they would want, less tools in some ways. And so, what that in turn I think has meant is that legal departments have had to be a little more efficient and a little more productive with how they're spending their time. And that doesn't necessarily translate into them being first adopters of new technology, but it has meant them trying to be a little more creative and a little more responsive to the needs of a business as opposed to a law firm. And so that's been, I think, an interesting thing to see evolve over time, and it still remains the case. I think that people are expensive to hire, to train, to maintain, what have you. So, in some ways, technology is seen as a way to help fight against that. And I'm not suggesting in any way that technology is always going to be the answer as opposed to hiring someone, or that technology can somehow replace everything that a human will be doing, but rather that human with tech is better than human without tech.

Alison Monahan: Right. I think of this particularly in the context of things like document production and discovery, e-discovery, all of these things, like I kind of referenced in the beginning. No one would ever do that now – that would be considered absurd, that they would give me physical documents to review personally with a highlighter. But at the time that just seemed like, "Oh, that's just what you do. We'll never change this."

Colin Levy: Oh, absolutely. I remember one time, when I was working as a paralegal for a BigLaw firm in New York, we had this special hard drive where we stored a whole bunch of documents for this e-discovery database. And it was a one-terabyte drive, which now doesn't seem particularly big, because consumer computers now come with hard drives of that size, or even bigger sometimes.

Alison Monahan: I know. I'm like, "I think my MacBook has that."

Colin Levy: Right, right. But at the time this thing was a behemoth. It was just huge. It was this big imposing metal tower that had to be very carefully dealt with and just treated very nicely, what have you, because it was just this huge thing and it was very special and no one else had one. But we've come a long way now, where one terabyte can be stored on something that's maybe a quarter of the size. So, that just shows you the pace at which technology is advancing, but also the pace at which the ability to store things as well, and manage things and how things that may seem at one time imposing or incredible become a little less incredible as new advancements make their way into society.

Alison Monahan: Right. I guess the flip side of that is we might actually end up reviewing far more material than we would have 50 years ago when no one had email and text and all these things.

Colin Levy: Right, exactly. Lawyers do love to do more work and push the boundaries of how much work can be done during a certain given period of time.

Alison Monahan: Yeah, definitely. I feel like the work always expands to fill the time available one way or the other. Well, I'm curious because one of the areas that I think is really interesting here is around access to justice issues. You look at statistics and most people who need a lawyer in the U.S. can't get one for whatever reason. How do you think legal tech might be able to help with this problem?

Colin Levy: Legal tech in a lot of ways can help make accessing information easier and cheaper. For example, someone needs to look up how to file a form. Now many courts offer electronic filing, but not just that, but offer their forms online that

can be filled out fairly quickly. But more than that, it allows for you to use perhaps generative AI solution to access legal research or help inform you as to what you need to do to file a particular claim. Knowing what tools to use certainly helps along those lines. I've actually seen a large number of different, not just legal tech companies, but also many lawyers and some judges as well, that have been very tech savvy and trying to help allow for those most in need of legal resources to access those resources cheaper and faster, whether it's through creation of forms, faster intake, or just frankly explaining what's needed to do a certain task, because I think the bottom line with access to justice in many ways is, the legal system here in the U.S. at least, is convoluted, expensive, confusing, and overwhelming. And technology can really help alleviate all of those problems in some ways. And we're now at a time where not only can it help alleviate those problems for the lawyer, it can also alleviate them for the client who now can access information and get it without even having to seek out a lawyer. And that, I think, is really a powerful thing, and that needs to be further taken advantage of.

Alison Monahan: Yeah, that makes sense. I remember in law school, I did this clinic on lawyering in the digital age, and we worked with actually the head, the Chief Judge of the Housing Court in New York State, in New York City, who thought it was very unfair that, when people came before her, almost all the landlords were represented, almost all the tenants were not. And they had these statutory defenses that, frankly, most people who were being evicted in New York City probably had some of these problems. And so, we worked with them to sort of create an intake where people could say, "Oh yeah, I do have leaky faucets. Yes, I do have mold. Yes, I do have bugs", or mice, or whatever it was. And then, that was printed out in the legally sufficient format, and they could hand it to the judge, who would then say, "Okay, well, looks like you've got problems here too." I'm not sure they ever actually implemented that, which would be unfortunate. But certainly, if they haven't by now, they really should be.

Colin Levy: Yeah, absolutely.

Alison Monahan: Alright. Well, you briefly alluded to everyone's favorite obsession right now, which is generative AI. So, let's talk about that in the legal context. How do you see this impacting the legal space?

Colin Levy: That's a big question. I think there are a lot of different ways in which it is impacting the legal space now and will impact it going forward. I think right now what we're seeing is not just a large number of tools that can do a large number of things, but also an increased emphasis on use of data to create either new resources or to look at existing data sets. So that, I think, has caused lawyers

and other legal professionals to really kind of look at what data they have, how it's being used, what it's pointing to, what it's lacking, that type of thing. So, generative AI, at its core essentially is a data analysis tool. It is trained on a large data set and it is provided with instructions for how to respond to certain queries, basically. The problem is that while it's trained to respond in a human-like way, that tends to lull people into thinking that they're interacting with something that is actually thinking and behaving like a human, when it's not. It's really just providing output to a set of inputs. And so, that can lead people to thinking that something they're being told is 100% accurate or must be true because this solution told me it is, when that may not be the case, which I think has put an increased emphasis on not just what tools are out there, but what data has been use, to train these tools, what are the limits of those data sets, and also to kind of look with a critical eye at what outputs you're receiving, because we've seen a couple of instances of lawyers using generative AI to help with arguments, or write a brief or what have you, and have been provided with, false, made-up cases or inaccurate arguments. And I think while that initially was said as a fault of tech, but I really think it's the fault of the lawyer, who frankly wasn't competent enough to double check their work, if you will, which is something we're all taught starting way back in middle school. So, I do think that's important. Generative AI, I think, is exciting, but it's also important to remember that we're at the early stage of it. We're just at the tip of the iceberg, if you will. There's a lot more to come and it's going to grow even more powerful. And while currently there are tools that can generate images and ones that can generate text and ones that can generate other things, I think we're going to see a combining of all those things going forward as well, which will be interesting and, I think, powerful. But again, it's important to recognize that these things are not without their faults, because they're created by humans – and humans, by their nature, are inherently imperfect.

Alison Monahan: Right. No, I think there's a lot of interesting stuff going on, and often a lot of stuff that's like, "Ooh, that's pretty creepy."

Colin Levy: Right.

Alison Monahan: And I think the key for lawyers, in the situation you referenced – and Lee and I've talked about this as well – just like you would have to supervise a paralegal or a junior attorney if you're the partner. You still need to double check things; you can't just rely on what Claude tells you the law is or whatever. It's like, they may have a general idea, but… Yeah, I think the evolution is super interesting and happening incredibly quickly.

Colin Levy: Yeah, absolutely, it is. And that's very exciting. It can be a little intimidating to people, but I do think it's always important to just recognize the limitations of a lot of these tools. And if it's a more sort of generic AI tool out there, and you're asking about a legal situation, it's probably not going to give you completely accurate information, because it doesn't have access to some of the information that is relevant and important for it to be able to provide a comprehensive answer. Whereas if you're looking at a tool that is used in association with a legal tech tool, it may be more likely to provide you with a more accurate answer, because of the data that's been trained on. But that's really up to, I think, the user to ask the right questions to kind of vet their tools, so that they know what is best used for what situation.

Alison Monahan: Oh, definitely. I think the interesting part at this exact moment is people kind of building on top of the generalized chat type of things with their own specific data, whether that is the companies providing all of the cases. I'm talking to some people next week who are doing a regulatory compliance-based AI and they're going to tell us all about how they do that. But basically they're adding their own data, it seems like. I went to a demo the other day with CoCounsel, the Casetext AI, which was pretty crazy, which kind of leads me to my next question. If I'm a law student listening to this, what do you suggest that I do if I'm thinking, "Huh, maybe this is something I need to know something about."?

Colin Levy: Sure. I think it starts with kind of getting a sense of the landscape of generative AI tools used in the legal context. I certainly think that CoCounsel, for example, is a really great tool that would be, I think, important for people to recognize and understand. I think that other solutions that are out there, like ones offered by UniCourt on the litigation analytics side, ones on the workflow management side, or note code tools as well, or just document generation tools – I think there is a range of them. And the bottom line is, I think, for law students, it's important for them to be aware of technology's place within society, as well as within the legal world, and its growing role and power within the legal industry. And I think that's reinforced by the fact that now 30 plus states have this duty of tech competence that's required for practicing lawyers to be aware of the benefits and risks of relevant technology, which kind of is very lawyerly, non very specific way of saying, "Look, we want you to be aware of technology and we want you to know when the right tool is available to perhaps best help you represent or serve your client."

Alison Monahan: Right. So, what are some things people might need to be aware of in that context? I immediately think of things like Clio, or you mentioned document assembly cases. What kind of stuff falls into that category that people should be aware of?

Colin Levy: Yeah, certainly, a practice management tool like Clio, for example, would be something very important. A workflow management tool like Proxy, I think, would be something to be aware of that helps you kind of understand who's working on what and what the status is and maintaining all the associated documentation associated with different matters. I think that billing software – of course, Clio can do part of this as well – is important. I think that document automation, whether it's GAVL or some other tool, can be very helpful for helping to basically put together documents, but also automate the processing of documents as well, because I think one thing lawyers are basically managers of documents. And that means not just creating them, but it means reviewing them, organizing them, staying on top of them. In a derogatory sense, I think we've been called "paper pushers", which in the olden days was true, because to your story earlier – sure, yeah, you drag papers out of a box and put them in one box and then move them to another, what have you. So, there is that, but tech is here to kind of make that drudgery less drudgery, and frankly make it so that you don't have to do it – a tool can do it. And therefore your time could be more valuably spent on something that may be higher risk or of greater value to those you're trying to help. And that ultimately I think is what should drive a lawyer really, is, them trying to help others in the most valuable, productive way possible. And technology can help them get there by reallocating their time and resources on things that are more valuable and less able to be done well by technology.

Alison Monahan: I think that sounds great, but I'm thinking about this like, okay, I'm graduating and I would have maybe gone into a junior associate position at a firm. I would have spent my time doing a lot of this stuff that now, frankly, is probably quickly going to be done by the AI or some other technology. What do you say to people who wonder if they're ever going to be able to get an entry level job?

Colin Levy: So, I think that the way to approach it would be look at the fact that the entry level job is changing. It's not going to be what it used to be, which in some ways is actually good, because it can be less dronelike work and less drudgery, and it's going to be more focused on things that technology can't necessarily do – for example, reviewing a bunch of documents and trying to figure out, do these kind of make sense with one another, does this argument ring true to you? That sort of intuitive judgment of a human can't be replicated yet by a piece of technology. So I think there is that. I also think that technology in some ways is going to kind of redefine exactly the types of work that are done by people. It's not necessarily about replacing you or taking over your job; it's more about redefining what these jobs are, and who they're done by and that type of thing. And the way I would look at it is, it's not a matter of preventing you from getting a job; it's more a matter of changing exactly what it is that you're going to be

doing as your entry level job. Instead of reviewing paper documents and marking them and what have you, it may now be, "I want you to set up this database, and I want you to put your documents into this section and into that section, and then write a report about what this tells you, what that tells you." That may sound like a lot, but with technology, it's not going to take you very long to do that and it's not going to be that hard either. So, again, I think that reinforces the point that technology is here to stay. It's important to be aware of it and I think ignoring it is at your peril, meaning that if you do ignore it, then yes, it will make it harder for you to find a job, as opposed to someone who is aware of it and is willing to learn, which will make it easier for them to find that role.

Alison Monahan: I agree. I think I would want to be that person who's like, "Oh sure, I can set up your database and load the documents into it and then pull a sentiment analysis. I know how to do that. I've done that in law school." The reality is, I think law students, although they don't feel this way, actually have more time than people who are working as lawyers to explore things like this. So, anyone who's listening, I would think very seriously about figuring out some way to stay apprised of all these things and hopefully become expert in some of them, and then that becomes your skill set.

Colin Levy: Absolutely. If I might be so bold, my book can help with that. But certainly I think that that brings up another point, which is that, yes, law students definitely have more time than they think, but also law schools, I think it's upon them to do a little more teaching of technology – not necessarily every single specific tool that's out there, but more of a general awareness of the types of tools that are out there, how they're used, and allow for their students to play around a little bit with them.

Alison Monahan: Right. So, if somebody's not getting what they're looking for from their school, do you have any suggestions on how to get the school on board or specific things they can ask for?

Colin Levy: I think that there're a couple things. One is, look for internships or externships that can provide some opportunities – that's one. I think two is, nothing's stopping them from connecting with professors at other neighboring law schools that have an interest in the space and talking with them. I mean, that's how I learned about legal tech initially, was essentially just having conversations with people who were doing things in the space and just listening to their journeys. And that's one great way to learn. I also think that more and more law schools do have people who have perhaps even just a passing interest in technology. Never hurts to just develop a relationship with professors who may

be able to point you in the right direction as well. That's in part why I decided to go to a smaller law school, because I wanted that level of interaction with the professors.

Alison Monahan: That makes sense. Well, before we wrap up, one of the things I really like about this book is that you incorporate a lot of different stories and a lot of different voices. Tell me about a few people or companies in this space that you are finding interesting these days, for whatever reason.

Colin Levy: Yeah. One is probably one of my closest friends, who happens to be the founder of one legal company I mentioned earlier – Proxy. He's an interesting guy, because he's a former computer scientist turned lawyer, and he's a partner at a BigLaw firm, and also runs his own legal tech company, which is very lawyerly of him because we lawyers love to just load on the work.

Alison Monahan: Busy guy!

Colin Levy: But what's interesting is he just approaches it from the perspective of, "Look, I'm just trying to make not just my life easier, but make my associates' lives easier and my clients' lives easier." So, he approaches things from a very human perspective, which is the same perspective I approach, which drew me to the approach I took with the book, in terms of telling stories and sharing quotations and other tidbits from different leaders in the space. So that's one I would mention. His name is Daniel Farris and he's just a fabulous guy who is not your typical lawyer in any way. So, that's one. I think another is – I mentioned her in the book – Marlene Gebauer. I may be mispronouncing her last name. She's wonderful for just sort of… Her journey and her dedication to innovation and really expanding people's minds about what it means to be innovating in the legal space, because for a long time, that kind of seemed like a disconnect, like, "Innovation and law – what? Whoa, those two don't have anything to do with one another." So, that's be another person. Then the last I'll mention is the individual who wrote the foreword to the book, Bjarne Tellman. He is a mentor and a really good friend of mine. And he has led some really huge legal departments, like he was the former GC of Pearson Education, which is this huge book and education company, and now leads Haleon, which is a consumer health products company, formerly part of GlaxoSmithKline. It's actually their consumer products division that spun off. He's this high powered guy, who, you would think would be kind of your typical lawyer because he's just been having all these big name roles, what have you, but he's not. And he's very much in favor of technology and innovation, because the way he looks at it is, "Look, the world is data-driven, the world is tech-driven. If I want to stay relevant, if my legal partner wants to be seen as valuable and as relevant, it's important for

them to reflect the business reality that's on the ground, which is data-driven." And so, that really is what has driven him to engage in some large technology adoption projects. So, those are three examples I would mention.

Alison Monahan: Nice. They all sound very interesting. Well, any final thoughts before we wrap up that you'd like to share?

Colin Levy: I would say, for all those law students who are listening to this, please feel free to reach out with me. I don't bite, I promise. I'm friendly, I'm approachable. You can ask other law students I've talked with if you need further proof of that. I really, really love talking with law students to try to help them find their way in a very murky and dynamic world.

Alison Monahan: Well, Colin, thank you for joining us. Remind us for the last time how people can find out more about you if they do want to connect and get the book.

Colin Levy: Absolutely. So, the book is on Amazon – paperback, Kindle, hardcover. They can find me on LinkedIn under my name, on Twitter/X under my name, and on Instagram if they have a really strong interest in seeing cats.

Alison Monahan: Alright, well, thank you so much for joining us. This has been really interesting.

Colin Levy: Thank you so much. It's been a pleasure.

Alison Monahan: If you enjoyed this episode of the Law School Toolbox podcast, please take a second to leave a review and rating on your favorite listening app. We would really appreciate it. And be sure to subscribe so you don't miss anything. If you have any questions or comments, please don't hesitate to reach out to Lee or Alison at lee@lawschooltoolbox.com or alison@lawschooltoolbox.com. Or you can always contact us via our website contact form at LawSchoolToolBox.com. Thanks for listening, and we'll talk soon!

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