

# The chief information officer:

Indispensable advisor and strategic partner to the modern general counsel



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## Executive summary

Chief information officers (CIOs) are being pressured to align IT initiatives with business goals, strategy, and innovation. They must improve IT operations and systems, modernize infrastructure and applications, redesign and automate business processes, and improve staff experience and productivity.

Meanwhile, the general counsel (GC) is facing digital transformation pressures to optimize operations, make smart data-driven decisions, reduce costs, and manage risk. Unfortunately, GCs often lack the technical expertise to select the best solutions to meet their needs. Working in close partnership with the CIO can be key to making the right technology calls now with an eye to the organization's long-term vision.



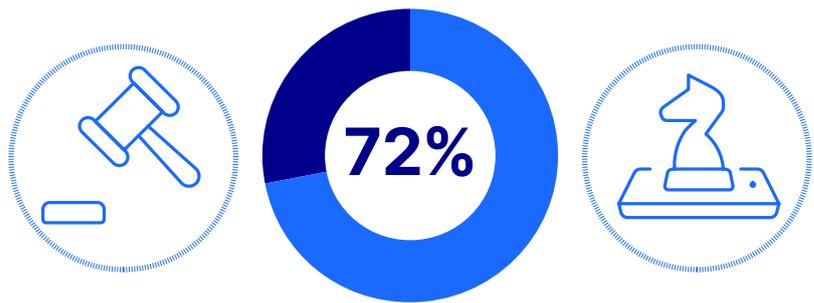


Chief information officers (CIO) are facing pressure to align IT initiatives with business goals, strategy, and innovation. They must improve IT operations and systems, modernize infrastructure and applications, redesign and automate business processes, and improve experience and productivity of organizational business units.

Meanwhile, the general counsel (GC) is facing digital transformation pressures to optimize operations, make smart data-driven decisions, reduce costs, and manage risk. The modern legal department is faced with a variety of needs, priorities, and potential capabilities—case and document management, contract management, eDiscovery, and other forms of AI and process automation.

Unfortunately, GCs often lack the expertise to select the best solutions to meet their needs. How can they ensure they are making the right decisions informed by a longer-term vision of the department and organization?

Achieving these goals requires leadership and support from a key, often overlooked partner: the CIO. In a recent joint survey, 72 percent of respondents stated that CIOs play a critical or important role in delivering on departmental legal innovation strategy.<sup>1</sup>



OpenText and the Corporate Counsel Business Journal conducted a follow up survey of legal enterprise leaders to learn more about this C-Suite relationship. This paper explores the relationship between the CIO and the GC and how this partnership is critical to supporting both departmental and broader organizational initiatives to thrive in the digital age.

### Departmental priorities

Assistance from the CIO and a team of highly trained IT staff can be critical to success as legal departments struggle to identify and deploy critical tools. Despite the recognized need, this partnership still needs work.

According to the survey, the level of collaboration between the GC/Legal and CIO/IT is low—with just over 20 percent citing instances of significant support around legal technology initiatives. In fact, more than 65 percent indicated low to moderate engagement with IT in some but not all legal technology initiatives. Moreover, just under 14 percent of IT teams do not support any legal technology activities.<sup>2</sup>

1. OpenText and the Corporate Counsel Business Journal, Modern General Counsel Survey: What is driving the Enterprise Legal 2.0 Evolution, 2023

2. OpenText and the Corporate Counsel Business Journal, Legal Department Innovation Survey: How can AI modernize your practice? 2024



In a previous survey, more than 40 percent of respondents indicated that lacking IT advocacy and collaboration is preventing GCs from implementing technology.<sup>3</sup> According to the GC, critical areas of CIO support include:

-  Identifying the right technology options to support needs/requirements.
-  Mapping solution needs to existing systems.
-  Evaluating the full value of technology options, including ROI.
-  Support user acceptance.

**Identifying and developing solutions**

Technology selection goes beyond addressing use cases and features/functionality to support business processes. CIOs provide a keen understanding of required technical considerations and how outside providers are meeting enterprise requirements and protecting personal and confidential information, including ensuring all key security and privacy capabilities are in place. In our survey, enterprise legal leaders acknowledged this value, citing data privacy management (55%) as the top area where the CIO/IT office can provide the most influence and support when evaluating and selecting solutions.

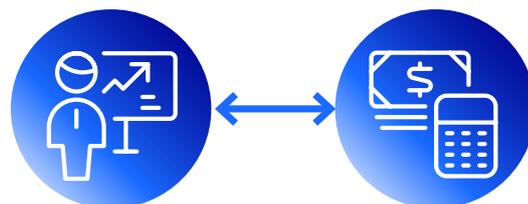
**Mapping technology requirements to legal needs**

Legal practitioners rarely have the extensive experience in mapping processes to technology requirements that skilled IT professionals do. Moreover, IT teams understand solution performance, productivity goals, and cultural considerations to better balance security requirements against ease of use. They are also in a better position to stay on top of technology changes needed to meet the demands of legal teams.

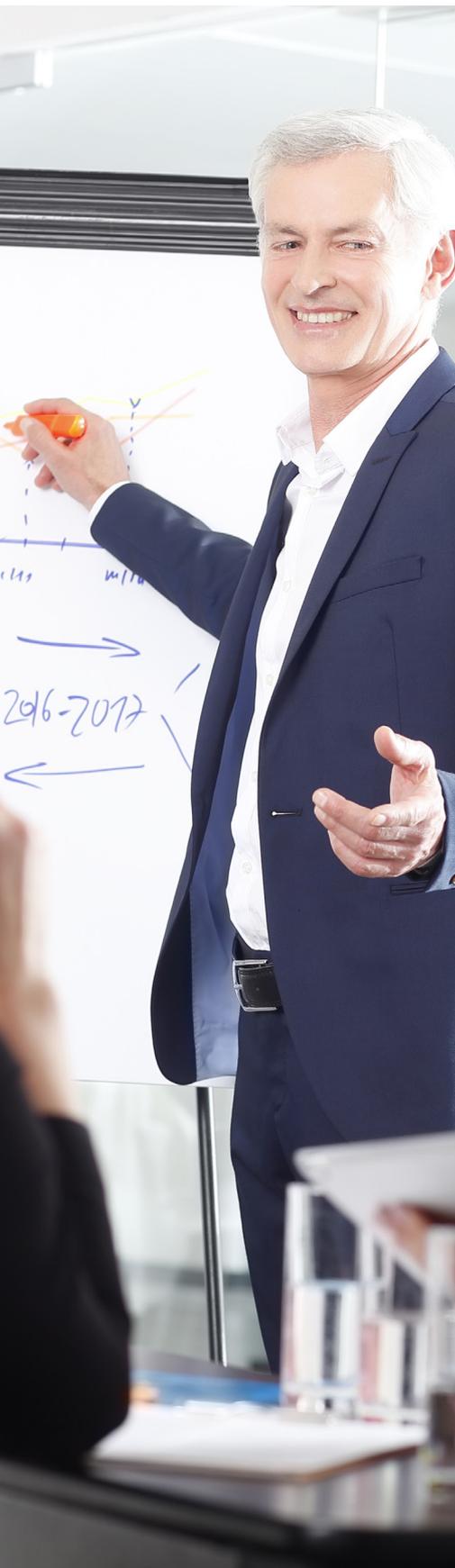
Legal leaders can work closely with CIOs to train teams to adopt and test new technology, including supporting enablement activities and resolving issues around user acceptance. Partnerships with the CIO and IT department have a significant advantage over those having to do implementation work by themselves.

**Evaluating the full value of technology options, including ROI**

A digital transformation roadmap is critical to the CIO's mission. It should be developed in a way that embraces emerging technologies, helps the organization improve profitability, and builds advantages over the competition.



<sup>3</sup> OpenText and the Corporate Counsel Business Journal, Modern General Counsel Survey: What is driving the Enterprise Legal 2.0 Evolution, 2023



The CIO must be included in all technology planning and demonstrations to better understand capabilities and how a particular technology can fit into a broader organizational digital plan. They must collaborate with the GC to ensure legal team requirements align with existing systems and organizational data governance framework.

Efforts to support project planning, implementation timelines, and longer-term strategy should inform how deployments can be augmented or adapted to meet changing needs and use cases. Technical partnership between legal and IT teams boosts adoption by ensuring needs are met, establishing key integrations, reassessing work dynamics, and driving secure, compliant data handling.

## Evaluating AI for legal department needs

The CIO plays a pivotal role in integrating AI technology into their organization's operations. It falls upon the CIO and their team to harmonize and synchronize AI adoption across all departments—ensuring technological advancement is in lockstep with broader business objectives.

Legal is heavily focused on leveraging AI technologies to free up time to focus on high value work, improve legal department productivity, and enhance decision-making. Legal leaders expect CIOs to master AI standards, applications, and risks associated with usage, as well as ensuring the quality and security of data.

Whether evaluating third-party AI vendors or building tools internally, the CIO and IT team need to establish or vet data governance and management strategies. They must evaluate and monitor AI-driven eDiscovery tools and other solutions built with machine learning algorithms, NLP tools, and process automation.

While most enterprises have yet to set a time frame to roll out GenAI usage (47%), many in-house departments are initiating pilot projects to validate its effectiveness in specific areas (25%). Moreover, 36 percent are considering the potential of AI and evaluating its relevance.



The CIO can be critical to helping legal leaders assess GenAI document summarization, contract drafting and risk mitigation, and compliance monitoring. They are expected to understand emerging regulations, AI frameworks, and whether certain approaches can be deemed accurate, stable, auditable, and secure. They are also the experts in determining a solution's value and how it impacts current activities, and the challenges of integrating or applying existing content or data from other systems.

## Information governance priorities

Today's boards of directors identify information governance as a key priority, driven by several intricately intertwined issues: content sprawl, inefficient collaboration, and compliance complexity. A multi-disciplinary team is needed to focus on data lifecycle management process dependencies, as well as a unified compliance strategy focused on data protection and cybersecurity. Collaboration is needed between the risk function, legal, and IT teams to balance value, risk, and the cost of managing information.



## Unified compliance strategy: Data protection and cybersecurity

In the follow up survey, participants identified key use cases and areas of need for guidance from the CIO/IT office.

### The top three use cases most commonly cited were



Data privacy management – 48%



Cybersecurity planning – 46%



Compliance monitoring – 44%

Legal has concerns over the effectiveness of risk management, compliance programs, and how data retention and disposition impact regulatory requirements or legal actions.

The GC focuses on managing and mitigating risk, as well as establishing consistent compliance across the organization. The CIO owns the strategic vision for governing content and has input on cost, embedded security controls, integrations, and coordination of information across departments. This includes having a critical role in controlling costs, economically managing information over its lifecycle, and improving productivity while avoiding disruptions.

IT departments and the CIO must play a prominent information governance role to ensure data is being managed effectively and in compliance with the information security program. This includes data classification, protection, privacy, storage, security, and archiving capabilities. Basic compliance measures, such as retention, archival, and disposition must be met without undue burden on users or practitioners.

The more interconnected these departments are, the more effective the risk and compliance program will be.

### Upstream IT decisions impact downstream legal activities

Information governance partnership activities must consider how ECM, matter management, and records solutions integrate with eDiscovery tools, such as legal hold, to simplify complex processes. As confirmed by our respondents, information governance and records management innovation is one of the top areas where IT influence and support is sought.

Data identification, search, review, and retrieval are necessary to support legal matters, government requests, or other productions, as well as to protect data and confidential business information from cyberthreats. It is critical to have legal solutions that manage, identify, preserve, and collect electronically stored information. Beyond eDiscovery, these solutions improve archiving and master data management as well as managing retention and records policies, security labeling, and legal holds. These tools must also be evaluated to determine (and reduce) downstream eDiscovery costs.



## Why IT is an indispensable partner to the GC

- Identifying and reviewing trends and developments in legal technology
- Addressing how solutions integrate with existing systems or capabilities
- Supporting ROI analysis to cut costs or meet operational objectives
- Evaluating whether a provider owns the technology and innovation roadmap
- Reviewing scalability of solution and deployment options
- Assessing broader information management needs
- Leveraging tools to address multiple use cases
- Offering managed or cloud services capabilities to augment the team.

## Outlook

The days of operating in silos are over. The CIO and GC must establish a strong partnership to improve alignment around departmental strategies, AI-driven transformation, and to create an information governance framework to comply with legal and regulatory obligations. They must also include processes, such as setting legal holds and data collections, which are important to both records management and litigation discovery.

Tightening this bond and opening stronger communication channels will ensure proper guidance for legal/IT issues and deployment of solutions that best support core strategies. This collaboration can create a high functioning, highly flexible legal department that makes the best use of its systems to deliver better staff experiences and measure solution performance.

## Further reading

[The modern general counsel: Legal advisor and strategic business partner](#) explores legal leaders' evolving responsibilities and priorities as they become strategic and influential partners to the C-Suite.

## About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](https://opentext.com).

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