

Pioneers and Pathfinders: Ari Kaplan

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Zeynep Ersin

Welcome to Pioneers and Pathfinders, Seyfarth's podcast about the people and ideas reshaping the legal industry.

Kevin Young

I'm Kevin Young, an employment litigator and counselor, and I've spent my career putting new tools and ideas to work in client service and helping colleagues and clients to do the same.

Zeynep Ersin

I'm Zeynep Ersin. I lead innovation and design thinking at Seyfarth, focusing on reimagining how legal services are built, delivered, and experienced.

Kevin Young

Each episode we sit down with someone on the front lines of legal innovation to unpack what they're doing and what it means for where our industry is headed.

Zeynep Ersin

We'll keep it fresh, we'll keep it fun, and we'll keep it to 30 minutes. Let's jump in.

Today we're joined by someone who has spent decades at the intersection of law, technology, innovation, and leadership. Ari Kaplan is a former practicing attorney, a widely recognized legal industry analyst, researcher, author, and speaker who has dedicated his career to helping the legal profession understand and navigate change. Over the past two decades, he's conducted extensive research, advised leaders across law firms and corporate legal departments, and become one of the industry's most trusted voices on innovation and the future of legal services.

Ari has a unique vantage point into what legal leaders around the world are thinking about, from AI adoption and innovation strategy, talent development, change management, and the evolving relationship between law firms and their clients. We're excited to tap into those perspectives and explore what he's seeing across the legal industry right now.

Thank you so much for joining us today. We are absolutely thrilled to have you on. Very much looking forward to the conversation. So I wanted to just kick things off. You know, you've had a unique career journey in terms of practicing law and then becoming one of the legal's most recognized analysts and experts, how would you kind of describe that evolution and trajectory in your own work?

Ari Kaplan

Wonderful, lucky, exciting, you know, serendipitous. I just, so I practiced law for nearly nine years and I was with large law firms in New York City. I grew up here, grew up in Brooklyn, I lived in the city for many years, and stopped practicing law in the summer of 2006, and I left the practice thinking that I would become a writer. I had published something like a hundred and twenty-five articles while I practiced and in

fact then developed a course to teach lawyers how to get themselves published and how to use that for their business development.

Well, and I started out just writing, thinking I would freelance and then quickly I created that course and then I wrote several books and started doing research in the space. In 2007 was my first corporate counsel report. And I've now published over seventy of those. So it's really been a wonderful journey and very lucky.

Kevin Young

Ari, at that time when you first launched, was the focus on innovation and tech and change or was it just the industry in general?

Ari Kaplan

This idea that legal is a hotbed of innovation and change, just incredible, is so satisfying to me and I know to many of my peers who have been doing this for quite some time because that just wasn't the case. I mean, I always found it to be fascinating and I always found the change journey to be so exciting. But legal was not as interesting for sure as finance or even insurance or where they were driving innovation. So when I started it was purely to try to bridge the connection between law and technology.

Zeynep Ersin

I'm curious, Ari, at the time because similar to how things are moving so fast now, how were you also kind of staying up to date and learning about what was happening as it correlated to the intersection of law and the internet at the time, and kind of maintaining your pipeline of information in terms of coming up with content and people to talk to and perspectives to have?

Ari Kaplan

When I ask leaders the qualities that they're looking for in their team members, curiosity is almost always part of that portfolio. And I was always lucky to be able to have conversations with people who are much smarter than me, who are much more experienced. They weren't necessarily older, but they were just doing something differently. And I'm so grateful to be a writer in whatever that means.

The idea of being a writer is that you're asking people what they know and then synthesizing it in a story that helps people apply that to their own lives. And I've tried to follow that now less from an individual standpoint and more from an organizational perspective, but the model is still the same. And I encourage that level of curiosity. And people are eager to share.

Zeynep Ersin

Active listening is a great skill, I will say. It's one to embrace. I think what I've seen too, in terms of right now, with the adoption and thinking about AI in particular and how to incorporate it into legal practice and workflows, more often than not, the aha moments and the supreme learning happens by hearing from others, sharing their own experiences and use cases. Of course, there's trainings happening, which, you know, certainly parallel in terms of how to leverage the tools and that are tool specific, but it's more about how are you applying this? How did you interpret ways in which to leverage the tools? So I think that absolutely continues to hold true in this moment that we're in of where a lot of that true learning happens is through the sharing of experiences and learning alongside each other, kind of going through this.

I also think the profession has become more comfortable with disciplined experimentation and how we work. That doesn't mean lowering the standard for legal work product. Legal work still requires judgment, precision, precedent, and rigor. But when we're talking about improving how services are delivered, there's more room to pilot, learn, adjust, and build on what works. Are you hearing the same kind of openness to experimentation and feedback from law firms and corporate legal departments? Or does it feel different across those environments?

Kevin Young

And Ari, I know that you get to spend time with law firm and legal department leaders and doers that's actually, you know, doing the work. Are you hearing, I mean, the same types of embrace for trial and error and kind of figuring things out, finding new paths, better ways of doing things. Are you hearing that with the same fervor at law firms as you are corporate legal departments, or is it a little bit different?

Ari Kaplan

I am lucky to get to spend time with leaders and have hopefully built a level of trust that they share with me, the challenges and the opportunities that they see, but sometimes those leaders are on both sides. I mean, my work is sort of equally divided between what happens in corporate legal departments and what happens in law firms. And a great example is that I was honored to help LexisNexis produce an event. It was their AI symposium earlier this year. And your chair, your extraordinarily gifted chair, was a panelist and a discussion also with the general counsel of a very large company and the CFO of a large law firm.

And we had this just amazing dialogue where each side, you know, the sort of the corporate side and the law firm side, were really trying to come up with some harmony, a level of equilibrium where the law firm interests and objectives were respected and honored, and the law department's interests and expectations were also met. And both just sort of dynamic leaders talking to each other, but in front of an audience of leaders, it's been an amazing opportunity to see that dialogue take place.

I also host a series of dinners that are exclusively either for law department leaders or specifically law firm managing partners, chairs, and CEOs. And the conversations are really changing. There's a real emotional component to making sure that this generation prepares for what's coming and what the next generation will face and how we leave the profession and what we do to shape it. It's really, really quite exciting.

Zeynep Ersin

About the shift in allowing for more experimentation and thinking about how legal services are delivered. Again, not onto the deliverable or the quality of the work product, but I'm curious, you know, what does success look like in terms of creating pipelines of feedback or opportunities to learn from those experiences? Because I think it's one thing to foster a culture that encourages experimentation, but then how are you taking those experiments and leveraging what worked, what didn't work. What does that look like in a successful way?

Ari Kaplan

Structurally, the firms that succeed most create not only an open dialogue, but bring up success stories, challenges in a sort of a regular cadence, whether it's in weekly meetings, monthly meetings, practice group meetings. You're also no longer seeing isolation where knowledge management, for example, because I feel like a lot of what's happening now in innovation is derived from the foundation that

knowledge management leaders had built years ago. And in fact, in the foundation that eDiscovery, the earliest individuals who were becoming expert in technology, in law, were doing. And so you're seeing these really dynamic, cross-functional teams having conversations in a uniform and really synthesized kind of language.

I am lucky to get to speak to law departments on a periodic basis because of my research. And frequently I'll be in front of a law department and having a conversation, and the general counsel will stand up there and say, you know, we really want our law firms to bring their head of innovation. Now, of course, there are many different roles that encompass this work. Head of AI, you know, sometimes pricing is combined with AI and innovation and the in-house leaders really want those people to participate in the conversation because they are really driving the transformation of the work. And also they want the leaders of actually the legal practice to be involved as well so that there's a combination and there's alignment. So you're really seeing firms that succeed combine these disciplines.

It's no longer one or the other, it's no longer someone's in the front and someone's in the back. It's really sort of arm in arm, this is how we are going to approach it. And you're seeing requests like this in terms of team composition and technology usage in RFPs. You're hearing it directly in pitch conversations. So firms recognize this and realize that this is going to be great for our team. It's going to be great for our brand, but it's what our clients want.

Ari Kaplan

And we need to be responsive.

Kevin Young

Yeah, I've said before and then in a previous episode, I remember maybe six to twelve months post ChatGPT hitting the mainstream. I remember we were seeing RFPs that among like the ten things they would ask you to answer, many would say, confirm you're not using generative AI for your legal work. Yeah, that you're not, you know, please don't, basically. And now, you know, we've obviously swung completely the other way. And how are you using it? How are you gonna deliver efficiencies? And it's not surprising, but it's stark, you know, it's stark how quickly that swung in that direction.

Ari Kaplan

Even to the question of like, why aren't you using it? What is it about it in this instance that would prevent you from using it? I have been very lucky recently to do two different reports. One on how law firm leaders are measuring ROI of their AI investment, and one on how corporate leaders are doing the same thing. I spoke to law firm leaders in fourteen countries about what they're doing and law department leaders in nine countries. And both reports were with Legora. And it was fascinating to see what their perspectives are, what metrics they're using, how they're driving greater usage and what the sort of the meaningful return that both law firms and law departments are looking for. And it's not exactly the same.

So that's also different, right? The models of how they operate differ. And there's a conversation that needs to be had. And one of the things I ask always about is how proactive are you in having this conversation with your clients? For a while law firms were far ahead of law departments in their deployment and their understanding of this technology. And they really had a window, great opportunity to engage them, even to bring them in on pilots, just to provide that level of guidance, real stickiness. Now the clients are

increasingly catching up. And so you're having this very even more sophisticated conversation and some challenges, some requests, and everyone is being asked to rise up, which is only good for the profession, it seems, though there is a question about training and judgment and a number of other areas where questions still remain.

Zeynep Ersin

There's a real learning opportunity for law firms in the RFPs and the more detailed surveys we're seeing from corporate legal teams. Because the questions themselves tell us a lot about what clients are actually prioritizing. But also to your point, Ari, about the importance of having an open and transparent dialogue across both, just to share experiences, lessons learned, you know, how we're even thinking about measuring. Cause I think it's easy to just be in go mode.

But it's critical in this moment to have this be really truly a collaborative journey in terms of, you know, sharing ideas, you know, even comparing what tools are being used and how they're being leveraged. And oftentimes, you know, the law firms are gonna have very different tech stacks than potentially the in-house teams. And there's a lot of opportunity for ongoing learning and dialogue across both sides. So we really are trying to encourage folks to do that with regularity with clients and corporate legal departments to kind of have this be as we call a simultaneous advancement opportunity for both teams.

Ari Kaplan

And it's really important for people to recognize that law departments are not necessarily exclusively interested in the training and development at law firms because of their work or the billable hour. I am very lucky to serve as the chair of the global advisory board for Barbri's professional education board and their unit. And I have been co-hosting a series of roundtable discussions with Lucy Allen, the co-CEO of Barbri.

We did one in New York, one in Washington DC, and one recently in London, and bringing together corporate and law firm leaders in this conversation about what does the future of training look like? Where are we using simulations? How does AI apply? And how can we advance the profession through training and development? And one of the in-house leaders said in one of these discussions that they're very concerned about what the training looks like because law departments recruit from law firms.

It's not magical, there's no magical pathway. Typically, people who work in law departments worked in law firms. Most general counsel were partners at law firms. And so they were raised and grown in these organizations. And if this organization at the preliminary stages, there's some gaps or some challenges, then at the later stages when it gets to the client, they may also have some gaps and they don't want that. So there really needs to be an understanding and a collaboration.

And so I think that when the law department is asking the firm about this, it is not just how will they do our work. We want to make sure that our work is done in the best, you know, in the most optimal way that it can be done. But also we want to make sure that our future team members are trained in the way that we had hoped, the way our previous team members were trained, or at least it can rise to the same level as our previous hires. So it's a really interesting collaborative effort that needs to take place in order for our profession to elevate at the same time.

Zeynep Ersin

It's interesting because, you know, we had our summer associates and we've developed, you know, an AI and innovation program with them that's not strictly about the technology. It's so much more about leveraging creativity and curiosity and ideating and design thinking. And part of what we do throughout the course of the program, in particular, you know, at the end, is we also pose the question to them that Kevin was touching on in terms of what are the types of experiences or work or project that junior associates should be doing now in getting ready to develop the context, the judgment, you know, all of that, the subject matter expertise.

And, you know, similarly, they are also aware, right, in terms of how the work will be performed differently. So they're coming at it from, okay, well, we recognize a few of them. It's said out loud, you know, developing critical thinking skills. What does that look like?

And so much of this I do think really also emphasizes the curiosity point in terms of just being curious enough to master your craft and wanting to elevate yourself and wanting to use the experiences that you're having, whether it's doing 10,000 things over and over and learning from that, or experimenting a couple times and learning from that. But I think both experiences have to come from a natural curiosity to want to learn from that.

And being willing to also take a step back and create those feedback loops to say what worked well, what didn't, you know, how can I leverage this experience and go to the supervising attorney to understand the context and, you know, having a dialogue around that. So I think that these skills that we're talking about really do kind of, they come from within and it's interesting to see how that's showing up now in conversations.

Ari Kaplan

And it was always something that mattered in your professional growth. When I was a mid-level associate, I remember doing lots of document review or being responsible for lots of review of information. And I remember going to the partner, my mentor who I mentioned, and said to her, I really know this case. Can I, I'd love to take a deposition? And she's like, great, next deposition is yours. Let's look at the calendar. I do remember once we were in court. There were lots of defense lawyers there. I worked at a big firm.

And we had to introduce ourselves. It was some sort of preliminary discussion and we had to stand up and introduce ourselves. And I turned to the partner and I said, do you mind if I also introduced you? I feel like that would add like a layer of confusion and complexity to the literally I had to stand up and say my name and my firm and the client. That's all I had to do. And then I actually I think she turned to me and she said, you know what? Why don't you introduce me? And I was like, no.

Wait, I got my name. I know the firm. I know the client. Now I gotta remember her name and repeat the, and it was this like all I felt was like, all I heard was like, I didn't hear any noise, nothing. And I just feel like it sounds ridiculous, but it is that moment, those kinds of things where you sort of chip away at your level of comfort in your career. And that is, you know, those things are kind of fleeting.

In a lot of ways in our profession, as things become more digital, as we come less in person, you know, things have changed. They've become, it's become a lot more remote in some respects. We're not

traveling as much. And, you know, junior professionals really need to find ways to either replicate that in some sort of simulation. They need to put themselves in those positions. They need to really voluntarily and proactively recognize that this could be an opportunity. I need to figure out how do I take advantage of it.

And let people know that they're willing to do something extra, whatever that looks like. I'm not suggesting that they work all the time, right? I, you know, value work-life balance and the culture of an organization, but I do think that it's really incumbent on each individual to recognize that there are just so many moving parts and they're moving so quickly that even the most extraordinary supervisor can't think of every little detail. The work needs to get done. Everybody is under time pressure.

Ari Kaplan

So you need to embrace that and accept the fact that a lot of it is on you and now there are just so many more opportunities for you. Just seize them.

Kevin Young

There's so many things I'm curious about. But one thing I'm very curious about, and this might go back a little bit to some of the cultural things you were just talking about. But you know, we're at a time where I think probably every law firm, if you went to the Am Law 100 or 200, every firm website's gonna talk about their innovation efforts and their focus on AI.

And I think it's true. I think, you know, firms are rightly focused there. Certainly Seyfarth is thinking and very much included, as you noted. But I also know making an investment in anything organizationally, tech, AI, or otherwise, is kind of one part of the equation and effecting the change, driving the change is another big piece. And I'm curious what you've seen or heard more, I guess, on the change management side. You know, what firms or legal departments have been doing to really get their investments to stick and to proliferate.

Ari Kaplan

You're seeing a really interesting now partnership between the organizations that are providing tools and services and the firms that are buying them, that are engaging with them. And there's a recognition that it's very hard to do this alone. So the stickiness often comes from true experts sharing with other true experts, people who are really experienced, really adept. And you see a lot of discussion about the size of many of the organizations, the growth. And the reason that I think you're seeing that is because it's those people that empower others to use the technology.

It's not as if they just, they're there because big numbers are very eye-catching. I think it's a practical perspective that no matter how big a law firm's innovation team, and no matter how broad, because some law firm innovation teams include a cross-functional group of people in other divisions, as they should, because they're all capturing different kinds of data, and that data really matters in terms of trying to create that stickiness.

But the organizations that really succeed in the way that they develop stickiness is that there is this consistency in identifying where particular tools can be used and what will drive change. Someone once

defined for me on my podcast that innovation simply means something different that creates value. It's not just a shiny tool, or it's not just some super novel innovative way of doing something. It's the value creation.

And how do we then take something different that creates value in a small way and make it work in a much larger way and ultimately at an enterprise level? I always tell people when I'm talking about business development or enhancing your career, figure out what works, multiply it by a hundred. And I think that that is a mantra that I've tried to use in my own career, but also really matters when you're trying to take something small and expand it out into something that creates transformative change.

Zeynep Ersin

Absolutely. That's so poignant. Ari, what has your attention right now that you think our listeners should know about or be thinking about?

Ari Kaplan

I have had the good fortune of doing work outside the US and I'm lucky to have been the MC of an event in Amsterdam every year called Lexpo. It's just an extraordinary innovation conference where I first learned about companies you've heard about endlessly now that are wildly successful, but no one knew about, but I heard about it years ago because I was there. And I think that it's really important to broaden your perspective when you're trying to figure out where we are, what's happening, what are your peers doing.

So if I'm a law firm leader, I'm asking my peers elsewhere what they're doing. Not in my city, not in my region, not even maybe in the US, but what is my colleague in Belgium doing? What is my friend in Warsaw doing? And I think that that will surprise people.

Because innovation starts in different places. I remember having a wonderful conversation with the leader of a very recognized technology company now that talked about how the technology got zero traction in the UK when they started. And nobody in the US at the time was particularly interested. So they went all the way around the world and found a firm in Thailand. And that firm really embraced it. It was really interesting to them. And they kind of, it took them all the way back.

And I think that that's a really important element if you're part of this. I also think that the cross collaboration between the firms and their clients is that we're at a really powerful inflection point and there's just huge opportunity to navigate what's changing, whether we're talking about billing models or staffing situations. I think that that conversation really needs to happen. It needs to be proactive and it really should be consistent.

Kevin Young

All right, any particular books, articles, podcasts, besides ours obviously, that you've been listening to that you'd recommend for folks who are curious about the space?

Ari Kaplan

So super interesting that you say that because I host a breakfast series in New York City and typically in any other city I go to if I can. I'm doing one at ILTACON, but I host a breakfast series called the Legal Tech Mafia and brings together kind of legal tech leaders. It's like an ode to the PayPal Mafia, not to the mafia.

But it's really meant to just be a salon for thought leaders and everyone's invited and had students there. We have CEOs, managing partners. It's just a wonderful, lucky conversation.

I'd love to host it at your firm. I've hosted it at many, many firms across the country. Just in June, I did one in Amsterdam and Stockholm and London, Chicago. So at the last breakfast in New York a couple weeks ago, we talked about the new book by Oz Benamram, Rebecca Patterson, Adam Curphey, Law Reinvented, just about leading transformation and change. And I just downloaded for my Kindle, Debbie Foster and Stephanie Everett have a new book, Be a Next Level Leader: The Four Cornerstones of Law Firm Leadership.

So those are some things that I from a professional standpoint that I have been really, you know, looking at and studying and I'm excited to see just the kind of level of scholarship that our profession is producing on the ground, in the trenches, really trying to provide guidance for one another.

Zeynep Ersin

Thank you so much. This has been a fantastic conversation. We of course wanna keep chatting with you and would love to stay in touch and thank you for your time and your insights.

Ari Kaplan

It's an honor. Thank you both. I really appreciate the opportunity.

Kevin Young

Thanks, Ari.

Zeynep Ersin

Thanks for spending time with us today on Pioneers and Pathfinders. I'm Zeynep Ersin.

Kevin Young

And I'm Kevin Young. We'll see you next time.