

Pioneers and Pathfinders: Colin S. Levy

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Steve Poor

Hi. This is Steve Poor, and you're listening to Pioneers and Pathfinders.

Today, we talk with a returning guest, Colin S. Levy. Since he last joined us on the podcast, Colin has become general counsel at Malbek. Malbek is a CLM provider that helps large companies manage their entire contracting function, including using AI. In 2023, he released *The Legal Tech Ecosystem*, a book exploring the evolving legal world and how to leverage technology within it. He also teaches legal tech courses at Albany Law School and is working on a new book aimed at using AI in practical ways as a lawyer and legal professional.

In our conversation, Colin talks about why he wrote the book and his approach as a law professor in the age of generative AI. We also discuss the importance of collaboration and cross-disciplinary work in in-house legal roles.

It was great for Colin to take additional time to meet with us again. I enjoyed the conversation. I hope you enjoy listening in.

Welcome back to the podcast. It's been a minute. Thanks so much.

Colin Levy

Thanks for having me again. It's always good to chat with you.

Steve Poor

I always enjoy our discussions. So since we last chatted on the podcast, which I now think is like three years ago, time flies when you're having fun. A number of things have happened in your professional life. A couple of them I want to talk about. First one is, you published a book called *The Legal Tech Ecosystem*, which I believe is still available on Amazon.

Colin Levy

It is.

Steve Poor

I'm curious, why write a book? It sounds like a pretty significant undertaking.

Colin Levy

It definitely was, admittedly more work than I kind of visioned it was going to be, but it kind of was the culmination of a few things. One was I enjoy writing. Two, I enjoy helping support the legal tech space and educating them and inspiring them. And three, I've interviewed a large number of different legal leaders and had conversations with even more than I've interviewed. And I thought, what better way to help folks understand the space than through recounting some of those stories and conversations that I had in a way that is thematically organized and logical, and so that was kind of what started the journey. Now it definitely was a little challenging, not just in terms of actually writing the book, but also the fact that AI was just starting to make its presence known generative AI that is at the tail end of that whole writing process. So I had to account for that, but I purposely didn't really talk a lot about it, because A) it was just starting to come into play, and things would change rapidly as they did. And B) I

really wanted to try to make the book as kind of timeless as I could given the subject matter. So that was sort of the purposeful decision I made with respect to that.

Steve Poor

It's very logical, very thoughtfully organized and very comprehensive. So I'll second all of your observations. I'm curious. You have all of this experience, you have all this knowledge, all of these interviews, so you have this mass of information. What's your thought process to go through to get it to say, these are the themes. This is the structure. This is how I can present this information in a way that's most useful to the reader?

Colin Levy

Well, it kind of took a result of conversations with my editor slash publisher, thinking myself about sort of the way that I wanted to structure the book in kind of drawing out the themes that I saw running through the voices that I thought would be most helpful to share, given what I was trying to do with books. So that was sort of the general approach, and it definitely took a lot of work, a lot of thought, a lot of back and forth, revising and editing, to get it to a place where I thought would be most helpful. I would also say that writing a book is unlike other forms of writing. It's challenging because you are not just writing for yourself. You're really writing for other people and really trying to help other people learn. And so you kind of have to take a little bit of yourself out of it and ensure that the book is written in a way that is going to be most helpful for those that you're intending to read it.

Steve Poor

Oh, good point. The other challenge, I suspect you had, is you're not a full time writer. That's not your full time job. You teach your GC at Malbek. Where did you find the time?

Colin Levy

Well, that's a very good question. And frankly, I made the time more than finding the time. And I made the time because it was something I felt strongly about doing, and I enjoy writing. It's something that gives me great deal of joy, and in some ways, is almost therapeutic. So for me, it was just kind of a fun thing to just take up my time when I wasn't working. And I found that if I really want to do something, I will make the time to do it, regardless of whatever else is going on. I'm a fairly tenacious person, and so if I'm determined to do something, I'm going to do it.

Steve Poor

And I presume it's been well received in the market. I've read it. It's an excellent book.

Colin Levy

Well, I appreciate your kind words. It has been well received. I was I'm always nervous when I write things that are going to be published and publicly consumed. And given that this was sort of my largest such project, it definitely was nerve wracking to share and have other people read, because legal folks have fairly strong opinions, but also, you know, it was something that I put a lot of work into, and so it's always a bit of a test of your nerves when You share something that you put a lot of work into, not knowing exactly what the outcome is going to be.

Steve Poor

I can imagine it's very nerve wracking. The other sort of big event I wanted to talk about is you, since last we talked, you've become general counsel at Malbek. Congratulations, by the way. Thank you. How was the transition into that position been? Has it been--What's surprised you about it?

Colin Levy

Well, I'd say that the transition has been relatively straightforward, because frankly, a lot of what I was doing was already under that kind of general purview of a GC. But I think what has most surprised me has been not necessarily the reception within the company, which has been all very positive, because I take pride in being able to work with a lot of folks very well, but really just the fact that the broader legal community acknowledged it in a way I wasn't expecting, in terms of acknowledging it as a big deal, and I think that's which I appreciated, but I think it also showed me the degree to which there remains a lot of value attached to different titles and credentials within the legal industry. And so people with certain titles, by virtue of just having that title alone, generate a fair degree of respect, or what have you, even though there may be plenty of folks who don't have necessarily that title, but do essentially all the functions and are responsible for all the things that would fall under the purview of someone having a certain title.

Steve Poor

It is interesting. Do you think that's unique to the legal industry? I've noticed the same thing in the legal industry over a very long period of time. Do you think that's unique to the legal industry, or do you think that's just a human characteristic in business?

Colin Levy

I think there is an element of it that's inherent to, I think humans and business, but I also think that the legal profession itself is very much still driven by credentials and accolades and kind of perception and accomplishments. So I do think that there is a little it's a little more pronounced within the legal industry, and that likely goes back to just the fact that big law firms, you know, when they're traditionally, when they're hiring folks, look to grades as a marker of ability. And I've long held the view, rightly or wrongly, that grades don't always tell the whole story. And so relying on that one kind of set of credentials as an indicator of likely success or aptitude or what have you, isn't always necessarily the best approach.

Steve Poor

One of the things that strikes me based on what you just said is, terms of the reaction to people, beyond just reacting to the title, is you've also done a remarkable job in creating an authentic voice in your social media branding--if I can call it that. I don't want to label it as such. Has that been sort of a conscious effort on your part to create that authenticity in terms of things you talk about? Do you think that was part of the receptivity to your promotion?

Colin Levy

I think it definitely played into the reception to the promotion. But I would also say that it wasn't always the case that I intentionally made efforts at building my brand as it were. I simply just approached social media as a way to share thoughts and connect with others, because I'm fairly outgoing, and I would say, fairly gregarious individual, and like to build connections with others. But these days, given how far I've come, frankly, I definitely do spend more time being more deliberate about how I'm continuing to support and grow my brand.

Steve Poor

Yeah, I can see that you've done a remarkable job of it frankly.

Colin Levy

Thank you.

Steve Poor

The other thing you do, I want to come back to Malbek in a minute. The other thing you do is you teach.

Colin Levy

I do.

Steve Poor

You're Adjunct Professor a couple of Albany Law School for example. How has the teaching you and you teach technology related courses? How has that evolved over the last few years, particularly after the big bang of chat GPT?

Colin Levy

Well, I've only very recently started teaching, but I would say that the rise of AI has definitely had an interesting impact, I would say upon students. I'd say that those that I've taught have all been interested in AI and use it for non professional or student purposes, but at the same time, some of them are, I think, skeptical still, of its ability to help them professionally, and also are not opposed to learning about it, but remain a bit hesitant in terms of, is this going to actually help me, or is this just to create more work that I'm going to have to do because it's documented sort of inaccuracies and mistakes that it makes, which has been an interesting area of discussion in my teaching. And frankly, I've tried to introduce concepts and introduced AI as a imperfect augments, in other words, some partner to work with to help supplement what you do and augment what you do, but not to replace what you do. And I think that perspective helps ensure that folks approach it with this understanding that it can do things and do things well, but it's imperfect, and so you can't look at it as a replacement for your own judgment, but it can help augment your own judgment

Steve Poor

Well, our own judgments. Not always perfect, either, exactly. It's interesting to me how we hold technology to a standard we don't hold humans to. Is it perfect? No, it's not perfect. Well, then we can't use it because it's not perfect. Well, I've worked with plenty of first year lawyers who are not perfect and needed to be worked with, and technology is no different.

Colin Levy

Yeah, absolutely. I do think that that is interesting that you mentioned that, because it's something I talk about a fair about myself, which is this idea that humans aren't perfect, and therefore anything we create is not going to be perfect either. So we kind of have to acknowledge that. I also think that this unrealistic expectation perfection of AI, especially in the legal field, comes from this inherent perfectionism that I think kind of runs like a vein through a lot of those that work in the field and think that everything they do has to be perfect, where I don't think that's necessarily the case. In addition, I think we have to acknowledge the fact that technology, even the best technology is not ever going to be perfect, because we have to perfection is one of those things that's very contextual and very much defined by very specific circumstances. And those circumstances can quickly change as well. So it's difficult, I think, to apply a blanket standard of perfection to a tool like AI when that standard itself is a bit amorphous.

Steve Poor

I think that's right. How does that work into your classes? I mean, how do you, I assume one of your goals is to equip students to succeed in an increasingly digital world. Do you give them hands on tools. Are you talking conceptually? Are you talking theoretically? How do you approach a topic like this at a law school class?

Colin Levy

So a class I currently teach is not solely focused on AI, but regardless, I approach it from a practical basis. In other words, the goal is to introduce first a high level understanding of what AI is and what

other technologies that lawyers would use are, and then have the students play around with those tools so that they get a sense of how they actually work in practice, and see how they could help them and also, quite frankly, see their strengths and weaknesses. Because I think that it's very important to have a practical understanding of these tools and not just a theoretical understanding of how they work, because while that's important, that's not the whole picture. And why I teach students, and I want them to leave my class with an understanding of the benefits and risks and strengths and weaknesses of technology, not just leave the class thinking technology is great, or leave it thinking that technology is terrible, but somewhere in between where it's helpful, but circumstances determine how helpful or not helpful it's going to be.

Steve Poor

Let's move a little same theme, but let's move a little bit to know your role as general counsel as you're building relationships with law firms, outside vendors in your own internal team, how does their approach to technology, how tech savvy they are, the attitude you just described with your students. How does that play into your decision to hire somebody for the legal department, hire an outside law firm, hire an outside vendor? How do you assess that?

Colin Levy

So there's a couple different ways I would go about it. One is looking at not just their level of understanding of these things, but their openness and willingness to learn, to experiment, which can sometimes be a tricky word for lawyers to accept and want to engage in, and also, frankly, a level of kind of practical way of thinking about things. In other words, they think about things from a practical how is this going to play out in practice, as opposed to how is this going to play out in theory? Because theory and practice can often differ, sometimes quite a bit. And so I think as a lawyer or a legal professional, it's important to understand both, but most importantly, understand how things are actually going to likely play out, as opposed to how they might play out. Because one thing I think that pops up a lot in actual legal education is when you're taught about lawyering, you're taught about thinking all the different ways something could possibly play out. But in reality, clients aren't particularly interested in all the different possibilities they're interested in. Okay, how am I going to get from A to B and what's going to get me there? Do I have to build something? Do I have to know something? Do I have to learn something? What do I have to do? And so that's why practicality is so important as a quality, both in learning but also in working with others, particularly when you and this may be a little bit of my in house experience showing. But in house clients don't really have time to wait for you to kind of present all these different options. They just want to know what options, in your view, is going to get them make progress with what they're trying to do.

Steve Poor

Well, they're trying to do business. They're trying to get the contract done. They're trying to make a particular move. They're not interested in an esoteric conversation about those 1/10 of a percent risks that are out there.

Colin Levy

Exactly, exactly. And I think that's another important piece of it, is putting risk in context and understanding that not all risks are at the same level, given a certain context. Different risks may be a greater or lower risk given other circumstances. Which goes back to something I was saying about AI, where I think it's important to provide AI with as much context and specificity as you can when you're asking it for support or insight or what have you, because it doesn't have the same level of insight and knowledge that you do in all likelihood and orders that have the context you likely have. So you want to give it as much context as you can.

Steve Poor

I know Malbek is a leader in the Contract Lifecycle Management space. How's this development and technology affecting that space?

Colin Levy

That's a great question. AI is, as in many other non areas outside of CLM is really augmenting what we're able to do, in other words, managing contract data, analyzing contracts, reviewing documents, even creating documents or proposing edits them. AI is augmenting and helping with all those different capabilities. So in the case of Malbek, you know, we have AI integrated throughout all the different functionality that we offer. And I think that that's largely how AI is playing out in the general space itself is it's not replacing capabilities, just making those capabilities even more powerful and more useful, and frankly, also more, I think, easier for folks to use, because it allows for folks to approach these functions through conversations and through plain language, which is something that hadn't been necessarily as easy to do before AI.

Steve Poor

That's sort of the genius of AI, isn't it? Sort of the genius of chat, GPT and the others. That the reason why it was such an explosion, I think, is because of the point you just made. It's a conversation you almost feel as if you're talking to a human, as opposed to trying to do a Boolean search or trying to do all of the things that I grew up on.

Colin Levy

Right. No, that's that's absolutely right. At the same time, I think that this speaking to a tool like a human, is great, but also can lead on to thinking that what you're speaking with is, in some ways, thinking or acting like a human when it isn't. And so you have to be careful in that way. I think the other issue as well, and this also pertains to kind of human like quality, is AI tools, largely, are designed to make you happy, to give you what you are looking for, and so you have to take what you get with a bit of skepticism because it is trying to make you happy. I think the tool usefulness of any tool is not necessarily giving you what you want, but giving you what you need.

Steve Poor

So you write, you teach your general counsel. You're connected to the legal tech community. How do these various strands in your professional life intersect with each other. How does your role as GC inform your teaching? How does your teaching inform how you perform your role at GC? How do you integrate these things?

Colin Levy

I would say that they all kind of complement one another really well. Me being GC at a legal tech company meshes really well my advocacy and education work in legal tech, my writing allows me to help continue to educate others and grow and support the legal tech community, which in turn allows me to, in part, talk some about my work from Malbek and about all Malbek does and Malbek's role within the legal tech space. So it's all kind of interconnected in different ways, which is really interesting. And it wasn't necessarily intentional for it to actually play out that way. It just happened to play out that way as a result of all these different things that I've done and continue to do, just developing and growing, and it's been fun to see that happen. But I often think that sometimes the most powerful growth happens when you're least expecting it, and is often the result of seemingly disparate things helping and supporting one another in ways that you don't expect.

Steve Poor

That is the way life works, isn't it?

Colin Levy

Very much so.

Steve Poor

Yeah. How do you see technology affecting the working relationship between corporate legal departments and outside vendors? How can they continue to work to drive innovation? Where is that cross pollination going to come from?

Colin Levy

Yeah, I think that technology is helping in a lot of different ways with those relationships. It's allowing for greater transparency in terms of how work is being done and by whom or by what, it also is allowing for better tracking and better data so you can better understand how successful things are, how unsuccessful things are, and so on, through dashboards and other types of tools, that technology can help support the creation of I would also argue that to some degree, technology is helping lower the cost of providing some services because it's allowing for better automation of them and allowing for some tasks to be done without the need of a human. At the same time, I do think that technology and AI is impacting the distribution of labor and who's doing what and what is doing what? And that remains, I think, a tricky area, as people continue to grapple with what it means to do their job in light of technology, it allows that can do, perhaps some of their job already, and they don't need to do that part of their job anymore. And certainly, I think that raises some concerns in certain sectors with respect to, well, what exactly is my job going to be if technology can do X or Y or Z? That is part and parcel of what my job used to have to do.

Steve Poor

Let me follow up on that with a question you can't begin to answer. So take us out two or three years. What would be the answer to that question? How do you see the evolution of technology affecting what lawyers do?

Colin Levy

Well, I don't really have a great answer for this, but it is definitely one that I'm asked about in different ways. And I would say that number one, it's asking the question of, well, what does it mean to be a lawyer? And I think what that is going to mean in the future is less providing information or answers to people, and more building things for people, whether that's products, services, new types of information, new types of content. I think that it's going to require lawyers and other types of legal professionals to be more builders and creators and less information providers in some ways. It's also going to mean, I think lawyers are going to be a little more have to be a little more collaborative and a little more team players, if you will, because they're going to need the expertise of others, like engineers and other folks with different technical capabilities To satisfy increasingly sophisticated and increasingly supported by tech needs of sophisticated clients going forward. I could be very wrong about that. That's why I don't really like making predictions. But that's in a nutshell, essentially, where I see things going over the next few years. We'll see how that plays out. I think, personally, it's, it's an exciting time. I think, though, for many people, it is also a bit of a scary time, given how fast technology is evolving and how fast businesses are evolving, that often are the clients of law firms and lawyers.

Steve Poor

Let me unpack a couple of things you said in that, because there's so much interesting stuff than your description. I know we don't have a lot of time left, but you talk about working in a multidisciplinary environment. That's not something lawyers are used to doing, but I suspect as general counsel, you have to work with business teams and collaborate with people all over the place. What type of different

skill sets do you think lawyers need to be able to work with developers and various other skill sets that are coming into play into the business?

Colin Levy

So this speaks very much to why I should really like working in houses because of that required collaboration and cross disciplinary work that's required. I would say, kind of some of the skills that you need, including kind of business acumen, understanding how businesses create products, sell products, market products, I think having an understanding of those different areas, not necessarily being an expert in those areas, but having a basic understanding how those areas work. I think also understanding kind of the way an engineer looks at a problem or looks at a product is vastly different from how a user is looking at that product and vastly different from how a lawyer looks at that product. So an ability to look at things through the perspective of others, I think, is helpful. I also think that the ability to tailor how you communicate information to different audiences is increasingly important as well, because not everyone is going to take the same bit of information communicated the same way, they're not going to read it all the same way. They're going to all read it a different way that's going to be largely informed by their background, their experience, their perspective, what they're most concerned with. And so to get them to understand whatever you're trying to share, you need to tailor it appropriately for the audience. And so I think that also is going to play into how best lawyers can work in an increasingly multidisciplinary environment. I also think, frankly, it requires just understanding how different roles operate. You know, for example, I work pretty closely with a lot of different sales folks, and I need to, in order for me to work effectively with them, I have to understand how they work, what they're doing, why they're doing the things that they do so I can better help them and support them. And ultimately, that just speaks to just the ability to listen and talk less

Steve Poor

Well, that's a challenge for lawyers, right there.

Colin Levy

It is.

Steve Poor

Last question, what's next for you? Your general counsel, you've written a book you teach as you look out over the next two or three years, what's next?

Colin Levy

Well, that's a good question continue. I would like to continue to expand the teaching that I do, because it's been incredibly rewarding so far, and also a little bit of, I guess, breaking news one could say is I'm working on another book right now.

Steve Poor

The first one didn't scare you off.

Colin Levy

No, it did not. This one, as one might expect, is going to have an AI flavor to it, but very much a practical flavor as well. So more to come on that front, and I don't want to share more at this point, but like I said, that is a project that is ongoing,

Steve Poor

Breaking news. You know, it's interesting. I was going to ask you, if you were writing the book now, how would it differ? So you've given us a little peek that there is another book coming. That's great.

Colin Levy

I can't help but stay busy.

Steve Poor

Well, you do it so well. Colin, thanks so much for taking the old time with us today and catching us up. It's been great. Thank you so much.

Colin Levy

It's a pleasure. And really enjoyed this conversation. So thank you again.

Steve Poor

Thanks for listening to *Pioneers and Pathfinders*. Be sure to visit thepioneerpodcast.com for show notes and more episodes, and don't forget to subscribe to our podcast on your favorite platform.