



## **Legal Ops Corner: Executing Transformational Legal Ops Projects**

**Law Department Management**



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Initiatives to improve legal operations are not self-executing, and success is never guaranteed. But a project's outcome will inevitably impact the reputation of whoever leads an organization's legal ops function. Against that backdrop, how can you achieve optimal results?

## Finding the starting line

When facing multiple operational challenges, the first question is, "Where to begin?" Generally, the concerns that create the need and drive for change in legal operations fall into one of four categories:

- 1.
- 2. Risk mitigation and enhanced compliance** — These are usually more persuasive with lawyers than those without legal responsibilities.
- 3. Enabling or accelerating the business** — These are usually more persuasive with the C-suite and business units (and may be less persuasive to lawyers).
- 4. Minimizing opportunity costs** — Initiatives that address opportunity costs often deliver the

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greatest impact, but many times the ROI is not immediately apparent and the upfront costs are high.

Typically, budget realities constrain your options and limit them to cost-reducing initiatives. If the projected costs of an initiative are substantial, it becomes a difficult sell, no matter how much promise it holds. Rather than trying to shoot the moon, start with opportunities to squeeze savings out of existing law department spend. Doing so provides immediate ROI and the savings can be applied to projects with greater startup costs, whose positive returns take more time to achieve, or whose impact is hard to quickly assess. A good example of a "quick win" project (especially amidst the slew of recent efforts by firms to raise rates) is improved management of outside counsel billing.



Squeezing savings out of existing law department spend allows for more funds to be allocated to more impactful projects. BoBaa22 / Shutterstock.com

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## Clarifying objectives

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After identifying a problem space, what next? With any legal ops initiatives, the crucial factors are (to borrow from the joke about location's importance in real estate) vision, vision, and vision. Too often, determining a vision for a project is an afterthought — yet unified, sustained, and concerted effort from across an organization is impossible if leaders and those whom they lead lack shared answers to critical questions:

- What are we, as an organization, trying to achieve?
- What is my part in achieving that goal?
- How will reaching that goal benefit me, my colleagues, and our organization?



Clarify objectives to ensure the whole organization understands the vision of the project in its entirety and the necessary steps needed to reach specific goals. *The Deserve / Shutterstock.com*

Cliches, generalities, and feel-good bromides are inadequate. Specifics matter, including the particular capabilities a solution must provide, how much flexibility the solution must offer, the constraints and limitations of possible solutions that will jeopardize achieving your objectives, and by

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what metrics — and when — you will know if the initiative is a success. Without detailed statements resolving each of those issues, you will find it impossible to make crucial decisions that determine a project's outcome.

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## **Drafting your team**

The people you enlist to deliver the project will determine its fate. Anyone you select should either care about the problem or be impacted by the solution — ideally both.

Counterintuitively, the most promising group from which to recruit are the critics of the existing system. Many of them will already have a wish list for improvements, and nearly all of them care about the solution working well. Other good candidates are colleagues known to care that things are done well. Often, these are technologists, influencers (whose sway may be greater than their organizational role), and colleagues with experience in innovation (organizational, technological, or otherwise). You should also include "Impactees" — ideally, at least one from each constituency (e.g., each business unit, department, etc.) affected by the solution. Depending on the circumstances, geographic diversity may be important, too.



It is crucial to choose the right candidates for your team and the wellbeing of the projects outcome.  
*erettan / Shutterstock.com*

## **When and what**

The sooner you provide team members meaningful opportunities to contribute and shape the solution, the more invested they will feel in the project's success and the more they will champion it to others. The same is true for how often you involve them and for how long. Practically speaking, that means involving individuals as early as possible, on an ongoing basis, and at a regular cadence, for the entire duration of the project. They should help in developing RFPs you issue, assessing solutions, selecting technology and service providers, and socializing change, and — importantly — share in the credit for success.

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## Big bangs vs. gentle steps

Migration to a new system presents a critical — and unavoidable — decision: all at once or in stages? The choice impacts project cost, organizational operations, change management strategy and activities, and adoption risks. It also dictates the timing and schedule of training, whether to build in pauses for readjusting change management activities, and the cadence of continuous improvement efforts. A migration strategy must take all those factors into account.

## The persuasion equation

Unlike the film *Field of Dreams*, with legal operations projects, there is no certainty that "[If you build it, they will come.](#)" Never assume the benefits of a new solution will be self-evident to those whom you want to use it. Engagement is crucial, starting with the critics who helped design, assess, and select the solution. If you lose them, especially early on, your odds of success plummet. They must be among the first group trained on the solution, along with influencers who can champion the solution among colleagues in a particular department or division. Company-wide influencers are another key constituency.

Your communications strategy forms the foundation of your change management efforts. Leverage multiple channels — rather than relying solely on email, also communicate via platforms like Teams, Slack, or Yammer, and through department- or company-wide informational or interactive sessions. As for the frequency of communications, the cadence should correlate with the degree the new solution will impact the intended recipient of the communication, and how soon that impact will occur.



Utilize multiple communicative social platforms to observe and measure all change management efforts. VLADGRIN / Shutterstock.com

## The end isn't the end

Effective change management includes post-migration activities. Celebrating results and publicizing "wins" reinforce adoption. Quantitative measures (e.g., dollars saved, invoice line-items reviewed,



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etc.) and qualitative results (e.g., user testimonials and satisfaction scores, etc.) each help demonstrate the solution's efficacy. Highlighting "super users" or singling out individuals (e.g., as a "User of the Month") can sway "fence-sitters" and "adoption-ambivalent" individuals.

The guidance above does not ensure your legal ops initiatives will deliver the impact you seek. But ignoring the key points — about project selection, whom to enlist and how and when to involve them, migration strategy, and change management — courts failure, with all the organizational and professional consequences that accompany it.

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