

## First Steps Toward Digital Fluency

**By Elizabeth Lugones, UpLevel Ops COO & Senior Advisor**

Digital Transformation has been a legal operations buzz term for several years now, and the pandemic has only increased the pressure and urgency to leverage technology. Meanwhile, your legal department is struggling to understand and adopt the tools they currently have and are overwhelmed with an abundance of data in various forms.

As a result, Tom is drowning in emails and barely able to focus on those that are either most recent or those whose sender was most persistent in following up. Then there is always that one person like Alice who refuses to engage in Teams where the rest of the project team is collaborating and misses timely information or bonding opportunities and feels less engaged.

How can you implement more sophisticated technologies like CLM, Workflow, or AI if people are unable or unwilling to fully adopt and leverage even the most basic tools the company has provided?

Legal Operations has the benefit of a bird's eye view of the interconnectedness of the legal department across practice areas and the rest of the company. This view affords us the ability to influence cultural and behavioral changes. It is our responsibility to prime the environment for the desired digital transformation and foster the inclusive and collaborative environments to innovate, solve problems, and, as we say at UpLevel, achieve "work joy."

One way to optimize and fully leverage the benefits of future technology implementation is to organize the current information to reduce overload and create the mental capacity within your team to tackle it.

Here are some steps to organize the digital/information chaos:

### 1. **Establish Rules of Engagement**

Every organization has a culture that drives behavior. Be intentional about how and when the team will engage and what expectations are. For instance, if a DM is longer than two or three sentences it may be something that requires deeper thought an analysis and ripe for email or meeting and if you have a quick question then use DM. If you tend to do your best work at midnight explicitly state that there is no expectation that people respond at 12:30 AM.

Evaluate and understand the level of comfort your team has with various modes of communication and collaboration and provide training and guidance to drive adoption.

### 2. **Identify Sources of Truth**

Establish where they need to go to find information, which will instill confidence that it is reliable. For example, store all executed contracts in Sharepoint, Dropbox, or a CLM. All information regarding

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outside counsel spend resides in eBilling, and payments for all other invoices reside in Oracle. Layering this with naming conventions and process for ensuring data quality will boost confidence.

### 3. **Create Channels of Communication**

Many of us miss the collaborative environment of being physically in an office. At UpLevel, we have learned how to recreate the benefits of being physically together in the digital world. Is it perfect? No. But have we achieved many of the results as being physically together? Yes!

We have various methods of sharing information and collaborating (i.e., email, Teams/Slack, text, video, phone calls, and more). Agreeing upon the optimal channels to use for certain information types alleviates stress and confusion. If you require someone to review a contract that requires deep analysis, you might send it via email so the colleague is able to address the level of detail appropriately. Add a brief, personal instant message in Teams with a heads up that that the email is coming their way.

Organize your Team or Slack environments intentionally to minimize the noise and allow people to engage at their own pace. Establish focused channels so that the team is not distracted in their DMs with information they don't need or want to engage with at the time. Example of categories of Teams or Slack are:

- Social Interaction (#watercooler, #recipes, #sportstalk)
- Project Based (#CLOC2022, #rebranding, #privacypolicyupdate)
- Knowledge Sharing (regulatory updates, legal tech, department news)
- Use individual DMs the same way you would knock on someone's office door to ask a question or share ideas or collaborate

### 4. **Foster a Safe and Inclusive Culture**

Make it acceptable to share mistakes, issues, and concerns without repercussions. Accept failure but expect learning and pivoting to move forward. When doing regular, public 'high fives,' make it common practice to encourage sharing moments of growth (aka 'errors') to normalize and encourage honest communication.

There's no putting the genie back in the bottle in our digitally-driven lives, but you can get all that you wish for if you establish rules, communicate openly and honestly, and encourage growth and learning. Harnessing these tools can truly move your legal ops team – and your business – forward.

For more ways to take legal to the next level, contact **UpLevel Ops**.

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**Elizabeth Lugones** is COO & Senior Advisor with UpLevel Ops who has built and managed Legal Operations teams in various industries in both public and private companies over her 20+ year career. She excels in global project management and business reengineering, with particular expertise in process improvement, change management, cross functional collaboration and team building, but her true passion is helping others find their own strengths and talents and harness them for the value of all.

