

## Legal Tech Done Right:

### How Best Practices and Process Improvements Can Make All the Difference

**By UpLevel Ops**

We are all keenly aware of what can happen when legal tech implementations go wrong. It's a nightmare scenario for everyone from in-house teams to clients. Whether it's the wrong technology for the job, a bad implementation, or lack of adoption, you've got unhappy, frustrated end users.

Unfortunately, this is often where UpLevel Ops is called in to problem-solve. We say, "unfortunately," because fixing a bad implementation is far more complicated and far more expensive than selecting the right tool and implementing it properly in the first place. Had they called us sooner, we could have steered them in the direction of a better tool to meet their needs and helped craft the necessary preparation work for a successful implementation. Coming in late puts us in a tough situation where we've got to win hearts and minds back after a technological failure, making the change management process and subsequent tool and process adoption that much more difficult.

With the following advice we hope to help you avoid this difficult and costly situation. Taking these steps up will increase your likelihood for success, and ultimately save time, money, and frustration.

First, let's define success. A successful implementation is one where the new technology aligns with a department's specific needs and goals, is integrated smoothly with existing processes and workflows, and people find relatively easy to use.

Several steps must be taken before this can happen. Skipping them can result in the wrong tech being selected, a bad implementation, a significant delay in implementation because the readiness work is incomplete, or worse, a combination of these issues.

#### **Do the Right Readiness Work**

- Understand the business needs and requirements before selecting the technology solution. Start by speaking with all the key stakeholders first (anyone who will be using the system extensively, including people in and out of Legal). Documenting their requirements and categorizing them into two buckets: Must-have features, and nice-to-have features. Then talk to a segment of "light-touch" users to document their requirements, too.
- Provide formal and informal channels for feedback and communication to get input from stakeholders.
- Talk to IT to learn how this new solution fits into the overall IT infrastructure. You will need to partner with them (and perhaps even get approval from them) throughout this process.
- Start by mapping out your processes to identify which ones are repetitive, time-consuming, or error prone. These processes will likely benefit the most from streamlining and automation.
- Analyze any potential bottlenecks or inefficiencies in your process before automating. If you automate a bad process, you will end up perpetuating the same problem.

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- Remove duplicative steps or people from processes. Every process can be simplified, and the simpler the process, the easier it is to automate.
- If templates need to be harmonized, or playbooks need to be written, now is the time to do this, or the implementation can be delayed by many months.

### **Select the Right Tool**

- Make sure that the technology is user-friendly and not too complicated for employees to adopt. Err on the side of lighter tech. Less can be more when it comes to technology.
- Check references. Do not invest in a tool unless you've spoken to colleagues to ask about the experience with the tool and the company and try to go beyond the references they give you, which of course will be positive. After all, you will be partnered with them for several years.
- Be wary of demos. Do you know the old joke about how the devil tricks the poor souls by showing them that life in Hell is a big beach party, but when they get there, it's really fire, pitchforks and brimstone. And when they ask where the party went he replies, "Oh, that was just the demo!" Well keep that in mind when you're evaluating technology. The demos are only showing you what the tool can look like, not what your instance will look like.
- Develop a script for your demos of at least three use cases specific to your needs, and have each vendor demo the same exact use cases, which you should provide to them ahead of time. This way you'll be comparing apples to apples when you're doing your evaluation.
- Document your findings and thoughts about the tool immediately after each demo. Otherwise, you'll forget details about what you liked and didn't like.
- Dig in on the functionality. This one is tough because if you're not truly a technical expert, it can be difficult to assess what's real and what's not. This is where a legal tech expert can really add value, as they know the right questions to ask, including about their future roadmaps, integration capabilities, etc. But in the absence of a tech expert, do what you can to ensure that their capabilities align with your documented business requirements.
- Ask for a proof of concept (POC). The best way to evaluate a tool is to use it before you've committed to it. But in fairness to the tech provider, this is a loss for them in terms of resources, so be thoughtful in what you request from them.

### **Manage the Project Properly**

- Develop a project plan and assign owners who are accountable for each task/phase. Be sure to take the scope of the project and available resources into account to set realistic expectations.
- Make sure that the timeline for implementation is realistic, and that all stakeholders are aware of the expected timeframe.
- Be flexible enough to adjust the implementation process as needed.
- Break the implementation process into phases and monitor progress to minimize the risk of a single point of failure.
- Build an executive steering committee. Have a group of executives (preferably one from each major stakeholder group) who can clear roadblocks and make high level decisions with you.

### **Champion for Adoption**

- Communicate frequently with stakeholders on progress and decision points, and tailor communications to different audiences.

- Celebrate small victories and express gratitude to those who have contributed to the implementation. This will go a long way towards building momentum and excitement about the new solution.
- Use storytelling to highlight the benefits and build buy-in from the different individuals and teams.
- Establish metrics to track performance and assess how well the implementation is working.
- Regularly evaluate progress and address any issues that arise.

If all of this sounds like it's a lot of work, that's because it is. Technology selection and implementation are some of the most complex projects we do at UpLevel Ops. But when done right, the resulting efficiencies, cost-savings and visibility our clients enjoy are worth all the effort.

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## About UpLevel Ops

### **UpLevel Ops leads the evolution of the legal operations practice and takes legal to the next level.**

We are trusted advisors providing practical guidance, mentorship, and coaching that goes beyond consulting. With our custom, high-end service – born of extensive corporate in-house experience – we partner with clients to craft actionable solutions. We create a roadmap to success that empowers teams with best practices, tools, and workflows tailored to their unique business objectives.

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