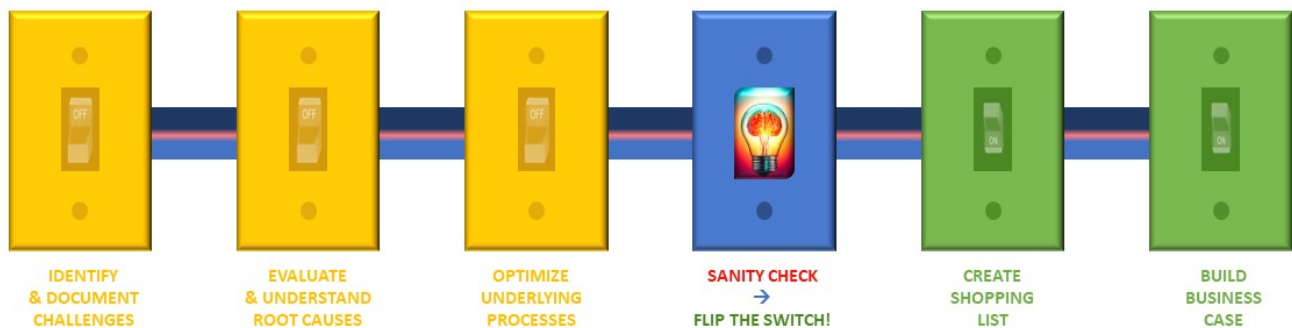


Flipping the Switch: Evaluating your Options before Changing Out Legal Tech

By Elizabeth Lugones, UpLevel Ops, COO / Senior Advisor

Before you sunset and replace existing technology, or what we like to call, “rip and replace,” it is important to evaluate why you are switching and ensure that this is the right path forward. It may sound like the best option to begin anew, but a significant amount of time and effort is required to do this.



Here are some steps towards evaluating existing and new tech.

1. **Identify and Document** points of friction and challenges with the existing technology from all stakeholders leveraging the tool.
2. **Evaluate and Understand** the root cause of the issues. Is functionality lacking in the tool? Were shortcuts taken during the initial implementation that could be addressed now? Are internal process improvements required to optimize the flow of work? Do people understand the process and the how and why they should be using the tool? Ask these questions (and more) and get to the heart of your tech challenges.
3. **Optimize** the processes the tool supports and evaluate if the tool can support the new process requirements. If so, update the technology to support the updated process. Remember to train and communicate all that you’ve completed in Steps 1, 2 and 3.

If, after optimizing your internal processes or for a variety of other reasons, you find that you’re tool no longer meets your business requirements, spend time to investigate whether a system upgrade or re-tooling of the current system meets most of your needs. Work with your current vendor or hire a legal technology expert to do a gap analysis. If the tool can be optimized, this can be a far less expensive and time-consuming path than a new implementation.

Sanity Check! You have optimized the process, evaluated the existing technology and confirmed that it will not support your business requirements. Move to Step 4

4. **Create Your “Shopping List”** from all you have learned from Steps 1-3. These business requirements will be used in evaluating new technology. Vendors should clearly address these requirements during demonstrations, and use this list to stay focused on the functionality as it relates to your needs, rather than getting distracted by functionality that is a “nice-to-have” versus a “must-have.”
5. **Build your Business Case** for internal support and whatever investments will be necessary for either an upgrade or the procurement of a new tool by leveraging the knowledge you gained from Steps 1-4.

Important Note: Your business case does not start with your official submission to a committee asking for investment. The business case journey starts at Step 1 and continues throughout. Ensure that you are engaging all stakeholders on the legal and business side that interact and/or benefit from the tool. Involve them in feedback sessions, requirements gathering and provide them with visibility into the planning. Use the power of storytelling and speak to them in terms they will understand. This is a step often overlooked. A strong and successful business case has the support of the majority of stakeholders involved and it's even better when they understand the vision and anticipated ROI. If they do, they will become your biggest champion.

6. **Engage Expertise** where needed to help in any and (or all) the above steps. Hiring a third-party legal ops and technology expert like UpLevel Ops is a valuable investment to ensure you achieve desired results. Plus, it can turbo charge your timing towards execution. Honestly, sometimes your internal stakeholders find it easier to talk about their concerns with someone who has less emotional investment in the decision.

In the fast-evolving legal tech landscape, switching to new technology requires a strategic evaluation and considerable examination of your options. UpLevel Ops can identify the challenges inherent in optimizing existing systems before considering replacements. Our experts define must-have functionalities and craft compelling business cases, ensuring seamless transitions for long-term success.

Elizabeth Lugones is COO/ Senior Advisor of 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.

Before joining UpLevel, Liz served as the Senior Director of Legal Operations at WeWork. Prior to WeWork, Liz served as Director of Legal Operations at a diverse range of companies, including UnitedLex, DXC Technology, Becton Dickinson, and MetLife. She also worked at Citigroup as Manager, Strategy and M&A.

Liz holds a BA in Political Science and Journalism from Rutgers University, is certified in Lean Six Sigma and fluent in Spanish. She is based in New Jersey.

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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