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How to successfully navigate change management

A guide for legal operations

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Introduction

A retiring generation, an emerging workforce of millennials, and ever-evolving technology means a perpetually shifting landscape for corporate legal departments. To navigate this, legal operations professionals are being called upon to effect robust change management strategies that will ensure their departments operate as an efficient and productive business unit. As corporate legal departments continue to evolve, change management becomes an unavoidable part of its progress.

What is change management & why legal ops professionals should care

At its core, change management is the planning and execution behind moving a person, team, or organization from its current state to a new state. Within the legal department, legal operations professionals are emerging as the driving force behind change, implementing everything from new processes to new technologies.

When done with thoughtful preparation, change management results in increased productivity, improved vendor management, cost savings, and earlier ROI realization. Conversely, moving forward without a strategy will result in wasted resources and low adoption by employees, particularly lawyers who, historically, are change-averse.

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What to ask before making major changes

Change is hard regardless of how it's packaged. That's why most change management efforts fail. Preparation is essential to success, and it starts with asking a few questions (and hopefully having answers) before strategizing even begins.

Why change now?

It sounds obvious, but plenty of legal teams attempt to implement changes without fully considering why they're making those changes at that time. Determining what's driving the changes and why will help you create a roadmap and clearly articulate the vision to individuals within the legal team, cross-functionally, and c-suite executives.

How will these changes benefit my legal team?

Don't expect much support if you can't explain to your legal team how this will help them. Whether it's streamlining menial and time-consuming tasks, improving vendor oversight, or implementing a more modern legal operations software, articulate the benefits of change management to garner support and demonstrate how the changes aren't just to improve the bottom line..

How will these changes affect other departments?

Thinking about changes and their impact in a silo will be detrimental to success. All business units are cross-functional, whether it feels that way or not. Part of the problem with silos is that they foster a "you versus them" attitude. Consider how changes will impact other departments, and then offer support or collaborate with those departments to create a more unified vision for the future of the organization.

And if we don't?

Ask what the alternative is. What does the future of the legal department look like if this initiative doesn't come to fruition? The answer to this question isn't so much about explaining why this is the best option but rather the negative impact not pursuing this course will have.

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The building blocks of successful change management plans

Change is inevitable, personally and professionally. In the workplace, change comes in all forms, from moving offices to implementing new technologies. Although these changes are meant to be beneficial, employees often wind up feeling confused or frustrated. For legal operations professionals spearheading new initiatives, a well articulated change management plan helps employees know what to expect and understand what is required of them.

Develop a strategy

Behind any effective change management initiative is a solid strategy that brings together your organization's culture, values, and people. Kick off your strategic planning with these operative tips:

Understand organizational biases, political landscape, and past experiences before setting future expectations.

> **Figure out who is involved and to what extent.**

> **Decide on an approach to understand how this will roll out: all at once, in phases, top down?**

As you continue to lay the foundation of your change management plan, consider the following:

- **Change management is a process, not an event** – Throughout the process, involve and prepare all stakeholders and teams. In this white paper you'll find additional tips on how to successfully do that.

- **Lay the foundation to move the organization forward** – We love the word foundation, because a strong one really is critical to everything you do. When done right, change management creates a framework for increased adoption and minimizes productivity loss. That doesn't just make for a good change management program, it makes for a strong future for the company as a whole.

- **Change happens on two levels: organizational and individual** – It's easy to overlook individual contributions and how change will impact each employee, but they drive the company's success. If you don't already, consider implementing goal mapping so employees at all levels on your legal ops team can see how organizational goals impact individual goals and vice versa.

- **One size does not fit all** – All changes need to be viewed using a variety of lenses and with appreciation for the nuances of each organization.

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Determine what is changing

In the dynamic legal landscape, change results less from the unexpected and more from careful planning that will (hopefully) improve business functions. Analyze the department's processes to determine where it's operating efficiently and where it's ineffective.

There are **three key areas** where legal ops professionals tend to focus their change efforts:

Technology	Analytics	Outside counsel management
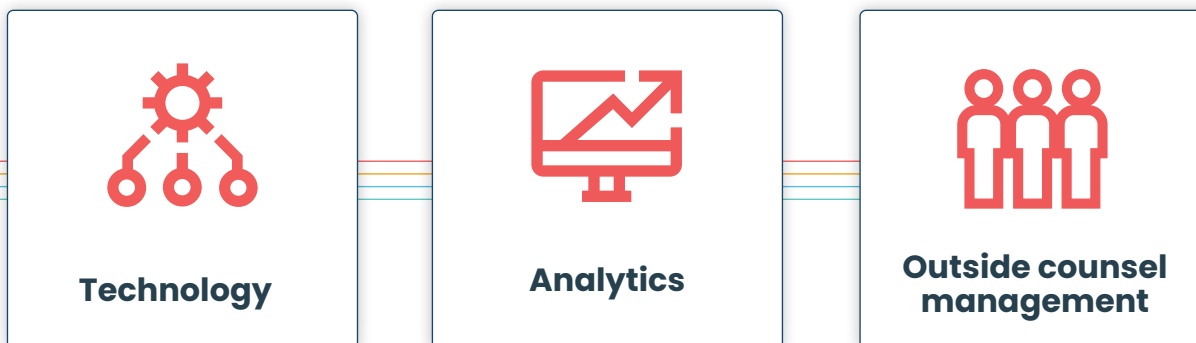
Technology

Staying current with technology will help power your legal department and set it up for ongoing success. If you have multiple software platforms for things like matter management, vendor management, and e-billing, focus on rolling everything into one updated platform. It won't be easy, and you'll likely need to team up with your IT department to integrate new software as seamlessly as possible, but working on multiple platforms inevitably decreases productivity and increases administrative costs, making the challenges faced during the rollout worth it in the long run.

Analytics

Speaking of new software, choose a platform that provides analytical insights. It's an exciting time to work in legal operations—data helps legal ops teams better understand where their time and money is spent, and it demonstrates ROI, which is critical to overcoming the outdated notion that legal departments are just cost centers. Granular insights will also help you measure success, improve workflows, and make informed decisions.

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Outside counsel management

The rise of legal operations software has also influenced how outside counsel and in-house legal teams work together. As part of your change management plan, commit to marrying project management with outside counsel management. Take a look at billing guidelines—who is following them and who isn't—review your preferred vendor list and make sure you're getting the most out of those relationships, conduct performance evaluations and pave the way for a feedback loop, and keep alternative fee arrangements in mind when reviewing pricing. Determine what changes need to be made in how you manage outside counsel and incorporate those as part of your overall change management strategy.

Roadblocks are inevitable

When it comes to planning for change management, running into roadblocks and challenges is inevitable. However, understanding that they often stem from a lack of alignment or resistance to change can make them easier to overcome. Keep this in mind as you consider:

- **WHO:** Determine who within and outside your organization this change will impact and to what degree. This will inform both how you communicate and the training approach you take.

- **WHAT**: Detail all the changes you anticipate happening as you transition between your current and future states, and describe the strategies that will be used in addressing those changes. You should also consider what resources will be necessary to complete this transition including money and technology.

- **HOW:** Conduct a stakeholder analysis and change impact assessment. The plans you make and how you communicate those plans can help reduce how many challenges you face down the road.

Our friend, Stephanie Lamoureaux, Legal Operations Lead at Square, shares that you can't forget to plan for the "why" when rolling out a change management plan.

"*It's not just about sharing what you're trying to solve, but devoting the time to helping everyone understand why you're making the change and how it's going to help them in the short-term and the long-term."*

Stephanie Lamoureaux
Legal Operations Lead, Square

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Communicate, communicate, communicate

Transparency builds trust. If you feel like you're over communicating, communicate more. It will be a challenging time in the office both leading up to the changes and then actually implementing them across functions. Engage employees in discussions early and often.

It is also a smart move to build and share a detailed communication plan that outlines the timing and delivery of targeted messages to appropriate audiences through various channels. Get creative with how you communicate – it doesn't always have to be email. Consider using town halls, brown bag lunches, or even posting signs in break rooms to let employees know what is happening, when, and how.

> **Legal operations is a cross-functional role and the more you're able to communicate your goals and follow through with the benefits that were originally proposed, the more credibility you can build within the organization.**

Create a training program

After strategizing, planning, and communicating, it may feel like the heavy lifting is done, but you still need to educate everyone – the legal team, in-house attorneys, and other business units – on the changes, whether informing them of new processes or training them on how to effectively use new technologies. Even the most comprehensive change management program will fail if this key component is overlooked.

When developing your training program, determining factors may include:

- Audience access
- Corporate culture
- Budget
- Importance of the message being delivered and the desired outcome
- Level of interaction desired
- Cultural differences (this may include the need to translate materials, a consideration for global legal teams and corporations)

Consider what types of training methods would best meet your employees' needs as well – workshops, a retreat, online courses, or a combination – and develop training activities that are tailored to a specific audience or objective. Be sure to let all involved know when training will be offered, what materials they need, and which stakeholder its for.

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3 Steps for creating a change management plan

Change management has evolved into its own discipline complete with framework, methodologies, and a whole host of models to help legal operations prepare for and implement changes. Use the following steps to create a strong foundation for your change management plan.

01 Focus on tangible goals, not aspirations

No one sets forward on a path to change with mediocre aspirations. Setting lofty goals is expected, but they don't provide any true guidance to the team members expected to achieve them. Use those aspirations to guide the goals of your change management plan. Lawyers who are driven by actionable steps will be especially appreciative of goals grounded in reality and based on actual metrics.

02 Build out a timeline

Something that will help across the board with adoption, communication, and the success of the change management plan is creating a visual of what it will look like in action so your team can better conceptualize how this impacts them, particularly if part of your strategy involves engaging with new vendors. These changes will directly impact general counsel, the legal team, and the IT department. Address what the first six months will look like, including timelines for interviewing and selecting new vendors and implementing their technology.

03 Assemble the team

By now you should have a good idea of who will be involved—from stakeholders and key personnel from other business units to individuals on your own legal team. Now you need to select a team who can help you successfully facilitate the change process.

The motivator

This person helps drive the beneficial changes you want to make. When you encounter resistance from people, it's likely because whatever they've been doing works fine and they don't understand why you're making the changes. The motivator's job is to do just that: motivate people to make the changes by demonstrating real ways the changes will help them. This person will also motivate the team by highlighting the hazards of inaction.

The stickler

You likely already have someone like this on your team. Recruit them to enforce decisions and curtail internal disputes before they get out of hand. Ideally, this is someone with the authority to put their foot down.

The communicator

This role isn't just about conveying information throughout this process, which he or she should do frequently. It's also about listening to employees who have concerns, frustrations, or don't understand why the changes are happening in the first place. Giving employees an outlet for their feelings is critical to the transition process, as is validating those feelings and helping to work through and resolve them so changes can happen as seamlessly as possible.

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Tips for success

There is no fail-proof way to ensure the success of your change management plan, but the following tips can help you get buy-in from all sides and ease the way forward.

✔ Create leaders at all levels

One of the best ways to implement a successful change management strategy is by creating leaders at all levels. The bulk of the work will likely fall on functional managers and directors, but taking a divide-and-conquer strategy where possible will not only relieve some of the difficulty accompanying the changes, it will help all employees feel invested in working through the transition.

✔ Give employees a voice

Before rolling out a change management strategy (really, before even creating one), get input from the people who will be directly affected. Everyone on your team will likely have an easier time negotiating changes if they're able to contribute to the strategy and feel that their personal pain points are being addressed.

✔ Tailor your pitch to get buy-in

Throughout this process you will need to get buy-in from a variety of stakeholders, chief among them are your leadership and legal teams. What motivates one may not motivate the other. Lawyers and your legal team are driven by facts and figures—long client response times, high costs, etc. Your leadership team, on the other hand, will be more interested to know how this change benefits the company as a whole and aligns with business objectives, not just your department. Implementing a successful change management initiative will require full support from leaders, which means they need to understand why you're making changes and what they can do to facilitate it.

Consider the language you use

Tossing out buzzwords when meeting with leadership is one thing, but that jargon can come across insincere when speaking with your team members or vendors. Keep things conversational instead of combative. The end goal is to provide a solution that satisfies the needs of individuals across different teams and business units.

✔ Provide additional context

Often when big changes happen at a company, or even within individual departments, employees are given a high level overview and a directive. Pull the curtain back a little to give employees the context they need to fully understand why the impending changes are critical, how the changes will positively impact both the legal department and the company as a whole, and what their role will be in making sure the process is a success.

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Localize

For legal teams spread across different geographical locations, it is essential to localize your plans as you would any other content being shared abroad. Think about how cultural differences might impact this process and how to address them. You'll likely need to accommodate regional differences and plan for those from the beginning, rather than rushing to handle unique cultural differences and doing so without the thoughtful approach required.

Measure success

What good is all the work you've done to implement this plan without a way to measure its success? There are hundreds of ways to track progress, including user satisfaction, the number of change management projects that have been completed, and whether you adhered to the projected timeline.

What you prioritize will depend on what changes you're implementing and why, but a few things you can measure regardless are:

- On-time deliverables
- Compliance
- Overall performance improvements
- Realization of ROI

Additionally, consider measuring your organization's success with the transition. Although some of these metrics are less tangible than straightforward KPIs, survey employees before, during, and after changes to measure user efficiency and get employee insights on your department's readiness, how closely you adhered to the rollout timeline, and how quickly changes were implemented. Use results to track adoption and satisfaction and identify process and policy improvement opportunities.

Manage resistance

It's impossible to implement changes without facing resistance in one corner or another. Try to understand why an employee is resistant:

- **Are they uncomfortable with new technology?**

- **Is it because they don't think anything is wrong with the status quo?**

- **Are they unsure why and/or how their role and responsibilities are changing?**

- **If you can identify the root of their concerns, you can put forward tangible solutions to help them transition more easily.**

Of course there is the possibility that someone resistant to change, regardless of why or what you do to help him or her transition, will remain resistant to change. If that's the case, you may have to reevaluate how their role fits within the new framework and decide if their unwillingness to adapt will affect their ability to make meaningful contributions to the team.

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Take a deeper dive with legal operations software

Leveraging data from a legal operations platform is a good starting point to evaluate progress and can help you answer the following questions:

- **Do you (and other business units) have clarity into your legal spend?**

- **Is your team able to easily find matters and related details?**

- **Is your team spending less time on manual administrative tasks?**

- **Have operational processes sped up?**

- **Are invoicing and AP more accurate and efficient?**

- **Can you quickly pull reports and metrics?**

If you're thinking about adopting new legal ops software to drive efficiencies in your department, change management is a vital component to ensure adoption and success.

Be sure to download our 'Making the Case' white paper which provides detailed guidance on how to make a strong business case and get executive buy-in for new legal technology. Supplemented with learnings from this white paper, you'll be able to create a comprehensive plan for how your legal department can approach technology adoption from start to finish.

Drive change with vendors

It's common for legal teams to work with a number of outside vendors. They can often be the most resistant to changes, whether due to system implementation or process and policy changes. Limit the pushback from vendors by involving them as early as possible in the process. Changes you make will have a ripple effect, and your vendors will appreciate being able to anticipate and prepare for them accordingly. Other ways to drive change with vendors include:

- Identifying change champions for each vendor, preferably someone in a leadership role who will take charge of implementing changes on the other end.

- Preparing to help the vendor through the change process in terms of logistics like training materials, meeting rooms, and the like.

- Planning to gauge and correct lapses in compliance, just as you will for your internal teams.

Other ways to smooth the transition for your vendors include setting clear success metrics and performance targets, tailoring your vendor approach the same as you would for in-house stakeholders and employees, and providing guidance on best practices during this time of transition.

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Conclusion

Change management is an ongoing process – one that's never really complete for legal operations and in-house professionals. Creating and implementing a change management strategy will allow your team to remain agile and equip them with the tools needed to successfully face challenges head on.

About SimpleLegal

SimpleLegal provides a modern legal operations management platform that streamlines the way corporate legal departments manage their matters, track and interpret spend, and collaborate with vendors and law firms. SimpleLegal combines e-Billing and spend management, matter management, vendor management, and reporting and analytics into one comprehensive application to optimize legal operations and the management of the entire legal department.

For more information visit: www.simplelegal.com