

SIX STEPS TO OVERCOME RESISTANCE TO TECHNOLOGY CHANGE

The legal industry is undergoing a period of significant change. However, when a successful transition to digital isn't assured, many legal professionals are reticent to explore and adopt new technology. In this article, we outline the six steps that can help legal leaders effectively manage change.

We've all heard the news. The legal sector is undergoing a period of significant change, and success—even for those who don't resist—is far from assured. However, as difficult as managing change in a risk-averse environment can be, the ability of the modern lawyer to adapt and thrive in such a world cannot be overrated. Thankfully, with the right strategies in place, change can be managed proactively and with relatively little fuss.

Here are six simple ways to ensure your transition to digital is a smooth one.

1. Don't wait for the 'right time'

When it comes to adopting new technology and exploring change, there's no such thing as 'the right time.' Budgets will often be under pressure and headcounts low; unpredictable economic environments make it impossible to know what's coming next.

To combat this uncertainty, legal leaders must adopt an attitude of agility and adaptability. One of the easiest ways to do this is to create a framework that supports change while retaining the ability to react to changing circumstances and evolving workplaces and priorities.

The key, says CSR Limited's Head of Legal, Sean Ventris, is to build alignment, both within the legal team, as well as in the broader business. "Individuals are more likely to 'jump on board' and become committed when they understand the 'what and the why' of what we're trying to achieve. They want to feel that the hard effort will be worthwhile in the long term and will lead to a better outcome than the status quo. As part of this process, we make a point of acknowledging and celebrating key achievements along the way."

For the more risk averse, it's worth noting that you don't have to be the first to try or institute new technology. However, you need to remember that when it comes to change, success is never assured.

To find the sweet spot between early adoption and missing the technology train, leaders must be prepared to explore, experiment and iterate. Filling gaps and implementing short-term solutions that don't deliver a significant business improvement is not the way to go—regardless of how safe it may make you feel. Instead, focus on encouraging a willingness to explore change as it's needed, but within the confines of what's achievable and safe for your team, organisation and industry.

2. Get the right buy-in

Regardless of the type of change you're exploring; the transition is always smoother when everyone is on board. To enhance your opportunities for success, it's imperative all appropriate stakeholders play an active part in the process. Building a strong and persuasive business case is a clear first step and will ensure organisation and team objectives are clear from the outset.

According to Mr Ventris, maintaining a mindset for continuous improvement is a must-have, along with not being afraid to be an early adopter. These things, he says, will deliver, "a step-change in efficiency and enable the team to demonstrate value and be accountable for legal spend. However," he adds, "this is only part of the story."

His advice is to begin by ascertaining everyone who will play a key part in identifying, testing and rolling out the chosen solution. Depending on the makeup of your team and organisation, this may include IT, procurement and legal (including lawyers, legal operations, external service providers). Mr Ventris adds, "Critical to change is obtaining the support of the key functional members of the team—the CFO's role in this is crucial. Additionally, as so many of the innovation improvements have a technological aspect, the IT team have a key role to play in the business case."

Once your stakeholders are set, clearly define the project team who will be responsible for spearheading and running the project. You may choose to have representatives from each stakeholder group or, if the project is to be confined to a discrete organisational unit or department, key personnel from the appropriate team. This will ensure a balanced approach to change that identifies and considers wins and losses from all perspectives.

3. Define your goals

To convince the stakeholders and potential users who may not see the benefits or are wary of investing in new technology, defined goals are a must-have. These may be financial-or efficiency-based but must be quantifiable and measurable. Although technology solves a range of issues, potential benefits shouldn't be measured solely in financial or efficiency terms. Instead, focus on identifying and defining a range of quantifiable and measurable goals that support an agile approach.

Having these defined objectives will help inform your conversations with potential vendors, ensuring a focus on what you want to achieve and the best ways of doing so. It's a buyer's market, so take control and make it clear to potential providers what you want, how you work and how you want to implement or roll out your chosen solution.

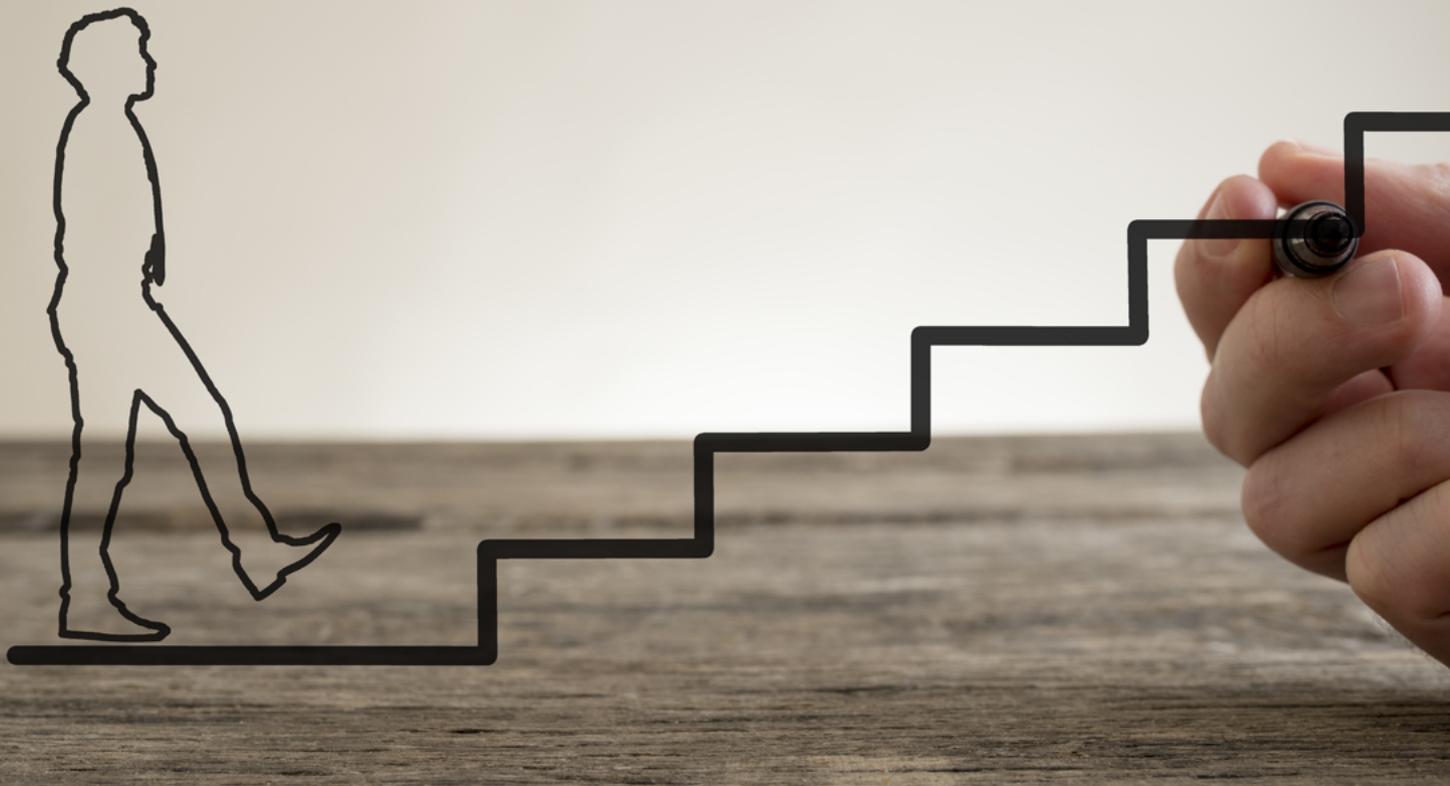
4. Build a strong business case

When it comes to implementing change, budgets are a necessary reality. However, when you're dealing with a reduced budget and/or a resistant or change-averse environment, building a strong business case and proving ROI on a potential technology investment are non-negotiable.

According to Steven Walker, CEO and Founder of Gen2Law and former General Counsel at Hewlett Packard Enterprise, "the ability to prepare a solid business case is a new and essential skill for many legal professionals."

However, he's quick to highlight the point that legal professionals tend to have less experience with business cases than their clients in business roles and may strive for data perfection and exhaustive detail. This can lead to analysis paralysis and never-ending review loops that can last months, or even years. The trick, he says, is to calibrate the depth and level of detail according to the organisation and the strategic significance of the project itself.

"A good business case should, at a minimum (and including the most comprehensive metrics reasonably available), cover an assessment of status quo and competing improvement options and include the inaction cost—i.e. choosing to take no action at all—relative benefits and risks, required resources, execution timeline and key milestones, budget, key stakeholders and selection criteria. When it comes to ROI, always articulate the quantifiable savings in terms of efficiency and cost, weighed against the costs of implementation and ongoing run."



"There are many different formulae available," he adds, "but good IT projects should aim for an ROI of more than 60% overall with a realistic and achievable payback period. The business case should also articulate unquantifiable benefits, including increased employee engagement, improved client or customer experience, increased quality or timeliness, or enhanced ease of doing business."

Above all, according to Mr Walker, "the client should be placed at the centre, with benefits to the client organisation well considered and articulated. This will help potential suppliers deliver on your needs while demonstrating to senior executives how technology investment can help deliver better, faster and cheaper business outcomes."

5. Communicate and collaborate

The legal team aren't the only ones who'll benefit from the introduction of new technology. The right digital solution will influence and deliver efficiencies and savings that can be realised across multiple business units and the organisation as a whole.

However, as Mr Ventris confirms, "transitioning a company's people, systems and methodologies can be difficult. The capacity for a busy legal department, such as CSR which is primarily focused on day-to-day priorities, to execute ambitious and sustainable change, is a key element to long-term success, but it also represents a great challenge. Driving successful change within the corporate legal environment—whether a simple protocol adjustment or a major organisational overhaul requires effective management."

Such effective management includes, he adds, "managing numerous stakeholders, including IT, risk and audit and procurement. These stakeholders bring with them a range of sometimes differing agendas and expectations. To be successful, a change process should commence with a comprehensive assessment of risks and the development of a coherent plan of action, involving all of the key stakeholders at the earliest possible stage of the process."

Above all, Mr Ventris offers this advice. "Keep in mind that realising tangible results in the change space is not easy; it requires determination, focus and planning." As Mr Walker adds, "the reality is that the legal profession has been reticent to adopt new technologies and service delivery methods, partly because of a desire to maintain the 'practice' of law as a profession, rather than treating legal services as just another professional service to be 'delivered' as a business."

However, the winds of change are upon us, so when considering change in legal service organisations, he says, "Those designing programs would do well to learn from established change management models and methodologies which have been applied successfully in business contexts for many years."

"As a rule of thumb, I generally recommend a starting allocation of around 50% of the budget to the technology sourcing, and the balance to professional change

management, paying attention to strategies targeting not just initial resistance to new ways of working, but to promoting long-term user adoption."

"Not everyone will jump on the bus at the same time or in the same way," he says, "so culture and communication are key. The new vision, processes and expectations must be well-defined and communicated, underlined and communicated again. Ideally, balanced with a healthy dose of fun and excitement about the future."

6. Explore, experiment and iterate

As the legal department moves further away from cost centre status, contributing to organisation-wide value outcomes is quickly becoming an imperative. And for legal leaders wanting to stay ahead of the curve, exploring technology is a vital element of this shift.

To ensure that change benefits the entire organisation, it should be viewed through an iterative lens, rather than one of perfection. As Walker articulates, "A perfectly executed IT implementation is a mythical creature and the perfection approach is neither pragmatic nor possible."

By recognising that modern business relies on agility, flexibility and practical application to move forwards, legal teams will be able to approach this brave new world with excitement rather than trepidation. [a](#)



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