



Lawcadia[®]

Transforming legal

**THE GENERAL COUNSEL'S GUIDE
TO LEGAL TRANSFORMATION**

Overview

The Continuing Evolution of the Legal Department.....	2
The Push for Innovation	3
Building a Technology Roadmap	4
What to Include	5
Who should be involved?.....	6
Identify your Pain Points	7
Identify your Priorities	8
Identify your Potential Investment	9
Identify and Prioritise Potential Solutions	10
Building a Business Case	11
Consider the Change Management Process	12
Six Practical steps and tools for building a roadmap	13
About Lawcadia.....	16



THE CONTINUING EVOLUTION OF THE LEGAL DEPARTMENT

Legal departments cost money, they don't make money – or so the old thinking goes.

Only a decade ago, the legal function was primarily responsible for providing legal advice (and charging the business accordingly). But while expert advice is still the order of the day, cost control, agility and maintaining a competitive advantage now combine to drive a more value driven agenda.

As the leaders of these new look legal departments, GCs face a further responsibility – ensuring their teams have access to the tools, technology and data that support more efficient legal operations.

Their resulting focus is threefold:

- 1** Identify and implement the best available technology to streamline workflows, increase efficiencies and control costs
- 2** Make the most of internal resources and encourage a strategic approach to the selection and engagement of external counsel
- 3** Collect and analyse data to inform decision making and drive productivity across the board

But when you're the one tasked with change, where do you start?






In this guide, we outline how legal teams are optimising their service delivery, how technology is supporting them, and how to craft a practical plan for your own team's transformation.

Let's get
STARTED

THE PUSH FOR INNOVATION

More and more, legal departments are relying on a defined strategy to lead their operations. One of the biggest drivers is a desire to demonstrate their value to the organisation as a whole. What defines 'value' differs from organisation to organisation but for many teams, how and why external counsel are engaged, and when and how internal resources are utilised are key in solving the equation.

Methods of tracking and managing these activities also differ, but may include:

-  Institution of streamlined, consistent competitive RFP processes
-  Strategic panel setup, management and review
-  Regular performance reviews based on defined rating criteria
-  Data capture and engagement analysis – who is doing the work, when and why
-  Establishment of defined working processes – workflows, matter management and tracking

But when it comes to choosing the technology that will help achieve these objectives, forward planning is essential. One of the best ways to start is with a technology roadmap.



BUILDING A TECHNOLOGY ROADMAP

For the uninitiated, a technology roadmap is a visual document used to communicate the implementation plan for new technology. It typically outlines when, why, and what solutions will be introduced to help the organisation (or in this case, the legal department), achieve its objectives without wasting valuable time, resources and money.

Importantly, it covers a broad timeline and includes currently available technology, along with improvements planned for the future. As such, it also allows for the phasing out of old technology by highlighting when support for old system/s will give way to new solution implementation.

To ensure the greatest impact, the roadmap should consider the long and short term goals of the legal department and the organisation itself. Multiple stages (or releases) can be included, with each stage (or release) linked to a specific initiative and each initiative to a specific product (or products where multiple solutions are being considered).

For the legal department, initiatives might be split into cost saving, relationship building and productivity, with a product linked to each. Conversely, one product may be able to meet multiple objectives, which should also be reflected in the roadmap. Approaching the planning phase this way allows stakeholder groups to track progress over time, encourages collaboration and provides a method of measuring success over time.



WHAT TO INCLUDE

A comprehensive technology roadmap considers the following key components:



GOALS

What are the short and medium term goals the legal team (and the organisation itself) hopes to achieve through the technology solution? Focus on the business capabilities the solution will enable, as well as what will be required to maintain the solution over the longer term.



RESOURCES

How many people will you need to implement and maintain the solution post-implementation? You'll need to consider ongoing support from the product provider, IT resources that might be required and who internally will lead the implementation.



NEW SYSTEM CAPABILITIES

What will the proposed technology actually deliver? E.g. for teams wanting to reduce external spend, adding a data collection and analysis capability will offer the legal team and GC greater insight into engagement behaviours, budget control and legal service provider performance and value for money.



RISK

What barriers are you up against when it comes to implementing new technology? Assess internal and external issues that may impact achieving your goals and milestones and build this into your long-term plan. Involve your IT team early and look for solutions with high security standards and ISO 27001.



ROLL-OUT PLANS

When will the technology be implemented? Will there be a phased or staged approach broken up by business units, teams or geography? What specific timing are you aiming for?



TRAINING

Will the technology provider take care of training or will you need internal support? Who needs to be trained, how long will it take, will it be a once-off or ongoing?



MILESTONES

What key accomplishments are you aiming for throughout the process? Setting milestones allows key stakeholders to understand and track progress towards the long-term goal.



STATUS REPORTS

These will need to be delivered as the project progresses to ensure all stakeholders remain reliably informed.

WHO SHOULD BE INVOLVED?



The number and type of stakeholders involved in technology implementation varies from organisation to organisation. As a general rule, the legal team, IT, finance and procurement teams (particularly for Government organisations) all have buy-in when you're considering implementing new technology.



Ultimately, your road map should identify the key technology initiatives that will support the legal team (and by extension, the wider business) moving forwards. Potential risk factors should be considered, enabling stakeholders to prepare responses to likely issues and roadblocks if and when they occur. Note that these are just as likely to occur early in the process – e.g. resistance to implementing a solution at the initial buy in stage – as later – e.g. technology failures and security breaches.










An effective roadmap is a living document and is updated throughout the process as timings and priorities change. This allows for better long-term planning and ensures the entire team (and potentially organisation) is part of a collaborative transformation process.



IDENTIFY YOUR PAIN POINTS

Identifying your pain points is an important first step to building a legal technology roadmap. Your pain points and frustrations will vary according to the size and maturity of your team and organisation, as well as your strategy and organisational objectives. Having said that, efficiency and saving money are two of the biggest drivers for any legal team. With that in mind, consider the following:

-  How are you currently controlling your spend? Do you even know what it is, or how to work it out? Do you have mechanisms in place to track it?
-  How much visibility and predictability do you have around your spend and fees charged by external legal service providers? What about scope and budget changes?
-  How many external legal service providers are you currently working with? Do you have a panel in place? Have you identified your preferred providers?
-  How many of your processes are manual? How much time is your legal team spending on administrative or low-value, repeatable work? Are their skills and expertise being used to the best possible advantage?
-  How are you managing documents and projects? Are multiple applications causing confusion? Is key information getting lost and are your team communicating effectively with internal clients and external service providers?
-  How much data do you have? Is it accurate? How are you collecting and analysing it? Do you have access to information that provides insights into past behaviours and can positively influence future decision making?
-  What kind of technology do you think you need? Do you have any preferred solutions in mind? What's going to help your team work more efficiently and produce high value work that benefits your entire organisation?

Answering these questions can be difficult, particularly when your team members are dealing with different frustrations. So get together and talk about what prevents you – both individually and collectively – from doing your best work. Use post-it notes and capture all of the issues and frustrations – from complicated email trails and duplicated work, right through to blown budgets and inconsistent service provider performance. See page 13 as a guide to getting started.

At this stage, there's no need to worry about solutions. Your key objective is to identify the frustrations your team is dealing with day to day and get them out into the open.

IDENTIFY YOUR PRIORITIES

Now that you've identified your pain points, it's time to prioritise them in order of importance. You cannot solve all of your problems at once, so your focus should be on determining which levers can be pulled (and in which order) to greatest effect.

To get started, consider the goals that link to each pain point.

For example, you may wish to reduce costs. Therefore, streamlining your RFP process, identifying preferred providers and establishing legal panels may be your key priorities.

Or perhaps visibility is your biggest issue. In that case, automating your data collection and having access to easy to use reporting functionalities could be key.

Providing a better internal service and properly utilising resources could also be an ongoing problem. If so, appropriate levers could be streamlining your workflows, establishing clear and consistent communication channels and using a single system that connects legal to their internal clients.

If you get stuck, return to the simple question: "What do we want to achieve?". By establishing a clear goal, you can more easily analyse what actions should be taken and when for the best possible results.



IDENTIFY YOUR POTENTIAL INVESTMENT

It's one thing to identify potential solutions to your problems, but if you lack the ability to finance them, you're right back where you started. So once you know the problems you want to solve and have ordered them in terms of priority, consider the limits of your potential investment.

At this point it's useful to ask:



How much can I afford to spend?

Depending on how organisational finances are structured, you may need to consider this through the lens of legal department budget, IT budget or organisational technology/innovation budget.



If we were to invest in xyz product, what would the ROI need to be and how do I calculate it?

Depending on your situation, you may wish to quantify your ROI based on cost savings, data collection or work produced/efficiencies.



Considering the required ROI, how will we measure the effectiveness of the proposed solution?

You may wish to consider running a pilot with specific restrictions or achievements attached. These may include restricting solution access to specific business units, setting timelines, quantifying savings to be achieved within a set period, or collecting specified data that can be used to support a business case.

This information should be included in your technology roadmap and may necessitate further communication with appropriate stakeholders like finance, procurement and/or IT.

IDENTIFY AND PRIORITISE POTENTIAL SOLUTIONS

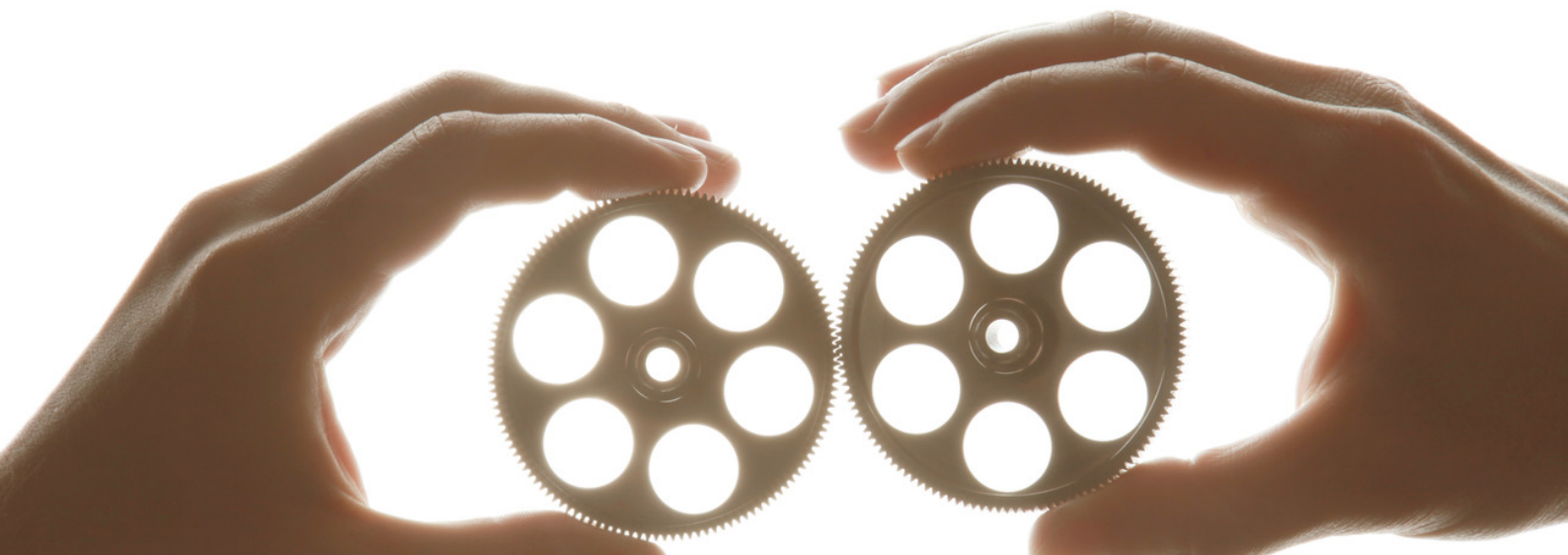
This is where the rubber hits the road. You know what you want to achieve (and in what order), what you can afford and how you're going to measure effectiveness. The next step is to identify the most appropriate potential solutions.

With the booming growth of legal technology, identifying the right solution for your needs can be an overwhelming and frustrating task. As you consider your options, ask yourself:

- ✓ Can this solution solve my identified pain points and help achieve my overarching goals?
- ✓ If it doesn't meet all of my needs, what am I willing to compromise on?
- ✓ Can I afford it?
- ✓ What implementation options do I have? E.g. Can I run a pilot or trial?
- ✓ Does the provider offer support? How long does it last? Does it come at an additional cost? Is it easy to access?

This is without a doubt the most burdensome part of the process. So if it helps, consider what legal teams in your industry (or similar) are doing. Talk to your colleagues and consider case studies – this will give you a clear idea about the problems other teams are trying to solve and which solutions have delivered results.

Once you've identified the most likely contenders, prioritise their offerings based on your pain point and spend continuum.



BUILD A BUSINESS CASE

When budgets are tight and resources stretched, getting the buy-in you need for technology investment can be difficult. This is where your roadmap comes in.

Using your roadmap as a reference guide, clearly articulate your goals, how technology investment will help you achieve them and the investment and change management process that will lead you to success.

Ask for help from your legal technology providers. Most providers will provide you with a tailored business case including return on investment, implementation plans along with benefits and case studies.

BUSINESS CASE OUTLINE

All organisations vary and some initiatives may only require a formal or informal business case for projects over a certain spend. Either way, these headings can be helpful to think through. Your technology provider should be able to provide you with most of this as well.

Problem definition	Describe the problem succinctly in terms of the challenges and the issues.
Solution	Briefly outline the recommended solution.
Benefits	Highlight the expected benefits and outcomes from this solution
System capabilities	Identify how this fits with any specific requirements or future strategic plans. Eg security requirements and additional products that fit with future roadmap initiatives.
Implementation	Identify how this system would be implemented including a timeline and any resource requirements.
Pricing	Outline the pricing plan and any anticipated changes over time.
Return on Investment	Analysis of likely financial and non-financial return on investment.
Case studies	Ideally provide examples of how similar organisations have benefited from a similar initiative.
Internal leadership	Within your team identify who can fill these important roles: <i>Project Sponsor:</i> this person holds a leadership role and is ultimately the one who makes the decision. <i>Project Champion:</i> this person is the 'go-to' team member who leads the implementation and ensure the project stays on track pre-, during and post-implementation

CONSIDER THE CHANGE MANAGEMENT PROCESS

Having a plan is one thing, knowing how to execute it is another. Therefore, your technology roadmap and business case must also include detailed information on how you plan to manage the implementation and adoption process.

You will have already considered some elements when putting together your technology roadmap – e.g. training and timelines – but you'll also need to think about:



Phased or all-in-one rollout

How do you plan to get the entire legal team and other internal users onboard? What will your timelines be? Will you require additional support to manage this?



Communication

How will you keep stakeholders and potential users informed about what's coming, how it's going to happen, when it's going to happen and how they need to prepare?



Monitor performance

Closely monitor the rollout and change process, adjust and learn as you go and iterate quickly.



Six practical steps and tools for building a roadmap

Download the Roadmap template at:
<https://www.lawcadia.com/legal-technology-roadmap-template>

Developing a technology roadmap can be a challenge for legal teams as this is not something that you routinely need to develop or have experience with. To assist you we have developed 6 easy steps along with a downloadable PowerPoint template to help get you on your way without having to start from scratch.

Step 1: Be clear on your goals

What are the short and medium term goals the legal team hopes to achieve?

What role could technology play in helping you be more efficient and effective?

Who are the key stakeholders to involve in this process?

Is there a timeframe? Eg have in place by next financial year

Step 2: Identify Pain Points

Use Post-it notes with one frustration or pain point per note and add to this space.

Can't keep track of budgets and spend

How do we prevent duplication in work / matters?



Step 3: Group Pain Points

Group the pain points together into common themes eg Spend Management, Business Processes, Internal Relationships etc

Step 4: For each “theme” explore possible solutions.

<p>Use this space to focus on one “theme” at a time and brainstorm possible solutions, as many as you can, tech and non-tech – be creative!</p> 	<p>Shortlist the top 3 solutions for further investigation.</p>
---	---

Step 5: Prioritise solutions to explore

Use your post-it notes to plot on these axes. It doesn't need to be scientific, just a basis for prioritising

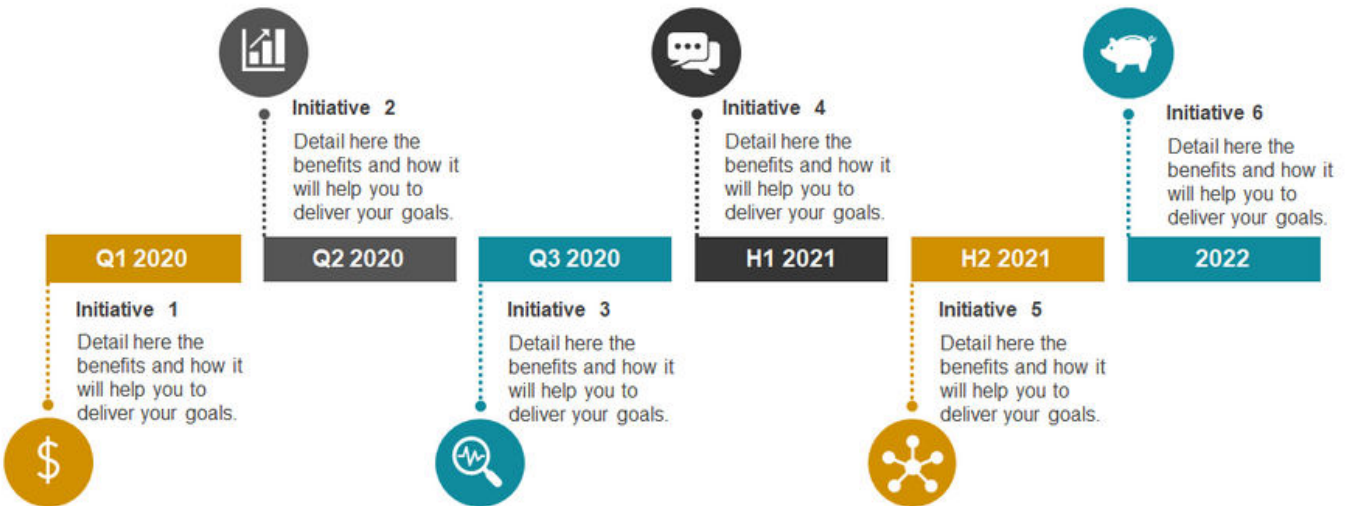


Step 6: Capture ideas and next steps

Theme	Tech / Non Tech	Idea / Solution	Next Steps	Who
Spend Management	Technology	Technology to get visibility and reports over scope, budget & spend	1. Market scan 2. Shortlist 3. Demonstrations	SK
Internal Relationships	Non Tech	Have Monthly pipeline meetings with Business Units to get oversight over pipeline	1. Speak with Business Units to discuss best options for involvement	WW

Legal Technology Roadmap Template

You can download this PowerPoint template for free from <https://www.lawcadia.com/legal-technology-roadmap-template>



ABOUT LAWCADIA

The Lawcadia Platform is a cloud-based matter intake, engagement and spend management Platform.

Its single interface allows you to manage everything from matter creation, to engagements, scope and budget, invoicing, reporting and post matter performance review.



9 +

Industry Sectors



5 +

Geographic Regions



140 +

Law Firms Registered



3,500 +

Law Firms Users



3,200 +

Client Users

ONE PLATFORM. MULTIPLE SOLUTIONS.

Lawcadia Connect

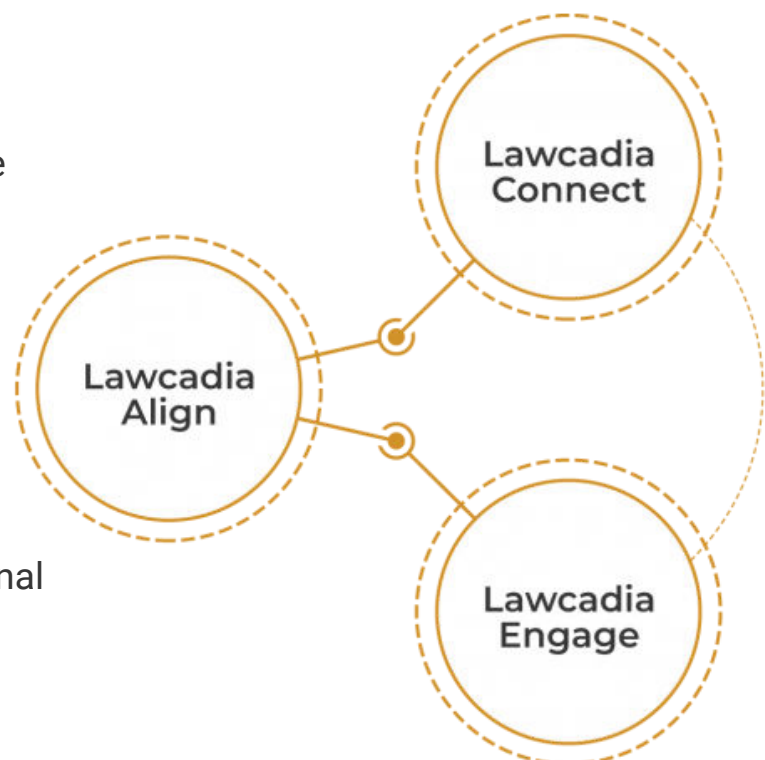
Connect your business to in-house and automate your intake process

Lawcadia Align

Create, manage and track your internal matters, tasks and documents

Lawcadia Engage

Manage and analyse all your external engagements, scope and spend



CONTACT US

T: +61 7 3188 4145

E: enquiries@lawcadia.com

W: www.lawcadia.com

