

Guiding Principles For Implementing New Legal Technology

By **Kate Orr** (July 27, 2022)

It's no secret that the hardest part of implementing legal technology is change — changing behaviors, changing systems, changing processes.

While there is no one-size-fits-all solution, there are some guiding principles that can make the change easier, and even welcome, for everyone.

Understand the who, why and how.

The most common reason that the adoption of legal tech fails is because an organization starts with the technology, hoping it will solve a problem, without considering the details.



Kate Orr

Just as you would not select a vehicle without knowing who will drive it, what it will be used for, the features needed and the expected return on your investment, you should not consider purchasing legal tech until you've done your diligence. This includes:

- Defining the need: What problem and business challenges are you trying to solve? What is the use case for the tech?
- Mapping the existing process: Are the right resources involved in the current workflow? Is the process efficient? Stated differently, do you really need a new tool to fix the problem?
- Understanding the use: Who will use the tool and in what part of the workflow? What are the requirements for the tool? Do you have existing technology that can provide this functionality?
- Making the business case: What are the costs, monetary and otherwise, of implementing the tech? What is the expected return on investment? How will you define and measure success — time savings, cost savings, ease of use, improved quality, etc.?

Answering these questions takes time and an organized effort but pays dividends. Not only does it help ensure that you ultimately select the right tool, it might reveal that you don't need to invest in a new tool in the first place.

Assemble a team and be clear on responsibilities.

Once you've concluded that you need a new tool, be sure that you have the resources in

place to support and guide the project. Some roles may overlap or be more involved than others, but each serves a critical function in the success of the project.

At a minimum, your team should include:

- A project manager to keep the trains running on time, share information and loop in needed resources;
- The executive sponsor or stakeholders to help drive change, maintain momentum and communicate about the new tool;
- Business users to identify needed features, vet potential solutions, pilot tools and ultimately serve as evangelists for the tool;
- Technology or an information technology team to ensure system security, consult on functionality, troubleshoot and collaborate with vendors on technical issues and integrate the tool into your existing stack; and
- The service delivery team that will be responsible for onboarding, implementation, training and maintenance of the tool.

By including all relevant parties at the start and understanding who is doing what, you can avoid wasted time, false starts and duplicate efforts in the long term.

As the saying goes, "teamwork makes the dream work."

Avoid death by demo.

With a multibillion-dollar legal tech market, identifying the right tool can be quickly overwhelming. Just as you do not have time to test drive every car on the lot, you should not spend countless hours demoing every tool in the space.

Building on your use case from the start, interview business users to identify the features needed in the tool, being sure to specify any absolute requirements. Consider using the MoSCoW method to do so — what must, should, could and won't the tool do?

With your requirements in hand, leverage existing resources to conduct market research to narrow the field. Take advantage of legal tech databases to search and sort tools by categories and functions.

Mine your contacts and professional networks to understand how others have solved similar challenges or are using specific tools. And investigate legal tech app stores, like Reynen

Court, Thomson Reuters Marketplace and Theorem, as a means of streamlining your search and process.

Then — and only then — conduct a comparison of the top contenders, including in-depth demos with business users and stakeholders, speaking with existing customers, and robust cost analysis. Be diligent about researching tools that claim to do everything.

When you've identified your top choice, take advantage of sandboxes and pilots to kick the proverbial tires and work out all the kinks before formal onboarding.

Make it easy for the user.

Once you've onboarded the new tool, do not assume that if you build it, they will come.

Lawyers are busy and learning how to use another tool is not at the top — or even in the middle — of their list. You will have the most success by making it as easy as possible for people to use the new tool. What does that look like?

In every communication about the tool, start with plain language about how it will make the users' lives easier.

Consider which is more compelling: "The firm has purchased a new tool that is an add-in to our email management system that allows individuals to x, y and z," or "Are you buried in email? We have a new tool to help." You must grab their attention and tell them everything they need to know in a few lines.

Avoid long training sessions unless absolutely necessary.

Create targeted, on-demand learning on specific topics functions — like how to get started, how to perform basic functions and use-case vignettes — and position the early adopters of the tool to serve as evangelists. It is far more powerful to hear a colleague explain how she used a tool and the impact it had in a matter than learning about the features of a tool from a talking head.

Look for ways to insert the tool into natural workflows so that people don't need to remember to use it. This will vary depending on the nature of the tool but can include adding reference to the tool in standard communications, including a link to the tool in collaborative workspaces, and automating email links to the tool at certain trigger points.

Determine whether lawyers actually need to use the tool or if it is the output that matters to them. It may seem easier to roll out a new tool to an entire law firm or organization, but that approach can weaken the impact of the technology.

Instead, be thoughtful about identifying the best resource to use the tool in the life of a matter and train that resource to use it in every instance. Just as a surgeon doesn't draw blood at the hospital, it is not always the case that lawyers need their fingers on keyboards interacting with a tool.

Do not fix it and forget it.

Too often, legal technology is purchased, rolled out and then forgotten about, which can result in low usage and poor user perception. To guard against this, after you have onboarded a new tool, be thoughtful about its performance and impact.

Take the time to establish a process for capturing the user experience and feedback, along with data and analytics on usage of the tool by individual and project.

Now that the tool is live, are there areas that can be improved? Who are super-users that could share their experiences with colleagues? What users or groups are underutilizing the tool and may need additional training? Where else might your firm or organization be able to leverage the tool?

Groupwide shoutouts to top users, sharing usage stats in newsletters or reports, and storytelling on use cases are each powerful in changing behavior.

Also, do not discount the value of picking up the phone to understand why someone is or is not using the tool on a regular basis. It takes time to do so but, just as you change the oil in your new car, it protects and sustains your investment in the long run.

Kate Orr is global head of practice innovation at Orrick Herrington & Sutcliffe LLP.

The opinions expressed are those of the author(s) and do not necessarily reflect the views of the firm, its clients, or Portfolio Media Inc., or any of its or their respective affiliates. This article is for general information purposes and is not intended to be and should not be taken as legal advice.