



Legal Operations Consulting Change Management Tools

The Art of Change Management and Driving User Adoption

Supplementary materials to the Virtual Roundtable, 9th July 2019

Consilio - Change Management Tools

Stakeholder Assessment

Creating a stakeholder assessment assists tailored communications to various impacted groups.

Legend

- ◆ - Target Awareness Level
- - Current Awareness Level

Unaware	Awareness	Understanding	Commitment	Advocacy
Stakeholders are not aware the project is occurring	Stakeholders are aware the project is underway	Stakeholders have a sound understanding of project purpose and progress	Stakeholders support the project, believe it is worthwhile, and would act if prompted	Stakeholders proactively communicate, take action required in support of project

Stakeholder Assessment

Stakeholder Group	Unaware	Awareness	Understanding	Commitment	Advocacy
<Client> 2019 Executive Team					
CEO, <insert name>		○		◆	
Lines of Business Leads - <insert LoBs>		○		◆	
Geographies Leads - <insert Geo Leads>		○		◆	
Global Enabling Function Leads - CIO, CFO, CMO, etc.		○		◆	
Legal Department Leadership					
Chief Corporate Finance & Strategic Development Officer, <insert name>					○◆
Group General Counsel, <insert name>					○◆
Group Compliance, Global <insert name>					○◆
General Counsel North America, <insert name>		○			◆
General Counsel Latin America, <insert name>		○			◆
General Counsel EMEA, <insert name>		○			◆
General Asia, <insert name>		○			◆
Contracts Group Leadership, <insert name>		○			◆
Department Personnel - Business Units					
List all departments here		○		◆	
Department 2		○		◆	
Department 3		○		◆	
Enabling Function Department Liaisons					
Technology (CIO, CTO)		○			
Human Resources				○◆	
Finance / Accounting				○◆	
Marketing and Promotions	○				
Corporate Affairs	○				
<Client> Project Team					
Executive Sponsor, <insert name>					○◆
Client Project Lead, <insert name>					○◆
Finance and Accounting Liaison, <insert name>					○◆
Human Resources Liaison, <insert name>					○◆
Legal IT Steering Committee Chair, <insert name>					○◆
Change Management Lead, <insert name>					○◆

Tips for Change Management

A. Setting the Stage

- Establish a sense of urgency
- Form a powerful guiding coalition

B. Deciding What to Do

- Develop the change vision and strategy

C. Making it Happen

- Communicate the vision for understanding and buy-in
- Empower others to act on the vision
- Plan for and create short-term wins
- Consolidate improvements and keep the momentum

D. Making it Stick

- Institutionalise the new approach

A. *Setting the Stage*

Establish a sense of urgency

Tip 1: Clearly define why change is needed

Tip 2: Describe what might happen if the change is not made

Tip 3: Establish clear success metrics incorporated into individual's performance goals

Form a powerful guiding coalition

Tip 4: Establish a project steering committee

Tip 5: Identify an internal project leader

Tip 6: Supplement with an empowered core team

Tip 7: Raise awareness of project team members

B. Deciding What to Do

Develop the change vision and strategy

Tip 8: Make it Clear, Desirable and Feasible

Tip 9: Evaluate your organisation's culture

Tip 10: Use a targeted approach, not a one-size fits all approach

Tip 11: Use a theme and visual symbols

Tip 12: Acknowledge that most people see change as threatening

Tip 13: Know there will be some pain

C. Making it Happen

Communicate the vision for understanding and buy-in

- Tip 14: Communicate early and often
- Tip 15: Use multiple communication, methods
- Tip 16: Consider the source
- Tip 17: Change is a process, not an event

Empower others to act on the vision

- Tip 18: Ensure internal ownership and responsibility
- Tip 19: Management needs to “Walk the Talk”
- Tip 20: Provide a feedback mechanism and freedom to challenge the status quo
- Tip 21: Use technology to prevent surprises

Plan for and create short-term wins

- Tip 22: Plan checkpoints to evaluate progress
- Tip 23: Make the celebrations public
- Tip 24: Reward those who have contributed to improvements

Consolidate improvements and keep the momentum

- Tip 25: Recognise initial success, and then look for additional promising opportunities
- Tip 26: Don't declare victory too soon
- Tip 27: Understand the “Neutral Zone”

D. Making it Stick

Institutionalise the new approach

Tip 28: Build commitment, not just compliance

Tip 29: Discuss lessons learned and incorporate them into on-going change processes

Tip 30: Perform periodic check-ups and drive towards continuous improvement

Legal Operations Consulting

Overview

Serving as trusted advisor to hundreds of General Counsel our team help our clients accelerate the operational performance of the legal team. Consilio has completed over hundreds of engagements for corporate legal departments, including over:

- ◀ **155** Matter Management, eBilling System, and IP Management Implementations
- ◀ **100** Law Department Operations Reviews
- ◀ **75** Discovery Process Reviews
- ◀ **40** Legal Hold System Implementations
- ◀ **30** Information Governance Process Reviews
- ◀ **25** Contract Management Process Reviews

Why our clients choose us:

Expertise - Legal Technology expertise and agnostic vendor selection

Industry Awareness - Thought leaders to deliver best practice

Corporate Legal - An understanding of corporate IT environments' challenges

Flexibility - A scalable, flexible and diverse team to take work off the side of your desk

Managing Change - It's not just the technology, people are key to change

- ✓ Organisational Strategy, Structure and Design
- ✓ Internal Resource Optimisation
- ✓ Outside Counsel & Vendor Management/Panel Reviews
- ✓ Process & Technology Review and Implementation
- ✓ Legal Service Delivery & Client Satisfaction
- ✓ Training, Communications & Change Management
- ✓ Guided Metrics, Data Analytics & Benchmarking
- ✓ Managed Services & Staffing
- ✓ Information Governance
- ✓ Records & Information Management
- ✓ Discovery Management

Find out more: <https://uk.consilio.com/services/law-department-management/>

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