



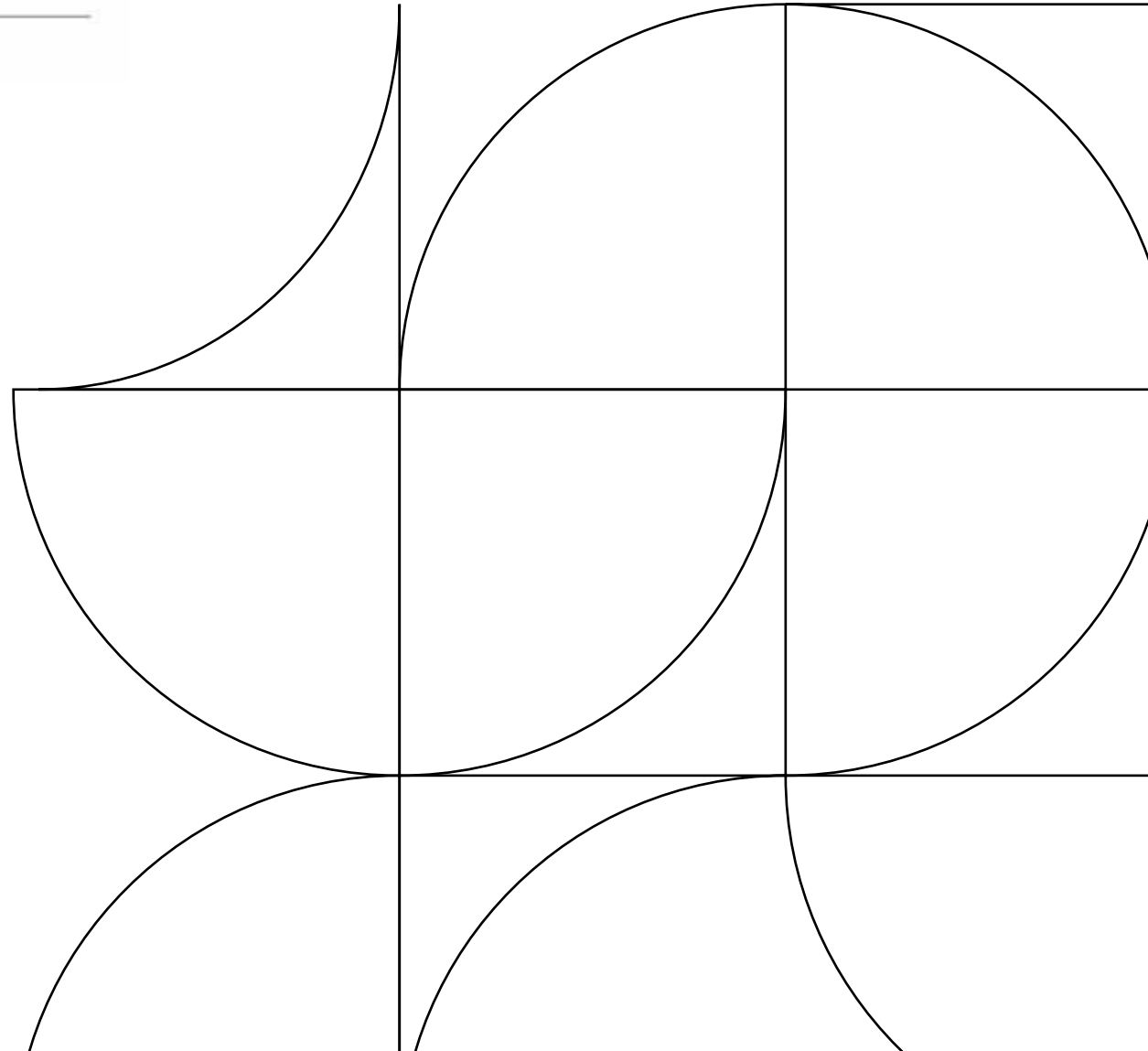
Evolve & Elevate: Transforming Your Legal Ops Approach

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Tara Brewer
Tanya Hampton

May 2, 2024

Seyfarth Shaw LLP

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Speakers



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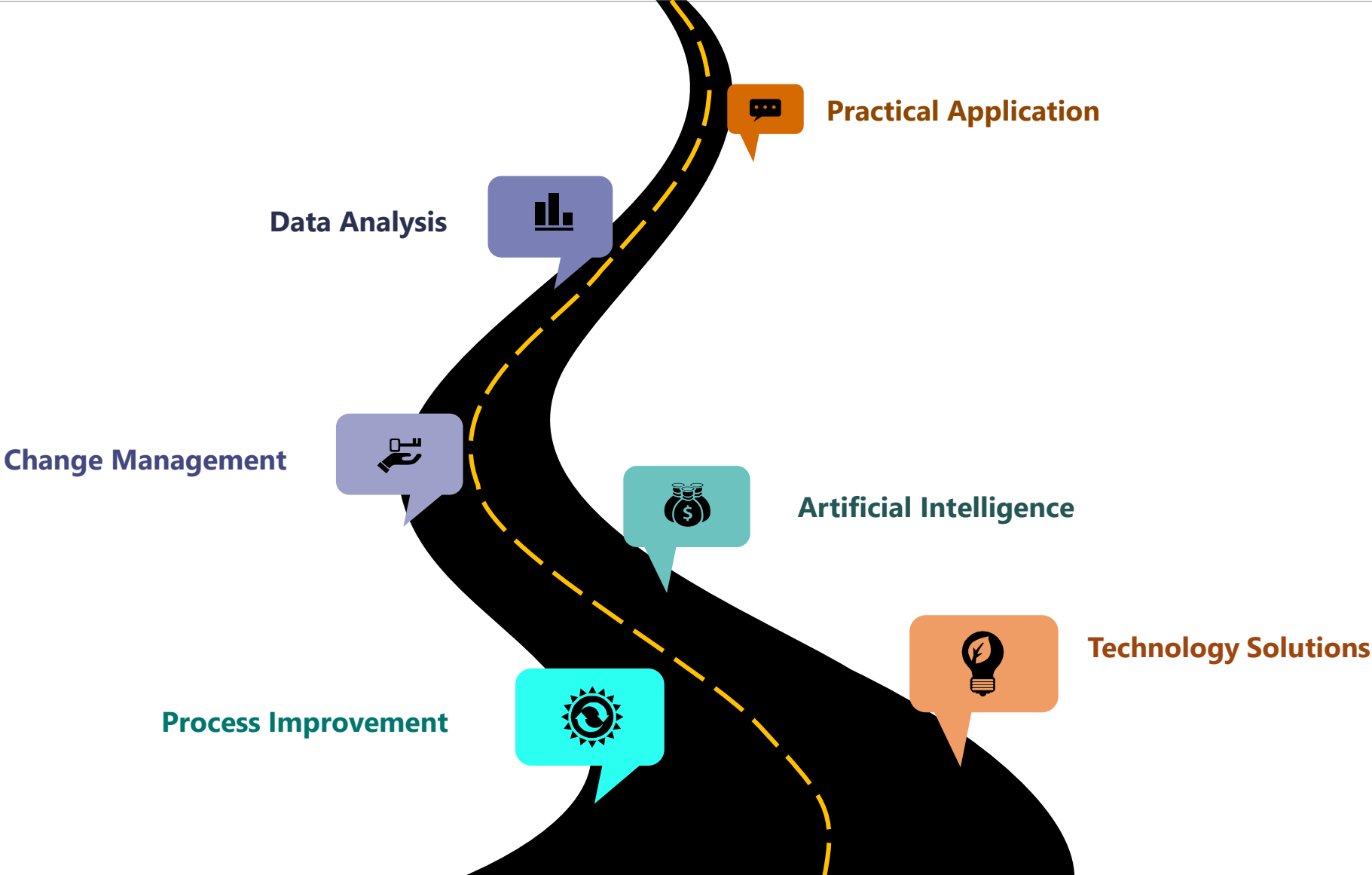


Tara Brewer
Head of Legal Project
Management
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The Roadmap



Interactive Poll

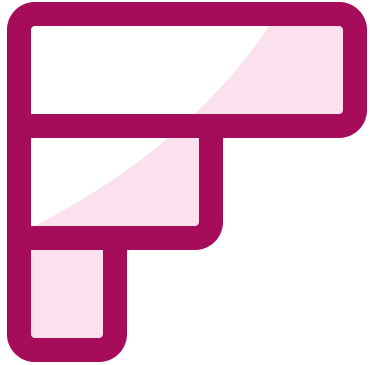
Have your smart phones handy

Go to [Slido.com](https://www.slido.com)

Enter the pass code 2401478

Then answer the prompt on your phone

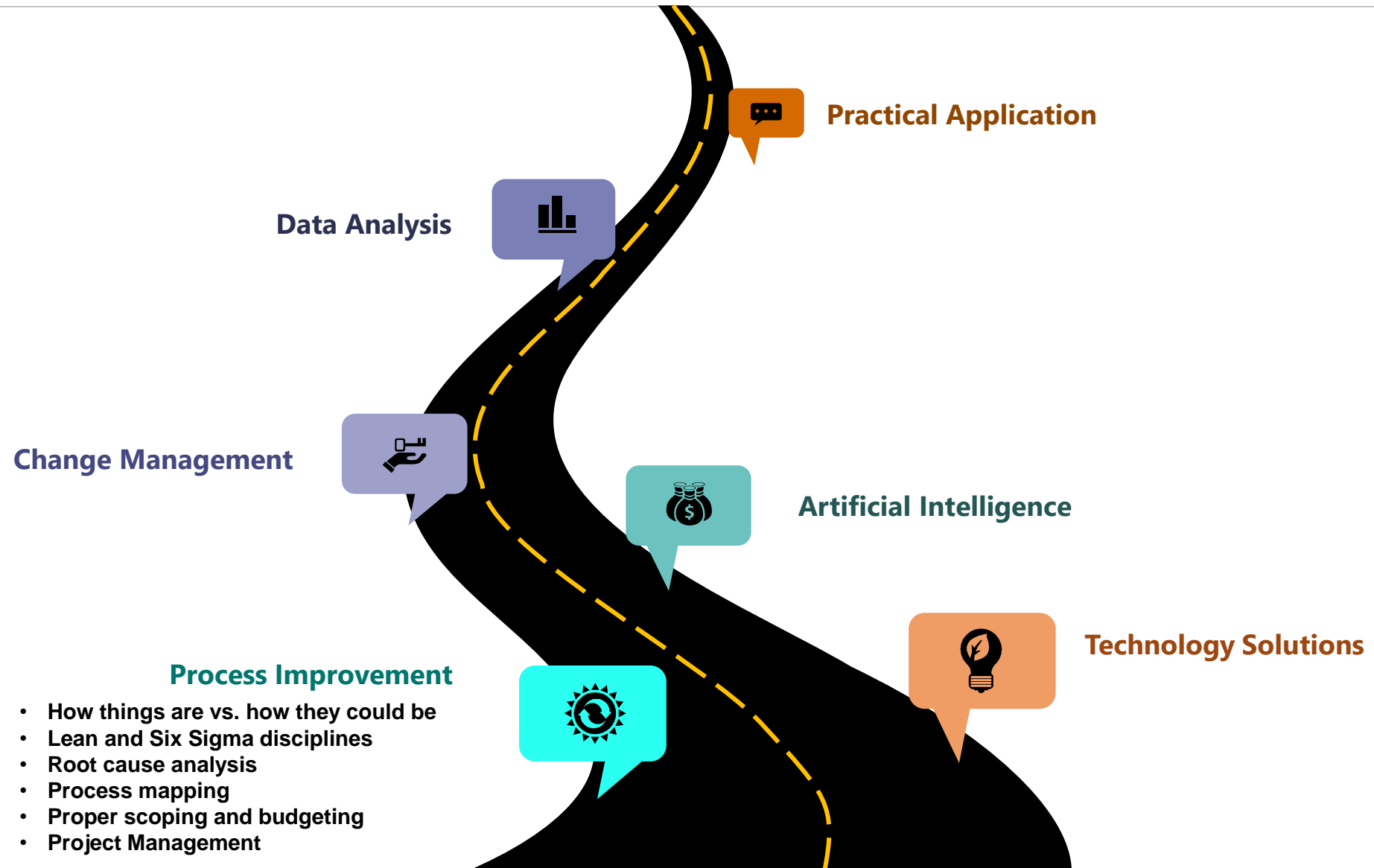
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Why do people resist change?

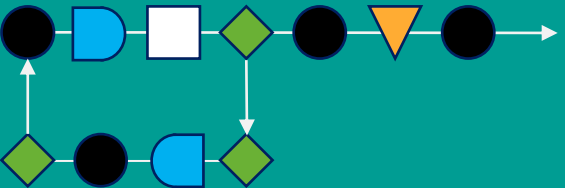
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Process Improvement

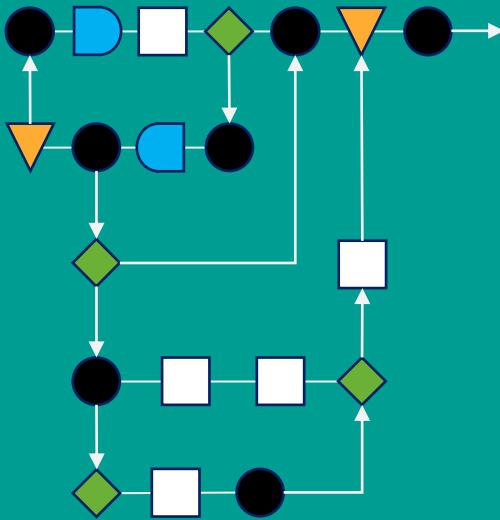


Process Maps – 3 versions

As we think it is



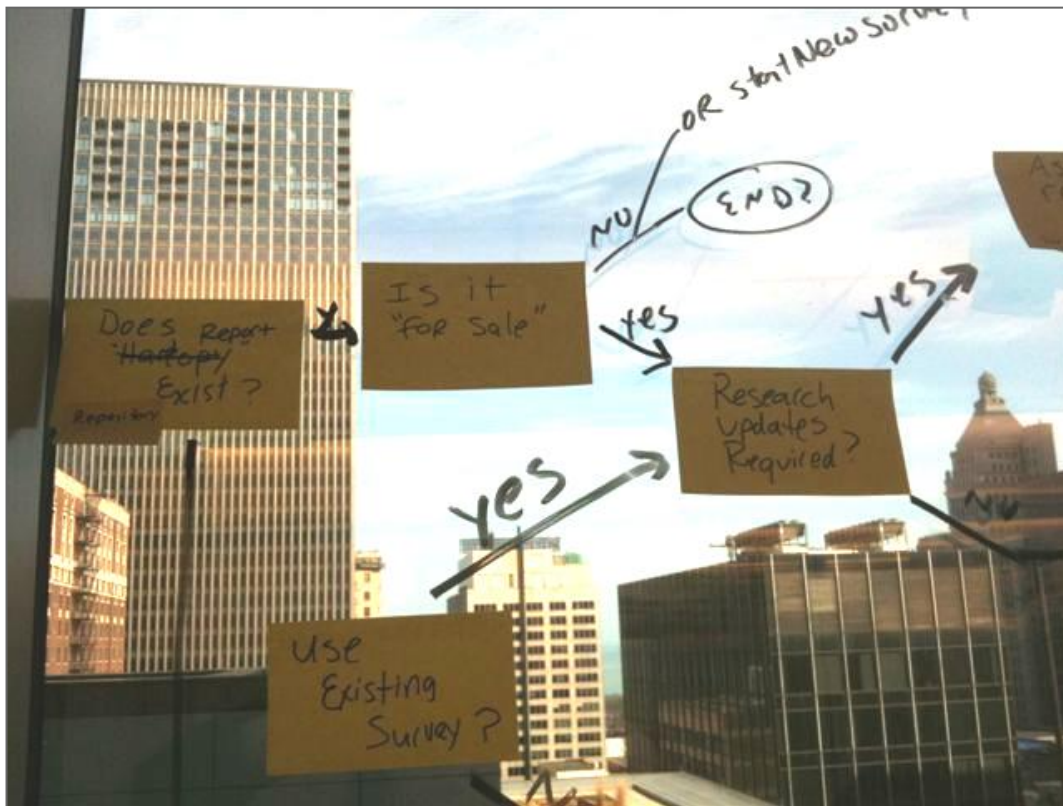
As it is



As it should be



Easy To Get Started



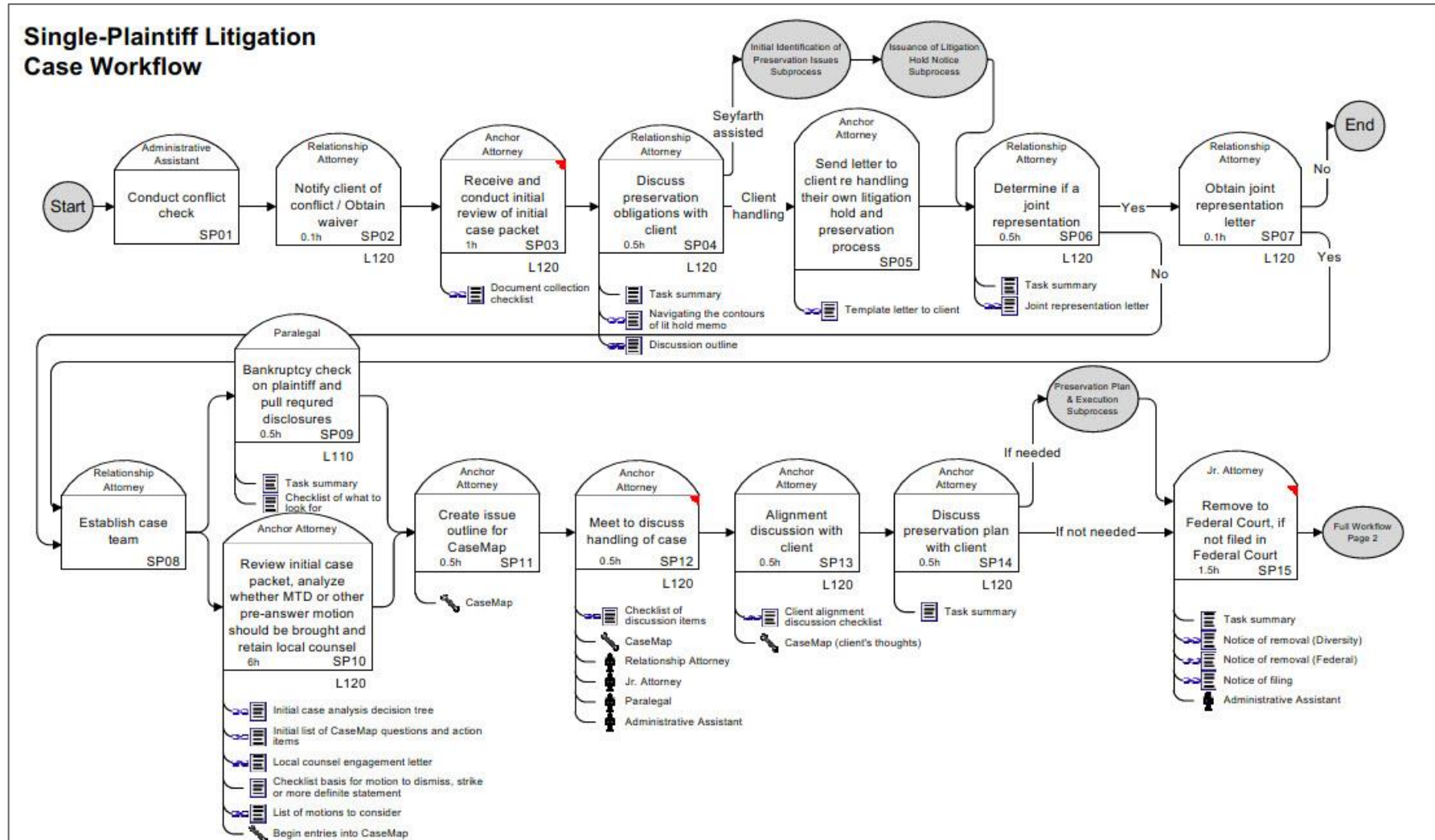


*A picture is worth a
1000 words!!*

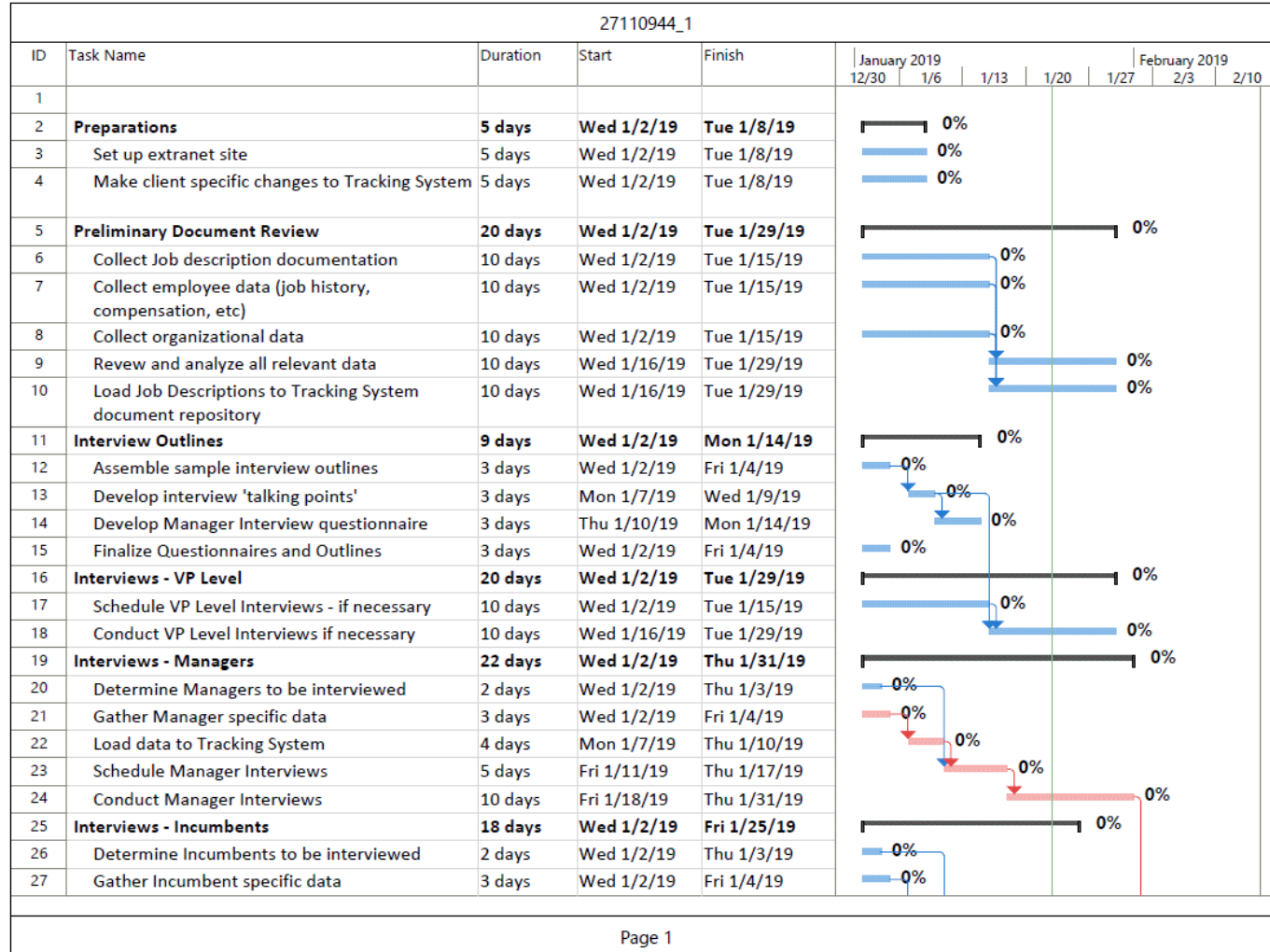
What a Process Map Shows Us

- A process map is used to clarify and create a common understanding of the process
- A process map makes it much easier to identify process 'waste':
 - Roles & responsibilities
 - Bottlenecks
 - Unnecessary steps
 - Missing steps
 - Redundant steps
 - Rework
- Provides an effective communication / training tool

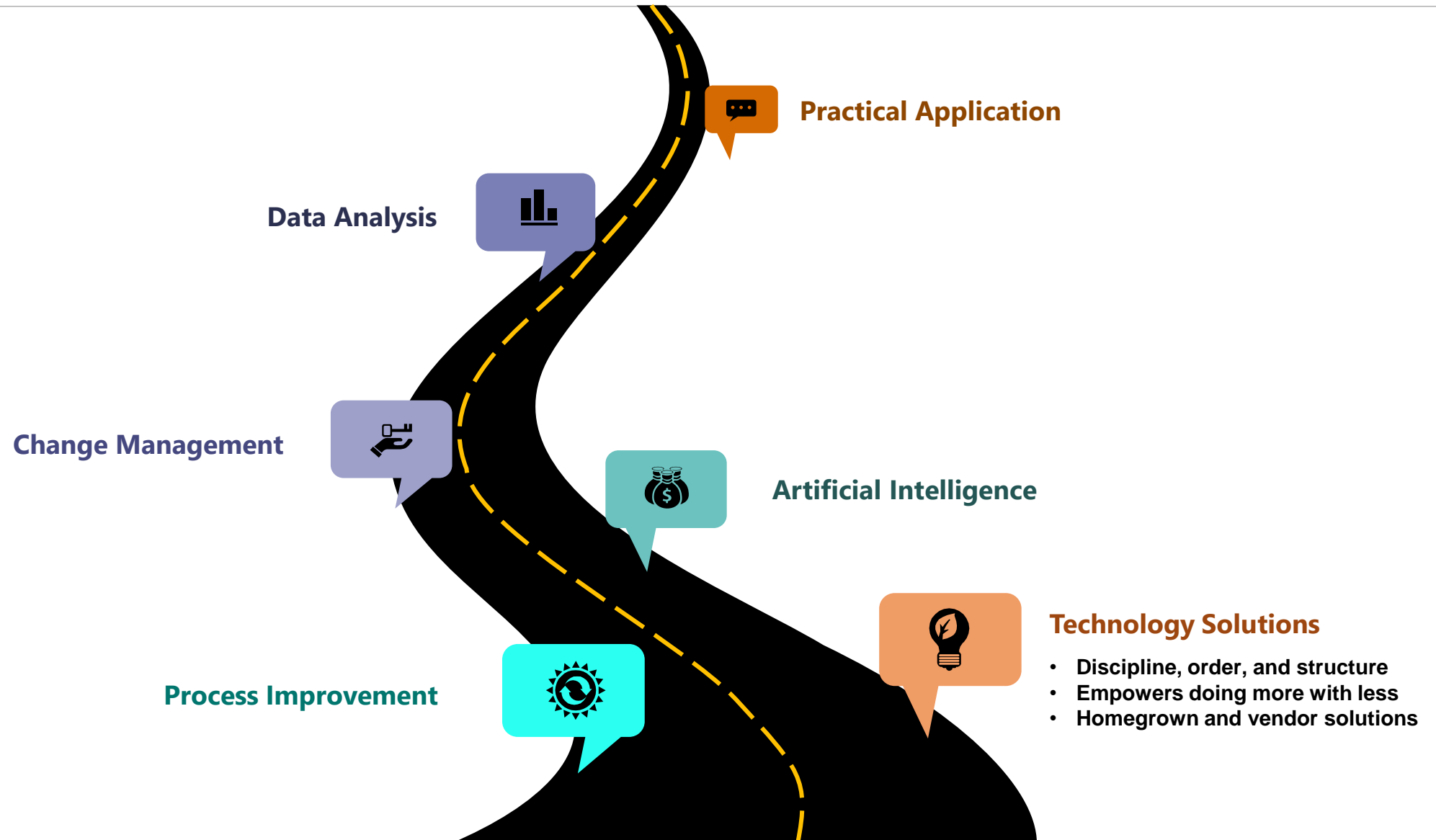
Process Design

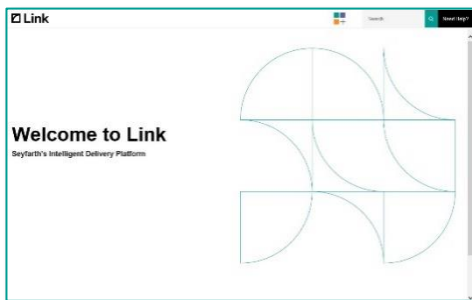


Project Management

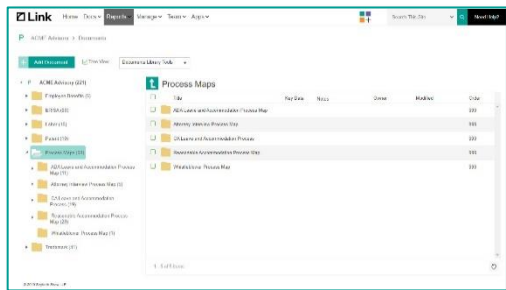


Technology Solutions





Real-Time Collaboration

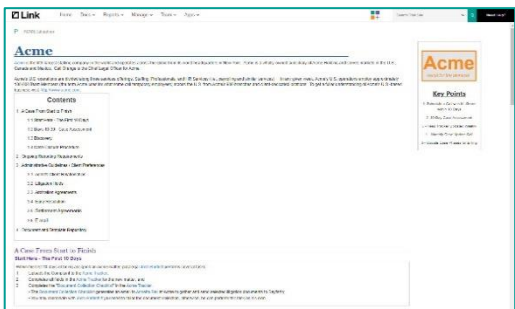


Information Accessibility

Financial Transparency



Technology to underpin legal service delivery



Client Centricity

Analytic Insight



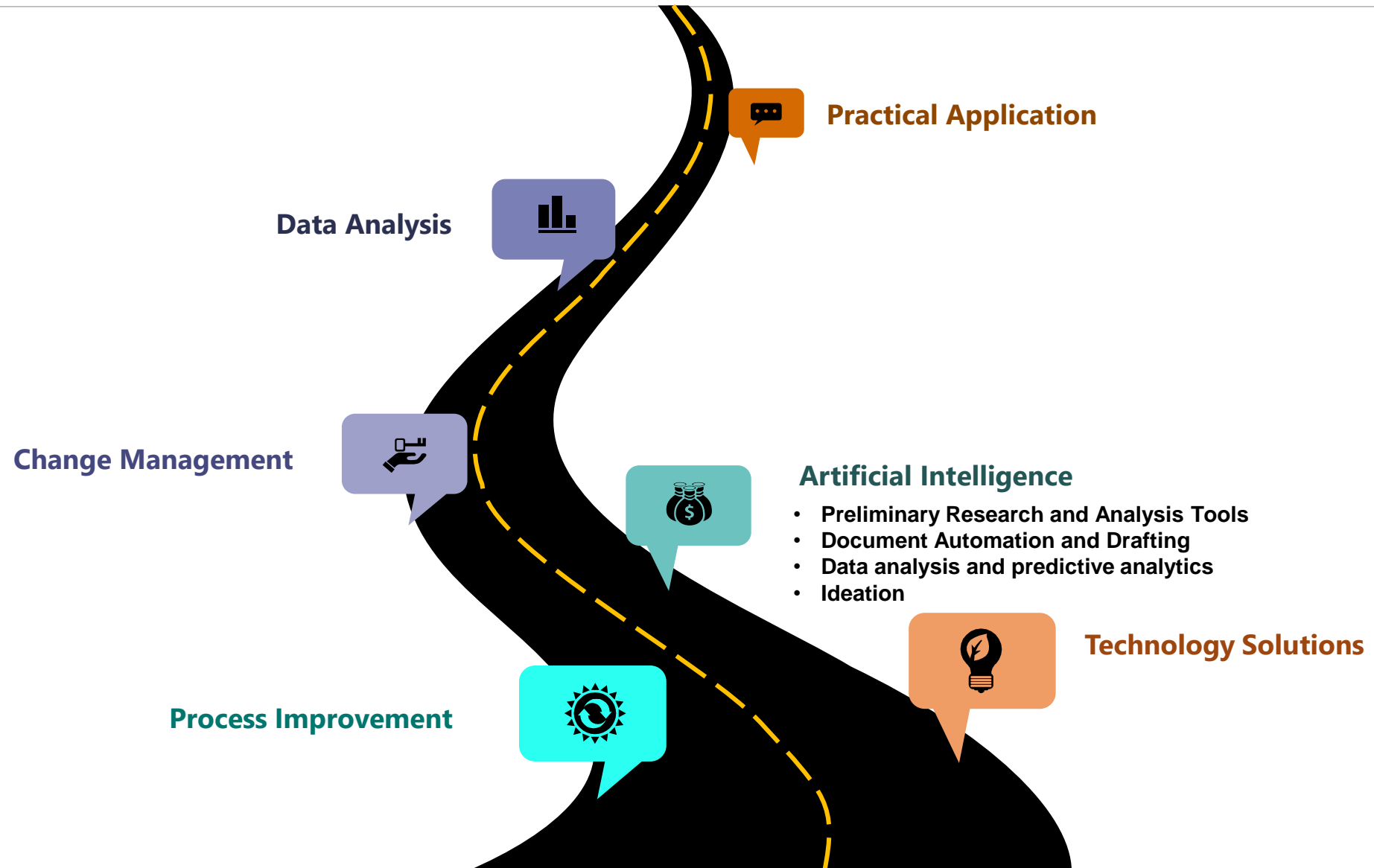
Portfolio Management



Other Possible Resources

- Microsoft Products: Excel, in particular, has a lot of power that is overlooked for organization and tracking purposes
- Smartsheet
- Fillable PDFs/templates
- SurveyMonkey
- Knowledge management resources (Practical Law Company, etc.)

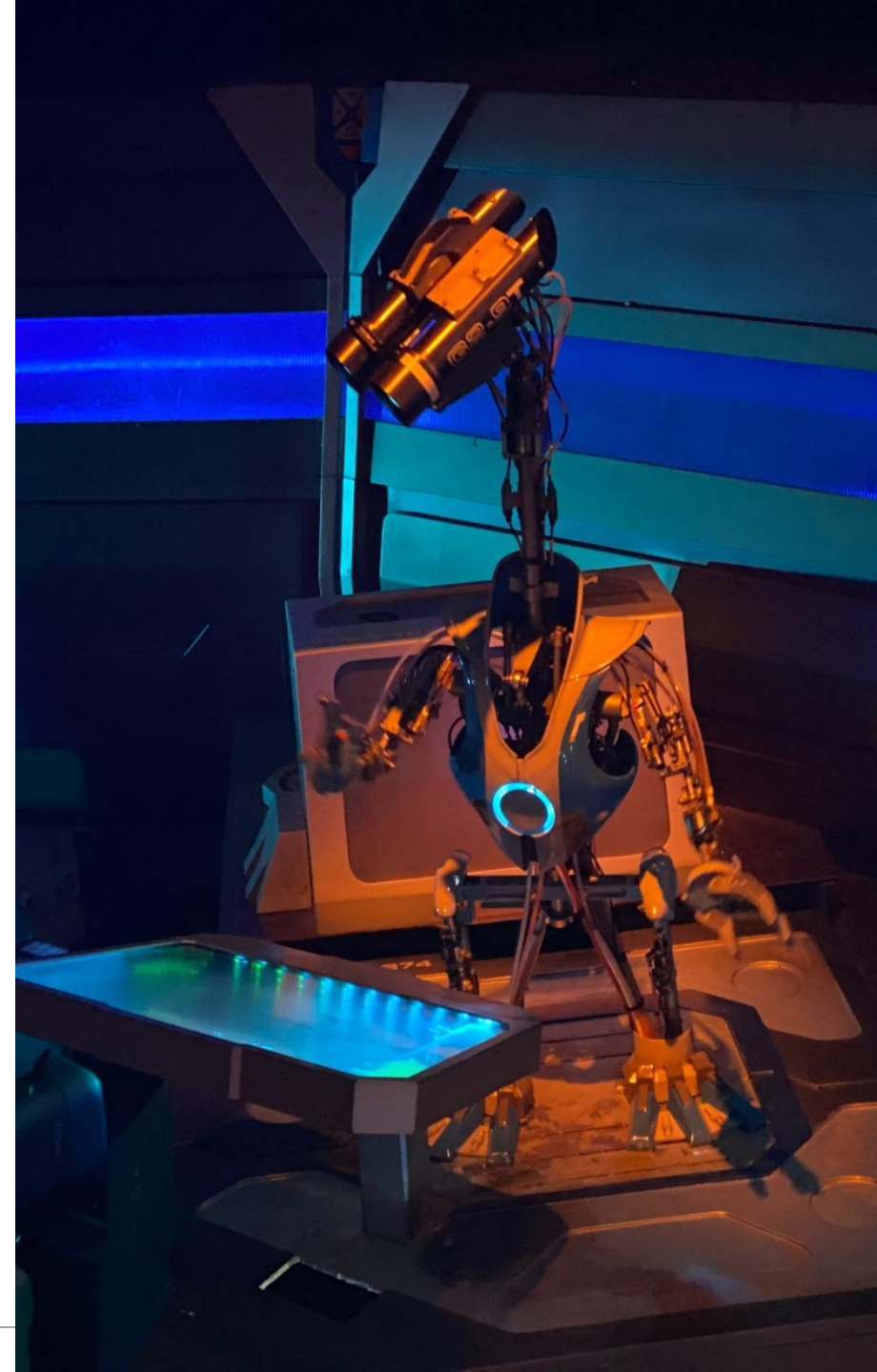
Artificial Intelligence



What is ARTIFICIAL INTELLIGENCE?

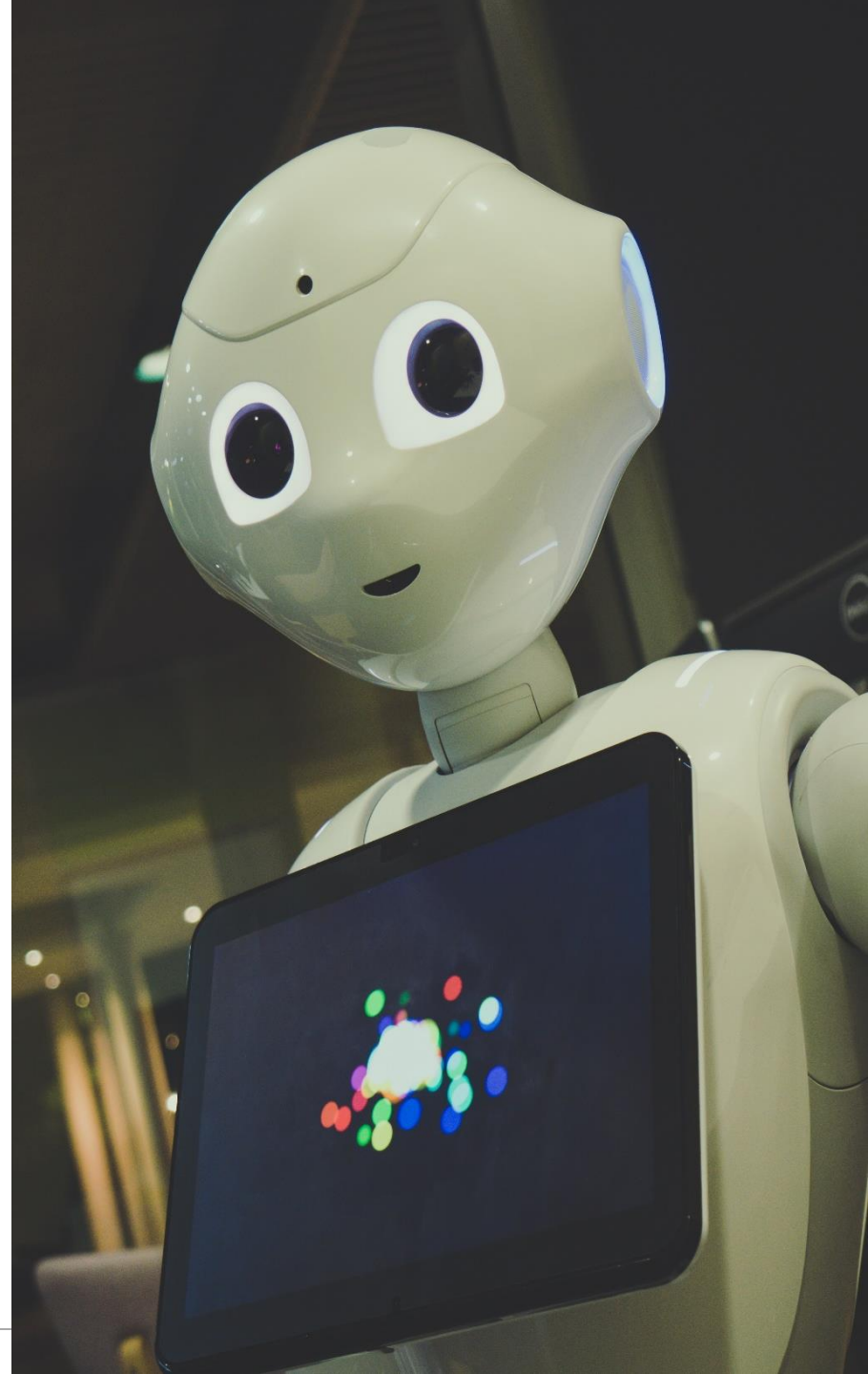
Artificial intelligence: noun

- The capability of computer systems or algorithms to imitate intelligent human behavior
- See also **GENERATIVE ARTIFICIAL INTELLIGENCE**: artificial intelligence that is capable of generating new content (such as images or text) in response to a submitted prompt (such as a query) by learning from a large reference database of examples
- [Merriam-Webster](#)



Artificial Intelligence

- Law Department Use Cases
 - Contract Review
 - Drafting Routine Documents
 - Legal Research
 - E-Discovery
- Considerations for Implementation
 - New Skill Set
 - Training
 - Change Management
 - Vendor Selection



What We're Seeing

- Implementation of “sandboxed” company or firm specific AI tools, including chat and document review
- Analyze & summarize existing documents, policies, etc.
- Legal research – referencing law databases
- Copilot





AI's Potential Pitfalls

- **Accuracy**
 - Errors are possible
 - Always needs to be checked
- **Bias**
 - Systems built by humans
 - Human bias in programming & training
 - Can be reflected in results
- **Learning Curve**
 - What you get out is what you put in
 - Important to learn how to prompt
 - Specificity is key
- **Data Privacy**
 - Be careful sharing anything confidential
 - May be implemented into system's knowledge base for future reference

Change Management

- Change Management**
- Preliminary Research and Analysis Tools
 - Document Automation and Drafting
 - Data analysis and predictive analytics
 - Ideation

Process Improvement

Data Analysis

Practical Application

Artificial Intelligence

Technology Solutions

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Change is...

ⓘ Start presenting to display the poll results on this slide.

Examples of Change



[Blockbuster Video, Addison Illinois, April 2009](#)
Joe+Jeanette Archie
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Change fails because those responsible for the change did NOT understand the impact on those involved in the change.





Changes often fail

- Few people consider the impact on PEOPLE
- Often FORCED upon people
- ENDINGS are not often acknowledged fully
- New beginnings are not CELEBRATED

CHANGE ITSELF MUST BE TREATED LIKE A PROCESS

Our brains are hardwired to resist change
BUT you can re-train it



What is change management?

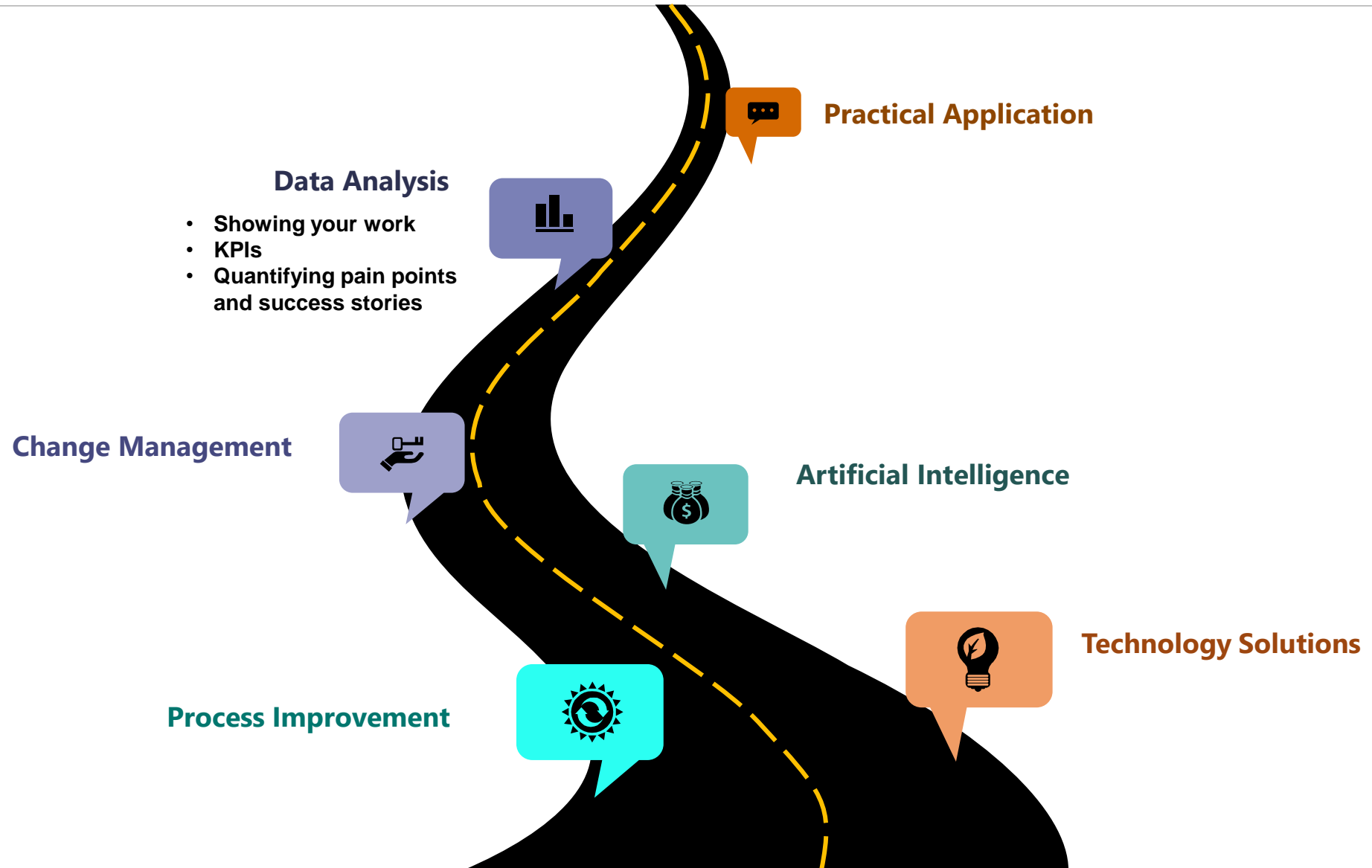
- Utilization of process, tools, and techniques to achieve change
- Goal is to sustain a desired business outcome
- It's not new – there are many methodologies seeking the same outcome

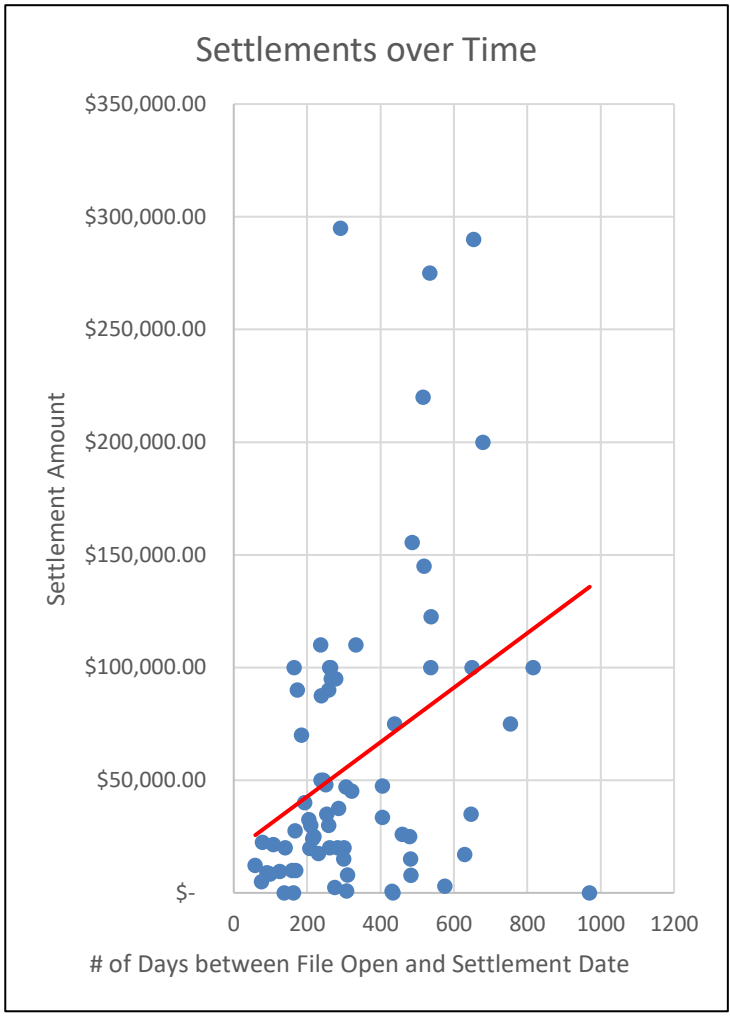
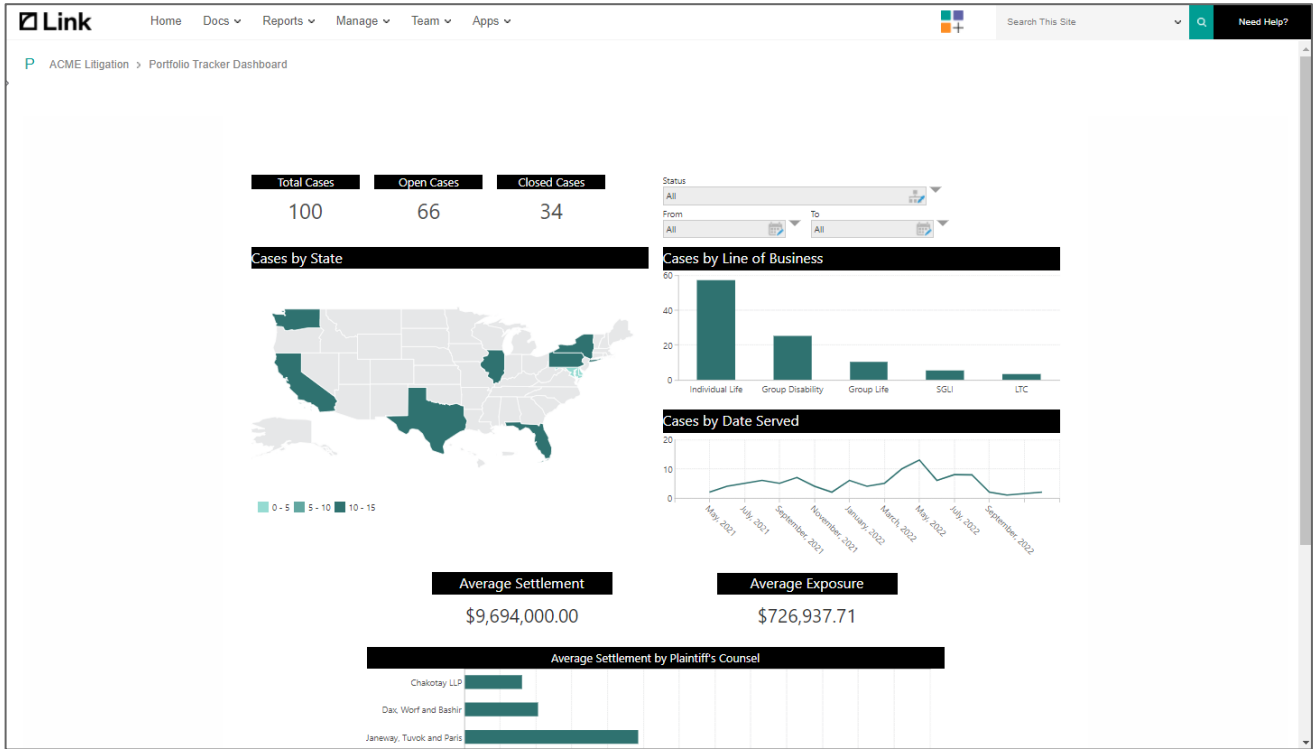


Change Management Models

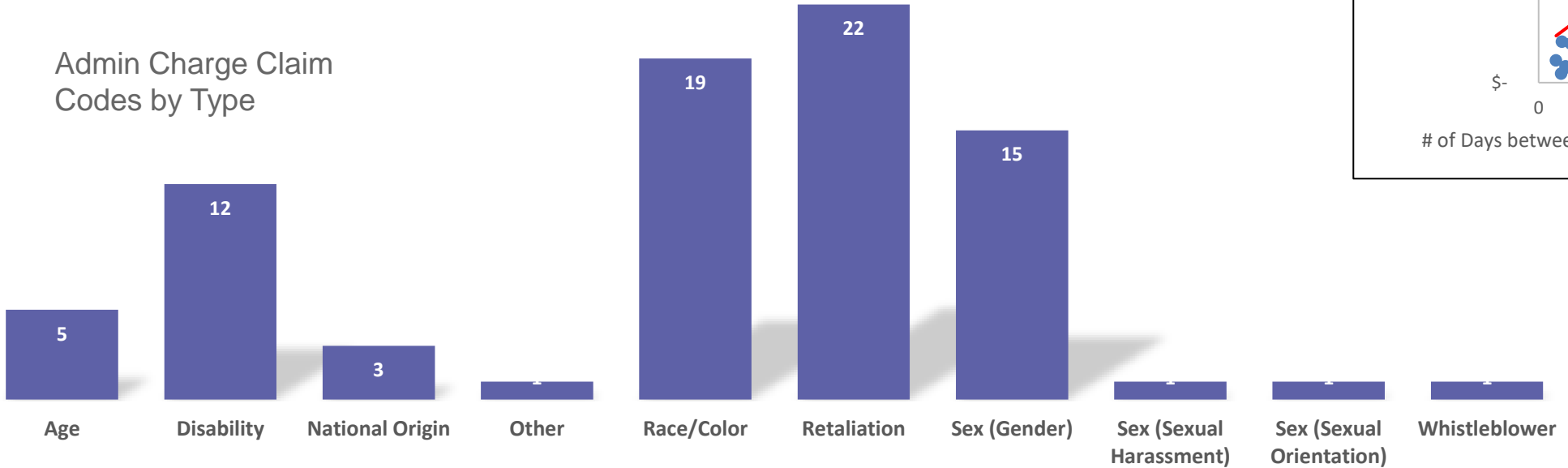
- John Kotter's Eight Stage Model for Leading Change
- William Bridges Managing Transition
- ADKAR (Prosci)
- Satir Model
- Lewins Model
- DMAIC

Data Analysis





Admin Charge Claim Codes by Type





SCAN ME

CLE: NEW PROCESS

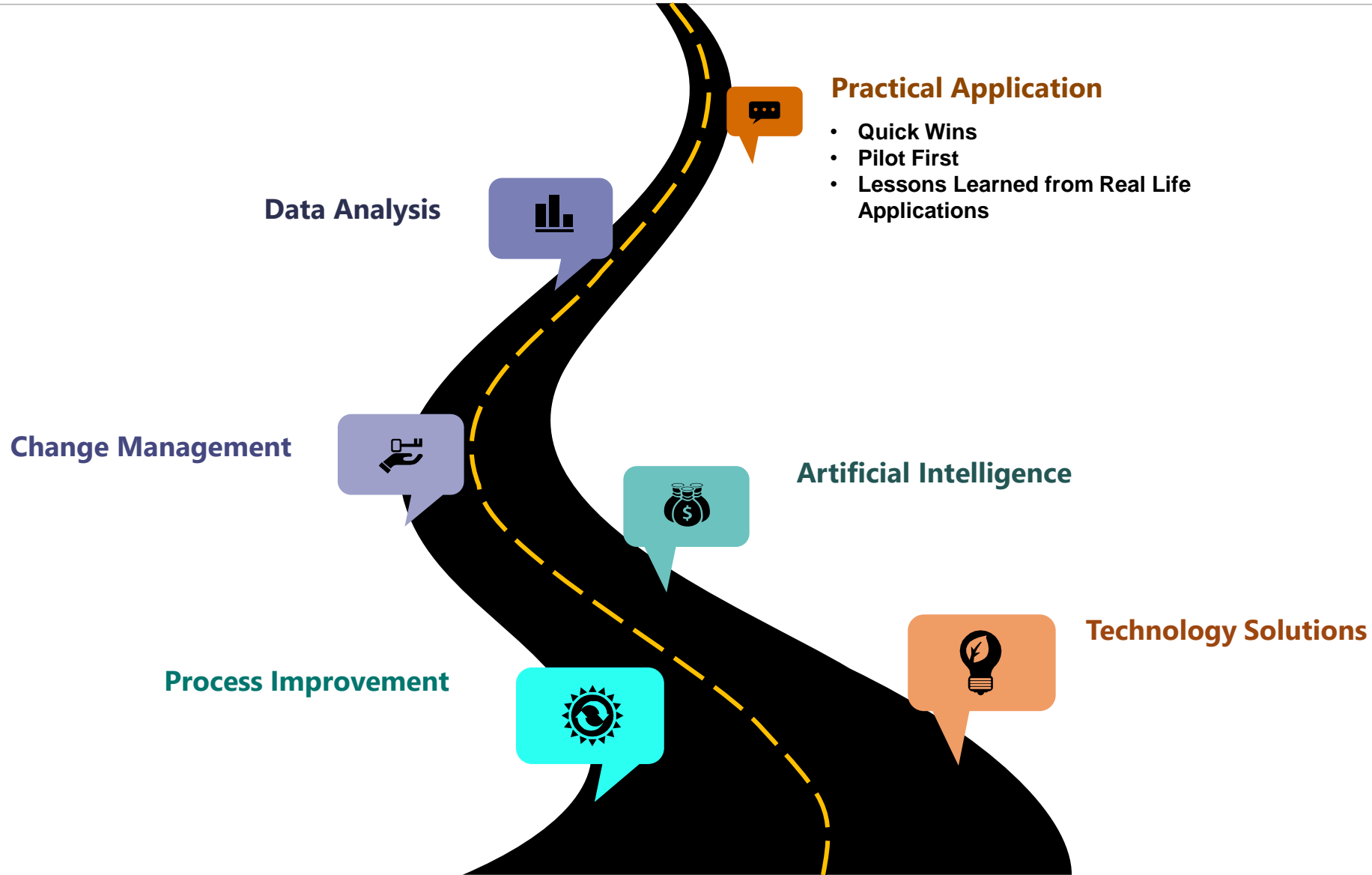
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Practical Application





Quick Wins

- Micro changes to reinforce small changes/wins
- See immediate changes
- Small changes over time have compounding effect and can drive larger change

Pilot First

- Select solutions to prevent and eliminate sources of the problem.
- Test the solution(s) by piloting, auditing and validating process changes.
- Implement solutions that have been piloted and proven successful
- Train personnel on revised process



Lessons Learned – The Good and the Challenges

- Large-Scale Contract Workflow Process
 - narrowing focus, deploying discrete modules with business buy in and use tools picked up along the way, like fillable PDFs/templates
- General Legal Email Inbox
 - lessons learned about establishing protocols in advance – SLAs and triage
 - the importance of change management
- Third Party Matter Management System
 - solutions have to be implemented while the plane is flying
- DocuSign
 - roll out solutions that make the business' lives easier

Key Themes

- Find ways to partner with the Business on these initiatives – conduct periodic listening sessions or satisfaction surveys
- Recognize a balance between day-to-day of legal practice and operational initiatives
- Importance of KPIs and look to all kinds of sources
- Change management starts from the top
- Look to outside providers for other examples of success stories - CLEs
- You are not alone in your challenges – look to the ACC!



Key Takeaways

- You are uniquely positioned to positively effect change management
- There are many opportunities and touch points to use the tools
- Lasting process improvement requires effective change management
- Change management is collaborative

thank
you

