



### Evolve & Elevate: Transforming Your Legal Ops Approach

Eric Greenberg

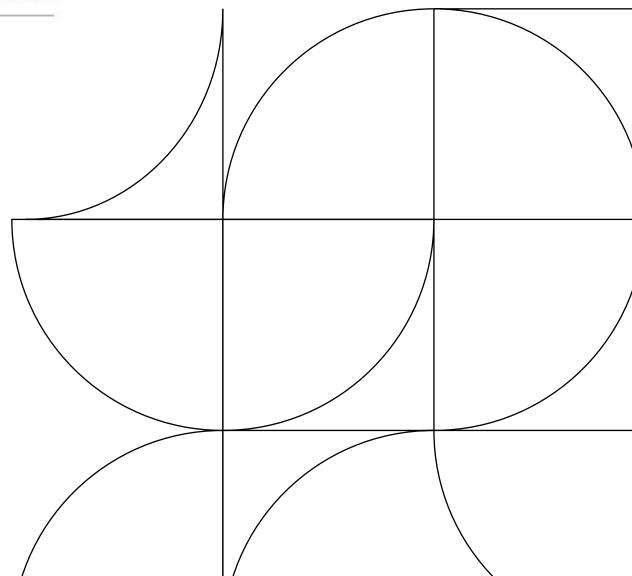
Tara Brewer

Tanya Hampton

May 2, 2024

Seyfarth Shaw LLP

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#### **Speakers**



**Eric Greenberg** Partner, Real Estate Seyfarth Shaw LLP

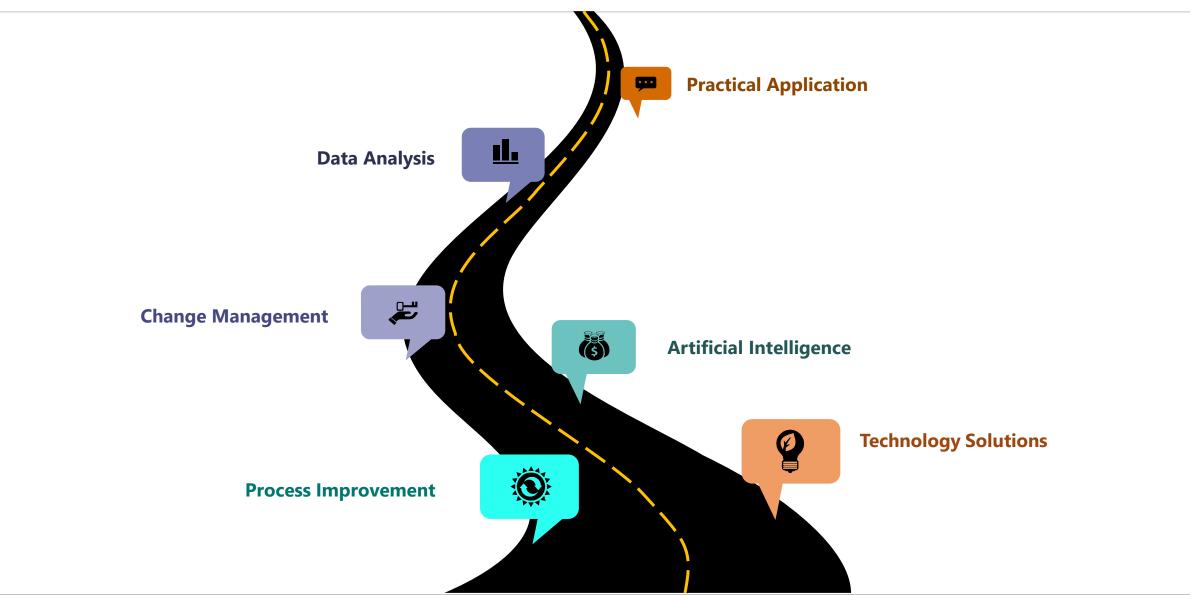


Tara Brewer Head of Legal Project Management Boston Scientific



Tanya Hampton Senior Legal Project Manager Seyfarth Shaw LLP

#### **The Roadmap**



#### **Interactive Poll**

Have your smart phones handy

Go to Slido.com

Enter the pass code 2401478

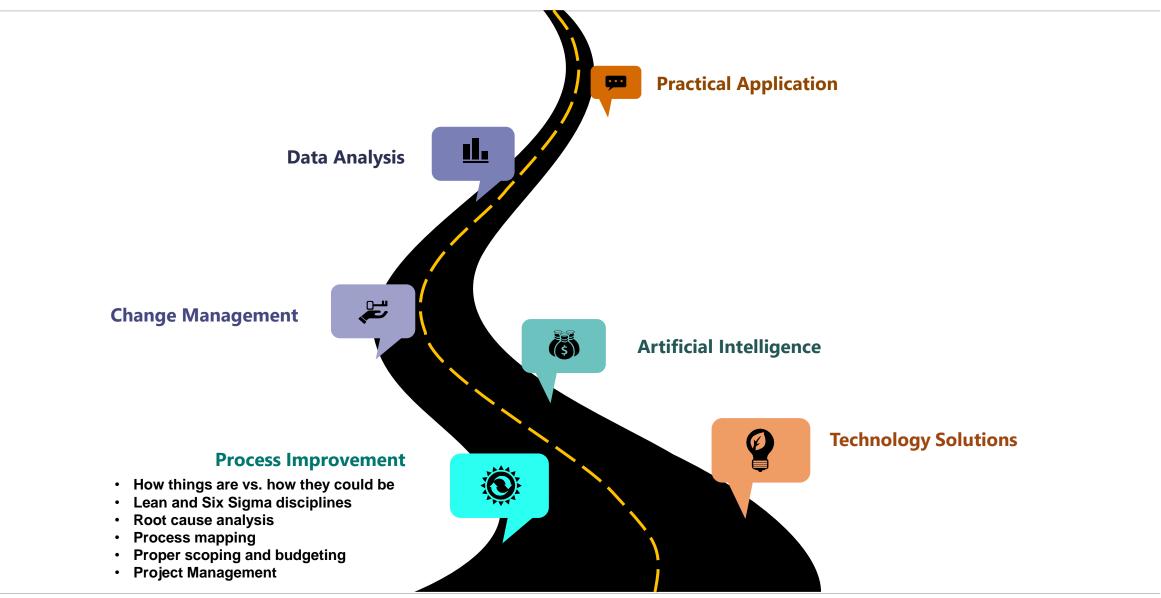
Then answer the prompt on your phone



# Why do people resist change?

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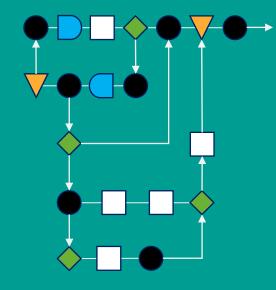
#### **Process Improvement**



#### **Process Maps – 3 versions**

As we think it is

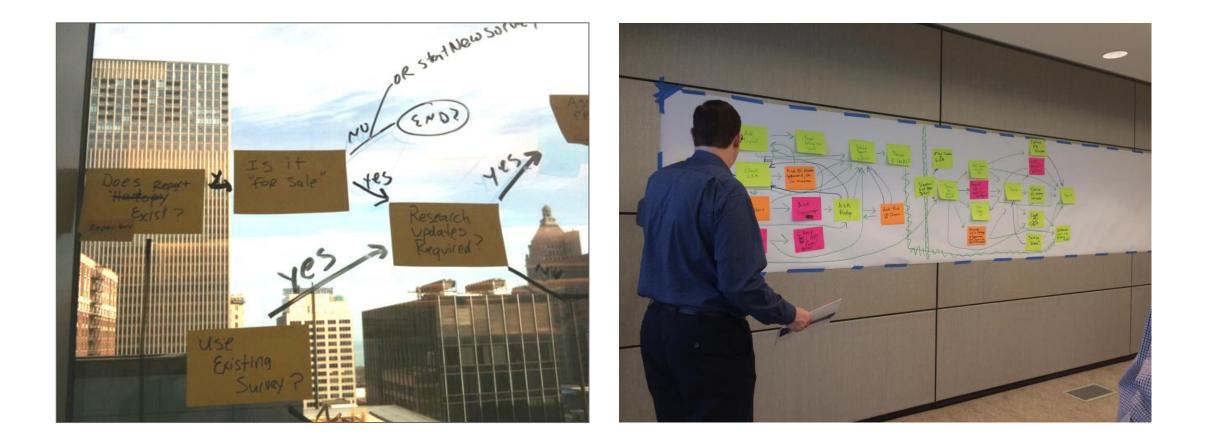
As it is

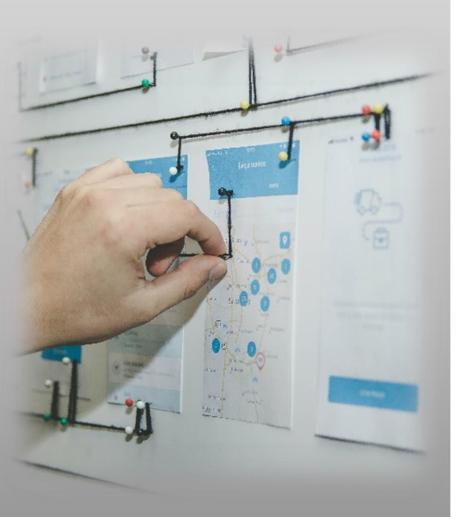


As it should be



#### **Easy To Get Started**



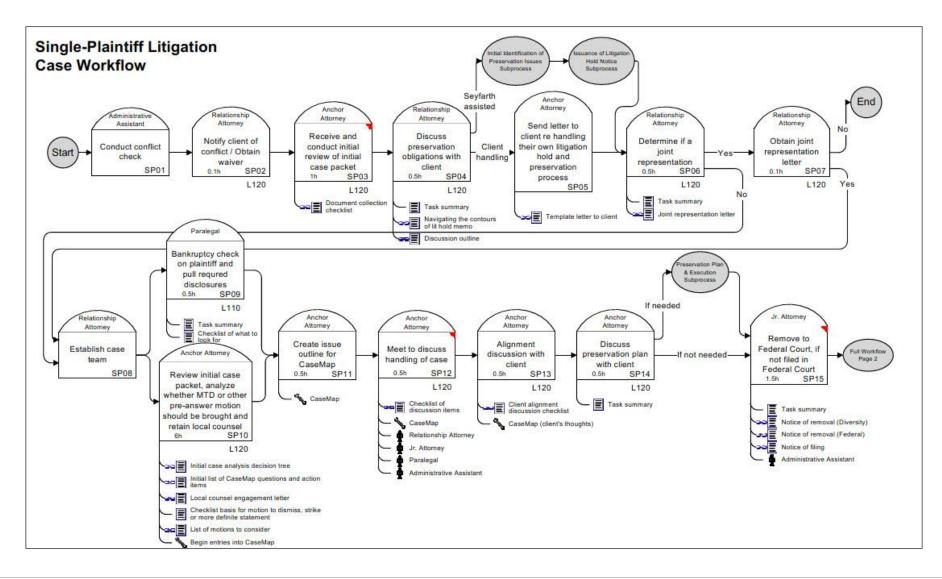


A picture is worth a 1000 words!!

#### 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

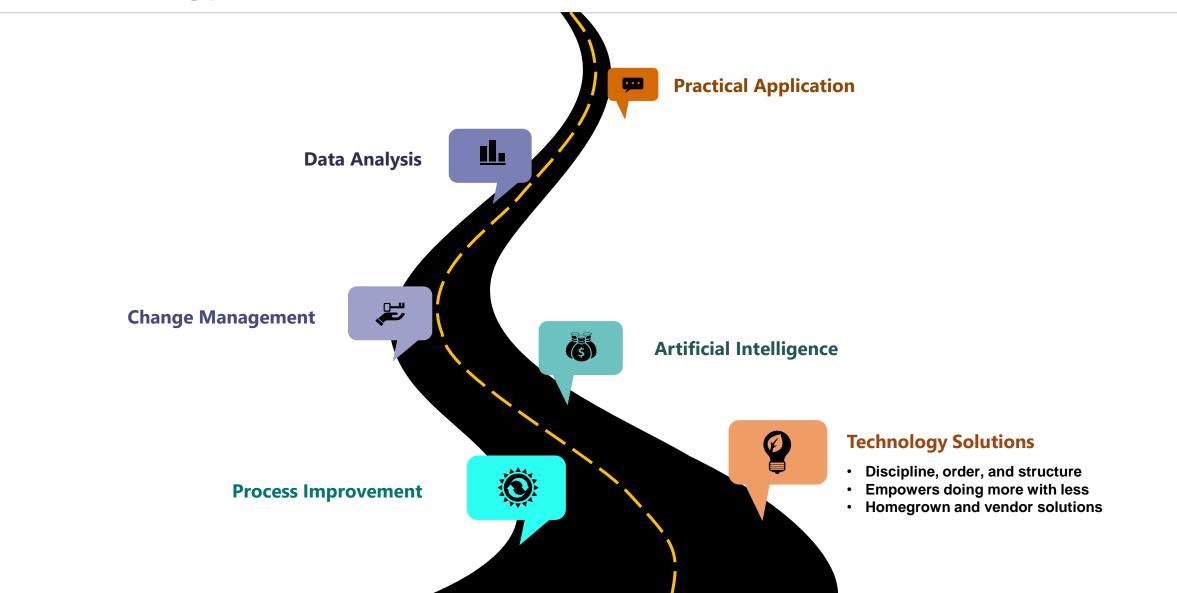
#### **Process Design**



#### **Project Management**

ID	Task Name	Duration	Start	Finish	January 2019 12/30 1/6 1/13	3 1/20 1/2	February 201
1					12/30 1/0 1/13	1/20 1/2	1 2/5
2	Preparations	5 days	Wed 1/2/19	Tue 1/8/19	<b>0%</b>		
3	Set up extranet site	5 days	Wed 1/2/19	Tue 1/8/19	0%		
4	Make client specific changes to Tracking System	5 days	Wed 1/2/19	Tue 1/8/19	0%		
5	Preliminary Document Review	20 days	Wed 1/2/19	Tue 1/29/19	1		0%
6	Collect Job description documentation	10 days	Wed 1/2/19	Tue 1/15/19	(	0%	
7	Collect employee data (job history, compensation, etc)	10 days	Wed 1/2/19	Tue 1/15/19		0%	
8	Collect organizational data	10 days	Wed 1/2/19	Tue 1/15/19		0%	
9	Revew and analyze all relevant data	10 days	Wed 1/16/19	Tue 1/29/19	<b>*</b>		0%
10	Load Job Descriptions to Tracking System document repository	10 days	Wed 1/16/19	Tue 1/29/19	*		0%
11	Interview Outlines	9 days	Wed 1/2/19	Mon 1/14/19	Г О	1%	
12	Assemble sample interview outlines	3 days	Wed 1/2/19	Fri 1/4/19	0%		
13	Develop interview 'talking points'	3 days	Mon 1/7/19	Wed 1/9/19	-0%		
14	Develop Manager Interview questionnaire	3 days	Thu 1/10/19	Mon 1/14/19	<b></b> 09	%	
15	Finalize Questionnaires and Outlines	3 days	Wed 1/2/19	Fri 1/4/19	0%		
16	Interviews - VP Level	20 days	Wed 1/2/19	Tue 1/29/19		1	0%
17	Schedule VP Level Interviews - if necessary	10 days	Wed 1/2/19	Tue 1/15/19	(	0%	
18	Conduct VP Level Interviews if necessary	10 days	Wed 1/16/19	Tue 1/29/19	*		0%
19	Interviews - Managers	22 days	Wed 1/2/19	Thu 1/31/19			0%
20	Determine Managers to be interviewed	2 days	Wed 1/2/19	Thu 1/3/19			
21	Gather Manager specific data	3 days	Wed 1/2/19	Fri 1/4/19	0%		
22	Load data to Tracking System	4 days	Mon 1/7/19	Thu 1/10/19	0%		
23	Schedule Manager Interviews	5 days	Fri 1/11/19	Thu 1/17/19	*	0%	
24	Conduct Manager Interviews	10 days	Fri 1/18/19	Thu 1/31/19		*	0%
25	Interviews - Incumbents	18 days	Wed 1/2/19	Fri 1/25/19	0	0%	
26	Determine Incumbents to be interviewed	2 days	Wed 1/2/19	Thu 1/3/19			
27	Gather Incumbent specific data	3 days	Wed 1/2/19	Fri 1/4/19	••••••••		

#### **Technology Solutions**



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#### 🗹 Link



**Real-Time Collaboration** 

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#### Information Accessibility

**Financial Transparency** 



Technology to underpin legal service delivery

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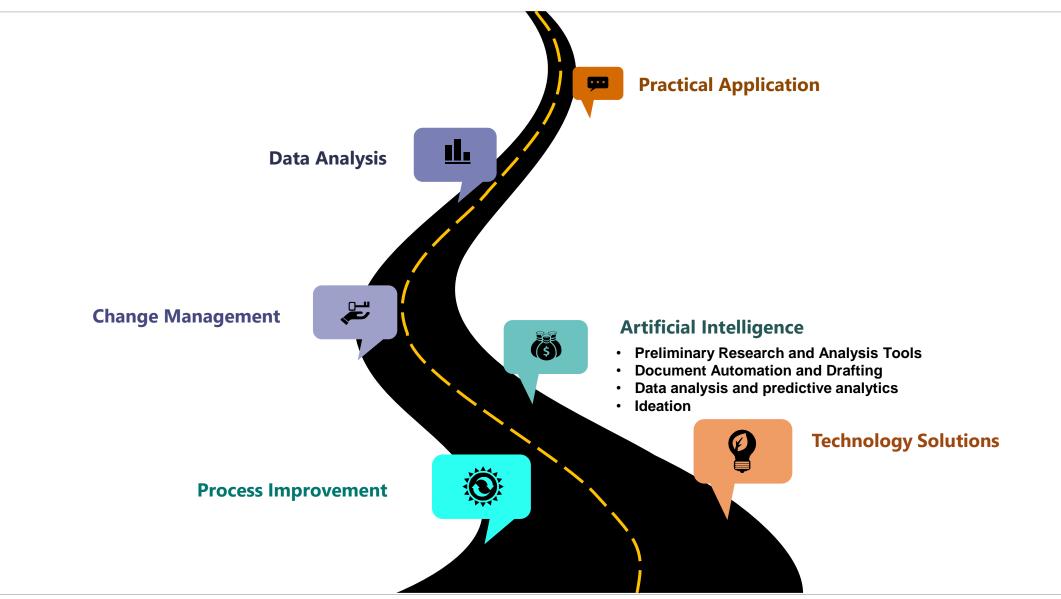
#### **Portfolio Management**



#### **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.)

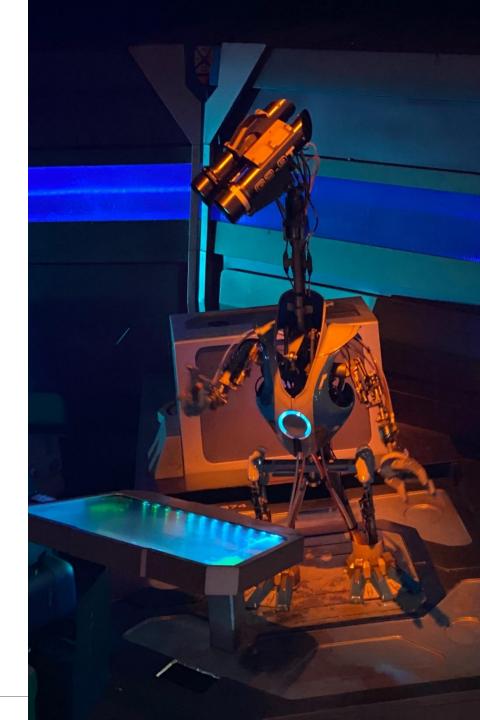
#### **Artificial Intelligence**



### What is ARTIFICAL INTELLIGENCE?

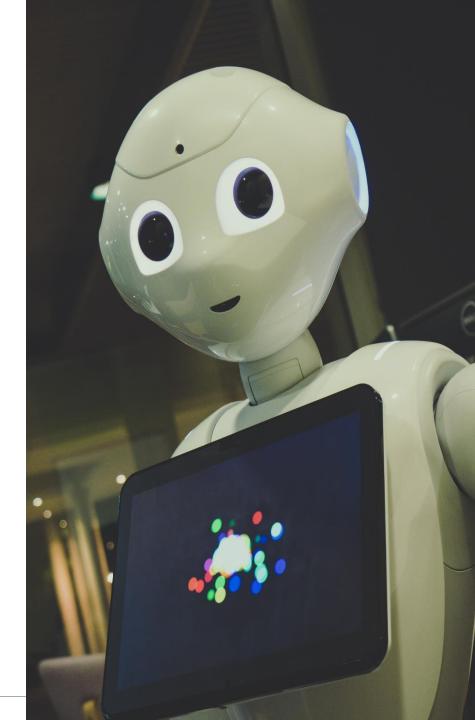
Artificial intelligence: noun

- 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
- <u>Merriam-Webster</u>



### **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





### **Al's Potential Pitfalls**

- Accuracy
  - Errors are possible
  - Always needs to be checked

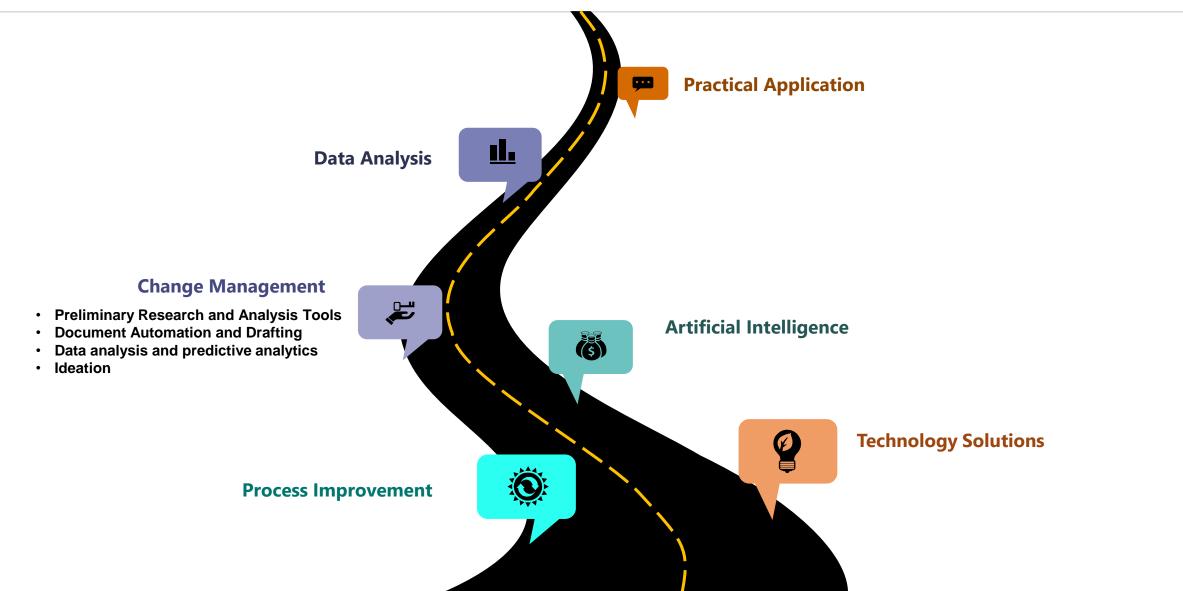
#### Bias

- 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**







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

#### **Examples of Change**



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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?

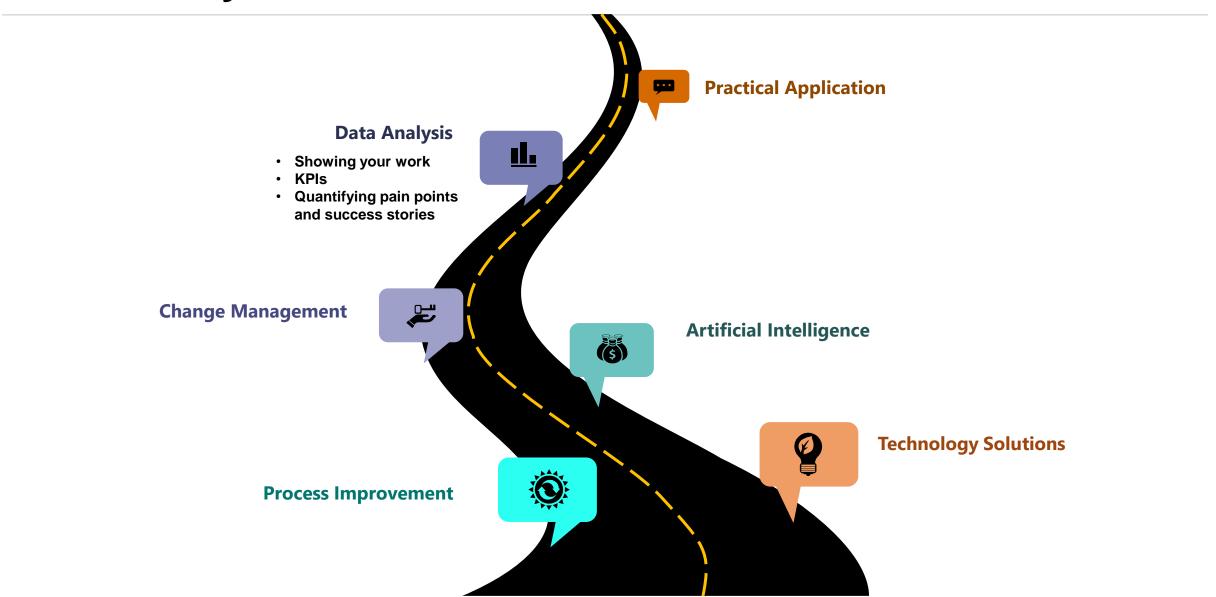
- Utilization of process, tools, and techniques to achieve change
- Goal is to sustain a desired business outcome
- It's not new there are many methodologies seeking the same outcome

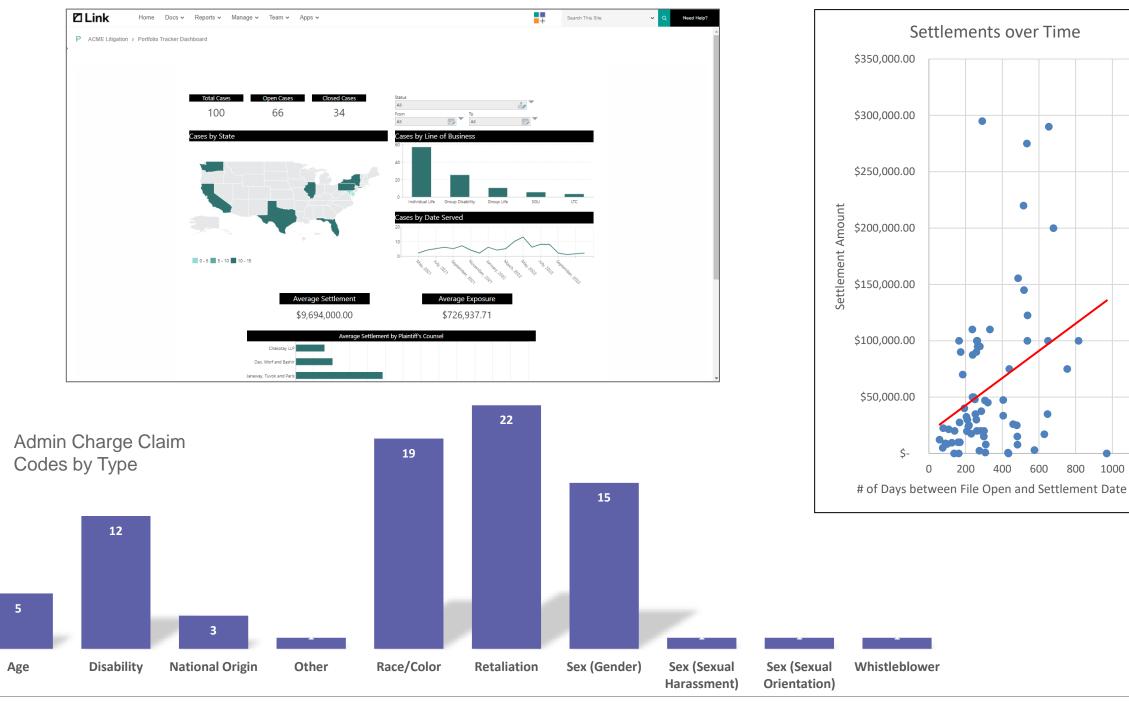


#### **Change Management Models**

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

#### **Data Analysis**





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## SCAN ME

### **CLE: NEW PROCESS**

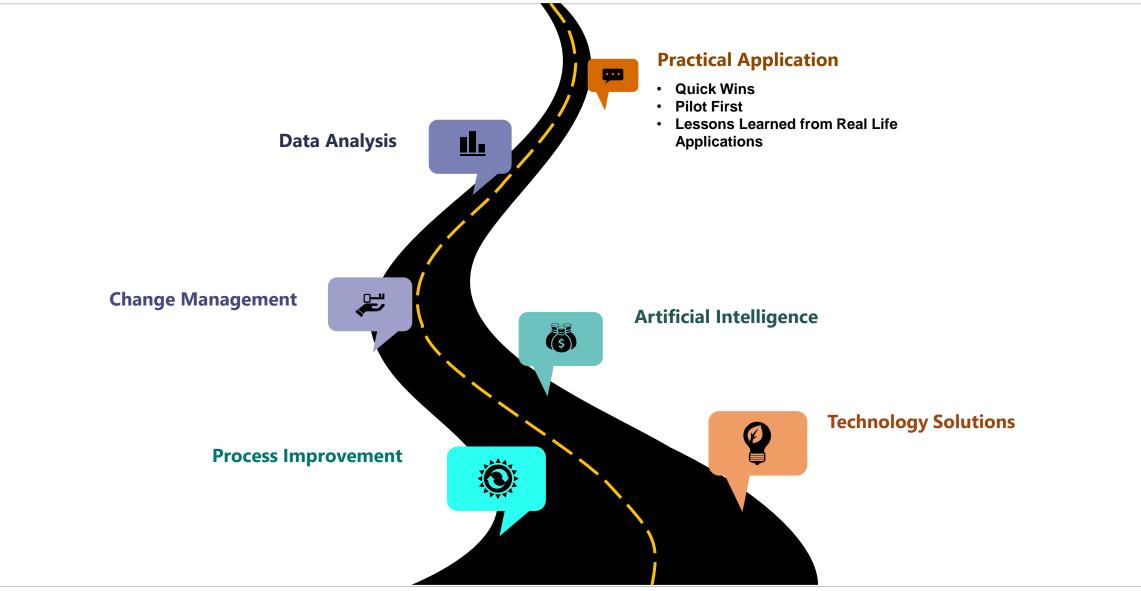
Please scan the QR code and complete the digital attendance verification form to receive CLE credit for this program.

#### You will need:

- 1. Title: Evolve & Elevate: Transforming Your Legal Ops Approach
- **2. Date Viewed:** 5/2/2024
- 3. Attendance Verification Code: SS9714

State-specific CLE credit information can be found in the form.

#### **Practical Application**



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#### **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