

# LRO Operations Transformation at Analog Devices, Inc. (ADI)



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## Company Overview & The Issue at Hand



“Following a \$21B acquisition by Analog Devices, Inc. — a multinational semiconductor company specializing in high-performance analog, mixed signal, and digital signal procession (DSP) integrated circuits — its Legal and Risk Optimization (LRO) function faced operational strain. At the same time, the LRO Ops team found itself inundated with repetitive tasks which limited its ability to complete more strategic work.

According to ADI’s Senior Director, LRO Operations and Strategy Nikki Rahimzadeh, the department needed substantial change. “The driver of this, was essentially needing to do a full-scale transformation and development of the legal and risk functions at the company to mature the entire function and manage risk, help us drive into the future, and enable our business,” she explained. Noting that when CLO Janene Asgeirsson joined the organization following the large-scale acquisition, she came in ready to build in “rigor and structure to this function.”

Rahimzadeh continued, “A big part of that was modernizing everything and being able to look at the work and identify areas for automation, leveraging AI and technology and workflow, and ensuring that as she was building this team, she had the right people to do that work, but also the right resources as far as process, technology, and AI solutions.” Evan Wong, CEO and founder of Checkbox, observed that the legal function is often pushed to consider ways to work smarter when the business grow significantly, at a pace legal can’t always entirely match.

“How do we scale further in smart ways through operational excellence?” questioned Wong, putting himself in the shoes of his client ADI. “Within the ADI business, what are the tasks that we’re spending time on that may be repetitive and manual, that can be solved through better process, and then enabled at scale through technology, so that our lawyers can focus their time on supporting that growth in the high-impact work?”

Rahimzadeh agreed with Wong’s advice for evaluating departmental needs, going on to explain that though ADI’s legal department did grow its team after the company’s acquisition and continued growth, tech from Checkbox and operational support from UpLevel Ops was critical in helping them identify the skills, and more, needed to support the business, with finite resources.

## The Solution

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ADI launched a “dual-track transformation combining strategic operational redesign and agile, in-house automation,” and UpLevel Ops was selected to overhaul LRO Operations.

UpLevel Ops recognizes that the legal and risk management offices of today are charged with not only delivering legal advice but are expected to also operate as high-performing business units. That said, ADI’s CLO asked UpLevel to do a full operational assessment of the legal department, to help prioritize a roadmap for operational readiness.

“It can't be understated the importance of having a chief legal officer who understands the importance of operational readiness, and of bringing the right operational experience in to help lay the foundation for what's to come,” said Brian Hupp, senior strategist at the legal operations consultancy. Cautioning legal departments not to simply focus on technology alone to solve problems, Hupp believes success is tied to a focus on readiness and identifying a combination of teams and technology to help the department more efficiently meet its goals.

UpLevel would go on to develop and implement a maturity model, redesigning matter intake, launching a formal outside counsel management program, embedding governance through a Legal Tracker–SAP integration, and creating a scalable global talent structure. In addition, Checkbox, selected for its no-code platform, enabled the LRO Ops team to independently build and launch more than 11 automated workflows, without IT support, and powered the “AskLRO” AI chatbot, developed in three iterative versions and deployed enterprise-wide.

“Bringing in the combination of teams that could help ADI prioritize that readiness work, and then start moving on it, with designs for both the organization and some of the technology deployments and then bringing in technology partners who were really well suited to help support the priorities and requirements which had been put together is a winning combination,” said Hupp.

UpLevel’s in-house expertise in operations design and project execution and Checkbox’s “array of agentic AI and workflow capabilities” provided the foundation needed to meet ADI’s diverse needs.

## The Process, Partnerships, and Technology

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When it came to identifying the right technical solution, ADI did go through what Wong described as an “extensive, multi-month long RFI” before choosing Checkbox. “We had to really prove that we were the right fit for this project, through a series of pilots and multiple meetings as well,” said Wong. “It's always a match between the right leadership and mentality when it comes to transformation and change — meets the right technology — meets the people who can actually enable the value out of the technology, and I feel like this story with Analog is the perfect kind of bringing together of these ingredients.”

Hupp expanded on Wong's point, noting that the goal of both service providers was to make ADI self-sufficient at the end of day; to teach the client to "fish" for themselves.

"We helped Nikki's team sort of get across the initial finish lines, then handed it off," he said. "We taught them how to fish, as it were — how to keep what we built going, and how to then start expanding their use cases and tackle new challenges on their own."

Hupp continued, "Driving that self-sufficiency and ability for legal to manage some of its own solutions is really important. That includes not having huge dependencies on IT teams, which tend to be overburdened and focused on the core business needs, first and foremost."

## Outcomes

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ADI reduced total LRO spend by about 20 percent versus pre-transformation while continuing to scale. In addition, outside counsel spend dropped 10 percent from FY23 to FY25, and entity management costs fell 25 percent through consolidation. Further, predictability improved materially, with 100 percent of legal matters having a budget at setup. And according to the legal team and its partners, when it comes to automation, the team deployed over 11 workflows with more than 3,000 submissions, handled approximately 650 chatbot queries, and saw email volume drop by roughly 50 percent within six months.

ADI LRO Operations team now has an array of tools at its disposal, an understanding of the art-of-the-possible, and the expertise and self-sufficiency to continue independently building and deploying similar solutions to meet additional needs, again without a heavy reliance on IT.

## Departmental Success: Key Takeaways

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For legal teams looking to replicate the success of the ADI LRO Operations team, UpLevel's Senior Legal Operations Advisor Sumi Trombley recommends doing that full operations assessment first.

"The full assessment is a way to help departments prioritize and put in a phased roadmap," she said, acknowledging the ADI CLO's ambitious goals, but also her understanding that certain things needed to be done in phases, which she advises for other leaders. "We helped build that roadmap, thinking about the change management that would be involved, thinking about the level of effort and what are the benefits to the business, the benefits to legal, and all of those things combined."

A big hurdle in the beginning of any transformation, particularly with legal operations, is facilitating the legal department's understanding of what can be done, and how the recommendations of services providers could ultimately create departmental efficiencies. And, according to Trombley, this process requires early involvement of the business units as well. She encourages bringing in the business counterparts early enough to for them to be involved in testing, in order to "understand what the benefits would be to them."

"All of that's still in a phased approach," she said of ADI's project. "We didn't unleash it all at once, it was an iterative process, and it continues today to be the iterative process. That's part of what makes it successful — it doesn't stop."

Once the teams identify the roadmap and the departments top priorities have been decided, it can be another process deciding where to start. "Start in places where you know you can get some good value and some quick wins, that give you some good talking points internally to help drive change management with the tougher ones that you've got to tackle next," advised Hupp, also echoing Trombley's suggestion of a phased approach being a key to success.

Technology that works for your organization

"Checkbox is an AI legal front door with workflow automation that powers everything behind it," explained Wong when asked to speak to the implementation of ADI's chatbot. "When you talk about chatbots in the legal industry, it can sometimes be a bit of a misleading label, because it depends on what the chatbot is really doing. What job is it solving and what use case is it applied to? For us, our chatbot is a legal front door."

Calling the technology "an agent with a chat interface" the chatbot developed for ADI is not used to read contracts, for example. "What we're focused on is how to help the business get what they need from legal, and to create pathways so that you can right-source the type of request to the appropriate resource to solve for it," explained Wong, noting that ADI has gone beyond having the technology simply answer a question.

"You can give the correct answer, but are you actually being helpful to what that person is trying to get done?" questioned Wong. "In the context of chatbots, when someone asks a question, something must have happened before in that business workflow to get them to that point of asking the question, and often when they get the answer, something needs to happen after the answer — the answer isn't usually the end point."

Therefore, the Checkbox CEO encourages those thinking of implementing similar technology to think about the end game. "What is our business client trying to do when they come to legal? What were they doing before they came to us, and what do they need to do after coming to us?" In other words, think holistically about the workflow and build solutions that are helpful and not simply correct.

## Advice & Demonstrating Value

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Legal departments leaning into technology to create efficiencies is nothing new, though some may be a bit slower at adapting more advanced or AI-based solutions than others. For those who want to implement some of these solutions and get buy-in from their teams and leadership, Rahimzadeh recommends meeting people where they are.

"We used to have lawyers only living in and out of Outlook, and they do that still," she said, though now many those same people are now working with the agents. "If you give them the right little bits of solutions that work, and they can be successful in it, then they become comfortable doing more and more."

That said, given the speed with which things are changing, and the necessity for the legal team to demonstrate its value as a partner to the business, and be seen as contributing to its growth, being slow to adapt is not advisable.

"The legal industry is evolving at a rapid pace — reshaping what it means to be a lawyer, how legal services are delivered (and who delivers them), and how value from those services is recognized and captured," said Senior Vice President, Chief Legal Officer & Corporate Secretary Janene Asgeirsson. "Those who do not sense, learn, and adapt quickly to this transformative environment will undoubtedly be left behind. During this time the power balance is also shifting toward the capable and tech/AI enabled in-house legal team! So, embrace innovation and be willing to step out of your comfort zone. Lean into your inner innovator and drive transformation within your team."

## An Award-Winning Solution

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The ADI legal department is seen as a leader within the business, capable of delivering tangible results to its cross-functional partners. And, according to its partner UpLevel, through the project, the LRO "modelled smart business enablement through workflow automation and practical applications of AI capabilities, allowing the focus to move to more strategic work." Accordingly, with the support of UpLevel Ops and Checkbox, the legal team at ADI is deserving of the "value champion" title.

"We are honored to be recognized as an ACC Value Champion!" exclaimed Asgeirsson. "This recognition is a testament to enterprise level impact derived from our multi-year effort to completely transform ADI's legal and risk optimization team, and it underscores that our significant efforts have been, and continue to be, focused in those areas driving the most substantial value for the team and ADI as a whole."