

# Ensuring a Successful Legal Operations Launch

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Fifty years after we sent humans to the moon, rocket launches remain an awe-inspiring testament to human potential and capability. With respect to Apollo 11, the American public was keenly aware of the sacrifice and commitment necessary to launch humankind to the moon and that the real mission of the astronauts actually started at launch.

In today's space program and corporate digital transformation projects, we too often celebrate launch day without the appropriate focus and resources to ensure effective launches and continuous operational improvement.

## **Leadership Is Critical**

President John F. Kennedy famously laid out the vision for landing on the moon on May 25, 1961. While the goals of legal operations are not nearly as audacious, they must be similarly grounded in shared reality and purpose.

The space program required coordination, resources from a multitude of talented individuals, and collaboration across many governmental agencies and private actors. A successful legal operations, data or technology launch similarly requires input not only from the legal team but from key internal stakeholders such as information technology, security, human resources, business partners, and procurement. Success will also depend on collaboration from other cross-functional teams, outside law firms, and other external resources that may be impacted by the operational improvements sought by the corporate law department.

The proper laying of this foundation requires openness from team members and the building of trust across silos. From Galileo and Gutenberg to Einstein, Edison and Jobs, humanity has advanced more by asking the right questions than by supplying the current status quo answer to the same problems. Making the tough acknowledgement that we can be better, or that we may not know something is a requirement for learning, innovation, and adapting to change.

Vulnerability and building of trust are also crucial for aligning common purpose. Teams lacking in trust cannot engage in healthy dialogue and conflict, commit to common goals, hold each other accountable, and obtain the goals they desire. Building the foundation can require time to achieve, but it would be wise to heed the advice of modern space adventurer, Jeff Bezos, who said: "Slow is smooth, and smooth is fast."

### **Use Case Identification**

Through a healthy stakeholder input exercise, pain points will be spotted and use cases will emerge. With new endeavors, the key is to build momentum for the team by tackling the proverbial low-hanging fruit. The demonstration of success on smaller projects leads to building of confidence and trust among the team for the later, heavier change-management lifts such as outside counsel management convergence exercises, centralizing e-discovery processes, or implementing matter management or contract lifecycle management systems.

To identify and map the low-hanging fruit, look to solve initial problems that require short implementation times, have high impact on legal team workflows, demonstrate a return on investment or reduction in cost, positively impact other functions and enhance customer satisfaction, or require relatively low change-management efforts. Examples of these operational improvements include optimizing enterprise or legal team tools already in place (such as electronic signature and legal research tools); partnering with IT to roll-out or optimize Office 365 or G Suite for the law

department; partnering with human resources on on-boarding and performance management initiatives; automating non-disclosure agreement contracts; and improving global translation and entity management processes.

## **Find Your Test Pilots**

The space program required the recruitment of talented people with differing exceptional skill sets. When it came to the astronauts, the government drew from the ranks of test pilots and aviators willing to push the envelope. In your organization, it is important to identify those individuals not only with technology competence and innovative streaks but also those who have demonstrated leadership capabilities, emotional intelligence, and resilience.

In technology and product management circles, it is well-recognized that innovation and change follows a pattern known as the diffusion of innovations. The innovators and early adopters are those willing to go first in the change journey. Only once those early voyageurs have demonstrated success does the mainstream majority come along for the ride.

## **Organizational Structure**

In order to cross the chasm from early believers to a sustainable and widely adopted operation, due care must be paid to organizational structure, alignments of incentives, and metrics for success.

On a project basis, a champion or sponsor in senior legal team leadership should be identified. Appropriate leaders from other functions can also serve as champions or sponsors where the project impacts those businesses. The sponsor or champion provides guidance, makes decisions, and assists in the allocation of needed resources for the project. The ultimate accountability for the project resides with the project owner, who should be someone with subject matter expertise on the problem being solved and a willingness to lead. Specific

project planning and implementation work can be handled by dedicated legal operations teams, law department staff (including attorneys), and outsourced partners, including law firms, alternative legal service providers, and legal technology vendors.

Regardless of the make-up of the team, there should be a shared understanding of who is responsible, accountable, consulted, and informed on specific work that's needed to complete the project. For in-house lawyers and staff, this work will often be engaged in addition to their regular responsibilities. Therefore, it is imperative that leadership updates individual performance plans and communicates constantly regarding larger team purpose within which the project sits. Doing so properly aligns department and individual goals.

### **Focus on the Endgame**

Lawyers and legal professionals involved in litigation and transactions routinely work backward, using checklists of work to be performed before a court date or product launch date. Likewise, legal operations launches should set a target date and break the work down into component parts and similarly plan backward.

Successful teams will also devote significant energy to pre-mortem planning and thinking about the long-term success of the project. At an early stage, this means understanding what data inputs and outputs will be necessary to craft a compelling narrative and business justification to the overall law department and other business stakeholders.

A launch is rarely a singular event. It is a process. The idea is not only to achieve a successful start, but to continue the momentum and drive for continuous improvement. These steps will help organizations shift from launch event to rollout process. Through a longer, larger view of launching your legal

data and technology solution and treating it as a process, organizations can continue to improve and refine, becoming better at meeting new challenges and achieving new levels of efficiency and effectiveness.