

## LEVERAGING CHANGE MANAGEMENT PRINCIPLES TO OPTIMIZE LEGAL TECHNOLOGY

The change management process empowers organizations to remodel traditional operating procedures, embrace innovations, and acquire new, profitable skills. This includes the adoption of legal technology. In fact, law firms that adopt legal technology will outperform non-adopting practices in the coming years.<sup>1</sup>

With that in mind, one question remains: How can law practices best adopt legal technology and manage the changes that accompany it?

### LEGAL TECHNOLOGY AND THE CHANGE MANAGEMENT PROCESS

Legal technology disrupts the traditional habits of practicing law. It automates manual and administrative tasks, and it facilitates efficient, convenient communication between attorneys and clients. Legal technology education programs have only recently become more common in law school curriculums.<sup>1</sup> As such, many practicing attorneys are reticent to embrace legal technology because they lack prior knowledge about and skills with it.<sup>2</sup>

Harvard Business School professor John P. Kotter's bestseller *Leading Change* provides an effective model for change management that can



<sup>1</sup> Tashea, Jason, and Stephanie Francis Ward. "Some Law Schools Offer Tech Programs to Help Students Find Jobs, but Does It Work?" ABA Journal, 1 Mar. 2019,

<sup>2</sup> "The Future Ready Lawyer: The Global Future of Law." Wolters Kluwer. 2019

position an organization for continued development.<sup>3</sup> The steps of his change management process, which have been slightly reworked for the context of solo and small law practices seeking legal technology, include:

- Creating a Sense of Urgency
- Building a Coalition
- Forming a Vision
- Eliminating Obstacles
- Creating Short-Term Wins
- Building on Change to Generate More Change
- Anchoring Change in Your Organization

Kotter's change management process underscores the importance of gradualism. A large-scale organizational change, like adopting legal technology, requires time and strategy to effectively implement it. The first step is recognizing the need for change.

## HOW DO YOU KNOW IF YOUR PRACTICE NEEDS TO CHANGE?

A change is always precipitated by indicators that your practice is in need of a change. Reflecting on those indicators can start you on the path toward improving your law firm performance.

### The Routine is Set

As with any business, your practice has an established way of providing legal services, living out office culture (if you work at a small law practice), and managing the practice. These established processes are likely the result of previous changes that have become the norm at your practice. The trick with what is “normal,” though, is to not be too complacent. If your practice has a ‘If it's not broken, don't fix it’ outlook, you may be in need of some change. If the mindset is ‘We've always done it that way’, that's a good sign that change may be a good idea, too.

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<sup>3</sup> Kotter, John P. “Leading Change.” Harvard Business Review Press, 2012.



Identify the Need  
for Change



- Complacency
- Industry, Local Changes
- Frustration

## The Local Scene is Shifting

It's often difficult to assess whether the local industry is changing or not. You can remain up-to-date on changes through online resources, your local Bar Association, and published articles about the evolution of the legal profession, including the [ABA Profile of the Legal Profession](#), [The Future Ready Lawyer](#), and more. Consider subscribing to one or more e-newsletters to keep abreast of the latest changes. [Lawyerist](#), [AttorneyAtWork](#), and [Evolve the Law](#) are highly rated free options.

## Frustrations with Standard Operating Procedures

Your practice may be inching toward a valuable change if you and/or other attorneys are pushing against the practice's standard operating procedures. This can include an eagerness for more efficient ways to conduct case intake, produce invoices, and track payments. These ways of thinking are the seeds of change, so you should listen to them carefully.

If you observe or experience any of these indicators, it's worth exploring how your practice can change. Continuous education is invaluable for all attorneys, and an exploration of how your practice can change is an excellent way to begin acquiring new skills.

## MANAGING ACTIVE CHANGE

In this section, we place Kotter's change management process in the context of solo and small law practices considering the adoption of legal technology. We hope this contextualized model will act as a road map for practices interested in transforming their practices through legal technology.

### Creating a Sense of Urgency

The first step in this process is identifying areas of change that need to be addressed. Most often, these are the pain points both attorneys and clients can face. By focusing on them, your practice creates urgency to change them.

Active Change



This isn't a one-off  
but a continual  
process

Your practice can discern its pain points through a business inventory: Which internal processes are not working optimally? Is time a big constraint? Are administrative tasks limiting the time available to practice law? How much time is spent billing and collecting payments? How can your practice improve time management overall? What are the tasks and responsibilities that the practice dreads the most?

These and many other questions can help your practice craft its pain points and, therefore, your particular approach to changing your practice. From there, identify the potential impact of a change in terms of time or cost savings, potential increase in billable hours, or a more balanced work/personal life. Identifying the potential benefit of the change will create urgency.

Additionally, review research on how legal technology is influencing law practices to create urgency. The following reports provide useful information about legal technology's capabilities and positive impacts on practices:

- Wolters Kluwer's [2019 Future Ready Lawyer Survey](#)
- Above the Law's [Small Law Firm Trends in 2019: How Does Your Firm Compare?](#)
- The American Bar Association's [TECHREPORT 2018](#)

## Building a Coalition

A coalition can include members of your practice, fellow bar association members, or even friends and family. Consider your coalition as those who support the change and experience the benefits.

As this step pertains to a small law practice, it's important to communicate the urgency of a change to your entire practice. Share the pain points and the potential improvement that will come from changing processes. And ask for help. Be sure to outline a change's potential benefits for each role within your practice. Share research and keep an open mind. Listening is as important as talking.

### Build A Coalition



Find Others Who  
Are Going Through  
or Have Gone  
Through Legal  
Tech Adoption

And as this step pertains to a solo law practice, cultivate a coalition with those who will see the benefits too. Think broadly in this step. No doubt we all have the need to create greater work/life balance.

## Forming a Vision

Your vision for change identifies its desired outcome: an increase in billable hours, higher client satisfaction, growth in number of clients, or even more time away from practicing law. The idea behind this step is visualizing the ideal result of a change. It's critical to identify must-haves results from nice-to-haves results so you are prepared to negotiate from there. And be open-minded as you develop your vision too. The process of developing this vision may introduce you to technology benefits you hadn't previously considered. Technology keeps moving forward and the application of it has truly transformed the delivery of legal services.

Once your strategic vision is set, it's time to start considering options. There are several online resources that provide overviews of legal tech providers, including [Lawyerist](#) and [AttorneyAtWork](#). But keep in mind that these secondary listings may be out of date, so use them as a first step. From there, identify your top options and visit each provider's website to confirm capabilities. Make sure to check pricing too. It doesn't do anyone any good if the platform is simply out of budget. Then request a free demo. And take good notes! This research (and particularly the demos) can help you estimate a provider's potential fit for your practice.

### Form A Vision



How do you want your legal tech to work within your firm?

## Eliminating Obstacles

Change isn't always easy. In our experience, attorneys and staff have cited concerns about time, cost, and lack of knowledge and experience that hold them back from adopting legal technology even after they have crafted visions for legal tech at their practices.

- Time: Time is a challenging obstacle to overcome. It takes time to learn new systems and methods. Once you have access to your new legal technology platform, move to the new platform as new matters begin. Wrap up existing matters with your existing tools and

processes. When a new matter is created, start with the new technology. Using both will be awkward for a while, but the break will ultimately be gradual and clean.

- Cost: Technology prices vary depending on what your practice needs. Single-feature solutions can be quite inexpensive, but they provide limited functionality. Some are as cheap as \$10 a month. Naturally, prices increase for full platform, but their features and capabilities increase far more rapidly than the prices do. Multi-feature solutions (like case and practice management platforms) are still quite affordable; you don't need many billable hours to make up the difference on your investment in them. And, in most cases, the additional time available more than makes up for the monthly or annual fees.
- Lack of Knowledge and Experience: This obstacle often keeps attorneys from even considering legal technology as an option. As such, removing this obstacle often means eliminating resistance to change, which isn't easy. Focusing on the outcome and the benefits is the first place to start. Remind potential users that if they can use their smartphone, they can use legal technology. Additionally, most providers offer live training sessions and on-demand online training videos with full modules on the fundamentals of using their platforms. Naturally, the platform provider is invested in the adoption of their platform being successful, so remember they are there to help you.

Eliminate  
Obstacles



One by one,  
address issues and  
how to overcome  
them

## Creating Short-Term Wins

Creating short-term wins helps the practice embrace the change process. If, for example, one change goal is to reduce time spent on administrative work by 10% after six months, celebrate that first 3% reduction. Keep track of how the process is going and share those wins. Seeing the incremental benefits of change is a reason to celebrate.

Regardless of which short-term wins are identified, make sure they are specifically defined, measurable, achievable, and time-sensitive so your practice has deadlines on achieving these short-term wins.<sup>4</sup>

## Building on Change to Generate More Change

A law practice can build on the success of change with the help of a legal technology provider. Your law practice will receive regular updates, resources, and tips on how to get the most out of the platform. Read those updates and take advantage of webinars and online training opportunities. And, of course, be a vocal user. Feedback is at the core of continuous improvement, so your ideas and suggestions are truly invaluable to your legal technology provider. If your firm sees potential benefits in new functionality, it is likely that other firms will as well.

## Anchoring Change in Your Organization

To institute a change like this at your law practice, you want to create the conditions to maintain it and prepare your practice to build on it in the future. There are numerous ways your practice can do this:

- Revise Job Requirements for Future Hires: Request that job applicants have prior legal technology training. This will conserve onboarding time, and it will help with the full adoption of technology at your practice.
- Implement Quarterly Technology Training CLEs: Your platform is never finished; providers are always updating capabilities. So, dedicate time to learning about how the legal technology industry is developing. That way your practice can stay abreast of the best ways to remain efficient and competitive in the legal profession.

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<sup>4</sup> Doran, G. T. "There's a S.M.A.R.T. Way to Write Management's Goals and Objectives." *Management Review*, vol. 70 , no. 11, 1981, pp. 35-36.

- Conduct Bi-Annual Evaluations of Your Platform: What difference is your legal technology platform making at your practice numerically? Evaluating how your platform is impacting your practice can help you continue to manage ongoing changes. Additionally, these evaluations can potentially kick-start new changes to further grow your practice.

## Summary

Legal technology is a transformative tool, a disrupter that streamlines once-manual tasks so attorneys can attend to their core responsibilities as attorneys. The change management process provides an effective model for managing the ins and outs, the expected and unexpected, that come with adopting legal technology that can transform your practice. Through it, you can place your practice at the forefront of innovations that are redefining how attorneys practice law.

Don't Stop



Staying up to  
date is a  
continuous  
process