



Evaluating Legal Ops Solutions

eBook

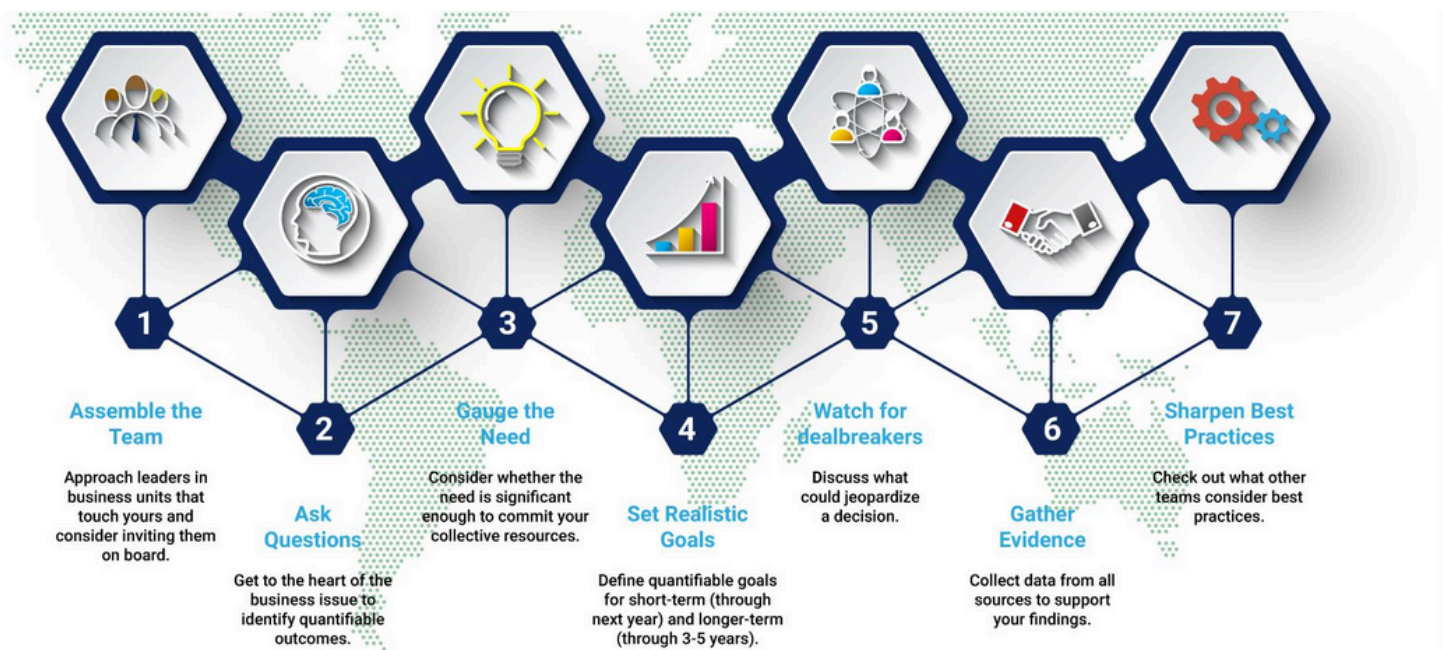
Implementing a proven process drives successful outcomes



Introduction

Today's business environment is fraught with hurdles and minefields. Who can you trust to guide your team to the best decision? Corporate legal departments are taking a hard look at advanced LegalTech as a means to meet their increased workload while offering a greater contribution to corporate goals. Legal technology provides the greatest return on the investment, but because legal technology evolves constantly, the evaluation process can seem rather daunting. A 7-step process has been developed to improve your success and simplify the evaluation process. The infographic below, is a guide for creating your own evaluation plan based on these steps. Continuing to refine the process is essential to maximizing its value. Review each step thoroughly and explore the process to gain a comprehensive understanding of the benefits it provides.

7 Steps to Successfully Evaluate LegalTech Solutions



The Goals of This eBook

Overarching Goal: To facilitate the adoption of new LegalTech solutions by legal teams. For legal success, it is often necessary to offer a comprehensive solution that addresses their own needs as well as those of other business units. This process identifies solutions that can overcome challenges for the entire business ecosystem.

Create Structure and Focus: To ensure alignment and keep everyone "marching in the same direction," it is crucial to develop a plan and strategy to guide the process. Start by outlining key talking points categorized under people, process, innovation, and technology. These points will form the framework for your evaluation steps.

1

Assemble a Team

Identify key stakeholders across various business units who stand to gain from the implementation of the new technology, and extend invitations to collaborate with the team.

This diverse group can facilitate a focused discussion aimed at pinpointing the underlying drivers of change and clarifying business issues more effectively. Addressing common challenges such as rising costs, which are prevalent across multiple industries and departments, is crucial. For example, achieving a 20% reduction in legal expenditures aligns with the broader business objective of cost efficiency, a goal shared by numerous teams within your organization. Identifying key decision-makers will guide you in selecting appropriate members for your evaluation team. Strategize to engage the most suitable champions who can drive optimal outcomes. Bringing together diverse teams to analyze the challenge and devise solutions fosters a sense of empowerment among participants. Engaging other teams in the dialogue also leverages their diverse expertise, insights, and potentially additional resources.

These talking points may help uncover systemic business ideas

- Find relevant data to advance their mission
- Making faster, better decisions
- Improving department/team efficiency
- Mitigating risk

Once defined, talking points become the core of your plan, including how to address these problems when choosing candidates. Each potential member may have their own ideas on the value an organization expects after issues are resolved.

Ninja Tip:

Build your team by broadening the scope of candidates. Make your team cross-functional, multidisciplinary, and more diverse. The result is a stronger foundational team that can visualize the "big picture" of an entire company's needs, not just Legal's. This method of team building helps ensure buy-in from department champions.

2

Ask Incisive Questions

Get to the heart of any business issues to identify and measure the quantifiable outcomes. Once the team is assembled, members will need the right questions to guide them through the assessment process. Here are critical questions to aid in evaluating providers:

- What attributes define a successful legal department solution?
- What criteria define a successful legal department solution?
- What are the desired outcomes?

Consider this carefully with your team, ensuring readiness to inquire specifically how ELM and other system vendors can contribute to achieving those objectives. Start by outlining your goals and challenges.

Providers must understand your goals and challenges. To uncover this info, these are among the questions you might address to prospective vendors:

- How will your ELM system help my organization be more efficient and productive?
- What makes your software unique?
- How does your platform help us search and report on legal matters?

Follow the financial trail

Ask clear questions about costs and potential additional fees; address the tough financial questions:

- What is the price or price range?
- What does this include?
- What are the typical add-ons?
- What is the total cost of ownership?

Dive deep into specifics

Every business is unique, so ask to reveal everything you need to make an informed decision:

- Which reports are included?
- How much extra will it cost for a custom report?
- Can you import our current historical data?
- Are all matter documents accessible on any web-enabled device?
- What are the costs for custom integration with other software we use?

Explore implementation

Ask for details on solution implementation and what's included to avoid surprise fees:

How does your implementation model work?

Will we need a dedicated consultant?

Will your ELM system tax the resources of our IT group?

How long does implementation for our corporation size typically take?

Address security

Assume nothing, and probe deeply to understand security and privacy protocols:

- How secure is your SaaS solution
- Exactly which security measures do you use?
- Is data stored in a physical location or on virtual servers?
- Will our data have its own instance?

Evaluate support

Make sure you know how they handle support, how responsive they will be, and who will be your point of contact.

Not all outside vendors include support:

- How does your support work?
- Who handles the training of our team and our external vendors?
- Can you show how your client support responds quickly and effectively?

What to expect

Ask probing questions about the vendor's solution throughout the business relationship:

- Which capabilities make your ELM system unique?
- Which of your system's features and functions outperform the competition?
- What is the most compelling reason to adopt your solution?

Go beyond the FAQs

Besides asking incisive questions, you might try:

Ninja Tip:

Ask questions that cover your expectations and those of the provider. Ask probing questions from the start.

3

Evaluate the Need

Consider whether the need is significant enough to commit your collective resources. Before moving forward with any software demonstrations or budget requests, use this step to help justify the resources – time and money to be spent or not. This third stage may also help garner support for approval later because of your dedication to completing your due diligence first. You'll need your evaluation team to assess each division's needs to apply quantifiable numbers to those needs.

There's little chance of getting budget approval for any new tools or service vendor relationships without those numbers. Identify critical needs using the questions from the previous step to identify which service providers and solutions are worth considering, your team can identify the most critical needs and link budget numbers to each one:

Ask for details on solution implementation and what's included to avoid surprise fees:

Assemble the team that helped develop relevant questions

Review the answers together and search for common themes

Establish vital requirements list to serve as a definitive factor in "go/no-go" decisions.

Drawing a clear separation between critical needs and beneficial improvements ensures you focus on what this technology must do and what maybe just a bonus.

Establish the relative importance.

Create a hierarchy of project needs and prioritize top-tier objectives initially. Critical issues take precedence over items considered optional or less essential:

Which needs absolutely must be met for project success?

Are there "nice-to-have" capabilities? If so, grade their relative importance.

What criteria will determine whether a solution is on your short list to demo?

Conduct a thorough cost analysis

Prove the need by quantifying the highest project implementation costs, ongoing cost expectations, and total cost of ownership. There will be a cost associated with not doing anything, even if it's not monetary. It could be related to increased hours to accomplish a task, lack of automation requiring manual work, manual errors, or an inability to manage data effectively:

- What are the quantifiable costs of pursuing a solution?
- What are the cost-related benefits (efficiency, time, money saved) of doing so?
- What are the costs of not doing so?

Recognize attainable outcomes

After all stakeholders are heard, you'll have a clearer picture of your collective business needs, their importance, and the related costs. From this point, it becomes clearer whether the change is imperative or merely aspirational for the future. Be brutally honest about:

- Precisely which resources (people, money, time) will you need to commit?
- Can you extrapolate numbers from a similar evaluation already completed?
- What are your "dealbreaker" issues: "If it can't do/provide____, it won't work for us?"

Ninja Tip:

Assess the final, realistic savings and costs for each solution, but remember that not everything is about money. Don't forget to add all extrinsic and intrinsic benefits here: added transparency of data, ease of use, and other business-critical factors. Which core issues can it fix, and can the new tech fulfill its promises?

4

Set Clear Goals

Define quantifiable goals for short-term (through next year) and longer-term (through 3-5 years).

Why set goals?

Goal-setting is an indispensable part of the evaluation process. Without it, you're "flying blind" with no sure way of knowing if or when you reach your destination.

Clearly defined goals will:

- Make sure teams are clear on expected results and reading from the "same sheet of music."
- Eliminate fear, uncertainty, and doubt
- Ensure activities contribute meaningful results.

One simple method for setting goals is the SMART system, where the letters **SMART** stand for **S**pecific, **A**ctionable, **R**ealistic, and **T**ime-Measurable, sensitive:

Specific goals are clear and well-defined such as;

- Creating a new business model for acquisitions that involve Legal, Finance, and Operations.
- Take into account revenue contribution, market share, and go-live schedules that drive in-house team efficiency.

Measurable means that the goal must be able to have metrics that are trackable and have relevant numbers associated with them:

- Unmeasurable goal example: Have a more positive impact on public feedback ratings.
- Measurable goal example: Improve public relations ratings 10% by the end of the year.

Actionable indicates that our goal will be affected by taking actions directly or driving action in others indirectly. Examples include:

- Leveraging our existing relationships with outside influencers to drive greater attendance to events to hear the value proposition.
- Requiring existing subject matter experts to attend outside sponsorship events, so more prospects hear our value proposition message, see product demos in-person, improve improve feedback, and boost sales as a result.

Realistic relies on real-world probabilities, such as:

- Is the goal attainable with present limitations?
- Does the project allow time to reach the goal?
- Are the resources available to attain the goal?

Time-sensitive means establishing a timeframe in which to achieve the goal. Try scheduling milestones in the months to come – mini-steps that keep the team motivated along the way.

For example:

- "We will reduce outside vendor costs by 50% in the next six months."
- "Client satisfaction ratings will improve 20% each month by the end of our current FY."

What does success look like?

Success can be personal and professional. Work as a team to come up with the best outcomes for all. To create your own vision of business success, ask:

- How will these goals drive future business growth?
- Will this project be the foundation for future projects?

You and your team have come together to drive success for your business. Ensure your attitudes and discussions focus on positive business gains. Any personal successes (raises, promotions, etc.) will follow naturally.

Set quantifiable goals for short-term (now through the first year). First take small steps:

Establish short-term goals ("milestones") to keep teams engaged and encouraged.

Use short-term goals to prove the project in stages, maintain budget funding, and in still confidence that overall goals will be met.

Set quantifiable goals for long-term (through the next 3-5 years). Long-term goals help you develop a solid strategy to meet the business goals since:

They're focused on final outcomes and may include goals that go beyond the project.

They're usually the results on which the project is ultimately judged.

Ninja Tip:

Setting goals early in the project establishes rules and guidelines to keep the evaluation on track and heading in the right direction. Keep it simple; provide visual cues to keep the team laser-focused on the goals. It's as simple as a poster or dry-erase board in the team room .

The internal team created for this project will be a great resource for their individual business unit's desired results. By combining all of these, you'll need to distill these down to the overall business ST & LT goals for evaluating LegalTech solutions.

- Asking more open-ended, probing questions that invite dialog.
- Focusing on getting to the heart of what will meet your company-wide needs.
- Refining questions to focus on issues most important to your legal department.

5

Watch for Dealbreakers

Discuss what, if anything, could jeopardize the purchase decision.

During the evaluation process, dealbreakers are issues that cause failures, and they may change at any point. That's why it's essential to train everyone on the team to watch for obstacles that could threaten the outcome.

Dealbreakers can be hard to identify

Keep in mind that:

- They mean different things to different people, so they're harder to pinpoint.
- Beyond mere hurdles, they're issues that can cause project failure.
- These issues may crop up at any time and could remain in constant flux.

Play the "Devil's Advocate"

Be mindful of potential deal breakers arising from varying perspectives. This allows an overview of the issue rather than focusing on a symptom. Ask probing questions like:

- "Why is that needed?"
- "What happens if the budget doesn't support what we need to do?"
- "Would it be considered a company win if this benefits only Legal and not my department?"
- Take a realistic view of all possible or probable issues.
- At each point, ask yourself, "What do we do if this happens?"

Remember, deal breakers can be unpredictable, expect the unexpected. Make sure the team is ready to handle budget cuts, unforeseen lack of executive support, competitive challenges, and market changes, and which may also include:

- Loss of funding
- Environmental conditions.
- Personal or professional biases.
- Time constraints.

Acknowledge the inevitability of change, prioritize when feasible, manage unforeseen developments, and refrain from viewing change as a hindrance.

- Anticipate changes.
- Plan contingencies.
- Be proactive, not reactive.

Communicate!

Once you've identified obstacles to success, communicate with your legal department team and other stakeholders involved in the evaluation process. Prioritize resolving key challenges and inform the team to facilitate collaboration and action.

- Assess the underlying issue thoroughly.
- Confirm its feasibility to overcome.
- Address it promptly to prevent escalation.

Take focused action

Dealbreakers will not necessarily deter you if you act thoughtfully and immediately. When you take action, make sure it's working towards the project goal. Focus on why the dealbreaker happened and take corrective, swift actions.:

- Deploy contingency plans to attack the issue head-on.
- Watch for morale changes – you need champions, not nay-sayers on the team.
- Be honest and encouraging; distrust can spell disaster.



Get it done!

You've faced it head-on. Now you need to evaluate whether success is possible:

- Bring teams together with the main stakeholders.
- Communicate both the issues and the planned fixes.
- Make sure the cost of success is acceptable to the business.

Ninja Tip:

Dealbreakers are not all doom and gloom. They can come from anywhere and be based on anything. If possible, simply fix them and move on. If not, record the reasons and what led up to the dealbreaker to learn from experience.

6

Gather Evidence

Collect data from all sources to support your findings.

Evidence begins with gathering information, but it goes beyond collecting data. As in a court proceeding, evidence consists of assembling facts that support a conclusion. In this case, the conclusion is that your legal department needs a Legal Ops solution that will positively impact all areas of the company. To offer the most relevant information possible, your team will gather the evidence that either proves the solution will meet the needs or doesn't. Either way, your task will be to collect the best information at your disposal to lead to the most intelligent outcome, even if that means you must move in a different direction.

Include other departments

Look beyond and involve people outside the legal department – from operations to marketing to finance – to get the information to support the evaluation that will ultimately strengthen your position when requesting a technology solution. Adding more departments means your evidence will cover more of the overall business. This simple step adds depth to the evidence for later review.

Seek the right answers Earlier, we covered the critical questions to ask.

Ensure your conclusions are based on the best evidence. Provide executive summaries, focusing on evidence that proves your outcome without interpretation. Now is the time to gather the answers that build your case:

- What are the long-term and short-term goals in adding the new technology solution?
- What stands in the way of meeting these goals?
- What evidence can the solution provider add to your use case?
- Categorize the answers you have and provide a clear synopsis for decision-makers. Once they see the clear answer, it's easier for them to make an intelligent decision confidently:
- Do their answers stack the evidence in favor of proceeding?
- Do they address your challenges? (If so, make sure to let everyone know.)

See the solution in action

No solution evaluation is complete without getting under the hood and seeing the tool at work:

Assemble your team and walk through the key features the Contract providers for technology demonstrations or hands-on trial installations that allow your super-users to test it.

Collect the feedback to determine if it lives up to its promises and your expectations:

- Does it meet your requirements?
- Will it work?
- Will it do what you need it to do?
- If not, discontinue and shift focus.

Ask other departments whether the information you've already collected will help them achieve their goals. If not, what else would they need to move forward? Would having them view the demonstration help them identify the value? Inviting others to the hands-on demo provides additional evidence supporting the purchase decision and demonstrates genuine support for the entire business.

Eliminate conflicts of interest

Identifying potential dealbreakers will uncover any facts and opinions that might develop into conflicts of interest between your objectives and those of other departments. Once you have the evidence, more may have surfaced. It's time to ask the key stakeholders about their concerns. If there are other conflicts, will the solution overcome these? Are there workable results? Each decision-maker may have unique criteria, so make sure the evidence presents in a way that supports each desired outcome.

Align your collective goals as the narrative for compiling supporting information, presenting it in a concise and comprehensible format to maximize its persuasive impact without irrelevant details.

Show it off to stakeholders

Just as courtroom evidence has no value until presented to a jury, your evaluation evidence has no impact until it rests in front of the executive decision-makers who can sign the contract. The evidence should be Concise, Persuasive, Problem-solving

Since the final decision is not up to you or your team, your role is to deliver the most factual and insightful evidence that builds a case to approve the purchase or not. The evidence will provide the facts that you did your homework for the betterment of the entire company.

Ninja Tip:

The evidentiary step helps save time and effort that might have been wasted on an unworkable solution. Let the evidence point to what you found in a clear and concise way. Personalize reports for each decision-maker in the way that makes the most sense to them.

7

Sharpen Best Practices

Check out what other teams consider their best processes and learn from your own.

At this stage in the process, your best practices need to be repeatable, consistent, and reliable when looking at bringing in other LegalTech tools.

At the beginning of this process, you recognized the need for assistance in managing the Legal team's growing workload, improving efficiency, and reducing expenses. A recent Thomson Reuters survey, in-house teams are increasingly focusing on areas like digital document storage and knowledge management, resulting in far less time spent searching for knowledge, previously buried organizational forms, and templates and maximizing their productive work so that they can contribute more effectively to the department's bottom line.



LegalTech solutions often enhance performance to meet the need by helping teams to manage day-to-day tasks better. While deploying technology is a proven way to accomplish many of your goals, choosing the best solution continues to be a stumbling block. What's more, reports and surveys are valuable by taking a hard look at the results to sharpen your best practices.

Look inward: How did your team perform?

Objectively scrutinize quantifiable results to gain an unbiased view of your work, gathering feedback from team members and other internal stakeholders for a comprehensive assessment.

- How well did your team perform versus expectations?
- Which changes would you make to the team for the next round?
- What conflicts arose that delayed moving forward?

Did you get your answers?

If you find insufficient answers were obtained during the process, consider addressing this in future projects and document adjustments for subsequent iterations.

- Was there any step that didn't provide enough valuable answers to justify its continuation?
- Were your questions unanswered, or did you receive negative feedback?
- Did the answers you received provide a clear direction at each stage?
- Were you able to identify a clear business need?

The business's needs must be addressed and resolved by bringing in a different solution. A clear need is a driving reason for the change. If the benefits of bringing in a solution can meet or exceed the need, even budgetary restrictions can be overcome. Other questions to address:

- Were there any obstacles to identifying enough need to continue?

Were your business goals attainable?

No goal is worth pursuing if it has no chance of being met. Take a hard look at what you thought were your goals. In hindsight, were they truly attainable? If not, keep track of why you set that goal. Often, teams change the goal mid-stream to adjust to the reality of the process. Facts tend to cause us to adjust for the next round.

- Were you able to achieve each goal to stay accurate and genuine?
- Were you able to measure the progress toward reaching that goal?
- Would you change the goal structure to ensure better achievement?

Were deal breakers addressed and overcome? Dealbreakers can be the most challenging part to assess in hindsight. Each project is different, and most business issues present their own set of challenges. Evaluate your team's ability to communicate effectively and honestly, as well as their ability to anticipate challenges:

- How effective was your team at identifying dealbreakers?
- How quickly were they addressed?
- Did this derail the process in anyway?

Did each step provide enough value?

No process is perfect for every situation. The idea is to build a method that works for you and your organization. Use the track record to define and refine your process to ensure the best results. This checklist provides a guide to work from when evaluating new solutions:

- Did each step deliver enough value for you to keep it in the next round?
- Which steps should you maintain for the next round?
- Did any stage provide so little value to the decision that it should be eliminated?

Ninja Tip:

The value you receive isn't a subjective measurement: It's strictly determined by whether the information moved the project forward. If not, remove it now.

Were you effective in gathering evidence?

Evidence is the backing your team needed to prove their case. The ability to present the evidence also needs to be measured. The team's and presenting the evidence clearly and concisely is a key performance indicator.

- Was your information received well by all stakeholders?
- Did the decision-makers trust your data?
- What was the outcome of the presentation of evidence?

The best evidence presented poorly can derail and obscure even the best project results. Be honest about what your team could uncover and whether the evidence created a truly data-driven decision.

Evaluate your evaluation process by taking a "big picture" look at the process itself. The only way to improve is to measure, evaluate, and adjust your process. Keep what works and lose (or alter) what didn't. This stage requires team input, so involve every member, their input and feedback is vital.

- Would more steps benefit the project?
- What worked well and what did not?
- If you found issues, could they have been handled more effectively?
- If your team excelled, why make changes?

Now, look outward:

What are best practices for other business unit teams?

Since the objective of best practices is to help your internal Legal Ops team run more efficiently and make better decisions, the place to start is to look at how other teams in your organization approach best practices. Ask what they did to reach their outcomes. Legal conferences can also offer a valuable way to learn from others. First, ask colleagues on other internal legal ops teams about their process guidelines, what complexity they encounter, and how they support their corporate goals.

Conclusion

The road ahead is paved by your colleagues' success.

The goal of this eBook series was that by the time you've completed your checklist, you'll be ready to evaluate software firms on how effectively they can provide the solution that meets your business needs. We put all of the blogs together here for you to expedite your evaluations.

Ninja Tip:

Keep asking questions, stay curious, and keep sharpening your best practices. Corporate legal departments rely on LegalTech and modern technology solutions. Advanced technology like this can be daunting, but you now know the path leading to better decisions and evaluations. Call on doeLEGAL to guide you through these processes. Use the standard news writing model: who, what, when, where, and why. These days, technology like Enterprise Legal Management (ELM) constantly evolves, making the evaluation process appear daunting. However, the proven success of others can guide your next evaluation and make your selection easier. Make your plans for success with insight and professional expertise.

[TALK TO AN EXPERT](#)

Ascent ELM™ is the award-winning Enterprise Legal Management solution.

Our experts are ready to help show your team the proper evaluations for ELM solutions. A customized demo for your organization will walk you through the benefits attainable by leveraging LegalTech solutions.

The logo for doeLEGAL features a red outline of a house above the text "doeLEGAL" in a bold, sans-serif font. The word "doe" is in a smaller, lowercase font, and "LEGAL" is in a larger, uppercase font. A small trademark symbol (TM) is positioned to the right of "LEGAL".
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