



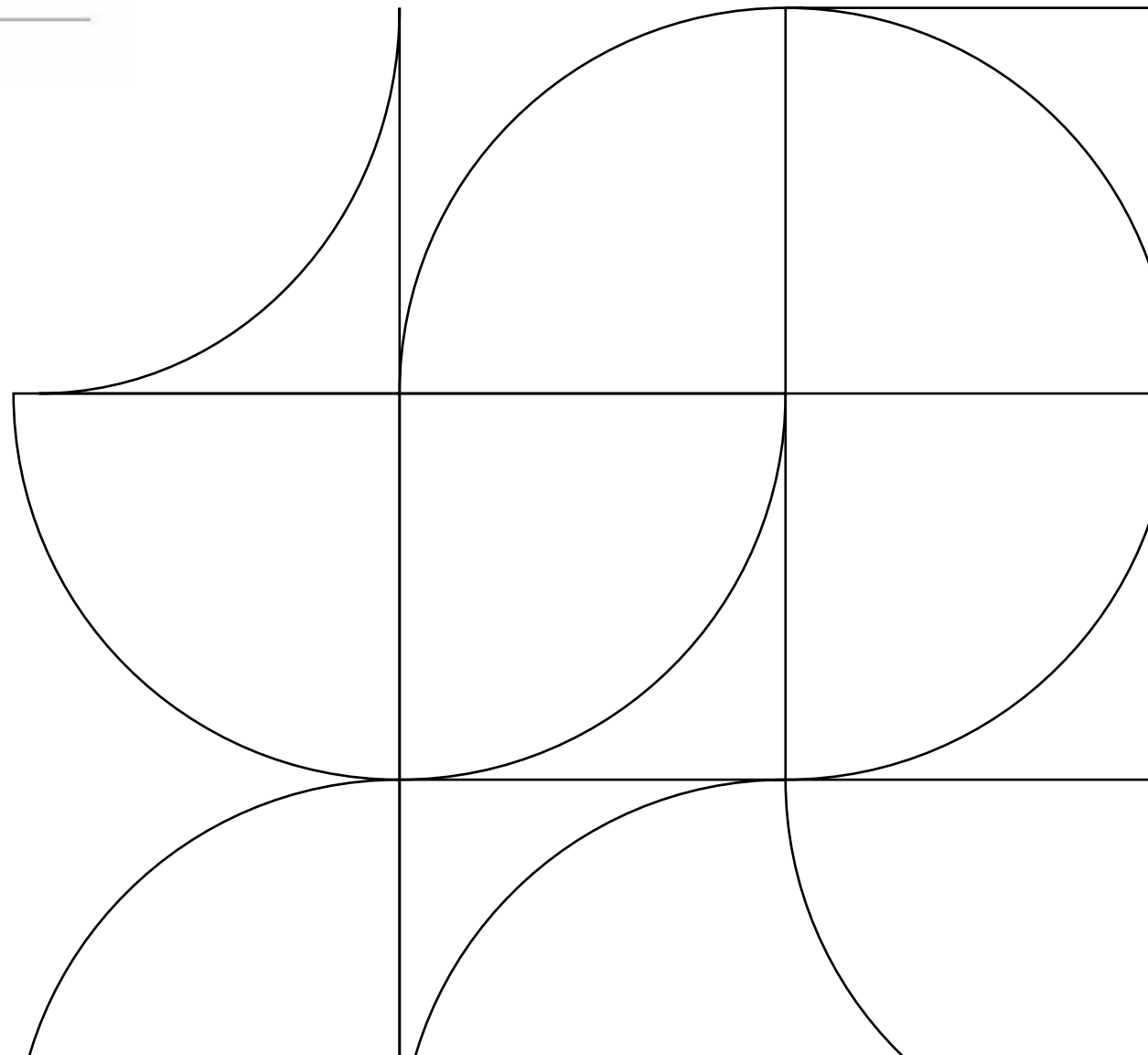
# Evolve & Elevate: Transforming Your Legal Ops Approach

Eric Greenberg  
Tara Brewer  
Tanya Hampton

May 2, 2024

**Seyfarth Shaw LLP**

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# Speakers

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**Eric Greenberg**  
Partner, Real Estate  
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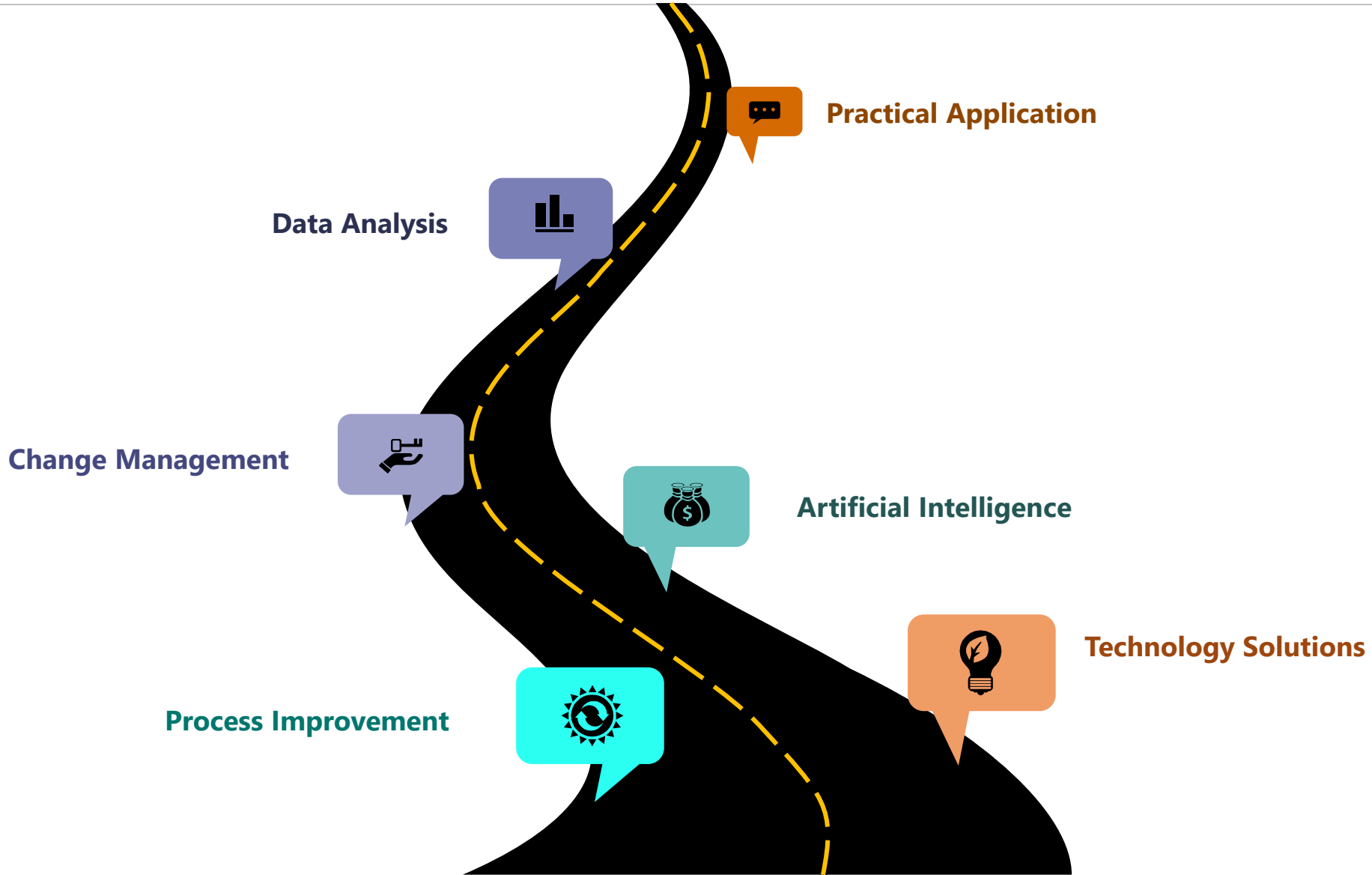


**Tara Brewer**  
Head of Legal Project  
Management  
Boston Scientific



**Tanya Hampton**  
Senior Legal Project  
Manager  
Seyfarth Shaw LLP

# The Roadmap



# Interactive Poll

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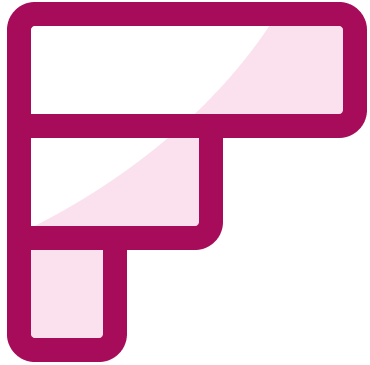
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Enter the pass code 2401478

Then answer the prompt on your phone

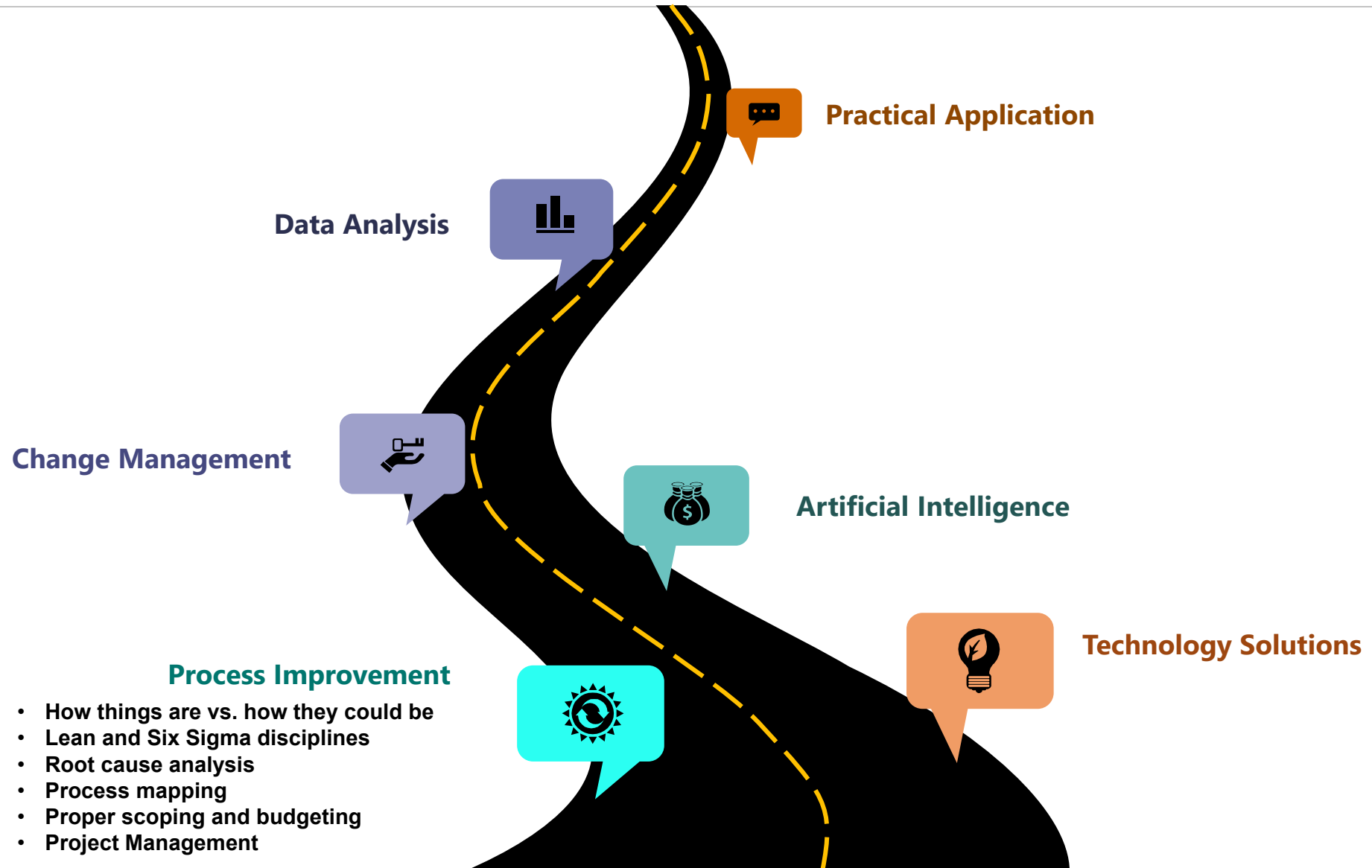
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## Why do people resist change?

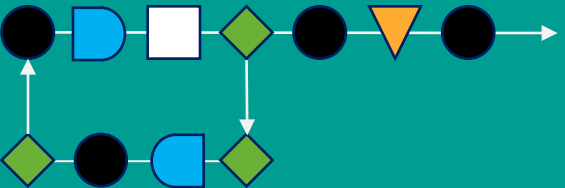
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# Process Improvement

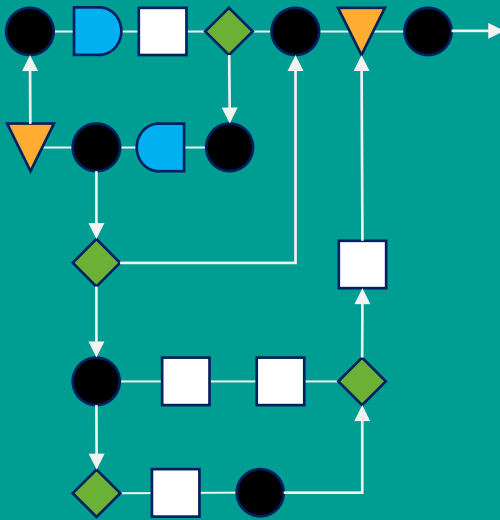


# Process Maps – 3 versions

As we think it is



As it is

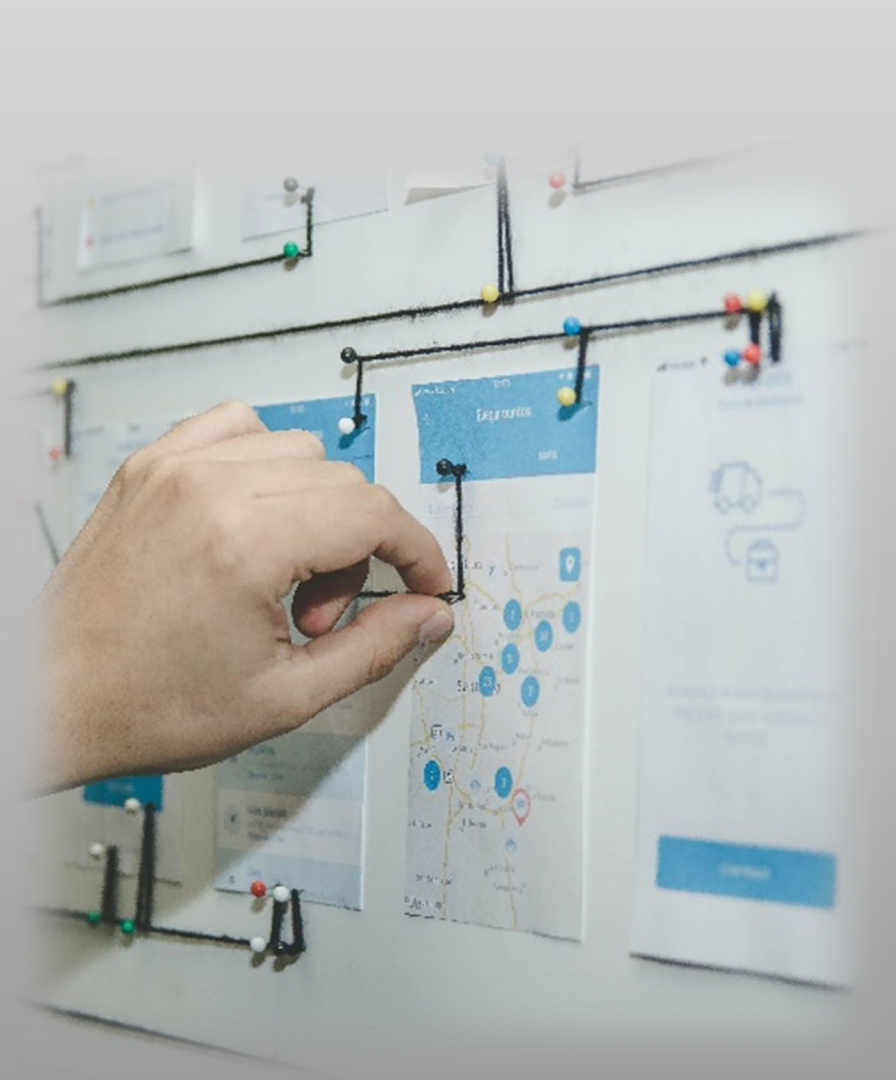


As it should be







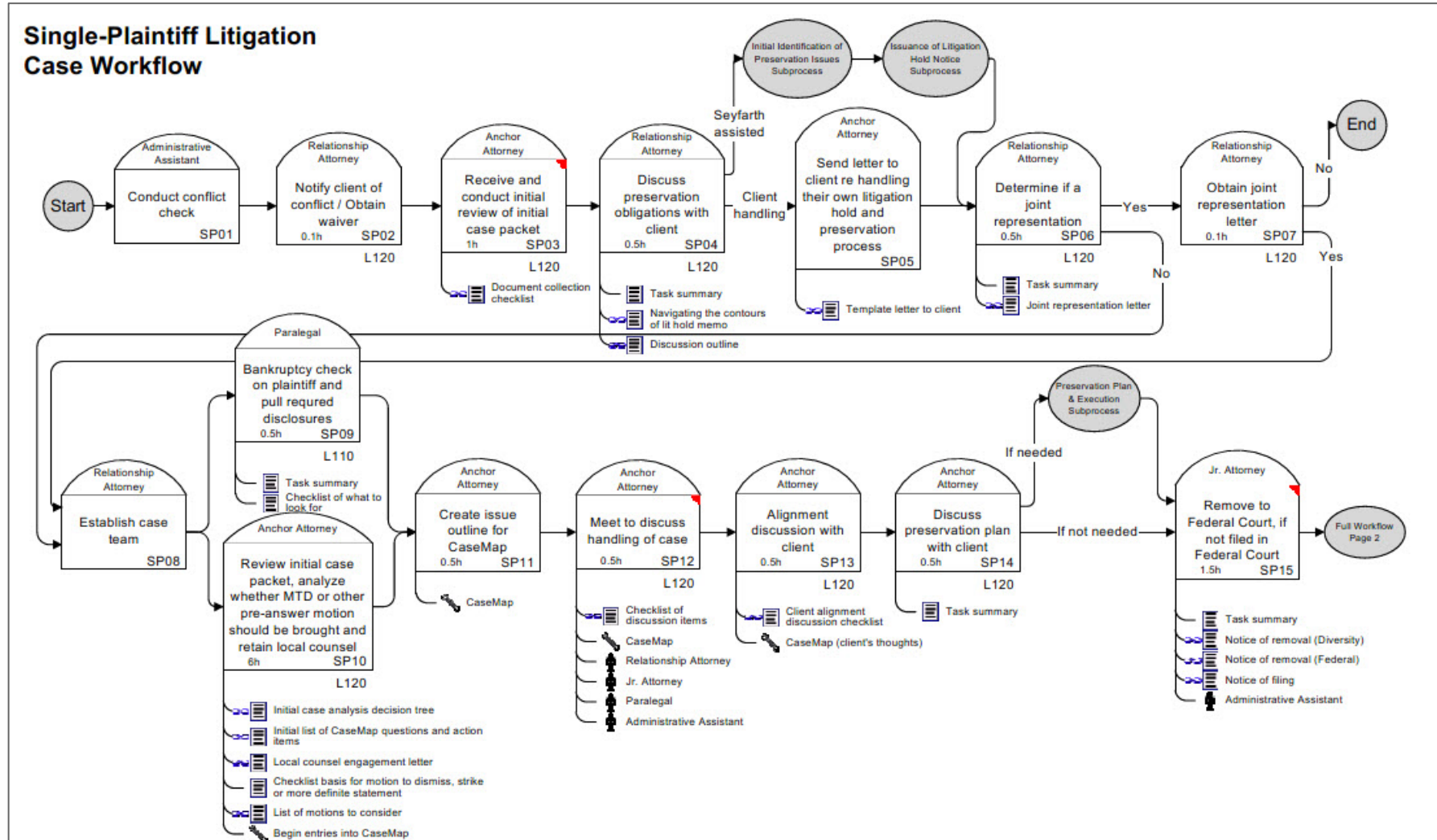


*A picture is worth a  
1000 words!!*

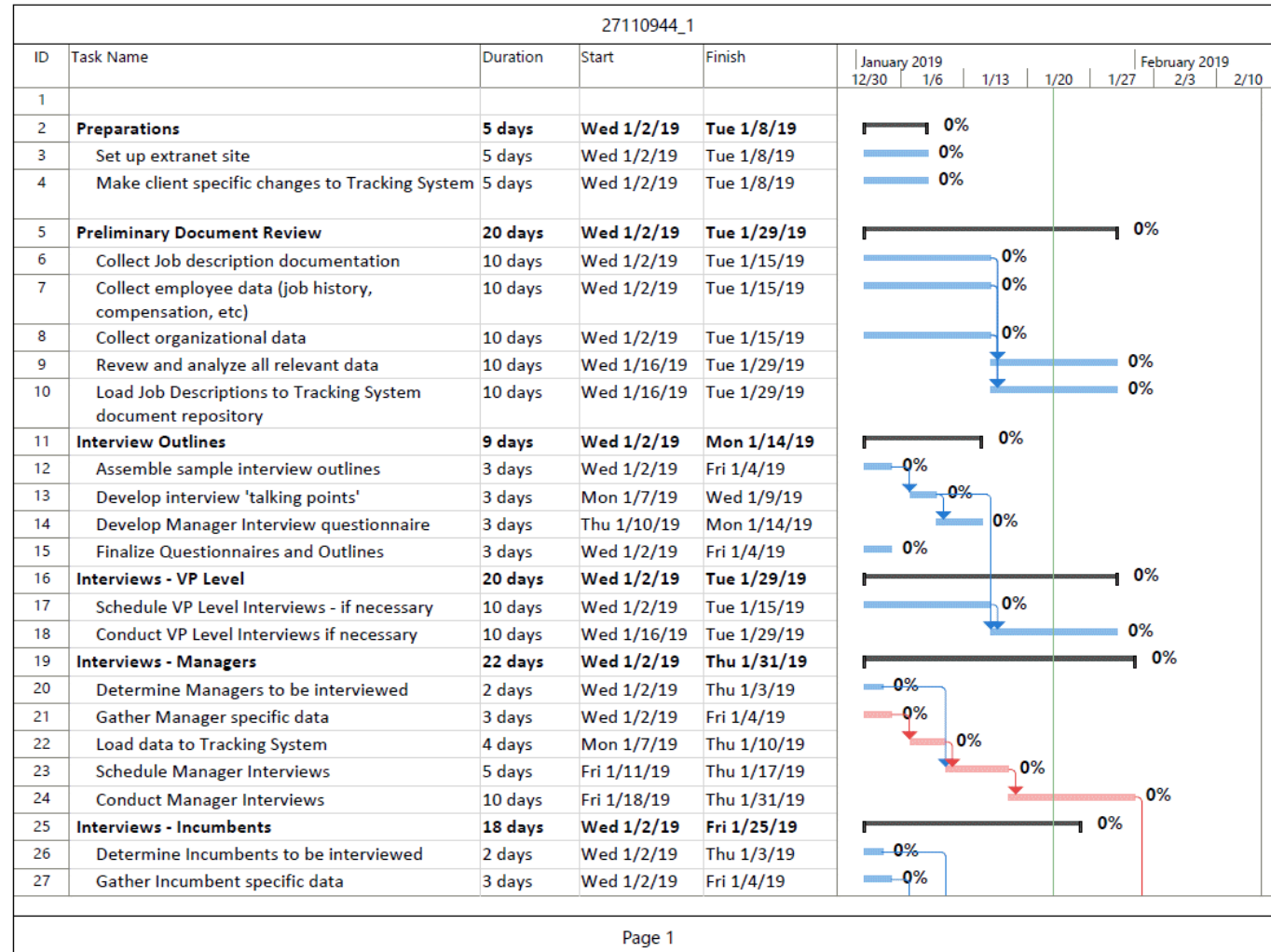
## What a Process Map Shows Us

- 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

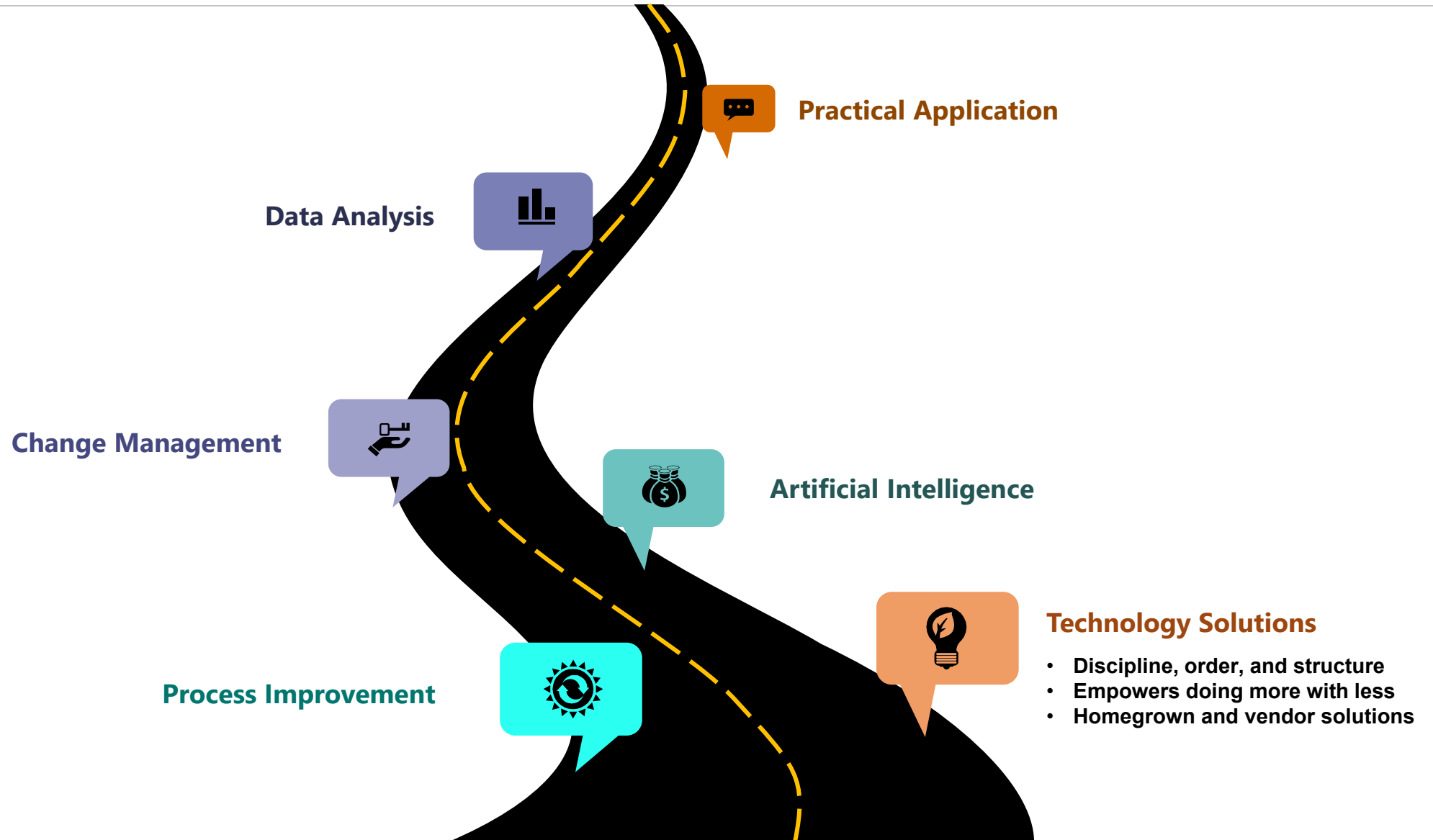
# Process Design

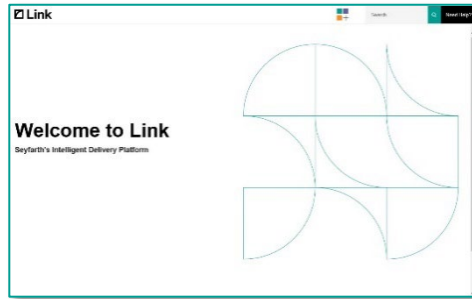


# Project Management

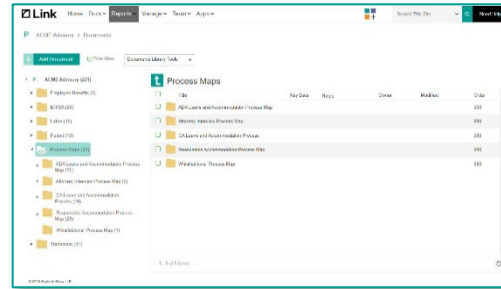


# Technology Solutions





Real-Time Collaboration

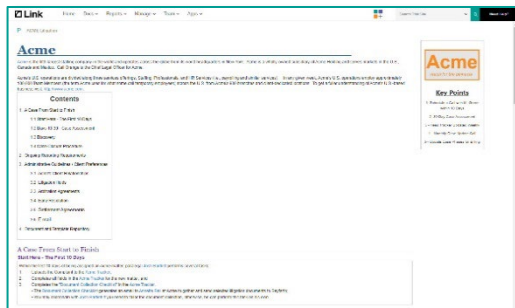


Information Accessibility

### Financial Transparency

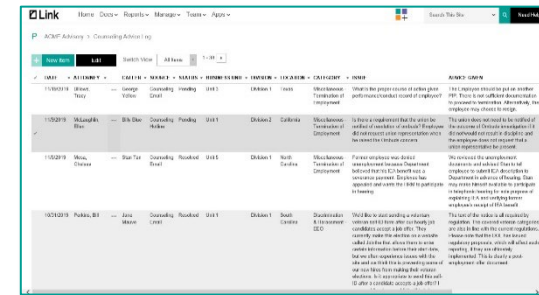
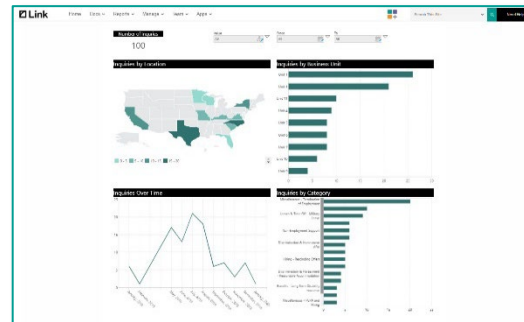


## Technology to underpin legal service delivery



Client Centricity

### Analytic Insight



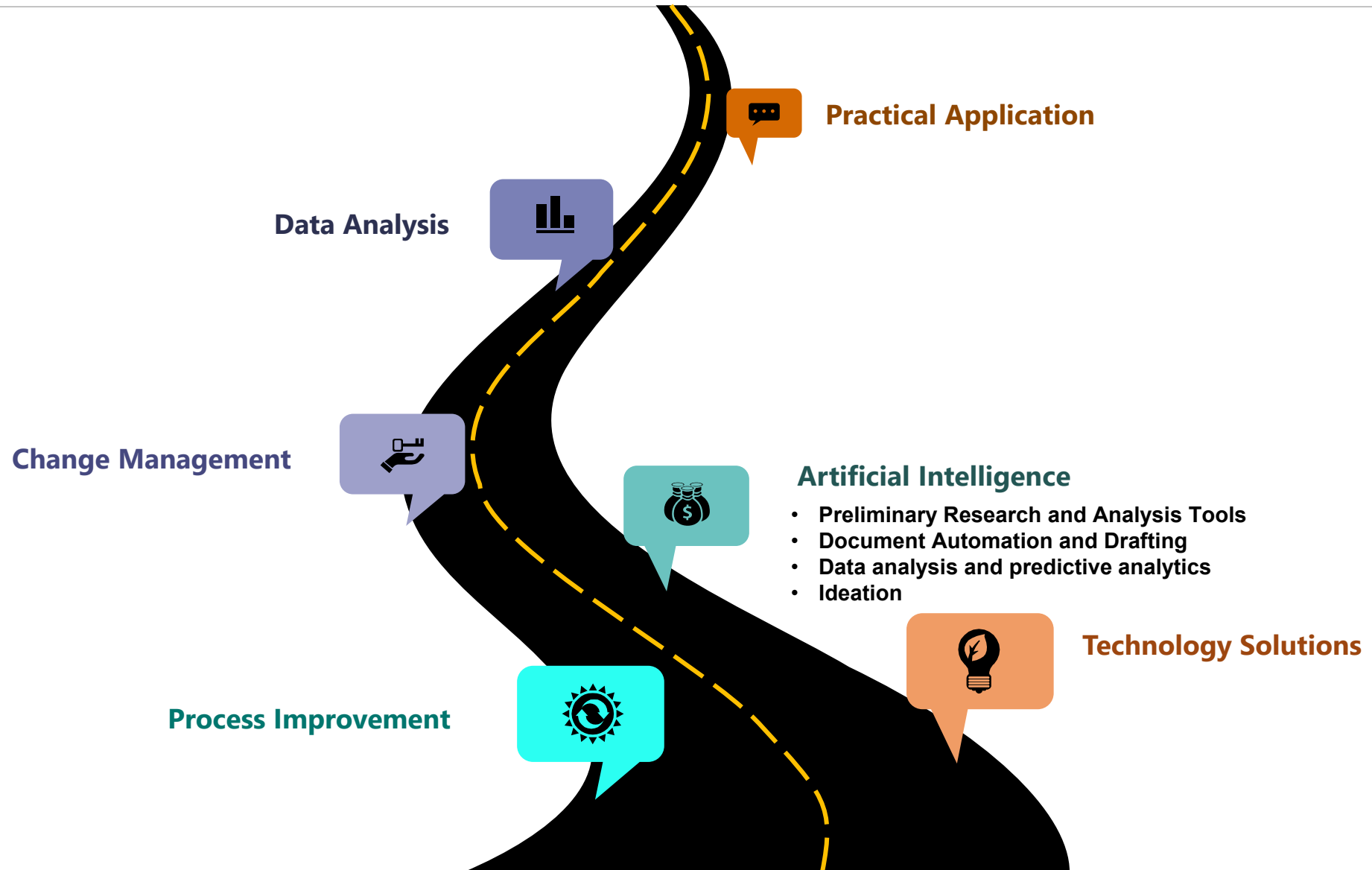
Portfolio Management



# 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 ARTIFICIAL INTELLIGENCE?

Artificial intelligence: noun

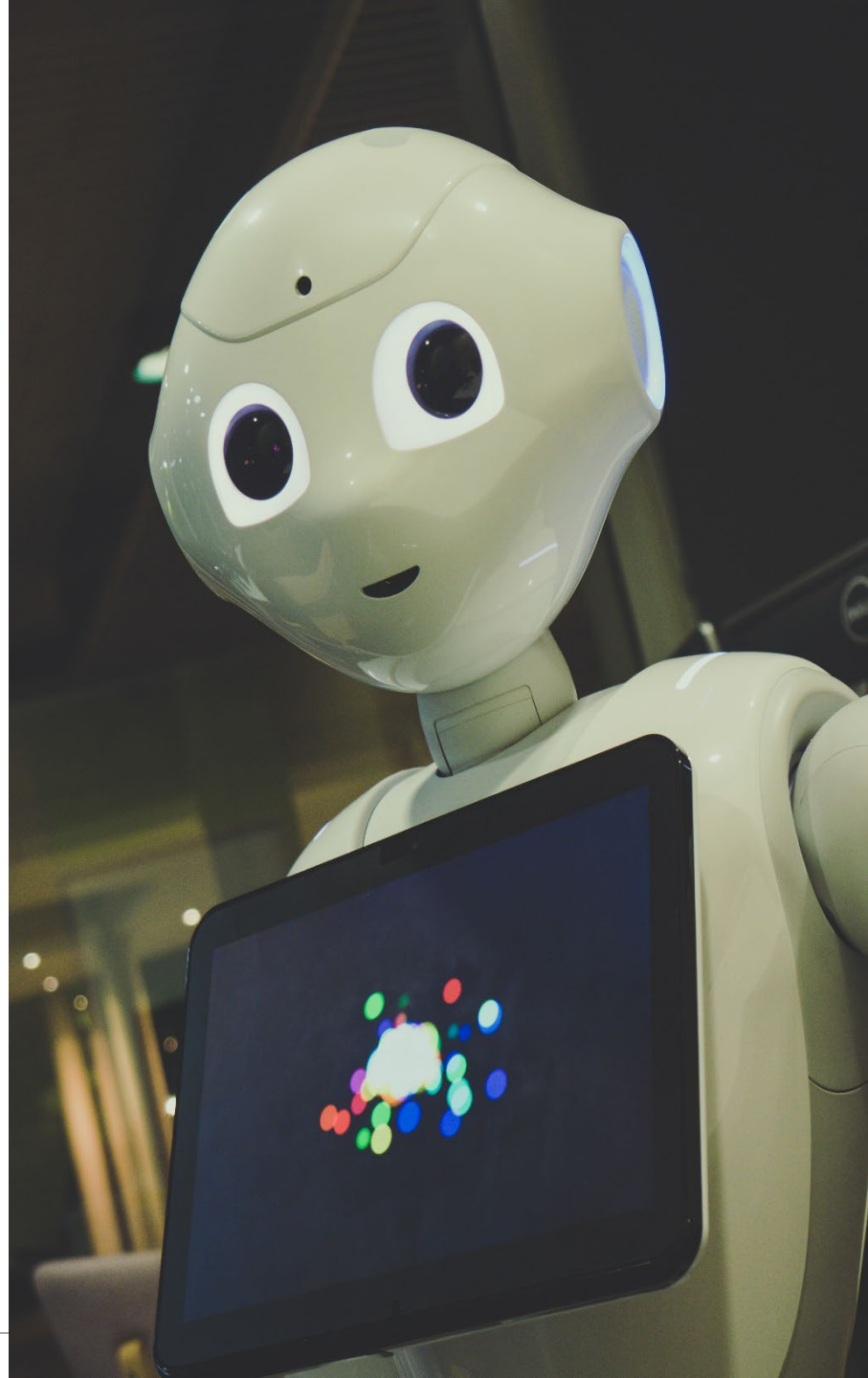
- The capability of computer systems or algorithms to imitate intelligent human behavior
- See also **GENERATIVE ARTIFICIAL INTELLIGENCE**: artificial intelligence that is capable of generating new content (such as images or text) in response to a submitted prompt (such as a query) by learning from a large reference database of examples
- [Merriam-Webster](#)





# 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





# AI'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

- Change Management**
- Preliminary Research and Analysis Tools
  - Document Automation and Drafting
  - Data analysis and predictive analytics
  - Ideation

**Process Improvement**

**Data Analysis**

**Artificial Intelligence**

**Technology Solutions**

**Practical Application**

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## Change is...

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

# Examples of Change



[Blockbuster Video, Addison Illinois, April 2009](#)  
Joe+Jeanette Archie  
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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?

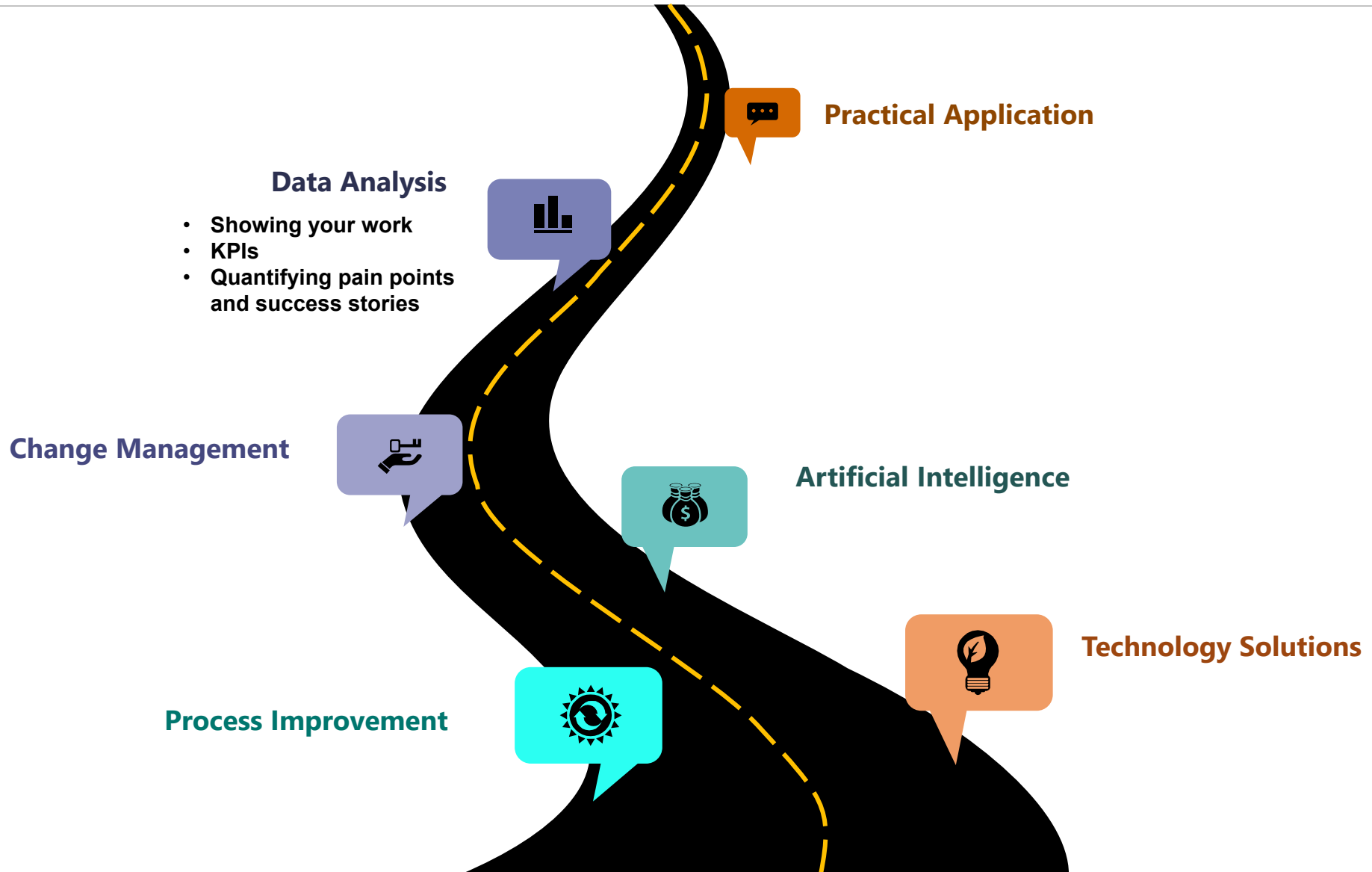
- Utilization of process, tools, and techniques to achieve change
- Goal is to sustain a desired business outcome
- It's not new – there are many methodologies seeking the same outcome

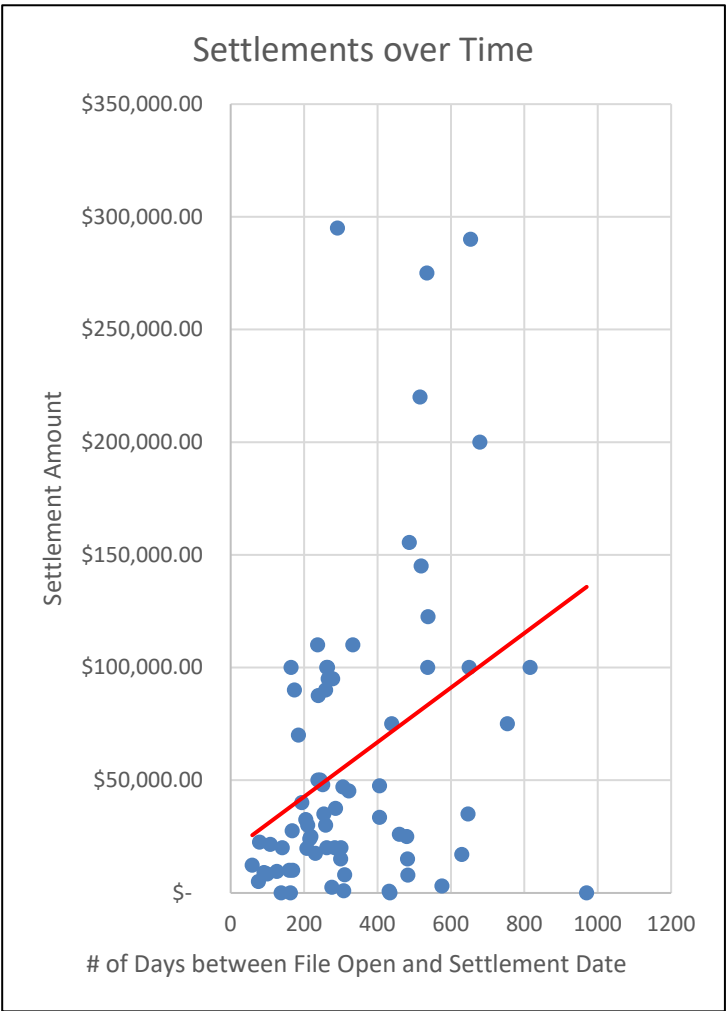
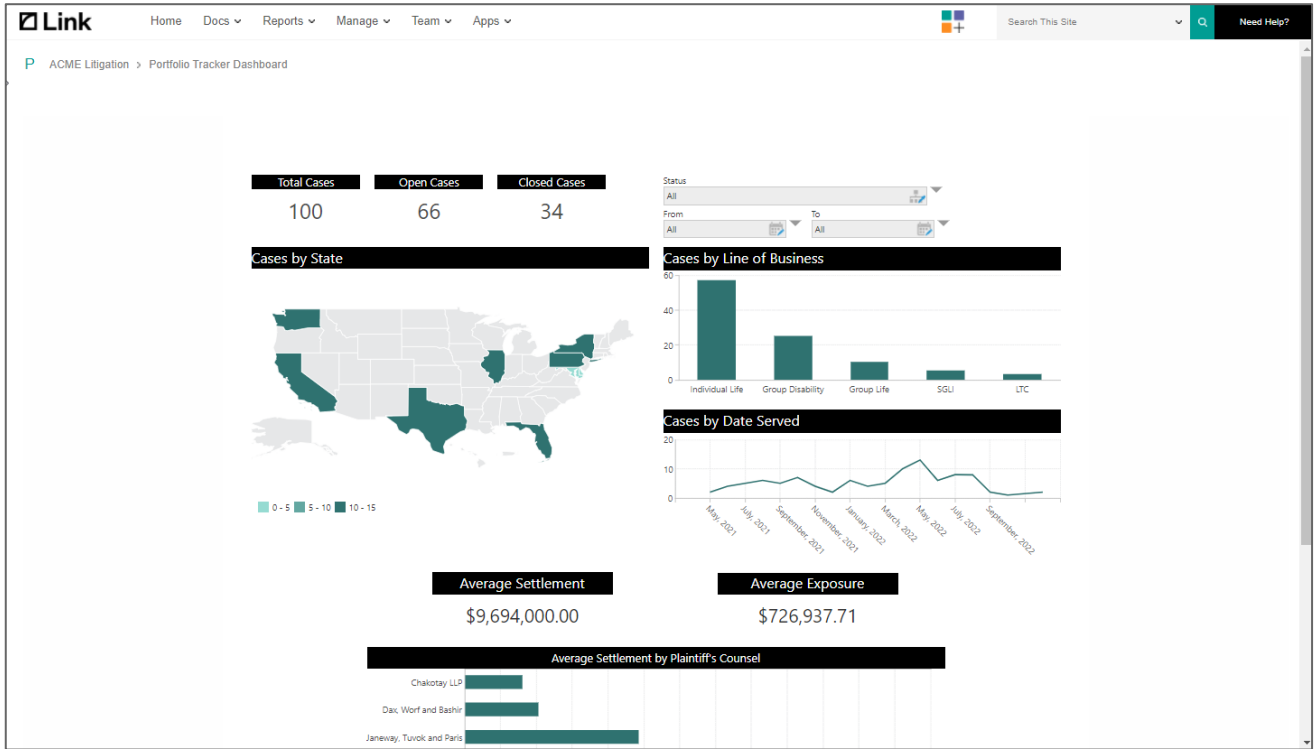


# Change Management Models

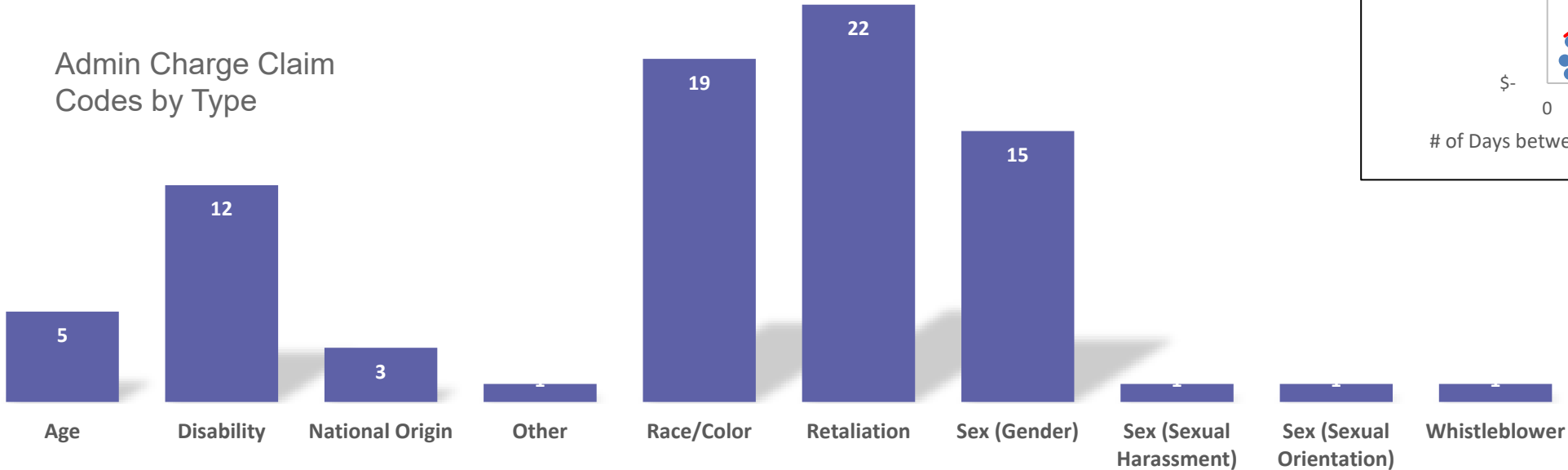
- John Kotter's Eight Stage Model for Leading Change
- William Bridges Managing Transition
- ADKAR (Prosci)
- Satir Model
- Lewins Model
- DMAIC

# Data Analysis





Admin Charge Claim Codes by Type





SCAN ME

## CLE: NEW PROCESS

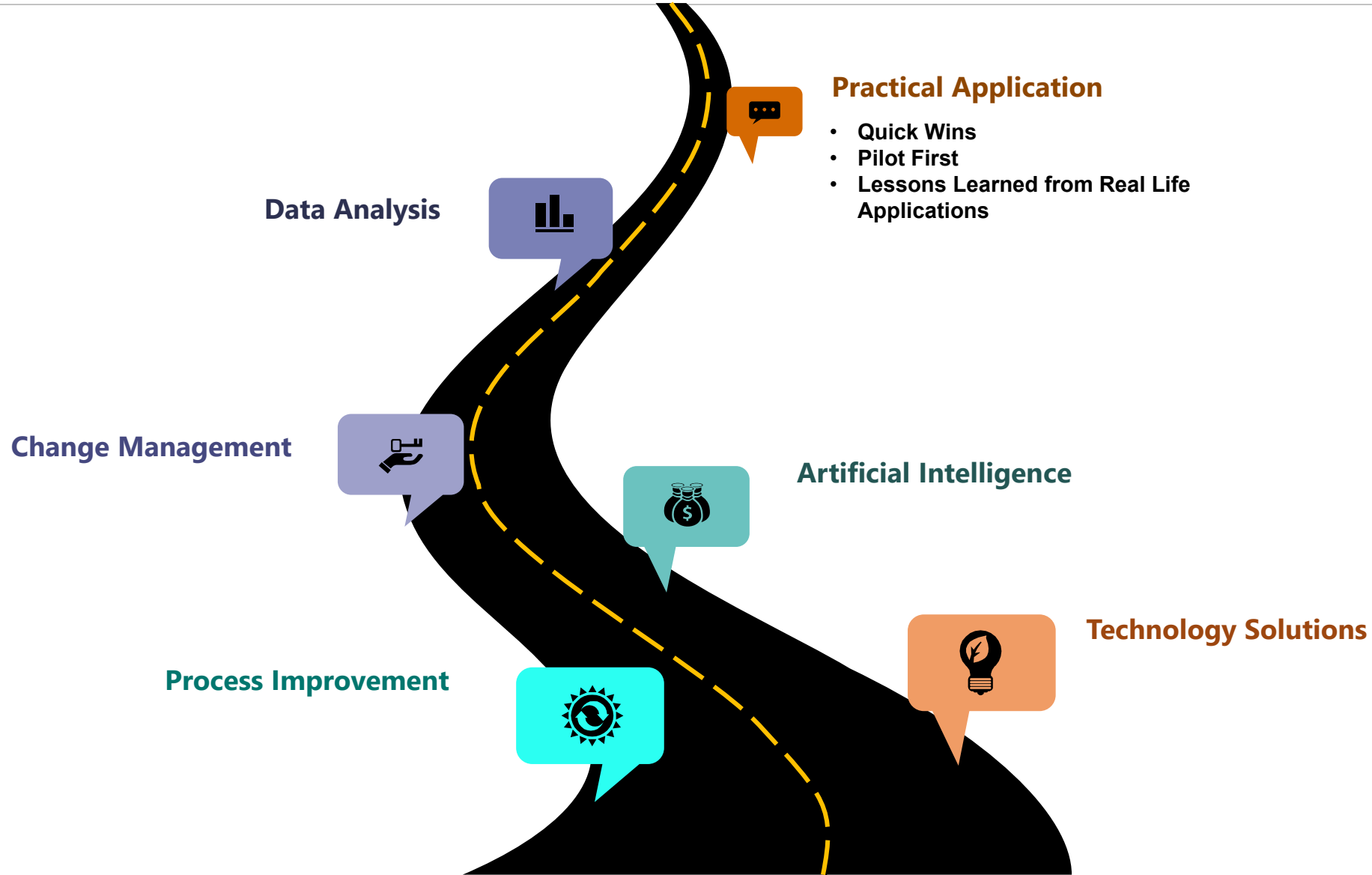
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1. **Title:** Evolve & Elevate: Transforming Your Legal Ops Approach
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3. **Attendance Verification Code:** SS9714

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# Practical Application





# 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

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- 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

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- 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

