

# Pioneers and Pathfinders: Barbara Rogers

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**Steve Poor** 00:00

Hi. This is Steve Poor, and you're listening to Pioneers and Pathfinders.

Today, we host a fantastic guest, Barbara Rogers, Vice President of Legal Operations, Strategy & Transformation at Honeywell. Honeywell, a Fortune 500 powerhouse, is known for developing cutting-edge technologies to tackle global challenges in safety, security, and energy. And Barbara, well, she's at the heart of driving transformation within the company's legal operations. With a career spanning HR procurement and legal, Barbara has led large-scale global transformation initiatives. She started out as an attorney focused on commercial and consumer plaintiff work, before moving into strategic business roles, including a time at Motorola as Senior Strategic Business Alliance manager. Now, at Honeywell, she's building a forward-thinking legal operations function, one that's guided by strategy, innovation, and a clear roadmap for the future. In fact, her team's work was recognized last year with the Financial Times North America Innovative Lawyers Award for Innovation and Operational Transformation.

In our conversation, Barbara shares her insights on legal operations and strategy at Honeywell, how she's cultivating a creative and innovative team, the common thread that ties together her diverse career, how to navigate the fear and opportunities surrounding generative AI. Thanks for taking a listen.

Barbara, thank you so much for making the time to talk to us today. Absolutely thrilled to be here. "Legal, operations, strategy, and transformation" is a ... It's a mouthful. Give us the bird's eye view of what your scope of responsibilities include.

**Barbara Rogers** 01:44

Yeah, so I mean, legal operations is really what I think anybody in the operations function, you know, would think it is. It's about how we create processes, tools around making a legal in house legal function operate as efficiently and effectively as possible. What can my team do to enable the lawyers, both inside and outside of Honeywell, to do the things that we need to do to appropriately manage Honeywell's risk and to improve our financial position in the marketplace? But beyond that, I think that you know, when I talk about strategy and transformation. It's really about where is our legal function going? I think that what I've seen in many cases is that people get a little bit too much into the wheel of, you know, continuing to do the things that they've always done. But this is a time of massive transformation in the marketplace, particularly around AI and technology and digital solutions, and so really starting to identify what is the end game, although there's really no end game, but what is the future optimal state for Honeywell's legal function in terms of how we interact with technology, what we want that Legal function to look like, what are the right tools for us to invest in and to leverage across our organization? So that really kind of goes to both the strategy and the transformation. It's really about, where do we take this function so that as Honeywell continues to evolve as a company, and it's obviously out there in the marketplace, what's going on with Honeywell, but as we continue to evolve as

a company, how do I ensure that I have all the right tools, the right processes, the right people in place to enable that growth and that future state.

**Steve Poor 03:33**

There's a lot to unpack there. Yeah. How do you stay aligned with the company strategy. You're looking down the road at the legal function and what it has to perform, but the legal function has to align itself with company strategy, the evolution of that strategy. How do you stay aligned? How do you communicate with various stakeholders to make sure your vision is consistent with the company's vision?

**Barbara Rogers 03:56**

Yeah, so a big part of my job is spending time with each one of our businesses, through business leaders, through our general counsels of the company, through other functional leaders, such as our IT organization, our finance organization, and so a lot of what I do is continuing to sit in on their strategy meetings, building those relationships, so that I have a seat at the table to understand where they are going. And in addition, you know, so then, how do I bring the legal function along with that?

**Steve Poor 04:31**

It obviously requires this type of transformation, this type of operational excellence. Requires a lot of change management function. How does that work in Honeywell, how do you drive whether it's stakeholders trying to help them understand the capabilities of the legal department or the legal department, which is full of lawyers and allied professionals doing things differently?

**Barbara Rogers 04:54**

Yeah, I think that change management is a continuous evolutionary process. Process. It's both grassroots, meaning, how much time can I spend with people, gathering feedback and then reflecting back on that feedback as we're starting to implement things? How do we do listen and learn sessions when we're implementing technology? How do we have office hours when we're implementing technology? What trainings am I going to put out there that can be used by the function, and then just a lot of standard communications. Honeywell, thankfully has moved recently to a more standard communication platform that goes out across all the company. And so I can take sections of that and continue to update in that on a regular basis for the legal function. So it's there's really no one methodology. You have to start with winning the minds and hearts of folks. So you need to build a level of trust and have very open dialog about what you're doing and how you're going to do it, so that transparency and no surprises to the organization. If you're rolling out a new process, if you're rolling out a new technology, all that groundwork has to happen first, and then it's a continuous communication to the organization.

**Steve Poor 06:08**

How do you measure success with various initiatives, whether they be rolling out a new technology or an initiative? How do you design this to be able to measure?

**Barbara Rogers 06:18**

Yeah, so you know, I think that one of the challenges corporate always has is that businesses feel that corporate can really get in the way of them doing their roles or being efficient and effective in their roles. And so always what I'm looking at, and Honeywell is a huge data company. Everything we do, we measure with data. So I look at compliance, I look at how many transactions are going through the process. I look at what is actually going outside of the process, and try and understand, why are you doing it this way, when we've set it up this way? Is there something I don't understand about how you do that piece of work that is not does not fit into the technology solution or the process solution that we've delivered? So it's a constant hunting game, I guess I would say in terms of, where do I have compliance? How can I measure if things are being done more efficiently? For example, if we roll out a process around how to do contracting processes, do we have a baseline that we can start with that says it takes this long now, and with this new implementation, measure that that efficiency, and so it's a matter of looking at all of what your KPIs and what's important to the business to measure, but also understanding what is kind of falling out and when people are going around the process or not following the process, and understanding why that is.

**Steve Poor** 07:40

You've been building this function for a while. You've been at Honeywell for not quite 20 years, and you've built it into an award winning function. You just last year, you won the FT's award for innovation and operational transformation, I get that term right, and you're the winner of the Monica Bay Award in Legalweek this year. Congratulations on both of those, by the way.

**Barbara Rogers** 08:03

Thank you.

**Steve Poor** 08:04

Obviously, it's due in a large part to you and your team's work. But what is it about the culture of Honeywell that has allowed you to build such a creative and innovative team?

**Barbara Rogers** 08:13

Oh, gosh, that's a great question. I guess I would reflect back on what you said is that I have been at Honeywell for almost 20 years, and I Okay, this is going to sound so ridiculous. I love my job. I love this company with all of my art, because there are such amazingly smart people here, and the company is constantly innovating and looking for new ways to do whatever work that we're doing, whether it's the businesses and what they're delivering in the marketplace, or the functions and how we support and so my career has really been at Honeywell, a transformation career. If you look back on my CV, I started in an HR transformation role. I moved into a procurement transformation role. I really am all about how do we take these functions and evolve them to be the most effective and efficient function for the business at that time, and it's a constant iteration.

**Steve Poor** 09:10

What value do you place on your experience in HR and procurement, apart from just the experience of transforming those functions? Are there substantive elements you learn from working in those functional areas that apply in your job now.

**Barbara Rogers 09:23**

Yeah, I think that, you know, you hit on it a little earlier with the change management. I think in general, people aren't good at change management. They forget that part of the process sometimes, and so early lessons around how important it is to have the support and the alignment with the business on the things that you are doing, I think that that is carried very well for me. I also think that when you're in a transformation job, in general, there's a lot of people who don't like what you're doing. You're moving their cheese, you're doing something different they don't want to do. It's different. They've been doing it fine for however many years, and so I guess, you know, developing both a thick skin and a natural curiosity as to what drives people to continue to do things a certain way when there's new and better and more innovative ways to do things and really understanding and meeting people where they're at. I don't know. I find that has carried with me forever. I think that, you know, when I started in my career in Honeywell, that was a lesson. I was a lot younger and couldn't really understand, like, why people didn't just see what we were doing. It was so great, like, just do it, but that never works. And so really investing the time in building my network, knowing the different functions, understanding what motivates people, helping people through a change cycle. Those are kind of some of the lessons that have really carried with me, regardless of what function you're in, if you're in a transformation role.

**Steve Poor 10:56**

You said something that struck a bell with me, which is the "curiosity" of how you do things better. I think that's an undervalued characteristic of people, particularly when you're trying to lead transformation.

**Barbara Rogers 11:07**

I absolutely agree, and you probably won't like that. I quote this, but one of my favorite shows of all time is Ted Lasso. And one of Ted Lasso's sayings is, "Be curious, not judgmental." And I try to live by that every day and say, Why? Why did you do it that way? Help me understand how that's helpful for you or effective, or help me understand why this doesn't work. And I think that you know, if you can disarm that defensiveness in people and really try and understand where they're coming from, you'll, first off, learn a lot, and second off, really builds strong relationships that are trusting.

**Steve Poor 11:45**

That phrase, help me understand is a pretty critical one, isn't it? It really, it's sort of an amazing way to sort of build a relationship. And as you said, disarm people. They don't think you're being as critical. And people want to help other people. So if you say, help me understand, most people will help you understand.

**Barbara Rogers 12:03**

Yes, yes, absolutely, but it takes time to build that.

**Steve Poor 12:08**

Yes, it does. Yes it does. Now let's talk a little bit about your career. I suspect you didn't go to law school thinking you're going to be in legal operations and strategic transformation.

**Barbara Rogers 12:18**

No.

**Steve Poor** 12:19

What did you go to law school thinking you're going to do with the degree?

**Barbara Rogers** 12:24

That's a very, very long time ago, but I did think I was just going to be a practicing attorney. I mean, I went in, you know, a couple of different directions. I loved litigation. I liked litigating. I liked being in a courtroom. I felt like that was going to be my path. But I was at a small firm in Chicago for a while and realized that lawyers are in general, in a smaller firm that does not really have business operations, aren't good business people. And it was okay. It was a little it was a chaotic time. It was hard to really sink into anything around how the law firm was being run, other than it was from case to case to case to case, but how you were being measured, how things were improving, how you were doing things more effectively. None of that really existed. And I mean, this is going back to the '90s, so we're talking a really long time ago. And so I made it a decision that I wanted to see if there was another career path for me that could take the skills and the passions that I had and move into another space. And it's a long, kind of funny story how I ended up at Motorola. But I ended up at Motorola doing employee relations work, which was at its core dispute resolution, which at its core is what lawyers do is figure out how they're going to resolve a dispute between two parties. So it was a really actual I was able to take my skills and move into that space. And it was a it was a good skill transition. However, when I joined Motorola, it was not a good time for Motorola. I probably six months after I joined Motorola, decided that they needed to really restructure, and over a period of two or three years, we went from about 150,000 employees down to 100,000 employees. And it was really a turning point for Motorola, which, if you know anything about the company now, doesn't even resemble anything that it did you know 25 years ago. Well aware, yeah, yeah, yeah. I know you're in the Chicago area. So that was really the first time that I started to understand that it was really about a skill set that you could take and plop down into different areas and use those skills, rather than just a very narrow path of, I'm a educated attorney. I need to do, you know, a very traditional lawyering role. And so that gave me freedom to really think about, you know, other things. I ended up doing a role at Motorola that led me into Honeywell. Because of the transformation at Motorola, I was. Running an outsourcing agreement. Motorola, at the time, kind of felt like running an outsourcing agreement for HR services required somebody who understood a contract, because it was this big contract with this outsourced company. Reality that has nothing to do with a contract. You should really probably never look at a contract again when you're doing a huge outsourcing arrangement. It's really all relationship based. But I fell into that job. And then when I came to Honeywell, it was a similar space where Honeywell was looking to transform how it did its HR function and build a shared service center. And so that was kind of the evolution for me, is, how do I continue to improve and evolve organizations? And so if you look at my resume and you don't really understand me, it kind of looks like I have no idea what I want to do. I've been in all these different functional areas, but you have to strip that away and say it's really about the transformation of organizations. That's my sweet spot.

**Steve Poor** 15:56

When you moved into the legal operations transformation job, what was the challenge you were facing? What was the task?

**Barbara Rogers 16:03**

Yeah, so I had been doing for several years a contracts role, reporting in to our general counsel. I still report in to our general counsel. I was hired into the legal function to build a contract lifecycle management system, a CLM. just

**Steve Poor 16:17**

Which is challenging in and of itself.

**Barbara Rogers 16:19**

Yeah. Yeah. So, we had no CLM. Each one of our businesses was managing their contract documents and their processes in silos. And so if you think back to what I did in my HR role and in my procurement role, it was all about pulling that work together and standardizing optimizing it. So I was brought in to build a CLM, and in transparency, I had very little experience with the CLM. I did not really have a deep background in it, so I spent a lot of time trying to figure that space out. And so I did that. I deployed a CLM. I built an organization around contracting, very much focused on contracting excellence. How do we improve? You know, once you have a tool, you need processes and people and metrics and all those things around how you continue to keep that alive? Otherwise that that tool is just never going to continue to support the business. So I did that for several years, and then in having a lot of conversations with my boss, you know, we really did not have a dedicated legal operations function. We had great legal operations in pockets. Some of it reported into litigation. Some of it was reporting into another space, but it was not really pulled together. And our vision was, as I stated, kind of earlier in the conversation, is, what do we want legal to be for Honeywell in 10 years. And are we driving down that path, or are we just kind of looking at point solutions and kind of smaller improvements to how we do things? And so that was really the genesis for this role, is to identify what we want that function to look like in the future state. And how can I build an organization that is flexible and resilient enough to keep up with the pace of change at Honeywell.

**Steve Poor 18:05**

That sounds like an enormous task. And obviously, you've done an incredibly good job at it, but when you look at that at the time, where do you start?

**Barbara Rogers 18:14**

I think I would say the same thing is in my contracting role, I've done a ton of benchmarking, a ton of listening, a ton of educating myself, talking to external parties as well as internal parties, around what their ideas were, what their thoughts are, what's best in class, out in the marketplace. You know, best in class the marketplace doesn't always work for every every company, but I think that you can get an idea of what world class legal operations looks like. And say, yeah, that fits for me. That doesn't necessarily fit for me, and start to frame out what I thought world class legal operations would look like for Honeywell. And then I need to go out and test that, you know, with my stakeholders, with the businesses, with the leadership at Honeywell, I feel incredibly blessed that I have a very strong relationship with our CEO, and he is ridiculously interested in how we're going to evolve our functions, and so I have face time with him on you know, what does this look like? What are we building? Does it make sense? Are we going in the right direction? Is it meeting the needs of Honeywell? So it's a lot

of education, and then a lot of adapting, adjusting, thinking, rethinking, readapting, to try to build a vision of where we want to go.

**Steve Poor** 19:28

What type of functions do you have in your group?

**Barbara Rogers** 19:32

So, I have a strategic operations function, which is basically, how do we manage our so I manage the budget for the function. How do we manage our budget? Are we spending our money wisely? Do we need to look in different ways of investing as well as building our strategic plan for the function? And so that's a little bit different than the legal operations strategy. It's more about the strategy for groups such as intellectual property and litigation and COVID. Clients, and so that team is responsible for pulling all of those pieces together into a strategy for the function. Then I have what we call Legal data intelligence, which is everything around records management, document management, e discovery, forensics, anything around legal data, legal holds, Service of Process outside council, spend management that all sits in that group, and then I have a group all around our digital roadmap. And so that is an area where I think there's a lot of areas that are at different levels of maturity, but have a lot of great work to do around really defining what our digital roadmap looks like. I know I said earlier, we tend to do a lot of point solutions. I think in general, businesses tend to do point solutions. You have a problem, you know, create a solution, but have we created too many point solutions that don't all hang together? And so that's really what I've tasked that team to do, is build that, that digital roadmap, and then I do retain all of my contracting work, so I still own our CLM and all the contracting excellence around how we do contracting at Honeywell.

**Steve Poor** 21:07

When do you sleep?

**Barbara Rogers** 21:10

I have a great team. They take good care of me. They take good care of me.

**Steve Poor** 21:15

I'm fascinated by the digital roadmap, yeah, particularly given the speed of change of technology these days, which seems to only continue to increase exponentially. How does the team keep up with what it's going to look like three months from now, six months from now, 10 months from now?

**Barbara Rogers** 21:32

Yeah, that's a challenge every single day. Because, like you said, the speed of change in the marketplace is intense. I think that what we can all kind of coalesce around, though, is that AI is going to be in our future in different areas. And so what I have found in terms of the AI marketplace is that it's good. It's not great. The more bespoke of a use case that we can develop for how AI is going to enable our digital transformation, the better the outcome. Meaning, there's some companies that are great at doing one part of AI or a use case with AI, there's other companies that are better at doing it in other places. So I think that market needs some time to mature. I mean, if you look back, we didn't even really talk about AI a couple years, right? So as that market matures, I think that we personally, at

Honeywell are a little bit ahead of or the we have all these things we want to go do, but the market has not yet gotten there in terms of the effectiveness of AI. And so I think that that actually has given us a great opportunity to pause and say, what are those things that we see AI doing for us in the future, and maybe the technology is not there yet, but here's the use cases where we see the most value. What's the benefit to the business in doing it that way? What's the ROI so we can slow down and build that out a little bit as the technology catches up?

**Steve Poor** 22:56

As you're thinking about the technology catching up, and thinking about the different functional areas that lawyers perform, let's talk a little bit about the human side of this. In your remit or, or, if not, how do you communicate the implications that has for the skill sets for the lawyers of the future? Honeywell runs a big legal department. I don't know quite how big, but you hire people, and you're looking for different skill sets. How does that communication work?

**Barbara Rogers** 23:23

Yeah, I think that's a great point. There's still a lot of fear in the marketplace anywhere that AI is going to replace humans. AI is not going to replace humans. It's going to redefine how we do work. And so having people, especially lawyers, more skilled and comfortable with how to use that technology is a huge part of our of our remit, and so I wrap that back into change management. I do a lot of, I mean, literally sitting on a teams, meeting with folks, and doing a demo of how things work and how you need to use this technology, and how that's going to improve the workload that you have. So there is a huge part of bringing people along and teaching them that is necessary, otherwise you'll lose them and they won't use it.

**Steve Poor** 24:08

Honeywell is a global company, and I'm sure you've got your transformation efforts spit out across the company and across various countries. Do you find it difficult or a challenge to deal with different cultural attributes and different ways countries operate? Or do you does your team pretty much operate seamlessly across borders?

**Barbara Rogers** 24:30

Yeah, that's a great question, and I would say it's kind of a combination of both. We try hard to operate seamlessly across borders, but that's not realistic all the time. There are cultural nuances in how things are done. There's different laws in different countries that we need to be aware of when we're rolling things out. And so I think it's a balance between driving to a standardization that is practical and having enough flexibility in the things that you're delivering. Bring that the cultural or country specific requirements are incorporated.

**Steve Poor** 25:05

Must be fascinating challenge. No wonder you enjoy your job.

**Barbara Rogers** 25:09

I do. I really do. It's a great job. It's a great organization.



**Steve Poor 25:14**

How have you seen legal operations function as a general proposition outside Honeywell? Obviously you built an incredibly sophisticated function that is the model for the industry. But we've seen this function evolve in different ways over a relatively short time period, over the last 10 to 20 years. Sort of how you see the legal operations functioning? Where do you see it going in the future, not necessarily Honeywell, but as an industry?

**Barbara Rogers 25:40**

Yeah, I think that with the fact that digital in the last like 10 years has just become so much a cornerstone of how to do things effectively, meaning in we've always had digital but really around our processes, I think that I see more of legal operations as a seat at the table of how to make companies run more efficiently. I think that in the past, and I haven't, you know, I've only been in this role, honestly, for less than a year. I said I did the contracting for a good long time. But looking back, I think that one of the wonderful things about Honeywell is that the businesses value the functions and want them to have a seat at the table and be a part of that strategic thought process. I think that I see that evolving more outside of Honeywell as well, where it's not just kind of a back office or, you know, somebody managing outside counsel spend in a vacuum, but it's really about enabling business results.

**Steve Poor 26:41**

I'm sure you get opportunities to meet people moving into the field for the first time, and look to you for advice and counsel and sort of guidance as to how to look at their career. What sort of typical advice or counsel do you give someone looking to move into legal ops?

**Barbara Rogers 26:59**

I ask people, first, how comfortable they are with change, what? How do you feel about change? Because change is very constant in legal ops. I talk about building your network. I talk about authenticity, and I talk about curiosity.

**Steve Poor 27:13**

To me, the legal ops function is a fascinating growth area, and it's gotten so sophisticated and so dynamic that, were I younger--I'd do a lot of things were I younger--Were I younger, it would be be a field that would really be interesting to me. Do you find it attracting more skill, or highly skilled people, or people who otherwise might have thought about truly a legal career--I mean in terms of being a practicing lawyer--that want to follow your path?

**Barbara Rogers 27:42**

I do. I see a lot of, I mean, my organization is made up of I have a lot of attorneys in my organization. I have a lot of non attorneys in my organization. And so, you know, having people that have passion around the legal function and like the law, but not necessarily wanting to be practicing attorneys, I have a whole project management organization that sits in in my operations, right? So, looking so so folks who are interested in doing project management work across the different legal functions, meaning, can you do a project with the compliance group, with the intellectual property group of litigation? So the breadth of what you get to touch by being in legal operations is immense, and I do see that there that

people who have an interest in the legal field, but not necessarily have to be lawyers. I definitely see a pull.

**Steve Poor 28:36**

Particularly at the beginning, did you encounter difficulty in getting the practicing lawyers to understand the value these other allied professionals bring?

**Barbara Rogers 28:46**

Yeah, absolutely. I mean, I think it's the same thing with paralegals, is, I think that really branding the function and ensuring that I continue to provide visibility to what our function delivers and how we deliver it, that increases the value that the rest of the legal function places on it. Like I said, same thing for our paralegals. I mean, I feel like paralegals are like an unsung hero. They do so much to enable the business, and folks just don't really understand the scope and breadth of that role. I think it's I do. I think it's education and just exposure to what we bring to the organization. I mean, I will say it's been fascinating in the last several months with some of our spin activity, and as we're starting to set up some of these new organizations, and having conversations with the organizations that we're spinning off, educating them on the scope of what you need to do to actually run a legal function where it's not just lawyers, but there's all these other things that are needed to run a legal function. I think it's been eye opening for people so that education and exposure is really important.

**Steve Poor 29:51**

Absolutely, I know we're at time, and I appreciate your time, Barbara. Last question you're talking about the market catching up to the needs of the function in terms of AI and technology, take us out a couple of years: Where do you see the market being in terms of capabilities, and how do you see it being used in the legal profession?

**Barbara Rogers 30:10**

I think that AI is going to take us to a place where contract reviews and contract evaluation. I think that's a good way to say it. Contract evaluation will become standardized through AI meaning, where are your risk profiles? What position is this other party asking for that you can or you cannot give? Is this going to create a risk of a compliance issue in Russia, those kinds of feelers out there beyond the four walls of the contract or the legal issue, I think, is where that technology is going to take us.

**Steve Poor 30:48**

It's exciting times, isn't it?

**Barbara Rogers 30:49**

It is.

**Steve Poor 30:50**

Well, thank you so much for your time today, Barbara, it's been a fascinating conversation. You're doing, and Honeywell are doing amazing things up there. It's great to see it recognized in the marketplace with all the various awards you've received. Congratulations.

**Barbara Rogers** 31:04

Thank you so much. I appreciate your time as well. I appreciate the conversation.

**Steve Poor** 31:09

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