

Roll it out like you  
would a red carpet:

# The ultimate guide to legal tech rollout



# Step-by-Step Process

For any legal ops managers, buying and rolling out legal tech is your red carpet moment. All eyes are on you; it's your time to shine.

This guide is here to act as your bible for this crucial career moment in the spotlight - and we've highlighted all the important steps.



Claire Nuske, Head of Operations (Legal), Bupa, understands the importance of her role:

**“We don’t want our lawyers spending time on work that doesn’t engage them or is monotonous. We want our lawyers to have time to contemplate the real issues and develop meaningful relationships with business.”**

# Before you go to market

Before you venture out into the market to acquire the best legal tech for your company, you have a little bit of homework to do.

Follow these steps:

**1** **Locate the pain point.** Consider metrics and make a decision about what you need to automate, based on business objectives. Then, think about scalability beyond that pain point.

**2** **Draft a problem statement.** A problem statement can be assembled by interrogating a problem. For example “Non-Disclosure Agreements are taking up too much of our lawyers’ time” - and then asking 5 ‘whys’ to get to the true root of the problem. [Use this guide](#) to find your why.

**3** **Identify your must-haves v. nice-to-haves.** Keep this list front and center and remember to circle back to it when in doubt. Don't be swayed by the bells and whistles if they weren't in the original brief or align with your “must-have” list.

**4** **Source team feedback.** Set up an Innovation Team who can deliver consensus on decisions. Make sure you cover a cross-section of your entire team and involve them in everything from vendor demos to vendor selection (this pays dividends when it comes to change management!).

# Consider Return on Investment (ROI)

ROI is a huge topic, which we have waxed lyrical about for [an entire guide](#). Determining return on investment is hugely important, because it helps your business determine (ahead of time) the time and money it will save from implementing new tech.

The TL:DR is as follows:

- **The calculation of cost and time saved.** Use this equation: Current annual workflow cost = time (how long each step of the process takes) x cost (employee cost per hour) x frequency (how often the workflow is performed monthly) x 12 (months).
- **Don't forget 'soft' ROI.** Hard ROI is the cash and by extension money saved, but soft ROI can be delivered in the forms of lawyer capacity, lawyer wellbeing and – importantly – client satisfaction. Soft ROI are the qualitative returns on your investment, where hard ROI are the quantitative returns.
- **Consider speed to competency.** That is, consider the time it will take to train your team and implement the automation. Change management is often underestimated yet it is vital to the success of the implementation of new tools and technology.

Mark Collins, ex-Lead Legal Technologist at Which? considered ROI when implementing legal tech, and it paid off.

**“One of the objectives I was working to achieve was “self-sufficiency” for the marketing team. With Josef’s no-code tools, not only can the team manage their own queries, the bot itself can be adjusted on a needs-basis. Reflecting on the previous process I estimate the bot now saves the company two to three hours every single day,” he said.**

# Pilot a solution

You've carefully selected the best technology. But before you go gangbusters rolling it out across a million different company problems, we strongly suggest starting with a pilot.

- **Draft a project plan (and stick to it!).** Come up with a project plan together with the vendor. Within the plan, clearly identify every step of the implementation process and all possible pitfalls. Stick to the plan come rain, hail or shine. The project plan needs to be put together with the vendor and not solo.
- **Hold the vendor accountable.** This point also speaks to carefully selecting the right vendor in the first instance. Do they offer ongoing support after launch? Will they be available to help you overcome roadblocks?

# Make the purchase

The pilot was a success! Finally, you can pull the trigger and make the long awaited purchase of the technology at scale.

For a smooth purchase, there are a few things we recommend considering:

- **Understand the buying process at your organization.** As any legal ops manager knows, there are likely powers-that-be holding the purse strings, and more often than not, a process around how to obtain budget approvals. Make sure you're following them before you ruffle feathers.
- **Get clear on pricing and inclusions.** It's easy to miss the small print, but you'll kick yourself when you're looking for integrations and they aren't available, or you need extra tech support from your vendor and there ain't any on offer!
- **Enterprise or entry-level?** You may well be an enterprise level organization, but that doesn't mean you need to purchase the enterprise level offering at first instance. Consider your company's needs, your organization's culture and whether starting with a smaller package will suffice.

# Roll out the technology

The time has finally arrived. You've completed all the necessary due diligence, you have all the right people onboard. You're ready for rollout.

Ask yourself:

- **Should rollout be phased?** Often this is advisable, especially if there are several moving parts to your solution.
- **Do you understand your team's preference for the rollout?** This is a great question to ask before you plan the rollout. . Would they prefer it done in phases? Would they prefer small teams? Regular feedback opportunities?
- **Are those affected involved in the rollout plan?** Rather than simply telling people about the changes that will impact them, consider making them active participants in construction of the rollout plan.

As with any change, big or small, expect hiccups and plan steps for mitigation. But, most of all, get excited about the transformative steps you're pioneering for your company.

They will thank you in the end.

[Book in a free demo today](#)