



From Siloed to Successful: Mastering Your Legal Tech Rollout

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Today's Agenda

Today, we're going to cover...

- Understanding change management.
- Lessons from a CLM rollout.
- Key takeaways for your next project.
- Your questions!





Britt England

Commercial Attorney, Director
Flagship Facility Services



Mat Calabro

Sr. Customer Advocacy &
Community Manager
LinkSquares



Patrick Won

Director, Services
LinkSquares



What is Change Management?

- Systematic approach to handle the transition or transformation of an organization's goals, processes, or technologies.
- Effective change management ensures smooth transitions, minimizes resistance, and maximizes engagement.
- **Change is needed when:**
 - There are advancements in technology, regulations, and client expectations.
 - There are noticeable dips in productivity or efficiency.
 - Business goals or strategic objectives are not being met.



Developing an Effective Strategy

- **Clear Objectives:** Outline what the change will look like and the desired outcome.
- **Stakeholder Analysis:** ID key stakeholders and understand their perspectives.
- **Communication:** Develop a plan to communicate the change & benefits.
- **Training & Support:** Prepare resources and training to help employees adapt.
- **Implementation Plan:** Outline timelines and responsibilities.
- **Monitor and Evaluate:** Regularly review progress, address any challenges, and adjust the strategy as needed.
- **Celebrate Success:** Recognize and reward successful adaptation to change.



FlagShip™

FACILITY SERVICES

- Southlake, TX-based facility services company.
- 6,000+ employees and 1,800+ clients across the US and Canada.
- Janitorial, culinary, facilities maintenance, lab services.
- Needed to manage sales contracts for all lines of business.
- 60 users required access.



Ghosts of Implementations Past

- Large vendor management systems, Salesforce-based systems.
- **Lessons learned:**
 - Everyone has a different learning style.
 - Adoption issues will arise.
 - Break old habits and be open-minded.
 - Uneasiness is temporary!



LinkSquares: Timeline of Implementation



Note: *Implementation timelines will vary.*

Breaking Down Silos

- How critical is interdepartmental collaboration and cooperation?
- Administrators can lead the charge, but what roles do others have?
 - Finding and uploading documents, providing input for correct formatting and tagging, etc.



Expectation Setting: Adoption of a new tool is a process!



- Recognize that no system is perfect.
- Utilize help articles and instructions.
- CSM partnership is critical.
- Develop advanced, self-service Q&A.
- Manage the stragglers.
- Make it work for you!



Implementation Challenges – and Solutions

Challenge:
Communication

How to fix it:

Have a plan. There needs to be a regular cadence of communication with an artifact that acts as a central place for notes and ongoing action items.

Challenge:
Project Health Tracking

How to fix it:

Problems and issues can often delay the project. That's ok! But they need to be communicated to the team so that they can be tracked and monitored.

Challenge:
Misaligned Goals

How to fix it:

Often comes from poor communication. The goal was presented, but not in a way that secured buy-in. Understand your audience and how to reach them.



Key Takeaways

- **Change management requires careful planning.**
 - What you get out of it depends on what you put into it.
- **Collaboration across departments is critical before *and* after.**
 - Understand what they need from the system and tailor trainings appropriately.
- **There is no one-size-fits-all solution for adoption.**
 - Work with your teams early and often and pivot as necessary.



Thank you!

Questions?

Request a demo!

