



SOLID SFO, 2025

How to Help Legal LOVE New Technology

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Agenda

- Understanding the Challenges
- Change Management vs Change Leadership
- Case Study: Implementing a CLM System
- Lessons Learned



**Understanding
the Challenges
to Legal
Technology
Adoption**

(Some of) The Challenges + Solutions

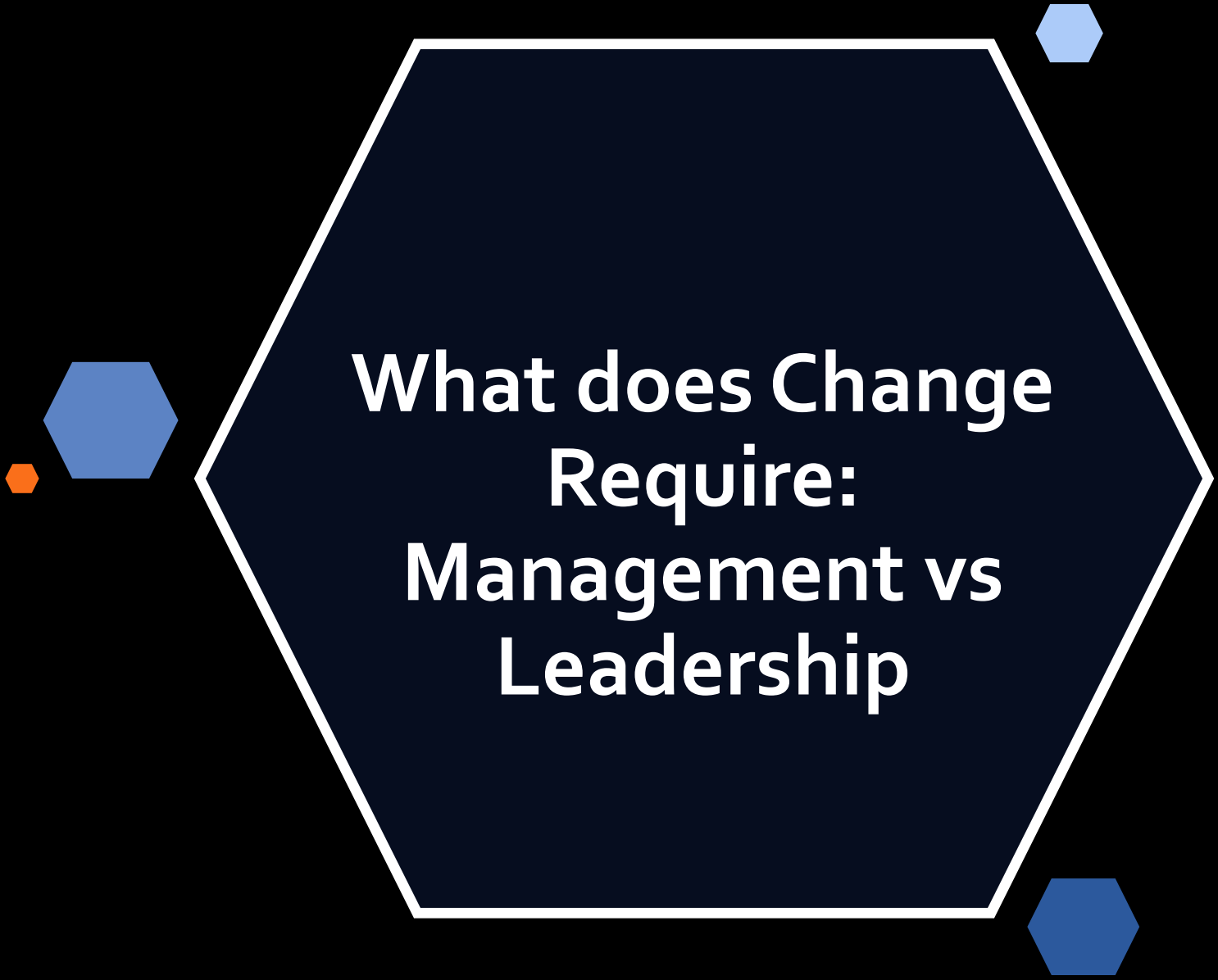
Challenges

- Cultural Resistance
- Lack of Technological Expertise
- Data Security Concerns
- Perceived Lack of ROI
- Readiness Before Tech Selection / Implementation
- Resource and Budget Constraints

Solutions

- Demonstrate ROI
- Secure Support
- Explore Alternative Funding Options
- Leverage Pilot Programs
- Clarify the Goal
- Select the Right Partner/Tool for You
- Execute on Change Management Initiatives





**What does Change
Require:
Management vs
Leadership**

Change Management vs Change Leadership

Change management provides structure and tools for implementing and monitoring change - ensures processes are in place

Change leadership provides vision and inspiration - initiates and drives change



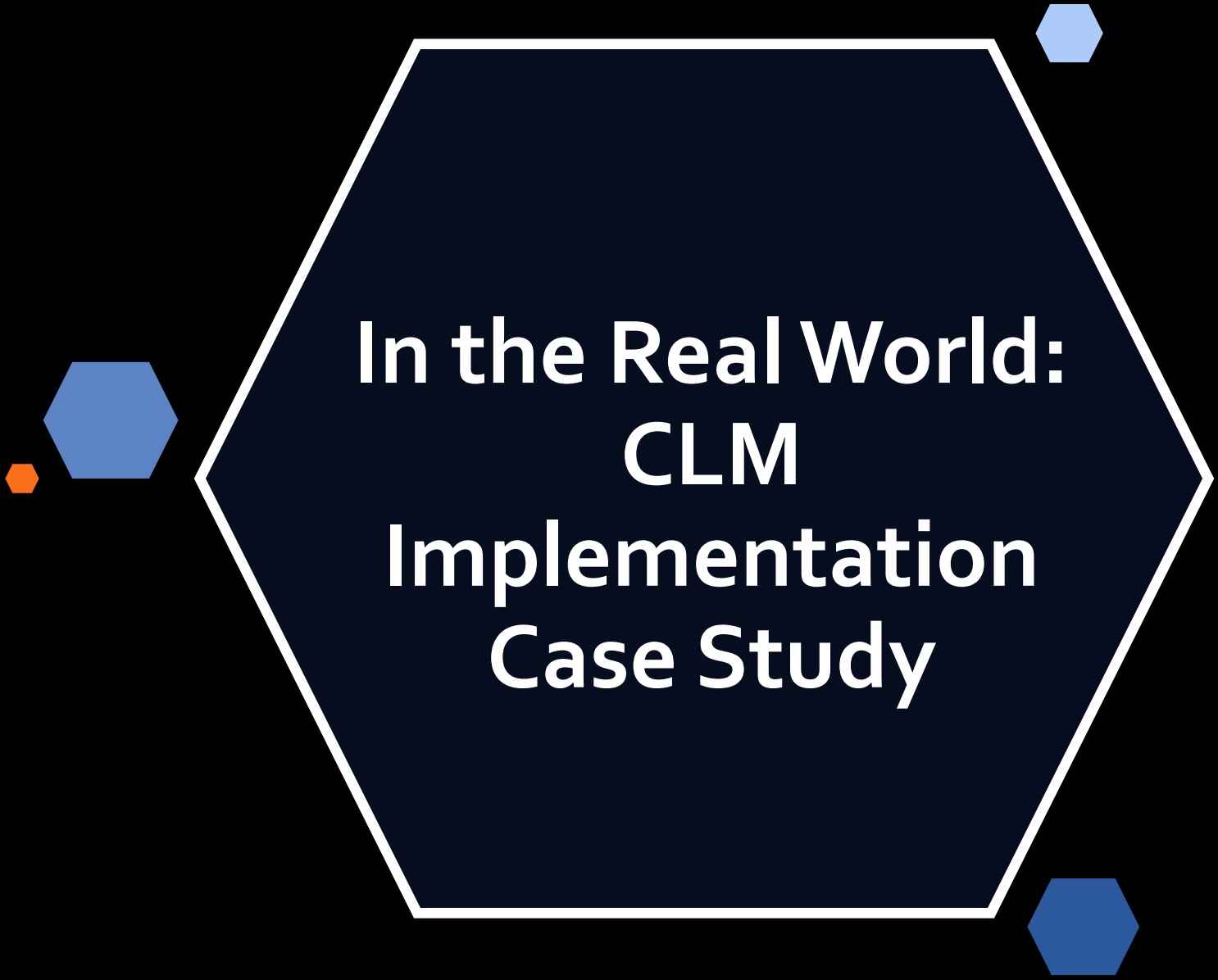
Key Change Leadership Attributes:

- Translates a mission into daily business operations
- Focuses on vision, strategy, and motivation during change initiatives
- Leads by example and communicates openly with team members
- Identifies obstacles and finds solutions
- Motivates oneself and team members to adapt to changes
- Takes risks to be innovative
- Provides clear direction, vision, and support during change management

Kübler-Ross Change Curve Model

Kübler-Ross Change Curve Model





**In the Real World:
CLM
Implementation
Case Study**

Implementing a CLM System at John Deere

Project Scope

- Transition from Legacy System
- Enterprise-wide Implementation - Procurement, Legal, IT
- Goal to eliminate 3rd party support (LSP for NDAs)

Key Challenges Faced

- Inherited after years of lag (already 3 yrs in the works!) – fatigue
- No clear owner - “committee” culture
- Lack of trust
- Lack of top-down leadership
- Disagreement about priority of requirements
- No implementation plan scoped/considered/budgeted
- Fear of change

My Role as a Change Leader

- Identified and evangelized the vision – Why are we doing this?
- Clarified roles and responsibilities (RACI)
- Got out and talked to people (verified our team’s specific needs, benchmarked with peers/industry experts)
- Ensured support / filled gaps (brought in Implementation Consultants)
- Visibly owned the final decision (note I did not make everyone happy! BUT – this feedback was a gift)
- Developed a plan/roadmap, took it on tour, got feedback, iterated (repeat)
- Set Meetings – Project Team / Stakeholders / Decision Makers / 3rd Party Support / etc.
- Ensured communication and support were in predictable places where people already worked
- Celebrated effort and wins

Project Outcome and Key Artifacts

Outcome (Jan 2024-Present):

- RFP'd 5 solutions (Gartner Magic Quadrant), POC'd 2, Selected 1
 - RFP -> Onboarding: 7 months
- Leadership prioritization/buy-in achieved – CLM success is a strategic goal for all 3 engaged departments
- Executed communication plan; predictably delivered and in the style (look/feel) of official company comms
- Training + support resources created and socialized to meet users where they are (SharePoint / Teams Channel / Email Distro / Office Hours)
- Agile delivery methodology; tandem workstreams in process
 - Workflow mapping + build-out, migration efforts, template/playbook/clause library rationalization, KPI development
- Iterative roll-out (based on volume & complexity)
 - NDAs launched Jan. 2025, next workflow on track for early March
- Lowest ticket volume (=happiest end users) of current projects in queue with enterprise support resources
- Overall project on track, under budget

Key Artifacts:

- **Business Case** - The “why”, how this supports business strategy, what value will be delivered
- **Project Plan** – What will this take to accomplish (budget, timeline, requirements, resources)
 - Risk Register - Don't take this lightly and seek feedback!
 - RACI - Who is involved in what way-who does what
 - Comms Plan - Consistency is key
- **Feedback Mechanism** (where to find you, where to get answers / ask questions)
- **Roadmap** as you have it – It's ok not to have soup to nuts from day one; phases are your friend. Start with specific dates for Phase 1, ID key milestones for the project and build out from there



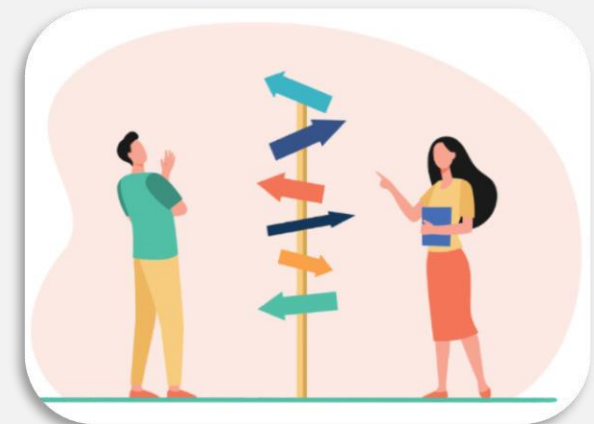
Lessons Learned

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The “Don’t” list*:

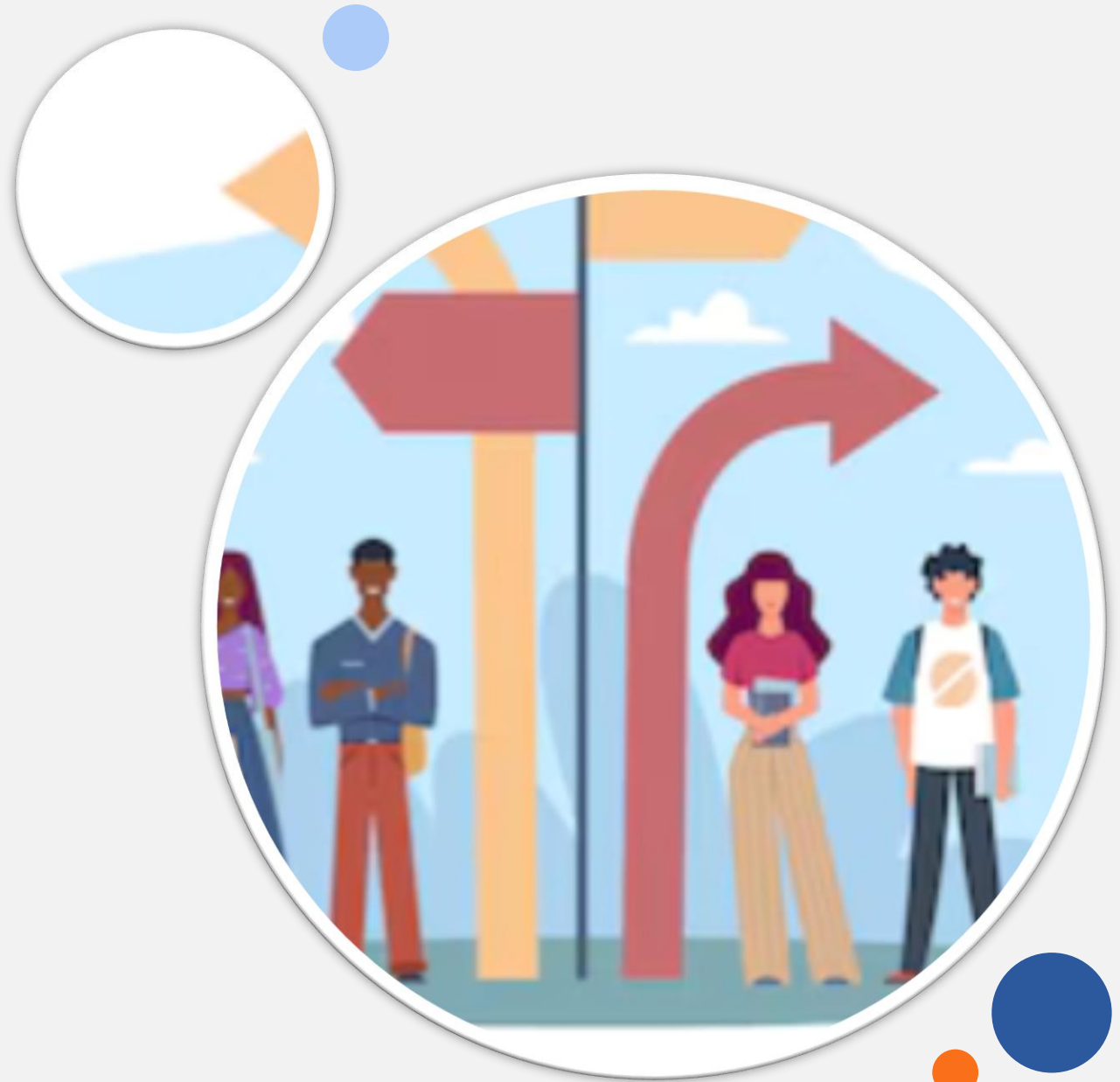
- Don’t assume Roles and Responsibilities are understood – especially regarding decision makers
- Don’t expect your message to land the first time – plan for meetings about the meetings
- Don’t expect everyone to “get it” - know who needs to get it to make progress, for everything else, get clear on your why, share your decision analysis and preserve
- Don’t underestimate the amount of effort required from stakeholders – set expectations and get buy-in early
- Don’t shy away from your mistakes – own and address them (this builds trust!)
- Don’t travel alone - lean on your networks and trusted 3rd parties/experts for advice and input
- Tech doesn't end upon purchase; Don’t forget to plan/budget for implementation support and hypercare
- Don’t expect people to find you, you need to meet them where they are
- Don’t try to do everything at once - MVP
- Don’t get stuck in linear delivery
- Don’t gloss over concerns that are shared, address these quickly and proactively
- Don’t underestimate the power of culture

*Non-exhaustive



Conclusion

- Legal teams do face unique challenges with tech adoption, understand them and tailor your approach accordingly
- Don't be satisfied with being a Change Manager, be a Change Leader
- It's not magic, it's patience, empathy, and careful planning
- Know, listen to and leverage your people (internal and external) - this is a team sport!
- Communication is key





**Thank
You**