



# Process Improvement and Automation

WHY START WITH WHY?

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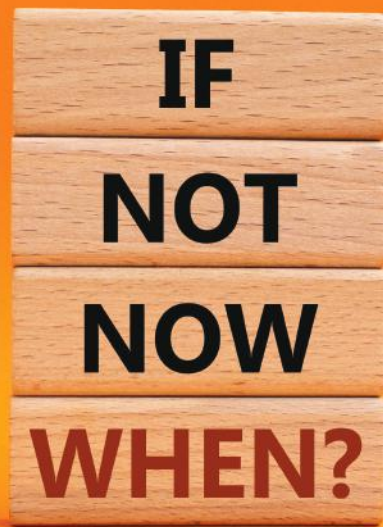
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## 1 • WHY START WITH 'WHY' IN PROCESS IMPROVEMENT

In the contemporary legal landscape, process improvement and automation have emerged as key areas of focus. However, the path toward effective reform involves more than simply pinpointing what needs transformation—it also hinges on understanding the 'how' and 'why' behind these initiatives. The 'why', in particular, assumes critical importance given the significant investment of time, finances, and labor that such endeavors demand, often without guaranteed outcomes. The task of persuading legal professionals, renowned for their intellect, resilience, and independence, to embark on this journey can feel akin to 'herding cats'

Navigating this complex terrain requires a strategic approach, starting with a clear articulation of the 'why.' By constructing a compelling projection of potential return on investment (ROI) and ensuring stakeholders that the process will be deftly managed, we can garner support and commitment for process improvement and automation initiatives. The judicious use of the right change management tools becomes crucial in achieving this goal.

### Chapters:

- 1 • Why start with 'Why'
- 2 • Securing Endorsement
- 3 • Embedding cultural improvement
- 4 • Understanding the 'Why'
- 5 • Concluding thoughts

Our recent webinar featured two esteemed figures from the legal sector - Eric Hurwitz, Partner and Co-Chair of the Financial Services Litigation practice group at Stradley Ronan, and Rachel Campbell, Corporate Project Manager and Legal Operations Specialist at Jack Henry and Associates. They graciously shared their insights into the 'why' behind process improvement and automation. Their experiences underscored not only how to develop robust tools for boosting productivity and profitability, but also the fundamental importance of commencing these initiatives by understanding the 'why.'

To actualize successful process improvement and automation initiatives in your law firm or legal operations, it is indispensable to unpack the 'why'. By emulating industry leaders like Eric Hurwitz and Rachel Campbell, you can devise a strategy that emphasizes the potential ROI and secures stakeholder approval for your endeavors.

# Process Improvement and Automation: Why Start with Why?

## 2 ▪ SECURING ENDORSEMENT

### *Leadership at the Partner Level*

Eric Hurwitz advocates for a modest start - beginning with small, simple initiatives and incrementally building upon improvements by learning from experience, maintaining openness to feedback, and considering more ambitious ideas for future steps. Publicizing and celebrating successes is key. His practice group at Stradley Ronan recognized a need for efficiency given the high volume of matters they handle. They started by attentively listening to their needs and focusing on improvements that delivered the highest value. Over two years, they continuously refined their approach, leading to increased sophistication and savings in their operations.

Hurwitz emphasizes the importance of securing buy-in from stakeholders at all levels, focusing on the easiest wins, understanding team needs, and being available to assist during transitions. He highlights that it's not necessary to tackle everything at once. Instead, by recognizing the team's pain points, one can identify and tackle issues with the greatest impact. As a leader, it's essential to leverage your position to invite everyone's input rather than imposing your own perspective.

*"If you're at the top of your organization or your team, you know, you have the benefit of hearing what everybody else is saying in a way that sometimes they don't communicate to each other." Eric Hurwitz, Stradley Ronan*



Demonstrating ROI is of utmost importance, given that process improvement and automation necessitate significant human and financial investments. Hurwitz advises laying the groundwork by identifying issues and quantifying their impact. As an example, his team calculated the time wasted on mundane tasks and, through the implementation of an efficient method for capturing information, transformed this lost time into billable hours.

### *Leadership at the Operational Level*

Executing successful legal operations requires the implementation of solid change management practices from the outset, encompassing people, technology, and processes. This includes choosing technology that adds tangible value to the business. Rachel Campbell emphasizes the essential role of unwavering support from the very beginning.

## Process Improvement and Automation: Why Start with Why?

Additionally, she accentuates the importance of transforming experiences into concrete examples of ROI. Campbell recommends designing a scope that clearly depicts the return to leaders, specifying the exact value it brings to the overall business, rather than solely addressing individual problem points.

Moreover, Campbell advocates for comprehensive planning that extends beyond merely addressing gap solutions. She underscores the essentiality of obtaining buy-in from top-tier leadership. According to her insights, effective change management isn't strictly a top-down or bottom-up process—it necessitates a symbiotic blend of both. Frequently, operational-level employees encounter challenges that may not be visible to senior executives. In contrast, these executives may identify overarching patterns and areas for improvement that aren't as apparent to frontline staff. Thus, collaboration across all levels of the organization is vital for the successful implementation of any change management initiative.

*“We are no longer office managers or office administrators reporting to a senior partner. . . We are valuable middle management team members that definitely serve a valuable function in space.” Rachel Campbell, Jack Henry*



### 3 ▪ EMBEDDING CULTURE OF CONTINUOUS IMPROVEMENT

Embedding a culture of continuous improvement within the organization is a significant challenge that both Hurwitz and Campbell have tackled in their respective roles.

Hurwitz notes that a culture of transparency and support catalyzes continuous improvement, making it more conducive for individuals to voice concerns, suggest solutions, and actively engage in the process. This necessitates cultivating an atmosphere where failure is perceived as a springboard for learning, not as a disaster. He advocates for acknowledging triumphs, regardless of their scale, as a means to inspire the team and cultivate a positive aura surrounding the improvement initiatives.

*“Adapt as new circumstances arise. If sometimes the solution you thought would be brilliant turns out to be terrible or could be implemented in a different way. Just pivot. That doesn't mean the idea was bad. Maybe you just need a tweak on how you're going about doing it.” Eric Hurwitz, Stradley Ronan*

## Process Improvement and Automation: Why Start with Why?

Campbell emphasizes that a culture of continuous improvement must begin at the top and permeate throughout the organization. She asserts that leaders should actively engage as participants and advocates of change, displaying unwavering commitment to the improvement process and serving as role models for the rest of the organization. This entails acknowledging and rewarding those who contribute to the improvement efforts, thereby integrating it into the organization's ethos.

*“you've got to get the users to use the tools in the process correctly.” Rachel Campbell, Jack Henry*



### 4 ▪ UNDERSTANDING THE 'WHY' BEHIND PROCESS IMPROVEMENT AND AUTOMATION

Hurwitz and Campbell both contend that understanding the 'why' behind process improvement and automation is essential. This understanding aids in justifying the investments made and helps in securing buy-in from various stakeholders

Hurwitz emphasizes that understanding the 'why' is crucial as it guides the selection of the 'how'—the technology and processes required to achieve the desired goals. He underscores that once the problem has been identified, quantified, and the 'why' is clear, the path to the 'how' becomes more apparent.

*“take a critical look at the way you're doing your job and ask yourself, is there a better way to do this right? Once you've identified the need for change, it's time to make it real. No one likes to learn new software or sit through training, but you can get through that by painting a picture of how much easier life will be once the change is in place.” Eric Hurwitz, Stradley Ronan*

Campbell agrees and further asserts, stating, 'The 'why' serves as the business case, enabling the demonstration of value and the establishment of credibility.' She also highlights that understanding the 'why' helps in avoiding the temptation of adopting shiny new technologies that may not align with the specific needs of the organization. By comprehending the 'why,' the team stays focused on selecting the appropriate technology and process improvements that genuinely contribute tangible value

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## Process Improvement and Automation: Why Start with Why?

### Concluding Thoughts

The webinar provided a wealth of invaluable insights into effectively managing process improvement and automation in the legal sector. Through an understanding of the 'why,' securing endorsements from all levels of the organization, and fostering a culture of continuous improvement, legal professionals can significantly enhance productivity, profitability, and client satisfaction.



*"We're keeping clients way better informed of what we're doing than we used to. And that by itself, you know, it's paid dividends." Eric Hurwitz, Stradley Ronan*

While the 'why' serves as the starting point, the 'how' is equally vital. Once the objectives are well-defined, the path toward achieving them becomes clearer. It is crucial to leverage the appropriate technology, engage all stakeholders, celebrate successes, and embrace failures as learning opportunities.

Always remember that process improvement and automation are not destinations, but rather ongoing journeys. Improvement is a continuous process, and the understanding of the 'why' helps maintain focus on the right path. Through effective management and collaboration, process improvement and automation can become a powerful driving force for success within your legal organization.

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