How to Get Senior-Level Buy-In for New Technology

Convincing firm leadership to upgrade can be an uphill climb. These tips can help.

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The pace of innovation in technology is always on the march. Is your firm at the back of the parade? If so, getting change where change isn't embraced can be an uphill climb. To reach the summit without breaking a sweat, make a strong business case to senior leaders about the benefits and opportunities that modernized technology can bring.

Change can be borne of necessity, which generally boils down to a list of pain points. Outdated hardware is expensive to maintain and will eventually fail. Outdated software can accumulate security issues and eventually become unsupported.

It can also come from opportunity. The desire for secure mobility is growing, allowing attorneys to work from anywhere with access to every asset relevant to their work. The emergence of cloud-based systems, applications and data allows firms to reduce hardware investments, while improving the ability to scale up or down quickly — if, for example, you want the ability to open another office quickly without a big technology investment.

And if natural disaster strikes your firm, the ability to quickly move operations can also motivate change.

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MARCHING TO SUCCESS

All that sounds exciting until you realize that the excitement for change is minimal. For many firms, everything is working fine the way it is. And there are risks changing, such as disrupting established processes, changing how people interact with technology, or buying the wrong solution.

But as technology marches forward, change is inevitable. Getting buy-in from senior leaders is about managing the natural skepticism that comes with a proposed technology upgrade. To convince skeptical executives, build a convincing evidence-based case for change. For success, avoid these common mistakes:

- Not being aware of current technology options and opportunities
- Not enlisting broad support early in the process
- Not understanding, at a detailed level, how each practice group works
- Not fully knowing the technology

Study and understand your options. Online research is a good place to start. Even better, according to Adriana Linares, President of LawTech Partners, a legal technology and training company, attend legal technology and ALA conferences, which give you easy access to representatives from a variety of technology companies that specialize in solutions for the legal industry. Conferences also allow you to network with other legal management professionals to learn how they use technology to keep their firms running profitably. She says that knowing what other firms are using and why they use it is good ammunition for getting buy-in from senior leaders.

If attending a conference isn't practical, consider reaching out to business partners by phone and email. Explain your requirements and evaluate their responses. They understand that you need high-level buy-in, so they'll be able and eager to offer advice.

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Finally, articles will help you make a case — lawyers like evidence, so scour the web for resources and white papers to support your situation. And don't forget the ALA Online Community. Your peers will often share what worked and what didn't work for their firms.

KNOW YOUR OFFICE

While each of your practice groups may use the same technology, they may use it differently. "You can't configure a tool the same way for all groups," says Linares. "The main thing is to understand what they need at a very detailed level. If administrators aren't buried deep in how each practice group actually works, they may not get a process right. We get this problem all the time."

To know your office better, Linares suggests including attorneys, paralegals and support staff from each practice group. "Get a team together from each practice area and get into the nitty-gritty of what their daily needs are. Pick a good solution based on that."

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Getting attorneys on board may take some selling. "It's hard to get them to stop and do anything because they're so focused on billing hours," says Joe Kelly, Founder and Chief Executive Officer of Legal Workspace, a legal technology consulting firm. "They need to understand that it can be worth their time to make a change." If a change will help them bill more hours, they will be very interested.

If you have an IT department that is engaged with how your people use technology and understands the business of law, including them early can be critical. "They're great at setting up demos and talking with salespeople if you have someone who's truly loyal to the firm and wants to help the firm," Linares says.

EXPERIENCE THE SOLUTION

Your team will need to experience the solution in order to make a strong case to senior leaders. Ask each business partner to show how your workflow will work with their solution. Have them give you access to a test environment to give their products a trial run. Encourage everyone on the team to connect at work and at home to put each solution through a stress test.

INCLUDE IMPLEMENTATION AND TRAINING

Include an implementation plan with your proposal. "We've seen projects spearheaded by a firm manager where the change message wasn't communicated through the organization," Kelly says. "In the cutover, you get half of the people using the old system and half using the new system. The data gets out of sync and it becomes a huge mess."

Linares suggests having a senior leader communicate the change — what's happening, the benefits and why the change is important. "Then it typically goes smoothly."

She also advises to cut off access to the old system during the changeover. "Overdo support in the first week so everyone gets their questions answered quickly. That seems to make a real difference in everybody adopting it. Training is also incredibly important. It's almost a make-it-or-break it factor in upgrading and modernizing technology," says Linares.

PITCH YOUR CASE

Bring all your evidence together and pitch your case for change to senior leaders. Explain the pain points and how they hold the firm back.

"Show how the new technology will make their lives easier and how it will impact the bottom line," says Chris Lukauskas, Director of Engineering and Support at Legal Workspace. "These are the best ways to show decision-makers the benefits."

Quantify, as much as possible, how the firm will save money. For example, if you're implementing a new cloud-based system, show how the firm will save money by moving to an operating expense and away from annual capital expenditures and equipment depreciation. Or, if you can show that a new solution will save attorneys two hours per week doing administrative tasks, that's compelling evidence. As much as possible, show how the solution is more efficient and allows the firm to bill more.

"The business case for modernizing is an easy sell to law firms," says Linares. "When we do a technology audit and see what they pay monthly for an outsourced IT company, what they pay for hardware, what they're going to pay if they want a new server, including the maintenance and the security that surrounds that, it's a no-brainer when you do a dollars-to-dollars comparison."

So your march to the summit of success may not be too steep — if you do your homework. ■

ABOUT THE AUTHOR

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