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Proven Guidance for C-Suite Action

Safe, Ambitious Automation Testing

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At the border of France and Switzerland, physicists hunt for subatomic particles, probing the nature of the universe. They station detectors along a ring of subterranean superconducting electromagnets that are chilled to a temperature colder than outer space. The magnets guide high-energy proton beams in opposite directions, accelerating them near the speed of light and squeezing them closer together.¹

To allay concerns that range from human injuries to cosmic accidents, this staging area, the Large Hadron Collider, is distinguished by its safety measures as much as by its scale and complexity. A board of independent scientists confirms the experiments are not dangerous,² beams and people are kept separated and precautions are taken to prevent energy overload within the equipment (see Figure 1).³

Workflow automation is not particle physics, of course, but the same principle applies — the boldest experiments and most outsized results require minimizing risk and maximizing comfort levels.

Figure 1. Views of the LHC Tunnel, Sectors 3 and 4



Photo credit: CERN

Ambitious testing that also contains fail-safes has emerged in an unlikely place — the in-house legal department, a traditionally cautious function with professional skills refined over the course of centuries. After all, errors introduced to, say, the contracting process can torpedo a major business deal or have severe financial or operational implications because of the agreement’s legal obligations. In a time of global turmoil caused by COVID-19, there’s even less patience for additional disruption. Yet using automation to manage workload burdens is a linchpin of enterprise resilience.

Precisely for that reason, leading legal department tactics offer three lessons for all corporate functions:

1. Support opportunities to experiment with low-cost automation solutions.
2. Support opportunities to experiment with low-risk workflows.
3. Let staff know it’s safe to fail.

Experimenting with unproven solutions has to move forward; it’s effective. In fact, 92% of legal

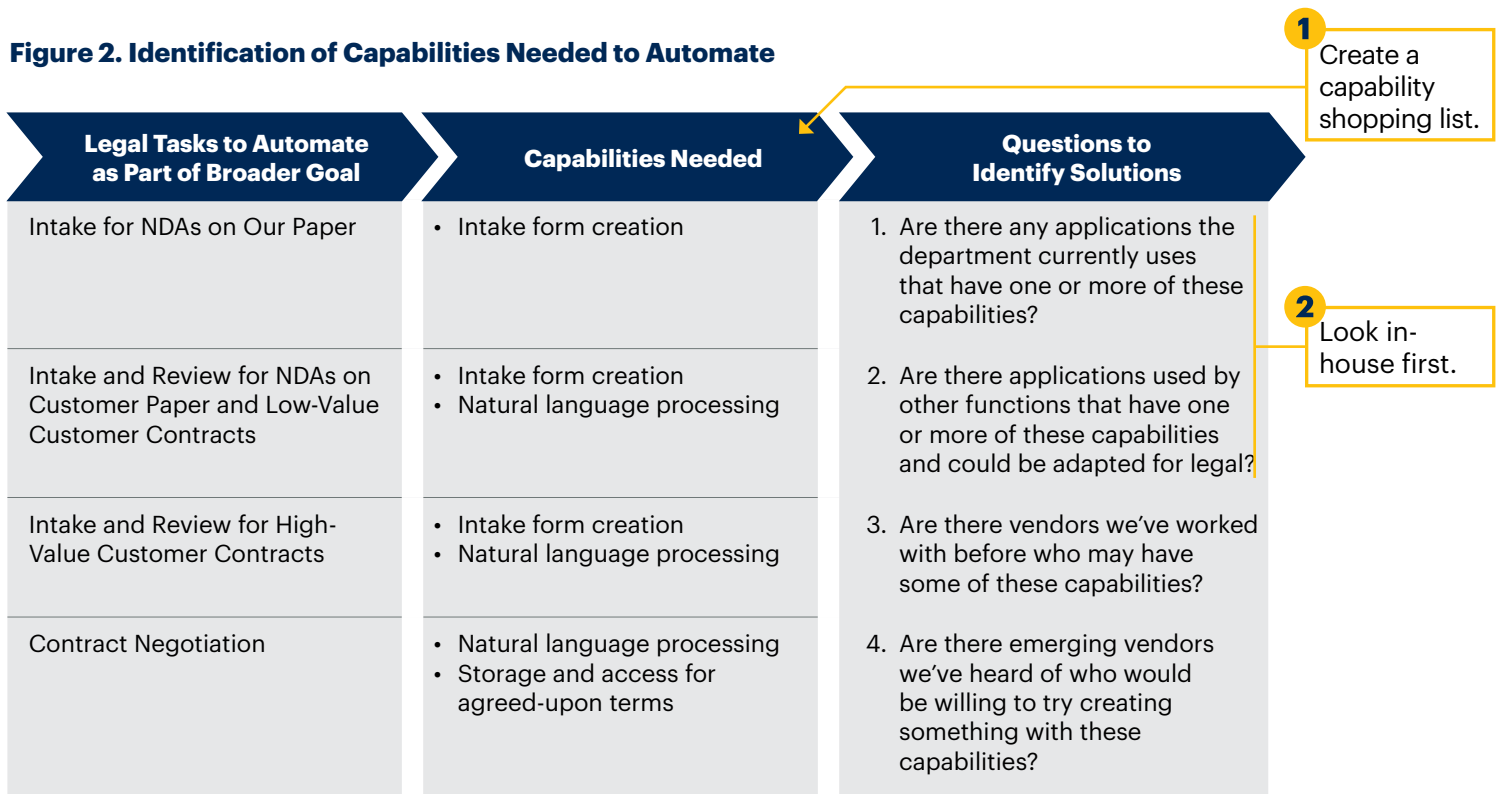
departments willing to adopt new and risky technologies achieved ROI from automation that met or exceeded their expectations.⁴ But you can get to that result in a careful way.

1. Support Opportunities to Experiment With Low-Cost Automation Solutions

Any function can feel pressure to invest in a solution without fully understanding its capabilities or the benefits that will result from automating the workflow. To increase the likelihood the payoff will justify the investment, corporate leaders can pursue low-cost opportunities for automation projects.

Legal operations at TE Connectivity created an inventory of the tasks that, if automated, would support its function’s goal of enabling business growth while efficiently and effectively managing risk. Next, legal operations identified the specific capabilities needed to automate these tasks. Finally, with this “shopping list” of automation capabilities in hand, TE Connectivity’s legal operations manager asked four questions to help source the solutions for automating the workflows (see Figure 2).

Figure 2. Identification of Capabilities Needed to Automate



Source: Adapted From TE Connectivity

These questions pushed TE Connectivity's legal department to first examine internal tools that could provide the needed automation capabilities. After referencing these questions, the team decided to start with a simple intake form for low-risk nondisclosure agreements. The tool it chose was SharePoint, which was sufficient for the task and available companywide, so no need to spend extra money.

TE Connectivity's legal operations team found automating each task individually over time better supported buy-in. Both legal staff and business partners felt comfortable using these solutions to support their own work, allowing the legal department to apply tools in even more creative ways as the plan progressed.

2. Support Opportunities to Experiment With Low-Risk Workflows

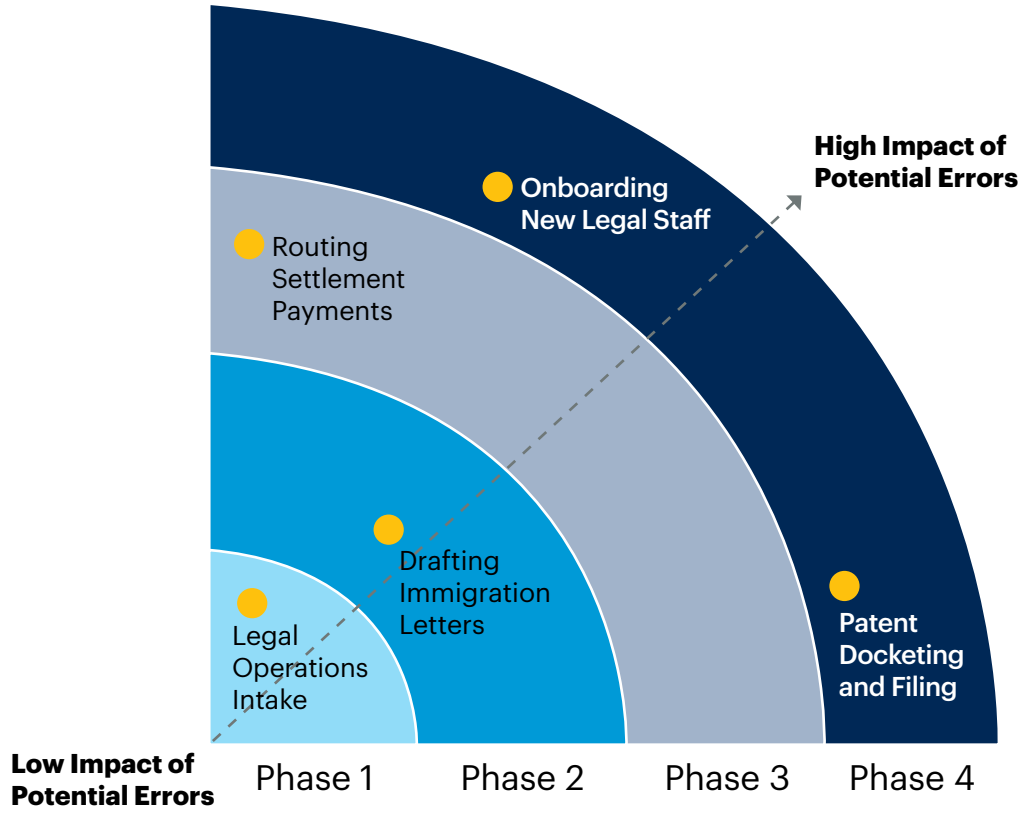
You don't want to start an experiment with the workflow your business partners rely on the most. Start with lower-risk processes to develop

an understanding of the solution's capabilities, and only afterward expand the solution to higher-risk processes.

T-Mobile's legal operations team developed a plan to roll out an automation solution in phases, each defined by the riskiness of the workflows involved (see Figure 3). Phase 1 involved testing an automation solution on legal operations intake, where in-house lawyers log requests for support from legal operations professionals. Because this process was completely contained within the legal department, errors could safely be evaluated and triaged with minimal impact. Business partners would not be inconvenienced in the event of a mistake.

Next, the team leveraged the knowledge it gained in Phase 1 to automate a slightly more complex task that was still relatively low-risk: immigration letters, which required the tool to flow between more applications and had a slightly larger impact on the business.

Figure 3. Phased Workflow Automation



Source: Adapted From T-Mobile

As the team continued to iterate, it gradually increased its understanding of the tool's capabilities and began testing it on tasks of increasing importance to the business. By Phase 4, the team could trust the tool with critical tasks involving corporate intellectual property, such as patent docketing and filing.

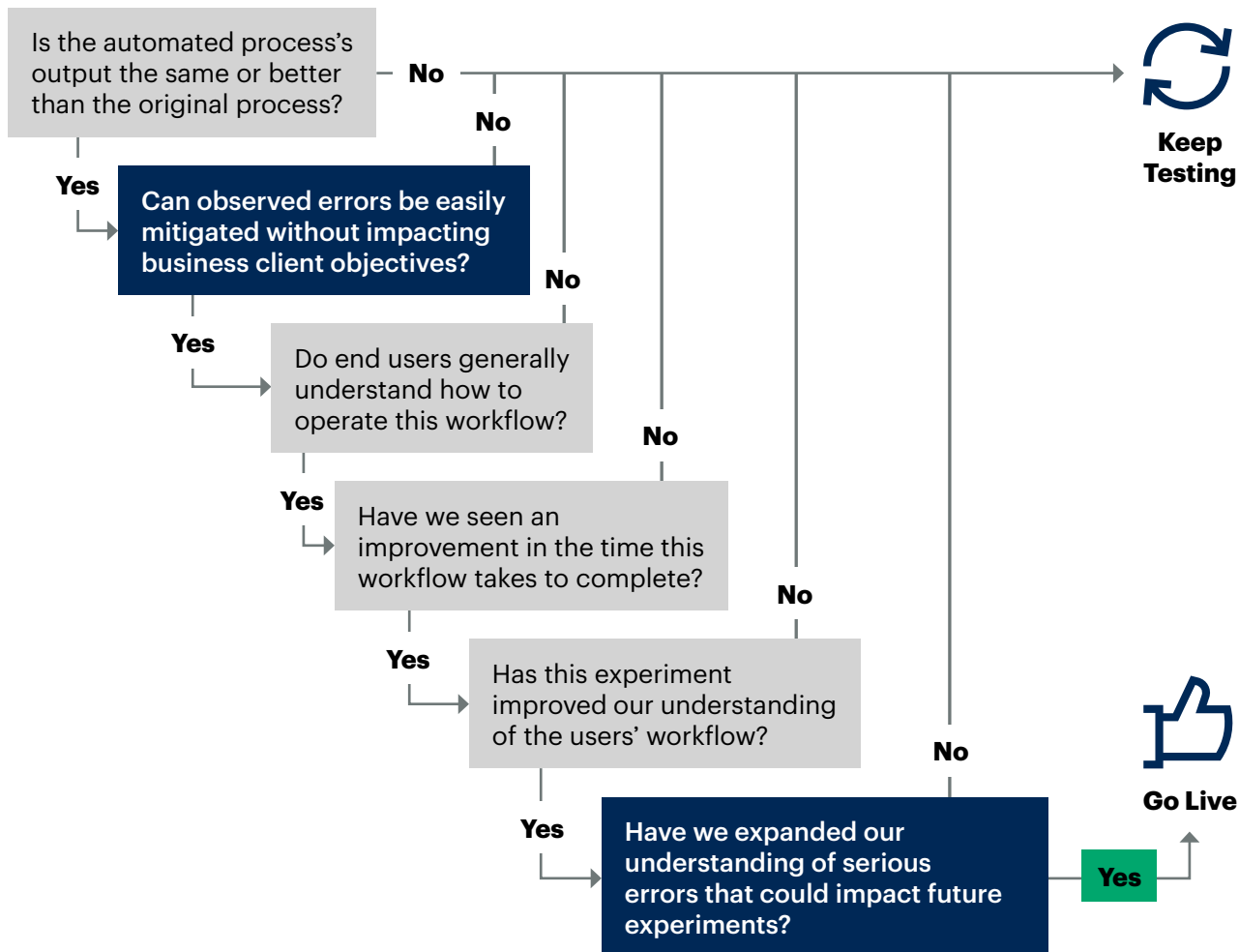
To determine whether the automation solution should be deployed without constant oversight within the current workflow and introduced to a higher-risk workflow, legal operations at T-Mobile defined a set of questions to ask at each stage (see Figure 4). These questions serve as both a fail-safe to ensure a poorly tested automation solution isn't rolled out too quickly for critical processes, and a mechanism to force legal operations to reflect on lessons learned from earlier tests.

Through its stage-gated automation process with built-in quality testing, T-Mobile's legal operations team was able to reduce time spent on the intake process by 50%, automate over 15 workflows and determine clear next steps for what automation solutions to test and implement.

3. Let Staff Know It's Safe to Fail

In addition to the risks presented to the business and the department's operations, your staff members also care about the damage to their own reputations and careers if their automation projects fail. To reassure them, corporate leaders should make it clear to staff that within safely scoped projects, risk taking and innovation are expected; perfection is not.

Figure 4. Automation Quality Testing



Source: Adapted From T-Mobile

The general counsel and legal operations team at Tech Data — a Florida-based technology distributor — realized their lawyers were not properly encouraged to work on transformation projects, despite the long-term value. So Tech Data’s legal team began to reference these initiatives in lawyers’ annual goals (see Figure 5). Participation became a criterion for promotion that figured prominently in promotion announcements.

In addition, Tech Data realized leadership messaging played a critical motivating role. Tech Data used a companywide recognition system to highlight staff effort — even on projects that were not successful — to encourage risk taking, experimentation and innovation across the team.

The fail-safes outlined here should help you feel more encouraged to experiment with an unproven automation technology to solve

workload management challenges. Creating a secure environment for testing, learning and experimenting will position your department to discover new ways to use automation to improve your business. The two go hand in hand, as British physicist and television host Brian Cox explained when he addressed “prophets of doom” about the collider. He wrote in Popular Science, “We are not powerful enough to endanger the world with this thing by a very long shot!” And “exploration always delivers,” he noted, “because striving to gaze over the horizon is the only route to progress.”⁵

¹ [The Large Hadron Collider](#), CERN.

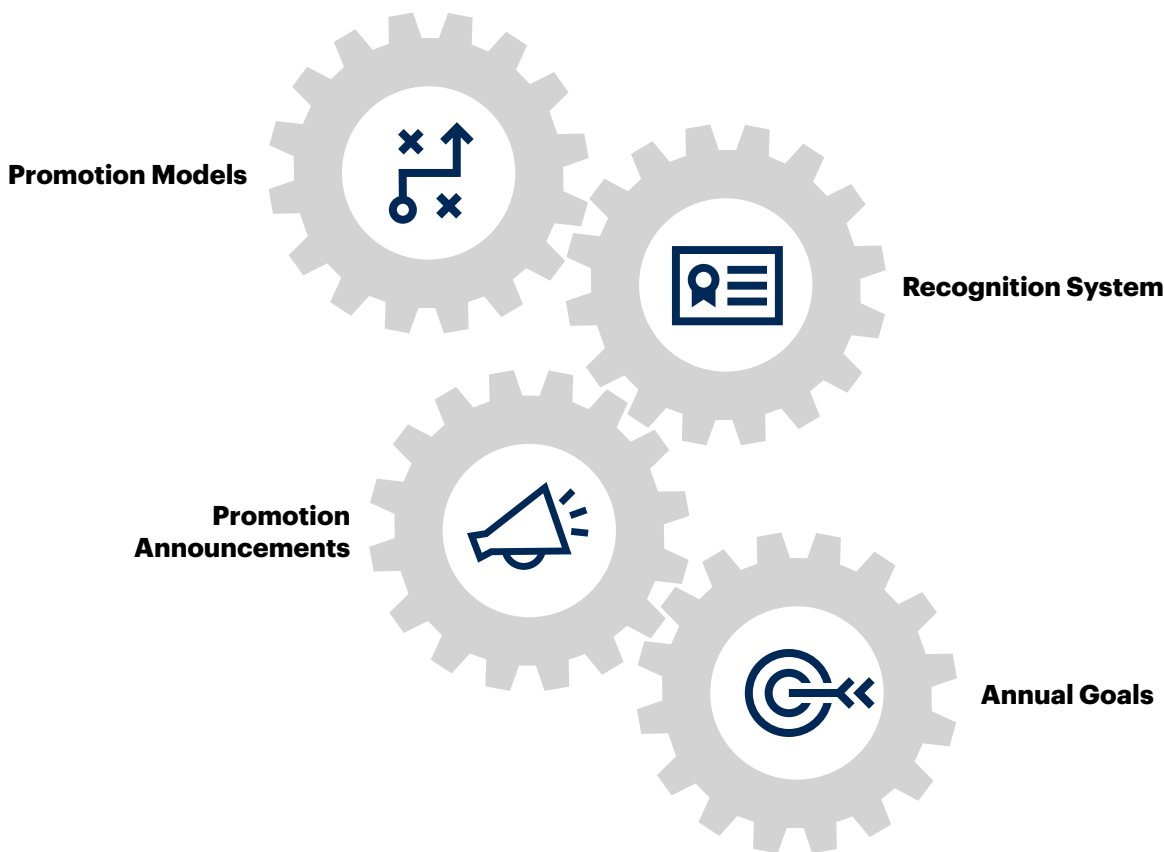
² [The Safety of the LHC](#), CERN.

³ [Protecting the LHC From Itself](#), Symmetry Magazine.

⁴ 2018 Gartner Legal and Compliance Automation Survey.

⁵ [In Defense of the LHC](#), Popular Science.

Figure 5. Transformation Effort Incentives



Source: Adapted From Tech Data

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