

# Creating the Digitally Enabled Legal Department

5 key steps to achieve digital readiness



# Why legal teams must embrace digital readiness

As the economic environment grows more uncertain, pressure on general counsel (GC) to modernize has never been more acute.

Traditionally, technology initiatives targeting productivity and efficiency start by identifying and selecting a system based on desired capabilities. But this selection-based approach often fails to anticipate obstacles around implementation and use, leaving most legal departments under-equipped for launch. The result? Costly pauses, repeat work, missed deadlines, poor adoption rates and budget increases.

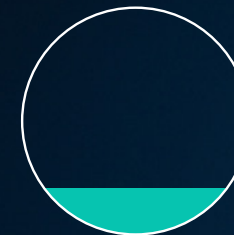
A maturing legal technology market and recent advances in AI are surfacing new opportunities for improved productivity, better decision making and higher quality legal services. But success relies on starting in the right place.

This research covers ways to build and scale digital readiness in your legal department, with specific action steps for GC on how to foster the right behaviors and accelerate success.



**1.9x**

Teams with higher levels of digital readiness are **nearly twice as likely** to succeed with technology.



**23%**

**Less than a quarter** of legal departments are digitally ready.

Source: Gartner

# Most GC start in the wrong place

Most GC start their digital enablement journeys with technology selection. This often presents problems because people, processes and data aren't ready.



## Digital readiness

Meet prerequisites for tech enablement across people, process and data gaps.



## Selection

Pick the right tech for legal and business needs.



## Implementation

Configure and integrate tech into existing legal and enterprise infrastructure.



## Adoption

Drive adoption by making tech easy to use and hard to avoid.



## Scale

Expand tech sustainably to support growth and evolving business needs.



## People aren't ready.

**Only 46%** of legal employees felt ready to use the system in their workflow as expected.



## Processes aren't ready.

**Only 42%** of legal employees feel processes were optimized for tech.



## Data isn't ready.

**Only 39%** of legal employees feel legal had the necessary data to realize their latest technology system's full value.

Source: Gartner

# GC's tech investments often underperform

When GC start with selection — skipping all people, process and data readiness — their tech investments underperform.

## Selection

Most lawyers don't believe the department has chosen the right technologies.

Only **22.6%**

of lawyers believe they've chosen the right tech to support workflows.



## Implementation

Most system implementations take longer and cost more than originally planned.

Only **34%**

of system implementations meet or exceed original delivery timeline.



Only **36%**

are completed within originally agreed-upon budget.



## Adoption

Low tech adoption remains a problem in legal departments.

Only about **two out of four** lawyers fully adopt legal technology.



## Scale

Most lawyers don't support expanding tech use.

Only **49%**

of lawyers agree or strongly agree that they would advocate for digitizing more workflows or additional elements of workflows.



Source: Gartner

## 5 phases of digital enablement journey

# GC must start with digital readiness



## Goal: Digital enablement

Improve legal service delivery with effective interoperability and use of people, process, data and tech.

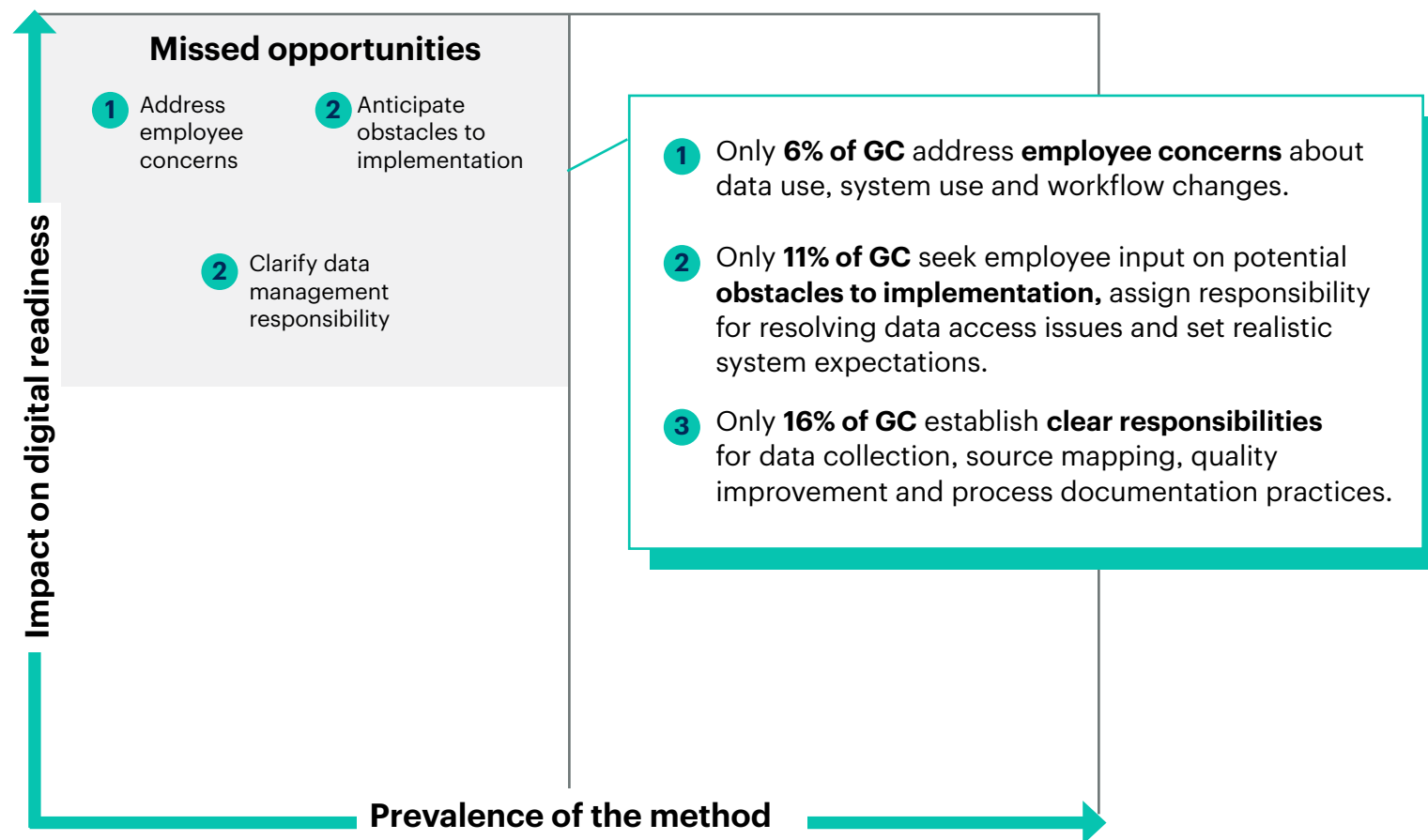


Source: Gartner

# GC miss 3 high-impact readiness opportunities

## Impact and prevalence of methods of driving digital readiness

To improve digital readiness, GC should adapt their approach to digital initiatives and emphasize these methods. In some cases, this may mean shifting excess capacity away from table stakes activities. In others, it may entail adapting table stakes activities to incorporate employee concerns, anticipated obstacles to implementation and clear data management responsibilities.



n = 136  
Source: Gartner

# Digital readiness

Meet prerequisites for tech enablement across people, process and data gaps.



## Current state of digital readiness

Only

# 23%

of legal departments are digitally ready.



## ⊗ What GC do wrong

**Most GC underinvest in digital readiness.**

- **People:** Only 46% of legal employees felt ready to begin using tech in their workflow as expected.
- **Process:** Only 41% of legal employees feel process was standardized prior to system rollout. Additionally, lawyers cite “I have my own preferred way of working” as one of the top 3 reasons why they avoid fully using legal tech.
- **Data:** Only 39% of legal employees feel legal had the necessary data to realize their latest legal technology system’s full value.

## ✓ What GC should do instead

**Invest in digital readiness** to achieve more effective tech outcomes.

**Use the checklist** on the next slide to understand key steps in the digital readiness phase.

## Recommended resource



Learn more about how the **Gartner Legal Department Workload Analysis Diagnostic** can help you identify opportunities for standardization, automation and self-service.

Source: Gartner



# Digital readiness checklist



High-impact readiness opportunity

## Process

- Identify digital enablement opportunities** by assessing end-user needs, pain points and underlying root causes (e.g., people, process, data, tech) of inefficiencies.
- Quantify existing pain points and inefficiencies** in current ways of working for identified digital initiatives.
- Prioritize digital initiatives** based on criteria, such as business, functional goals and end-user digital readiness scores, to maximize likelihood of success.
- Document as-is and to-be processes** for prioritized digital initiatives.
- Standardize and simplify processes** for prioritized digital initiatives (e.g., templates, approval workflows, signature requirements, etc.).
- Develop governance mechanisms** to ensure standardized processes will be routinely followed.

## People

- Evaluate and score end-user digital readiness** to determine preparedness for adopting new technology, and improve confidence in selecting digital projects with the highest likelihood of success.
- Conduct a digital readiness gap analysis** to create a go-forward strategy. This can help eliminate specific end-user readiness gaps and clarify the total investment required to successfully implement the technology.
- Seek employee feedback on potential barriers to success**, including concerns around data use, system use and process changes. Assign clear responsibilities for resolving them.
- Set realistic expectations** for what the tech can and can't accomplish.
- Outline expectations** for participation in digital readiness work, with clear ownership across workstreams. Include these as part of individual goals and performance reviews.

## Data

- Develop data use cases** for prioritized digital initiatives.
- Evaluate data accessibility and quality** of any existing data.
- Create master data model**, including data elements required for workflow, reporting, integrations, migration, security and permissions, etc.
- Assign clear roles and responsibilities** for identifying, collecting and maintaining necessary data for prioritized digital initiatives.
- Implement data governance policies** and standards to ensure data quality, security and compliance.
- Clearly communicate how data collected** for digital initiatives will and will not be used.



# Selection

Pick the right tech for legal and business needs.



## Current state of selection

Only

# 22.6%

of lawyers believe they've chosen the right tech to support workflows.



## ⊗ What GC do wrong

### GC select tech before they're ready.

This manifests in two primary ways:

1. **GC assume tech is the answer** to a problem that hasn't been well defined.
2. **GC use tech as a superficial fix** for deeper issues without understanding the root cause of those issues (e.g., are there parts of the problem that need to be solved first with people, process, data).

### GC don't define what they need from a tech solution.

Only 50% of legal departments submit structured RFPs based on tech capabilities. Requirements, if documented at all, are overly broad and don't represent all user groups. This often results in improper selection, which snowballs into underwhelming ROI from tech investments.

## ✓ What GC should do instead

**Start with the digital readiness** phase to meet prerequisites for tech enablement across people, process and data gaps.

**Use the checklist** on the next slide to understand key steps in the selection phase.

## Recommended resource

[Gartner BuySmart™ tool](#)



Source: Gartner



# Selection checklist

## Prepare

- Document technology use cases, capabilities and detailed requirements** for prioritized digital initiatives, leveraging foundational work from readiness phase.
- Evaluate existing technology landscape** to determine when to use enterprise versus function-specific solutions and whether there's need to procure something new. **Then, develop a technology roadmap.**
- Develop a business case** detailing the required investment and expected ROI to secure budget approval and executive leadership buy-in for priority investments.
- Create project plan for evaluation and selection,** assemble cross-functional team to support this project, and establish timelines for kickoff date, phases, tasks and detailed schedule of events.

## Evaluate

- Conduct market research** to understand technology markets, vendor landscape and offerings.
- Create vendor list** by matching vendors to requirements.
- Prepare and distribute RFP** detailing specific requirements, evaluation criteria and submission guidelines to solicit proposals from potential vendors.
- Evaluate RFP responses** against requirements and conduct initial scoring.
- Shortlist vendors** based on responses, initial scoring, vendor due diligence and market research analysis.
- Conduct demos** based on specific business scenarios or use cases.
- Conduct reference** calls with shortlisted vendor customers.
- Finalize vendor scoring** using evaluation scorecard.
- Prepare final recommendation** with evaluation team.

## Select


- Get final approval to **select vendor** from required stakeholders.
- Notify all vendors,** both selected and unselected, of the final decision.
- Negotiate and execute contract** with statement of work from selected vendor.


# Implementation

Configure and integrate tech into existing legal and enterprise infrastructure.



## Current state of implementation

Only **34%**  of system implementations meet or exceed original delivery timeline.

Only **36%**  are completed within originally agreed-upon budget.

## ⊗ What GC do wrong

**GC implement tech before their people, process and data are ready.**

**GC overly rely on external partners** to drive implementation. This includes project management, system design, configuration, testing, training, deployment and ongoing maintenance.

**GC don't consider extensibility of legal and enterprise data** in implementation, leading to duplicative work, increased friction for end users and inadequate data utilization.

## ✓ What GC should do instead

Use the digital readiness phase to **ensure people, process and data are ready** for tech implementation.

**Use the checklist** on the next slide to understand key steps in the implementation phase.

## Recommended resource

**Case Study: Centralized, User-Friendly Legal Intake and Triage Platform**



Source: Gartner



# Implementation checklist



## Prepare

- Secure executive sponsors** across major stakeholder groups.
- Establish a central governance committee** to guide and oversee the implementation process, including management of escalations.
- Determine implementation scope** based on level of current pain/inefficiency, process maturity, budget and end-user readiness.
- Define success metrics** and determine how to measure ROI according to the implementation scope.
- Develop detailed project plan** that outlines roles, responsibilities, phases, tasks, key milestones and deadlines for all parties involved (e.g., in-house team, vendor and implementation partner).
- Secure resourcing required** to ensure successful implementation using detailed project plan as a guide.

## Design and build

- Conduct design workshops** with primary user groups, SMEs and technical architects to finalize specs for system design (workflows, templates, user groups, permissions, etc.), using readiness work as a foundation.
- Finalize master data model**, including elements required for workflow, reporting, integrations, migration, security and permissions.
- Finalize design specifications** to use as blueprint for configuration and obtain signoff from key stakeholders.
- Configure system based on design specs**, ensuring alignment with the roles and responsibilities outlined in the detailed project plan.

## Test and train

- Conduct technical testing** (e.g., performance, security, load testing) to ensure system architecture and infrastructure are sound.
- Conduct functional testing or user acceptance testing (UAT)** to ensure system performs according to specified requirements.
- Track and resolve testing feedback** to improve system performance and usability. Create a backlog of issues that should be revisited after go-live.
- Develop role-based training** that is easily accessible and digestible.
- Review and update the training section of the project plan** to ensure it encompasses all roles and geographic locations.
- Execute training strategy** across relevant stakeholder groups and regions.

## Deploy and maintain


- Execute communications strategy** outlined in project plan (tailored role-specific messaging, FAQs, consistent narratives across existing communication channels, etc.).
- Develop and maintain open feedback channels** for end users to share their experience, suggest improvements and learn how their feedback is used.
- Provide hypercare to troubleshoot and resolve problems** quickly after implementation to reduce the likelihood of end-user frustrations and ensure a smooth transition to operational stability.
- Assign ownership for ongoing system administration** (e.g., transition to in-house operations team or designated IT system administrator post-go-live).
- Use metrics to monitor system performance and utilization** to ensure continued ROI and alignment with the needs of end users and the business.


# Adoption

Drive adoption by making tech easy to use and hard to avoid.

## Current state of adoption

Only **half of lawyers** fully use applicable technology features relevant to the task at hand.

**19%**   
believe they're expected to use these features.

**13%**   
claim they'll face real consequences for not using them.

Source: Gartner

## ✗ What GC do wrong

**GC traditionally focus on selling the value of technology and making technology easier to use.**

This approach isn't working. Lawyers often fail to embrace technology and adjust their ways of working accordingly.

## ✓ What GC should do instead

**GC must set clear expectations** for using technology and enforce consistent consequences for noncompliance. They must lead by example, integrating technology into their own work.

**Use the checklist** on the next slide to understand key steps in the adoption phase.

### Recommended resource

**Case Study: Address Use Barriers to Improve Employee Tech Adoption**



# Adoption checklist

## Prepare

- Define the mindset shift the team must make** to adopt new ways of working and break it down into specific behaviors using “moving from” and “moving to” statements.
- Identify “winners”** to showcase successful examples and best practices. Motivate teams by demonstrating success is achievable, and learn from similar experiences to avoid common pitfalls.
- Develop a change management plan** for prioritized digital projects. This should include an impact assessment, enablement strategies for segmented user influence personalities and change management champion within the business.

## Persuade

- Communicate expected value** for end users across the legal function and the business.
- Ensure the tech is easy to use** by gathering feedback from primary user groups early and often, ensuring the solution addressed past pain points. Provide necessary training required for new ways of working.
- Use peer-to-peer communication** to promote value of the tool, ensuring representation across all primary user groups.
- Lead by example.** Signal the importance of using new tech, get personally involved in digital initiatives and be an early adopter.
- Incentivize and reward tech adoption** by recognizing wins of both individuals and teams in digital initiatives, job performance assessments, etc.

## Enforce

- Set expectations for technology use** to ensure alignment on goals and create a sense of shared accountability for expected outcomes of technology adoption.
- Build tech adoption into functional and individual goals** to benchmark and evaluate success of adoption progress.
- Establish an accountability network** to monitor adoption behaviors, elevate issues and enforce expectations around technology use.
- Define profiles of why people do not use technology** (e.g., unaware, unwilling, untrained, etc.), encourage nonusers to self-select profiles and develop action plans for each segment to turn nonusers into adopters.

## Sustain


- Keep a grooming log with feedback/change requests** and evaluate on a regular cadence as part of continued platform administration and improvement.
- Conduct user behavior survey to measure nonfinancial value of digital investment** (e.g., improve the efficiency of a process without directly impacting revenue) using behavioral changes as a proxy to measure whether tech is succeeding.
- Use data from platform to drive continuous improvement projects** (e.g., identify and eliminate bottlenecks in workflows, manage resource allocation, decide where to build out workflows next, etc.).


# Scale

Expand tech sustainably to support growth and evolving business needs.



## Current state of scale

Only **22.6%**  of lawyers agree the tech achieved its intended goals.

Only **49%**  of lawyers agree or strongly agree they would advocate for digitizing more workflows or additional elements of workflows.

## ✘ What GC do wrong

GC take a **big-bet approach** to tech without meeting underlying readiness requirements. To comprehensively automate an entire workflow from beginning to end, each step must be clearly mapped with defined decision rules. Most legal departments skip this readiness work, making automation overwhelming, costly and seemingly impossible.

## ✔ What GC should do instead

**Plan narrowly scoped experiments** that gradually automate individual pain points over time. For example, instead of trying to automate an entire workflow from beginning to end, prioritize one step, meet readiness requirements for that step and gradually expand automation over time.

**Build in-house capabilities** to support digital enablement.

**Use the checklist** on the next slide to understand key steps in the scale phase.

## Recommended resource

[Case Study: Incremental Automation Plan \(TE Connectivity\)](#) 

Source: Gartner



# Scale checklist



## Prepare

- Integrate digital enablement into legal talent strategy.** Identify and develop in-house talent to support digital initiatives, accounting for agility, responsiveness, cost-effectiveness and continuity. Recruit talent where needed to close skills gaps.
- Build partnerships with IT** to implement, maintain and expand tech.
- Maintain a long-term technology roadmap** to proactively identify needs and ensure connectivity across enterprise and legal tech landscape.
- Develop master data strategy** to capture, integrate and maintain data elements required for workflow and reporting.

## Iterate





- Use agile methodologies**, such as scrum and sprints, to break larger projects into smaller components. Making incremental improvements can accelerate progress toward achieving goals.
- Develop prototypes or minimum viable products (MVPs)** to test ideas quickly and gather user feedback on iterative enhancements.
- Allow users to experiment with tech** to instill confidence, while generating new and innovative ideas for future use.

## Optimize

- Continue to integrate** tech with existing systems and tools. Minimize end-user disruption and maximize the utility of current investments.
- Continue to build connections across legal and enterprise data** to create a unified data view that enhances decision making and operational efficiency.
- Use data to improve functional and business performance.**

# Actionable, objective insight

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