

# PROCESS MAPPING: WINNING OVER STAKEHOLDERS

## GETTING STARTED

Starting a process mapping initiative can be a daunting task. If only there were a magic answer to this, we'd share that. For now, we need to figure out what the needs are, what the problems are, and what solutions will work. It isn't a single-layered process, as each layer uncovers more steps and answers - this depth also depends on the process mapping structure you have chosen to work with.

One of the main challenges in getting started is working with stakeholders in the process, i.e. clients, attorneys, and associates. What information do we need from them, and how do we get that information from them. How much involvement should they have on the matter? What's too much, and what's maybe too little?

## GATHERING THE DATA

Before designing a dashboard or even putting our pen to paper to map the process, we must identify and document key data points needed for outputs and management. This data can be collected from direct conversations, surveys, and interviews.

Getting critical data can be a challenge that LPMs sometimes face as a part of process mapping requires having a conversation with stakeholders about previous projects. Lawyers don't necessarily like looking back and seeing what went wrong but instead want to move on.

That said, this existing data is essential when configuring legal software, breaking down stages, life cycles, engage, matter, projects, and critical data points - what is good to have, what is essential?

*"You'd identify your step, your activities, the stakeholders and the required data points even if that's broken down by individual stakeholder as well. You'll end up having report requests, but then you can take those ones off and put the ones in the bin that aren't required, and just say here's your core data that we're going to have at the end of it."*

*"I'm working on the reverse. I'm trying to go back and kind of supplement our historical matter information to build a better dashboard on. Where we've been to help us figure out, maybe where we can grow a little more or, get a better handle on that, more than just some spreadsheets and kind of like utilizing SharePoint."*

*"Even though they (lawyers) don't want to look back a ton and go over everything that went wrong, I've noticed they're very adamant about talking about how to improve things or how to, so they don't mind as much. We've been doing half an hour interviews on another project and getting very good feedback from partners... so even like a survey at the end that's kind of automated and goes out to help you fill in some of those points. Might not be as intrusive as as maybe. You think if you frame it correctly?"*

- ✓ HAVE A CONVERSATION
- ✓ SURVEYS
- ✓ IDENTIFY THE AUDIENCE

## QUICK WINS: GETTING STAKEHOLDERS ON YOUR SIDE

To get stakeholders on your side, you must show them what you can do for them. How can you improve their workflow and make things easier for them? It may not happen overnight. It can take weeks, or even months, but by proving your worth in each project you work on together, you are moving in the right direction. Starting by collecting minimal data may be enough to get some results while not being 'intrusive' to partners, associates, and clients. When lawyers and clients have seen and like what you have accomplished in past projects, they often look forward to working together again.

*"What is the minimum data we can collect so everyone can be happy and you can see some results. And you can share, and you can drive some decision based on that and not throwing them the full blown solution of a framework. Because that, from my experience, takes a long time to get the buy in from different stakeholders. Start a little bit more simplistic. See the value at the end so they recognize it, and after that, start building on that [success]."*

*"I'd say the barrier is that somebody is here to tell me (lawyer) how to do my job, right. And I'm not willing to accept it at that moment. But if you understand the why, maybe it's because they want you to spend time on things that are more interesting than keying three times the same data in three different systems, just as an example."*

## THE FUTURE OF PROCESS MAPPING

People now increasingly understand the importance of having the right people working on the right things. This is where LPMs shine. They help identify the needs, the issue, and the solution. LPMs help predict and plan how a project may turn out by looking at past experiences.

As LPM matures, we will see changes in how process mapping and other LPM-related work are perceived in firms. As new associates enter the industry, they will be working with existing LPMs, and they'd naturally understand that this is a part of the process when working on a project, and at the end of the day, it is for their benefit.

*"We're now on our newer members of the team and one of the first things that we do is talk to them about this and the importance of, you know, having the right people in the right place doing the right work... So tell them the reason. Explain the reason why you want to do this and it essentially it's to help others as legal teams to better forecast for future work, for new work for new clients. If we're learning from those previous lessons and regardless of whether the partners want to run for the hills and run on to the next engagement it's really important that we just analyze that data. Not necessarily, what went wrong, but also what went well and tell them that story, that success story and, you know, shouting it from the rooftops"*

*"Find your champions, somebody to cheer for you and for the solution. And in time, you can fine tune what they see. They see the progress and my hope is that in a couple of years you have new associates coming on board and just start the training from day one, so they are exposed to this type of expectations for a matter. And in this way, you grow or help grow the next generation of partners. They are more into having that bridge between legal delivery services and project management, because they can all benefit from that."*

*"You'll always have conflicts of interest, and you'll always have the challenging conversations of people because they want to capture X data, and then the person to the right of you will say, well, I don't really see the point of that. It's really important to get that friendly group right at the start. So if you're going to go off and have some corridor conversations, do it with the right people."*

On data: "If you put in garbage data in, you're going to get garbage data out."