

Intapp Strategic Consulting

Change management in action: Driving new ways of working in partner-led firms

Faced with the inherent complexities of global operations, partnership-led structures, and increasing client expectations, law firm leaders are challenged to increase revenue, boost profitability, and sustain the firm's competitive advantage.

To face these issues and stay ahead of the pack, firms must implement modernization strategies that focus on supporting collaboration, improving client services, and increasing firm growth. Although leading law firms are taking large strides on their modernization journeys, many are undervaluing the importance of change management in enhancing program effectiveness and cementing the adoption of new processes and systems across the organization.

In this era of unparalleled change, we are seeing increasing demand from our clients to support them in achieving modernization success through a robust change strategy, one which — when executed correctly — can be key to ensuring adoption of new ways of working and achievement of the resulting ROI to the firm's partnership.

Change management: It's about the people

While deploying a change strategy is key, traditional "one size fits all" strategies are not fit for purpose in today's legal workforce. These outmoded strategies typically focus on business benefits and a "follow my lead" mentality, resulting in resistance and fatigue when employees feel that the change is being done to them, rather than with them.

People-related issues are the leading cause of technology deployment failures, emphasizing the need for program plans that manage more than just the technical aspects of any deployment. For this reason, it's imperative that any change approach puts people — rather than business needs — at the forefront. Each individual must have a clear understanding of what the change means for them, as well as what role they play in delivering the program vision.

At Intapp, our robust approach to achieving successful adoption combines our extensive experience in delivering large-scale business change across the legal and professional services sectors with a unique understanding of Intapp OnePlace technology.

This approach builds upon deep industry insights into the unique adoption challenges that these firms need to address through change management, as well as lessons learned across multiple engagements. Our change management approach aligns five key pillars with one ultimate focus: ensuring our clients' aspirations for their businesses are firmly aligned with that of the user experience.

Intapp's five pillars of successful change management

Our change management philosophy enables successful, sustained adoption. Working with our clients, we align Intapp technology to their firm's unique work patterns, informed by industry best practices. This ensures their business goals map to their user experience: We design processes to mitigate the unique challenges law firm leaders face.

Our approach enables greater adoption and the effective use of new systems and processes, enabling firms to realize benefits in ways that traditional change strategies do not. We focus on five key principles to drive change.



Align the vision

We work with business leaders to design a program vision that will underpin the change strategy and associated interventions.



Enhance the user experience

We take a user-centric approach to inform solution design, ensuring processes are built to deliver their intended outcomes.



Lead from the top

We ensure change is driven by senior leadership: leading by example, helping define the strategic direction, and building buy-in.



Embed behaviors

We collaborate with client teams and change agents to embed behaviors and ensure that the new ways of working will stick.



Sustain adoption

We support our clients in understanding the best methods for tracking and sustaining user adoption across a firm's business areas.

1. Align the vision

We work with business leaders to design a program vision that will underpin the change strategy and associated interventions.

We work with our clients to understand their firm's overall modernization vision and the specific drivers behind the program, aligning business outcomes with user needs.

When any firm embarks on a change journey, its people will question what is changing, why it's changing, and how it's changing — and, most importantly, what does the change mean for me? In the process of building a robust case for change, we focus on answering these key questions, fostering understanding and buy-in across the organization.

The development of the case for change focuses, first and foremost, on the benefits to the business. But it also recognizes how vital it is to address benefits specific to the end user. Getting both sets of messages right is crucial to success. Focus too much on the business, and you risk disengagement from

the user population, and resulting poor adoption of both new systems and new ways of working. Focus too much on the user, and you risk losing the buy-in of senior leadership.

Our user-centric approach to solution design combines with the intuitive nature of Intapp OnePlace, feeding into a change management approach that recognizes success on the platform is driven by a firm's users. The heart of the approach is the tailored development of key-user journeys as part of managing the change, which, in turn, ensures successful user adoption and delivery of sustainable benefits across the value chain.

The case for change must achieve the following:

- Articulate the drivers behind the change and a clear vision for success — Where is the firm now, and where do they want to be?
- Communicate why change needs to happen at the leadership level.
- Answer the common question asked by the firm's people, "What's in it for me?"
- Enable users to see everyday benefits for themselves, not just for the business and its leaders.

2. Enhance the user experience

We take a user-centric approach to inform solution design, ensuring processes are built to make it easier for people to do the right thing.

Our change management strategy recognizes that the success of any modernization effort is driven by its people.

Working collaboratively with our clients, we take a persona-led approach to assess the strategic, functional, and user needs of each group. This supports the design process by articulating how each of the key personas interact with the value chain.

We understand there will be nuances in the way different personas interact with Intapp OnePlace; the platform's flexibility allows for this inevitability through the configurability of different user groups, aligned to identified personas.

Our change management strategy recognizes that the success of any modernization effort is driven by its people.

Our user-centric approach to solution design combines with the intuitive nature of Intapp OnePlace, feeding into a change management approach that recognizes success on the platform is driven by a firm's users. The heart of the approach is the tailored development of key-user journeys as part of managing the change, which, in turn, ensures successful user adoption and delivery of sustainable benefits across the value chain.

3. Lead from the top

We ensure change is driven by a firm's senior leadership: leading by example and building buy-in.

To cascade and transfer knowledge, a powerful leadership change network is critical. As leaders translate the program vision to all levels of the business and put it into practice, they, in turn, take ownership for realizing the benefits.

The influence of a firm's leadership on an organization is a critical tool to facilitate change. Because leaders are positioned at the forefront of change, they're better able to use Intapp OnePlace to capture and leverage their organizational influence.

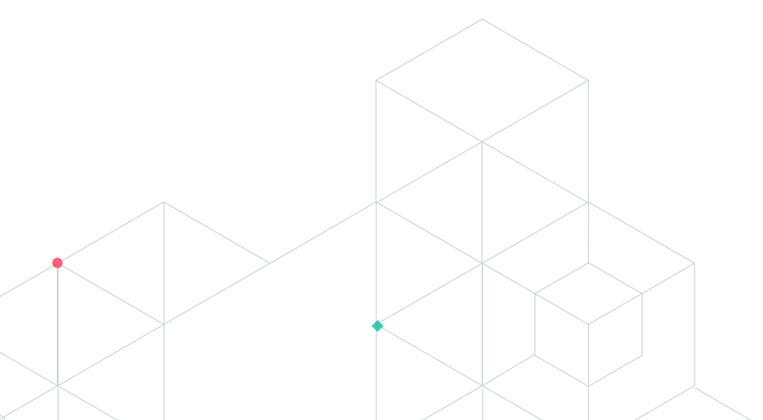
Senior leaders are empowered to focus their engagement efforts on recognizing and rewarding areas of the business that are embracing the new ways of working, while in turn providing more support to areas of the business that aren't demonstrating the desired behaviors.

4. Embed behaviors

We collaborate with client teams and change agents to embed behaviors and ensure the new ways of working stick.

A successful transition to new ways of working requires breaking old habits – and this does not happen overnight. People need to be taught to walk before they can run. Our approach focuses on getting the basics right before transitioning over time to more mature ways of working.

Although we encourage teams to work in a new way together, changes need to align across the organization in order to realize the benefits of a new technology. At Intapp, we believe that fully engaging users is a critical step in managing resistance and risk, as well as to support successful adoption. We implement key tools, including "day in the life" communications that articulate how a user can interact with and implement new ways of working, change-agent networks that champion change across the firm, and tailored user training aligned to each of your firm's personas that creates embedded behaviors and sustained adoption.



5. Sustain adoption

Our efforts don't stop at launch. We support our clients in understanding the best methods for tracking and sustaining user adoption across a firm's business areas.

Ongoing post-launch tracking and governance is critical to sustaining adoption and cementing new ways of working. Old approaches to this focused on slow and inefficient measures of assessment (such as quarterly feedback surveys of the user population). Our approach enables leadership to have adoption data at their fingertips, empowering leaders to act more swiftly and iterate rapidly to identify necessary interventions and uplift adoption.

We ensure our clients are set up to manage required post-launch change efforts and drive adoption of enhanced ways of working. To monitor the uptake of new work methods, we provide access to adoption dashboards – configured to the client's specific requirements – enabling access to live data insights, which help inform the ongoing change strategy.

Applying Intapp Strategic Consulting expertise to solve firm challenges

Key strategic outcomes ...



Improve firm and client outcomes by strengthening client relationships



Drive revenue growth from the firm's largest client accounts



Build better strategies through a data-driven approach



Apply the the firm's best resources to solve client problems

... enabled through Intapp OnePlace technology ...



A 360-degree view of the firm to identify and strengthen key-client relationships and optimize the portfolio



Actionable visibility to surface a greater understanding of client needs to generates revenue opportunities



Data-derived insights from across the client lifecycle to inform plans across partners, lawyers, and practice and industry groups



A breadth of information at users' fingertips to surface the right expertise, experience, and credentials to assert the firm's competitive edge

... and embedded using change management



A design approach that puts people at the forefront



A case for change that aligns business outcomes with user needs



A process led by organization leaders to facilitate users' engagement and buy-in



Ongoing tracking of adoption to embed and sustain behavioral change



Connecting with Intapp Strategic Consulting

With our deep professional-services industry expertise, our thorough understanding of the unique needs of law firms, and our extensive track record of enabling adoption through user-centered deployments, Intapp Strategic Consulting is uniquely positioned to support your firm's modernization efforts.

To learn more about how Intapp Strategic Consulting can help, visit www.intapp.com/consulting.services.

