# Sysero

# GETTING STARTED WITH SYSERO

A guide for managing your Sysero project

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# SETTING UP YOUR SYSERO PROJECT FOR SUCCESS

## KNOWING WHERE TO START

## Introduction

We know that starting a new technology project can be a bit overwhelming. That's why we've put together this getting started guide to help you plan a successful implementation of your Sysero technology.

Of course, we're always here to help. If you have any questions or need support, feel free to reach out to us anytime.
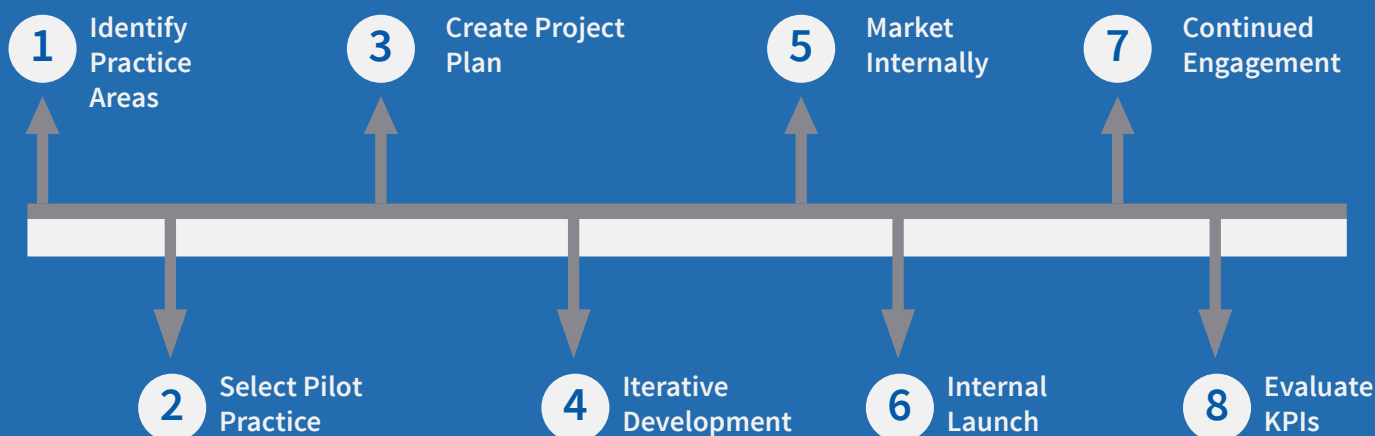
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**We recommend taking an agile, iterative approach to rolling out your new Sysero technology**

## Automation Best Practices

- **Ensure Proper Support:** Dedicate a trainee to automation and pair them with a fee earner to ensure quality

- **Get your Templates Ready:** Refine and optimise your templates before you start automating them

- **Define your Processes:** Map and define your processes at the start of the project

- **Start Small and Automate Incrementally:** Complex legal documents may have 30-40 variants. Start with simple documents, and build from there.

- **Involve Lawyers Early On:** Engage lawyers early in the process to build buy-in and source valuable feedback.

- **Clearly Communicate Benefits:** Once lawyers understand the benefits of automation, they are more likely to adopt it.

# 8 STEPS TO GETTING STARTED

## 01 IDENTIFY KEY PRACTICE AREAS

**Identify practice areas within the firm that would benefit from automation.**

Automation can advance law practices in many ways. Consider the current needs and processes of each practice to determine if practice areas are suitable for automation, and if so, which types.

Some questions to ask:

- Is the practice area's work suitable for automation?
- What type of automation would most benefit the practice area (ie, document automation or process automation)?
- How eager is the practice group to automate?
- Does the practice have the correct support staff?

### Tips & Resources

**Not sure how automation can help your firm? Not to worry. We can help.**

Fill out our Automation Audit and we'll provide personalised recommendations for how to bring automation to your firm.

**Complete Automation Audit**

## 02 SELECT A PILOT PRACTICE

**Identify a practice group with which to pilot the programme.**

By piloting the programme with a single practice group, you'll gain valuable feedback and input into ensuring the programme meets the needs of the firm's lawyers. Your pilot group also can serve as internal project champions, which will be advantageous in promoting the project internally and driving project adoption.

When selecting your pilot group, consider the following:

- Is the practice group comprised of key influencers?
- How engaged is the practice head?
- How excited is the practice group by technology and innovation?
- Does the practice have documents or processes that are ideal for automation?
- How eager is the practice to participate?

## 03 CREATE A PROJECT PLAN

**Create a detailed project plan to ensure a coordinated, successful launch.**

After you've identified your pilot practice, it's time to develop a project plan. A project plan is a formal document that outlines the project's objectives, identifies key stakeholders, delineates roles and responsibilities and provides a general outline for approaching the project. Essentially, it serves as the blueprint for how you plan to implement the project.

When drafting your project plan, be sure to include:

- Purpose of the project
- Project objectives and goals
- Main stakeholders
- Steering committee members
- Identified risks
- Core benefits
- Proposed timeline and approach
- Key Performance Indicators

## 04 INITIATE ITERATIVE DEVELOPMENT

**Automate documents incrementally from the start of the project.**

Your selected pilot practice should serve as the starting point for your project. Work with the practice to identify its most-used documents and determine which ones would be best suited for automation. We recommend starting with short, simple documents, such as an NDA or employment contract. This will give you an opportunity to build confidence and familiarity with the technology, and identify potential risks, before moving onto more complex documents.

Be sure to include lawyers early in the automation process to gain valuable input and feedback to ensure the technology meets their needs. By incorporating continuous feedback and testing in the automation process, you can proactively address issues as they arise. An iterative approach also can help you achieve early success and build momentum for the project internally.

| Tips & Tactics | |
| --- | --- |
| **Marketing Activities** | **Marketing Tactics** |
| • Develop a compelling brand for your project | • Host town-hall style meetings for practice groups to preview automation tools |
| • Create targeted messaging for practice groups to establish credibility and build engagement | • Communicate project updates and early successes via email marketing |
| • Share early success stories from the pilot group's usage of automation | • Share project updates and notifications on firm intranet |
| • Leverage internal champions to foster viral marketing efforts | • Visit practice group weekly meetings to provide updates and build interest |

## 05 MARKET PROGRAMME INTERNALLY

**Build buzz and excitement leading up to the launch.**

To drive adoption of your new programme, it's important to build awareness, interest and engagement amongst lawyers leading up to the broader launch. Consider creating an internal communications plan to communicate the goals and benefits of automation and help lawyers understand their role in the project.

We've idenfied some suggested activities and tactics to help you market your launch. However, each firm is different, so it's important to select tactics that will work best for your unique audiences.

## 06 COORDINATE INTERNAL LAUNCH

**Introduce programme and engage with internal audiences to drive adoption.**

Now that you've successfully automated documents within your pilot group and built interest in automation within the firm, it's time to launch. Preparation and coordination is key to a successful internal launch.

As you move towards the launch, you want to stay focused on the execution and be ready to address any last-minute issues. Appropriate communication and training will be crucial to determining the long-term success of the project.

# IDEAS TO PROMOTE YOUR LAUNCH

Use email and the firm intranet to communicate the launch

Create instructional guides and videos for on-demand training

Host internal events and training led by pilot practice team

Craft a press release to promote the firm's innovation

## 07 ESTABLISH ONGOING ENGAGEMENT

Continue to educate and engage lawyers to drive adoption.

Keep up momentum after the launch by fostering ongoing training, education and communication with lawyers. As lawyers learn more about your project, they'll discover new tools and features that can help them be more productive, efficient and deliver higher quality client service.

Suggested Tactics:

- Launch an email training series
- Continue to participate in practice group meetings
- Feature project success stories in internal firm-wide communications

It's also good practice to provide lawyers with the opportunity to provide feedback and input to ensure their needs are being met. Reach out to lawyers via one-on-one meetings, practice-specific meetings or online user-surveys. Use lawyers' feedback to identify process changes, new requirements and other improvements.

## 08 EVALUATE & MEASURE

Evaluate the project's success using performance metrics.

Lastly, it's time to evaluate the outcome of the project. We suggest holding a project de-brief meeting one to two months following the firm-wide launch to assess the success of the project and identify any risks.

Use the KPIs identified in the project plan to measure the overall impact of the project, and refer to lawyers' feedback to determine any changes that need to be made.

## What's Next?

Now that you're up and running on Sysero, it's the perfect time to plan for the future.

**How else can automation help differentiate your firm?**