



# APPLIED INSIGHTS

A Transformation Readiness Review for  
implementing a firm-wide e-signing  
solution based on practical experience

**tact**

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# OVERVIEW

**Starting point\***: A prestigious German law firm with a 50-year legacy seeking to modernize its processes with the goal: to implement an efficient e-signing solution that aligns with existing core values of "**Client First**," "Excellence," and "Integrity," while minimizing disruption to daily operations.



## What *tact* offers

- **Holistic Project Setup**: Designing the project with a focus on feasibility, considering the firm's unique structure.
- **Minimal Disruption**: Ensuring relevant stakeholders are engaged without shutting down daily operations or decision-making.
- **Measurable Outcomes**: Delivering success metrics for internal motivation and external communication.
- **Expertise in Law Firm Dynamics**: Understanding how informal structures affect transformation acceptance, engagement, and implementation.
- **Efficient Execution**: Managing a project of this scale within a tight timeframe and predictable costs.
- **Legal Tech Network**: Providing practical, informed suggestions for tool selection through strong industry connections.
- **Seamless Preparation for Change**: Preparing all involved parties for smooth operational changes once the project progresses.
- **Tailored Communication**: Balanced communication for various stakeholder groups, ensuring everyone is informed and aligned.
- **Collaboration Leadership**: Taking the lead in coordinating internal and external contributors, including IT and legal tech vendors.

\*Theoretical case based on experience

# THE PERFECT FIT

*tact's* expertise in sustainable and measurable transformation projects makes it a natural choice for an engagement like this.

An alignment is further strengthened by a law firm's readiness:



- **Unified Leadership:** A partnership supporting bringing in external expertise.
- **Shared Interest:** A partnership recognizing the growing client demand for advanced technological (e.g. e-signing) solutions and demonstrating an intrinsic interest to learn.
- **Collaborative Spirit:** The partnerships willingness to actively participate, ensuring a cohesive transformation.
- **Recognition of Limitations:** The leadership understanding the need for specialized support not available internally.

With clear objectives and aligned leadership, the foundation is set for a transformation that will redefine how a law firm can approach efficiency, client satisfaction, and collaboration.

## TACT'S COMPREHENSIVE SOLUTION

Law firms today are under immense pressure to change, driven by client demands and agile competitors. Yet, **change projects are often siloed**, involving a few individuals without strategic oversight or alignment with the firm's culture, values and mindset. Formal processes and hierarchies and informal cultural dynamics are bypassed for the sake of speed, creating distrust in leadership, frustration, and unsustainable results. These missteps cost more time, money, and motivation than firms can afford.

*tact* understands, that transformation is not just about reacting but building readiness. Our **Transformation Readiness Review** delves into your firm's unique structure, values, and people to ensure change is strategic, inclusive, and lasting. We bridge the gap between "legal" and "delivery", aligning your firm's legacy strengths—trust, expertise, and culture—with operational efficiency, data-driven decision-making, and seamless execution.

This readiness is crucial as the trust advantage of law firms over Alternative Legal Service Providers (ALSPs) is fading. Technology, particularly AI, is levelling the playing field by proving its reliability and efficiency. The window for internal transformation is narrowing. To secure client trust and thrive in this new landscape, firms must evolve from within, embedding operational excellence and strategic foresight into their culture. With *tact*, transformation becomes a strength, not a reaction.

# CHALLENGES

## Ownership Starts at the Top

Transformation in law firms must be guided by the partnership. Their role is **not execution but providing clear, cultural, and strategic leadership** for the effort. In law firms' dual structures—hierarchical yet highly informal—it's vital to articulate the unique challenges of change. Cultural motives are key to building alignment and ownership. Transformation is ultimately about people, not tools.

## Aligning Vision with Operational Reality

Law firms' informal dynamics necessitate validation of the transformation vision by **individuals deeply familiar with daily operations. These trusted insiders - respected, knowledgeable, and connected** - must identify who is, should, is not, or must be involved. Reviewing the Current Operating Model ensures the alignment of transformational goals with actual structures, processes, and roles.

## Managing Emotional and Structural Impact

Change affects people and processes in profound ways. **Anticipating resistance and crafting mitigation measures requires cultural alignment.** Engagement with all stakeholders, guided by the firm's values and vision, ensures that emotional, mindset, and operational impacts are understood and addressed before implementation begins.

## Precision in Planning and Budgeting

A detailed **understanding of the Current and Target Operating Model is essential to plan effectively.** This includes defining clear benefits, required resources, and precise goals for time and cost. Key considerations include operational areas suited for tool implementation, **vendor engagement for accurate scoping**, and formal organizational adjustments. Addressing these factors upfront prevents overruns and misalignment.

## Defining Success Metrics

Measuring transformation success starts with a clear understanding of desired outcomes. What efficiency gains, measurable benefits, or KPIs will indicate success? **These metrics can only be defined by benchmarking against the current state and go beyond hours invested.** Clear definitions empower employees and vendors to achieve targeted results collaboratively.

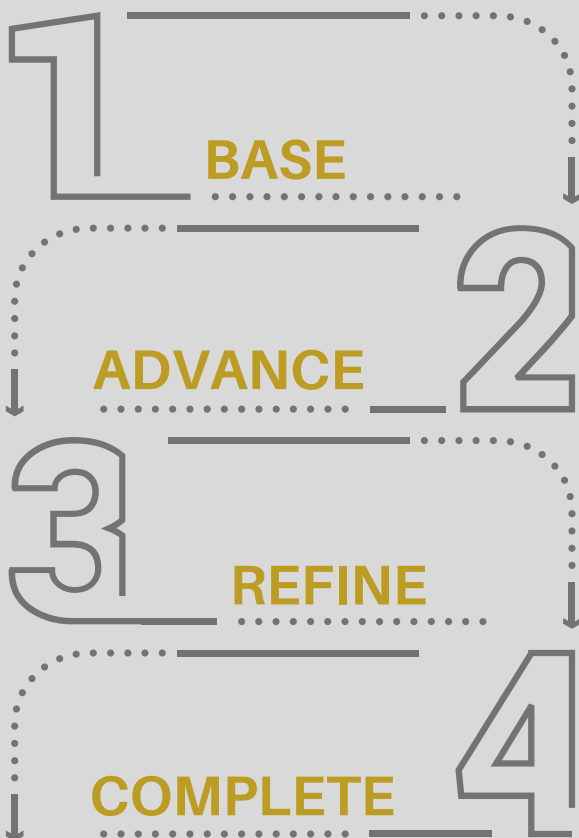
## Assigning Clear Execution Responsibilities

A dedicated execution team with unambiguous authority is essential for project success. **Goals, priorities, and guidelines are clear, freeing the partnership from constant approvals.** This group acts as the central point of contact for internal and external stakeholders, ensuring consistent, decisive action and communication throughout the project.

# APPROACH

The Transformation Readiness Review consists of 4 Modules that build upon one another and are concluded with the confirmation to start with project implementation and execution of the transformation project.

## THE 4 TRANSFORMATION READINESS MODULES



**Goal: Laying the foundation** - understanding the impact of change in law firms and highlighting the importance of comprehensive preparation.

**Goal: Aligning Culture and Vision** - revising cultural challenges that could stand in the way, defining a measurable goal and relatable vision for the project.

**Goal: Refining Structure** - selection of Informal Leaders, confirming cultural understanding and vision to operational reality, defining the Current Operating Model, compiling a Process Design Memorandum and anticipating change impact.

**Goal: Finalizing the project** - employee involvement, decision on tools, defining the Target Operating Model, profound project planning and budgeting, appointing the Leadership Team.

## MODULE BASE KEY ACTIVITIES

### *tact's* Project Management

- Virtual document management area where all documentation is stored according to project progress and topic
- Knowledge Management area for all notes, feedback and know-how gathered over the entire project, supported by AI for easier handling of data and information

- **Change Management Overview:** Partners explore the basics of agile change management, including triggers of transformation, the Change Curve, and common challenges faced by law firms.
- **Focused Workshop:** The group discusses why change and transformation uniquely impact law firms, emphasizing the interplay between traditional structures and modern demands, formality, hierarchies and informal execution.
- **Critical Conclusions:** Partners examine frequently overlooked aspects of transformation in law firms and how these are being proactively addressed by *tact* to ensure success.
- **Actionable Take-aways:** The session concludes with clear guidelines on involving relevant stakeholders, explaining the project, and gathering input effectively.

## MODULE ADVANCE KEY ACTIVITIES

- **Exploring Values and Culture:** Partners reflect on the firm's current values and culture. They discuss what the values mean to them, provide examples of when these values were upheld or contradicted, and identify any gaps or missing values.
- **Answering the Key Question:** The partnership addresses whether their current values and culture support their transformation aspirations. Where gaps exist, areas requiring upgrades are identified to define a robust vision for change.
- **Aligning Values with Practice:** Partners examine how well the firm's culture supports agility, collaboration, and innovation—key traits needed for the seamless integration of legal tech (e.g. e-signing) solutions.
- **Defining a Transformation Vision:** The firm establishes a shared vision for the project in question.

### Applied Insights

- **Key Focus on "Client First":** The partnership reaffirms commitment to the core value, "Client First," as the guiding principle for the project.
- **Introducing "Collaboration":** Recognizing the importance of working seamlessly across teams and with external vendors, "Collaboration" is planned to be incorporated as a new core value. This value is to be refined and formally adopted as the project progresses.
- **Identifying Cultural Barriers:** Challenges in adapting values and culture to support more agile and collaborative methodologies are acknowledged. Such barriers are addressed in later project phases.
- **Joint vision:** *"Empower our clients and enhance our collaborative spirit by seamlessly integrating e-signing into our workflows, transforming the way we deliver legal services with speed, security, and transparency."*

# MODULE REFINE KEY ACTIVITIES

## tact's Project Management

- All directly involved participants have access to a collaboration area for factual discussion and brainstorming
- A Process Design/Modelling tool is used to map processes and compile the Process Design Memorandum

## Defined KPIs

- **Resource Optimization:** Reducing the number of individuals handling signing processes to free up time for other tasks.
- **Targeted Training:** Implementing task-specific training for involved individuals to minimize reliance on lawyers and partners.
- **Process Playbooks:** Developing comprehensive playbooks for all signing scenarios for minimal learning time.
- **Time Savings:** Streamlining site-independent preparation and execution of signing processes, supported by in-tool communication to reduce e-mail volume.
- **Enhanced Compliance:** Achieving improved compliance levels through complete digital audit trails.
- **Streamlined Procedures:** Minimizing back-and-forth communication by using upfront checklists to clarify requirements.
- **Unambiguous responsibilities:** Clients and colleagues know exactly who to refer to in which situation.

- Critical culture and values assessment by appointed Informal Leaders
- Revising **Current Operating Model**
  - Defining of all signing instances
  - Grouping signing instances logically
  - Positioning of signing workflows into greater process framework
  - End-to-end process mapping of all signing workflows
  - Identifying synergies, overlaps and gaps
  - Refining workflow characteristics (logical groups)
- Defining KPIs
- **Compiling Process Design Memorandum**
- Preparing HR change impact analysis and measures

## Applied Insights

- **Cultural insights:** Discussions reveal serious doubts about whether the existing culture can support seamless collaboration across roles and departments without further engagement.
- **Group Expansion:** Recognizing the project's strong focus on people, Informal Leaders recommend adding a trusted HR manager to the group. This addition ensures a proactive approach to addressing cultural and structural challenges.
- **Remuneration and Benefits (R&B):** A follow-up project is projected to align a new R&B program to the new roles and responsibilities

## Selected Advantages

- **Reduced Partner Time:** The successful delegation of responsibilities to Informal Leaders frees up the partnership to focus on strategic oversight of the project rather than operational involvement.
- **Clear Areas of Improvement:** Identified cultural and structural gaps that need addressing for successful transformation.
- **Process Transparency:** A comprehensive process overview, uncovering redundancies, including roles and responsibilities and **enabling efficiency gains without any tool implementation.**
- **High Impact with Minimal Involvement:** The significant volume of insights and results is achieved by engaging only a small, trusted group of employees; a highly efficient approach, preserving confidentiality.
- **Respecting Informal Structures:** Informal Leaders acknowledge and leverage the firm's existing informal hierarchies, enhancing the group's credibility and effectiveness.



# MODULE COMPLETE KEY ACTIVITIES

- Involvement of affected employees and yet another chance to confirm culture, values and vision alignment
- Tool decision
- Defining the **Target Operating Model (TOM)**; with internal and external stakeholders
- Preparing the overall project plan and budget
- Naming of the Transformation Leadership Team
- Signing with selected tool vendor
- Town Hall to kick-off project implementation and execution

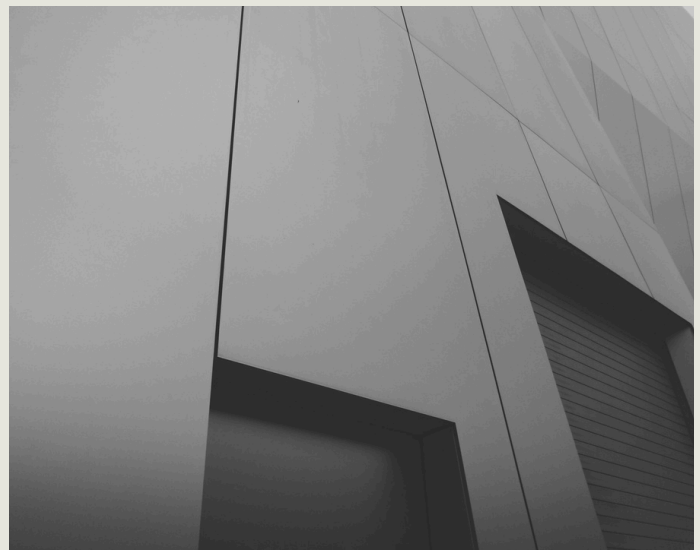
## Selected Advantages

- **Unified Communication:** The detailed documentation and unified messaging from prior modules allows managers and HR to address employees' concerns confidently and consistently.
- **Client-Centric Adaptability:** Early identification of client-specific needs allows to plan for accommodations without derailing the project timeline.
- **Minimized Resistance:** Providing clear, personalized information and gathering feedback reduces uncertainty and resistance among employees.
- **Precise Tool Requirements:** The extensive preparation ensure that tool requirements are clearly defined, enabling vendors to provide precise, well-calculated offers. This minimizes the risk of budget overruns and re-calculations.
- **Efficient Project Planning:** The involvement of the vendor during TOM development allows for precise project planning and customization of pricing plans based on a firm's specific needs on scope and assumptions.
- **Efficiency and Trust:** Employees recognize a firm's effort to value their time and engagement, fostering confidence in the project.



## Applied Insights

- **Key Q&A and concerns of affected employees:**
  - Will I keep working with my current team at my current desk?
  - Who will be my point of contact for new or changed responsibilities?
  - Will I receive training for these changes, and who will support me?
  - What tasks will I no longer perform, especially those I enjoy?
  - What personal benefits will I gain from this change?
  - Why can't we stick with the old way, if it worked?
- **Exceptional client considerations:** Employees raise valid concerns about the need for tailored support for specific clients, which prompts the creation of a list of clients requiring additional care.



# RESULTS

With a committed, receptive, interested and aligned partnership, **transformation preparation can be completed in less than a week of partner time\***. This paves the way for seamless implementation of firm-wide solutions, such as e-signing - while gradually embedding transformation into a firms DNA.

**40 DAYS**  
project time

**57%**  
thereof  
client time

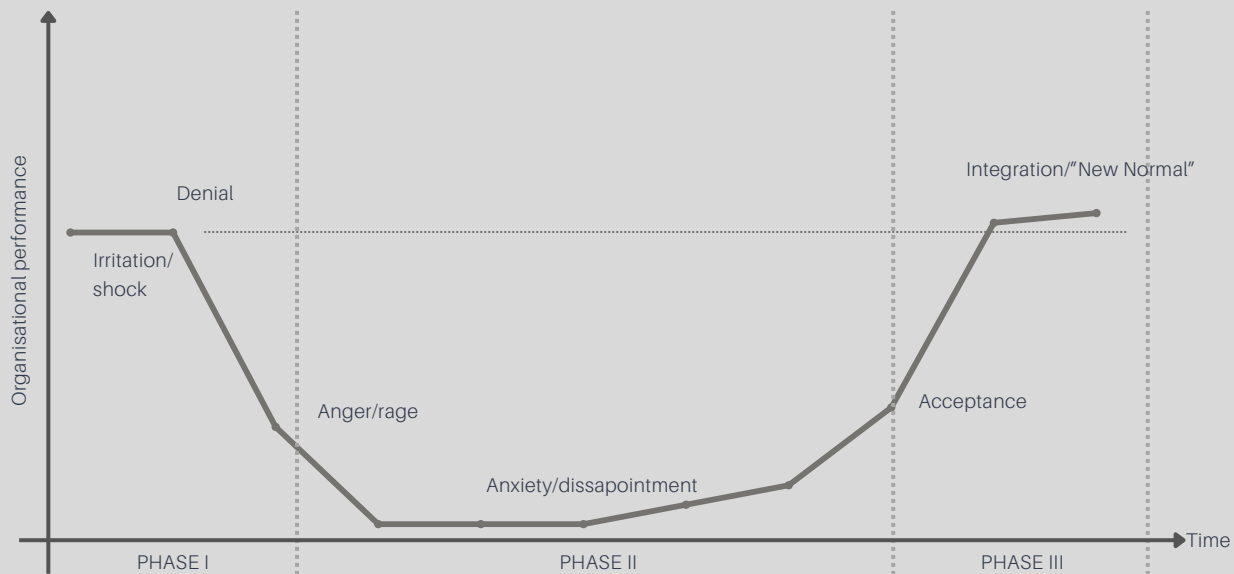
**14%**  
thereof  
partner time

- ▶ Comprehensive documentation of all project-specific document, decisions, communication, etc.
- ▶ Precise project plan with firm and vendor specific scope and assumptions
- ▶ Clear execution objectives for all internal and external stakeholders
- ▶ Informed overview of milestones and responsibilities
- ▶ High motivation of empowered employees
- ▶ Client-centric solutions on eye-level
- ▶ In-depth cultural target-performance comparison

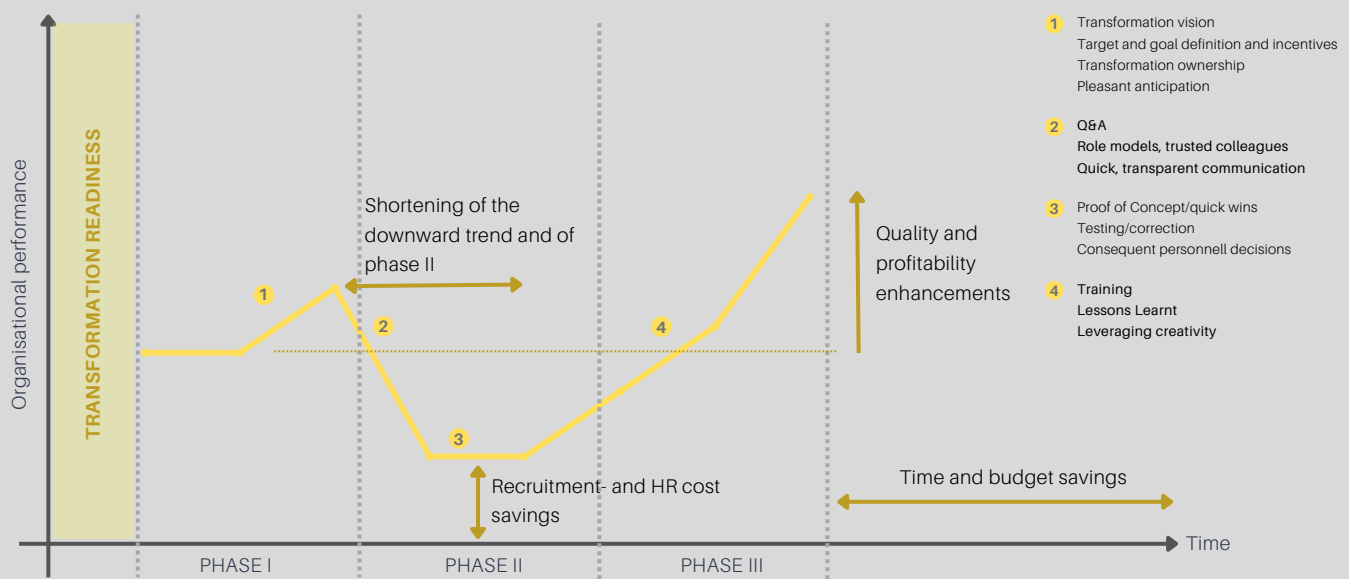
\*Assumption based on experience

# OUTLOOK

## Common Change Curve \* Progression



## Change progress with *tact's* Transformation Readiness Review



\*The Change Curve model by Elisabeth Kubler-Ross adapted by *tact*

# THANK YOU!

Inspired by these Applied Insights\*?  
Get in touch with *tact* to get transformation ready!



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