LLI WHITE PAPER

Agile Working Method for Legal Departments | A practical and empirical report with impulses for implementation

contains the Agile Manifesto adapted for legal departments

Authors
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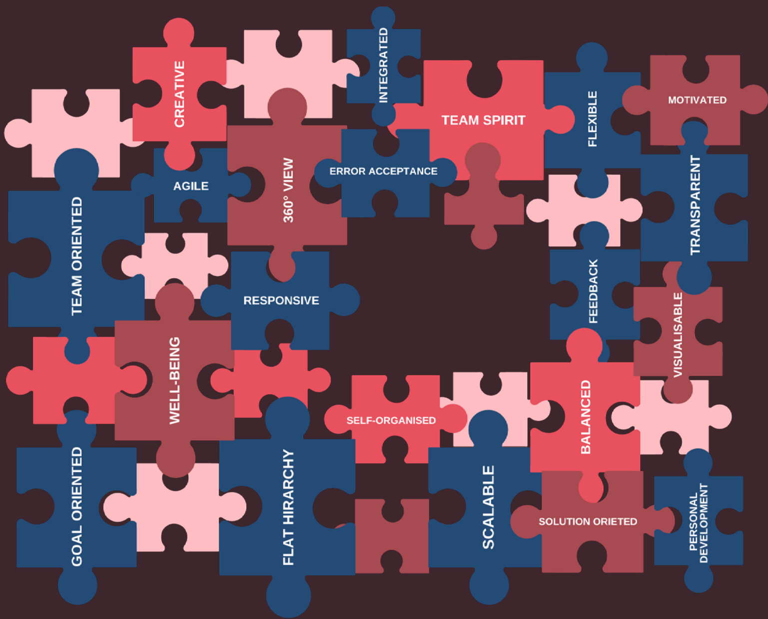
With contributions by
Rasmus Furth / Stephan Mok / Karla Schlaepfer / Florian Schüttke / Yunyun Wang



liquid legal institute

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FOREWORD BY THE AUTHORS AND INSTRUCTIONS FOR READING

Why this book? – The purpose of the Liquid Legal Institute is to provide a collaboration platform and promote exchange among members. So, on the initiative of one of the members, we invited all those involved in the topic of *Introducing Agile Working Methods in the Legal Department* to get an overview of where the different firms stand in the implementation, what went well, and what did not go so well.

We took turns: all shared their approach, presented their tool landscape, and reported on setbacks and successes – you'll be able to find those stories in the text that follows.

This book makes no scientific claims. Although we talk a lot about Agile, Scrum, KanBan and the like, none of the methods and frameworks are applied here *lege artis*; instead, it outlines ways of how an adaptation from the bouquet of possibilities might look for a legal department. Also, this book does not so much describe the destination of the journey, but rather the journey itself.

It is a travelogue: we start with insights into legal departments before Agile ways of working were introduced, then introduce Agile ways of working followed by a discussion, provide a handout on how to get started in 10 steps of what the IT landscape might look like, and end with a few "outsights", namely reflections from other firms, from customers within the firm, and from coaches who professionally guide firms in adopting Agile methods.

Finally, we looked at the 4 principles and 12 values of the Agile Manifesto and discussed them in light of our working reality.

The reading should be fun and make it easier to get started! We are always happy to receive feedback and suggestions!

And one more thing in advance...

The Liquid Legal Institute e.V. (LLI), as host of the project, as well as the editors, authors, and contributors of the publication, unreservedly recognize the importance of gender-equal language. Through projects such as LLI Diversity Framework, LLI strives for diversity and gender equality. For better readability, the simultaneous use of feminine and masculine forms of language is avoided in personal designations and personal nouns, and the generic masculine is used. All personal designations apply equally to both genders. The abbreviated form of language is for editorial reasons only and does not imply any form of evaluation.

CASE HISTORY

BOSCH – Dr. Dierk Schindler, Carolin Schrott

> *Let's travel back to 2019 for a moment. It's Thursday and the bi-weekly meeting for exchanges within the department is about to start. Over the past two weeks, I've had a lot of cases floating around. I quickly start entering them into team board software. The goal: to be able to give an overview at the meeting. Exactly 30 minutes are allotted for this. The meeting starts and my colleagues report on their cases one after the other. There are a few exchanges – as it should be – but the time is running out…*
>
> *Then it is finally my turn. I start to report about the work of the last two weeks. No sooner have I spoken two sentences than we have already reached the end of the time. Our team is forced to leave for their follow-up appointments. I am a bit disappointed by this course of events. I would have liked to get feedback from my colleagues on one or the other case. I also leave the room and wonder why I took the trouble this morning to spend so much time updating the team board. Furthermore, a long Excel spreadsheet with cases on a certain project is waiting for me at my desk. It is absolutely necessary to update the spreadsheet today. I dive into this task and then send the result to my supervisor. Done. Now I can finally devote myself to the actual processing of my cases. I glance at the clock. Shocked, I realize that the entire morning has passed me by and that it's time for lunch.*
>
> *On my way to the break room, I ask myself if this could be done more efficiently…*

The digital transformation is challenging everyone. Teams in legal departments are working at full capacity, and the mountain of new challenges grows daily. The ability to adapt quickly, reprioritize and make course corrections is becoming increasingly important. Agile working promises to be a solution. But is it really? "More effective and transparent through agile working" – is this just a loud buzzword, or an answer to the dilemma of the messiness and inefficiency of outdated structures?

More and more legal departments are recognizing the potential of this methodology. However, they are entering uncharted territory. When exploring new territories, it is particularly important to share experiences, and learn from the competencies and mistakes of others. It is precisely these competencies that this white paper aims to highlight. We want to learn from each other, as agile working – especially in the legal department – has not yet found its way into everyday life everywhere. The Liquid Legal Institute as initiator of the cross-company project on agile working in legal departments (project name: *Legal In-house Scrum Master Roundtable*) sees itself as a platform for cooperation and exchange: together we define the general part, so that you, dear reader, can jump off our findings and thus define your "special part" faster and easier and implement it in practice!

Liquid Legal Institute – Kai Jacob, Evgeny Ioffe

> *We, the Liquid Legal Institute, are an association. However, we have no clubhouse, no sports facility, no rented rooms that we regularly visit. That would be difficult, as our growing membership is internationally dispersed. What we do have, however, is a desire to work closely and collaboratively, and an understanding that it makes a lot of things easier to get done... like this whitepaper, for example. It goes even further: many project ideas emerge in the first place during collaboration or mature in continuous exchange with creative minds and sharp thinkers.*
>
> *But collaboration in a purely virtual setup requires suitable framework conditions. It doesn't work "just like that". It needs trust, commitment, order, and a functioning platform. We knew this from the very beginning of our association, stuck to the idea, and implemented it step by step together with our members. It was not easy, but we succeeded because we had a vision and were not afraid to stick to it. For three years now, we have been on our way to becoming a digital association that works according to agile principles. And, to encourage others to follow this path, we are happy to share our experiences and "lessons learned". We can no longer imagine a path back to the "old", non-Agile world at LLI. The learning process was proper, important, essential and, in retrospect, unavoidable. We are proud of the transformation. And it is far from complete! We are in the middle of the process, constantly discovering new methods, and we are surprised how much more we get out of ourselves and achieve with the members using the same amount of resources – and without feeling over-burdened.*

But how do you provide tangible "lessons learned", that general part about agile working that everyone can also use in the context of "Legal"? We, a group that deals with agile working in legal departments, have come together under the care of LLI to answer this very question. We regularly exchange ideas and learn in the process. We want to make these insights available to all LLI members and interested parties. The more people who join in the discussion, the faster we will master this competency and thus – so the hope – get through the transformation more easily. And this transformation is urgently needed!

KPMG Law – Alicia Mühter

> *Lawyers often like to operate according to the motto "we've always worked that way". In smaller law firms or corporate legal departments, this is often still the case: there are rigid procedures and projects, and mandates follow the tradition of established structures and processes. Lawyers have largely managed their mandates themselves. If other teams (and/or countries) join, for example in interdisciplinary projects, the overall goal picture can easily fall out of sight. Everyone works on his/her own work package without taking into account possible links and dependencies.*
>
> *That's why we introduced professional Legal Project Management a few years ago. Certified project managers manage large international projects and mass projects in particular, but also smaller, complex legal mandates. Project managers are like the spider in the web, holding all the strands together: starting with the professional set-up and holistic planning of projects through continuous management and control to reporting and quality management. These processes and procedures are absolutely essential but must be regularly scrutinized and adjusted if necessary. Especially in cross-disciplinary projects with many different stakeholders, framework conditions can change quickly, and these changes must be responded to. Otherwise, only hurdles remain. You get in your own way with the – possibly specially imposed – processes, the project does not move forward, and the deadline is missed.*
>
> *We have recognized that transparency and, above all, agile working are the keys to success. We use digital platforms that give all project stakeholders access to all information. This has significant advantages: all project participants have the same level of knowledge, and everyone can access all information at any time. We regularly scrutinize all procedures and look at them retrospectively – to see what went well and what did not go so well in the project. We want to act and react quickly and with foresight – through high quality and fast adjustments. Agile work allows us to identify early on what needs to be changed to bring the project to a successful conclusion. By applying the agile method, we create transparency and continuous quality improvement for our projects. This was the reason why we implemented agile working at KPMG Law.*

The most important words you hear from proponents of Agile working are transparency and efficiency. In contrast, however, there are a number of hurdles that you still have to overcome. The biggest of these: how do you start the transformation? The days of whiteboards with bulleted spreadsheets are over. How do you implement agile working in a digital environment? The exchange in our group brought light into the darkness. We now pass this light on to you, so that you too can succeed better and faster on the path to agile working.

PTC – Dr. Tobias Broda

> *In the fall of 2017, we began redefining the way we work in PTC's EMEA legal department and its cross-functional interfaces. PTC is a global software company based in Boston that enables digital transformation for its many industrial customers. Inspired by the innovative mindset within our company and influenced by personal experiences such as building a global partnership with McKinsey on the topic of "Digital Factories", we wanted to explore the digital and transformational potentials available to us based on aforementioned inspirations also as a legal department .*
>
> *So we embarked on our own transformation journey: we initiated appropriate organizational changes and process improvements, built the needed individual capabilities, and deployed relevant technologies. Initial outcomes included creating an organizational structure that would enable programmatic initiatives and free up capacity beyond day-to-day operations. We then analyzed specific core processes and explored how interdisciplinary efficiencies could be increased by translating them into flowcharts as a prerequisite for homegrown digital prototypes; for example, in the context of developing a questionnaire-based automated compilation of contract clauses in main contracts that needed to be repeatedly tailored to an individual business process. Following these initiatives, we expanded the team's capabilities over time, both by increasing theoretical expertise and through hands-on experience on a learning-by-doing basis. At some point, all of this fed into a broader initiative we called Legal Analytics: an Excel-based tracking of our transactional business support activities, including metrics and KPIs such as revenue sizes of the contract in question, the effort invested on our part in the process, the products involved, whether we used standard forms or customer contracts as a starting point, and more. We analyzed this data in pivot tables using Excel's statistical functions. We shared the results, such as average cycle times based on a combination of contract type, territory, product bill of materials, and contractual starting point, with our colleagues in other departments to identify opportunities for improvement in terms of cross-functional collaboration on a data-driven basis.*
>
> *Around this time, our collaboration with LLI became closer. Through the exchange, we learned about activities within the Bosch legal department to-*

wards a robust and scalable digital platform that would also enable agile working models while, in return, we contributed our experience in defining relevant metrics for data collection and analysis. Having thus prepared ourselves for the journey towards a digital and agile matter management solution, we started the implementation of HALO, the so-called "Hub for Agile Legal Operations", in late 2020. Building on the Azure DevOps and Power BI licenses already available within PTC, we took our original Legal Analytics initiative to the next level and established a modus operandi of Agile working within our team and its cross-functional interfaces that went far beyond using the usual buzzwords. And we would like to share the experiences and insights gained on this journey with you here – as an inspiration for your own transformation.

Agile working and its digital implementation are no end in themselves, but a (more or less) new tool for working more efficiently, more transparently, and more flexibly. New also always means change: every transformation is associated with changes, learning, and initial additional work for those involved, and sometimes also with uncertainty or worry. We want to share our experiences with you, dear reader, on how to embark on this common journey and how the common journey can be designed in such a way that everyone involved is "picked up and taken along" and the transformation becomes a success for everyone.

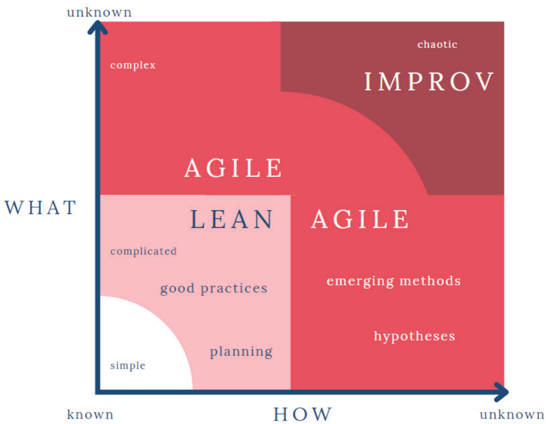
E.ON – Stefan Grassee

At the beginning of the common journey towards an agile working environment may be the introduction of agile working methods in the traditional line structure in (parts of) the legal department – this is shown by the examples of BOSCH, KPMG Law and PTC. For the E.ON Group, the beginning of the joint journey was the digitalization project "LegalTech@E.ON" and its goal to relieve the employees of the legal departments through digital solutions (not: agile working methods). The E.ON Group is an international energy company with a focus on intelligent energy networks and innovative customer solutions. More than 300 legal department employees support business activities in approximately twenty legal departments. The mission statement of the legal departments at E.ON: "Legal matters – Your legal counsel for E.ON's success".

Agile working methods were not the core objective in this project but contributed to the project success once we decided to develop our solution, "Legal Matters". "Legal Matters" is a matter management system and, as such, is designed to facilitate the structured filing of matters while improving the collaboration capabilities of those involved in the matter.

Initially, the project work was not really 'agile'. However, in the initially still loosely connected project team "LegalTech@E.ON", digitization was thought of as a group-wide project from the very beginning. We set ourselves the goal of conducting a needs analysis and prioritizing the identified needs. The result of the needs analysis was that the lowest common denominator, the Minimum Viable Product (MVP), should be a common matter management system.

Then it became agile: A fixed core project team consisting of employees from numerous legal departments learned the advantages and disadvantages of SCRUM, Kanban and agile work with the help of our E.ON internal coach Florian Schüttke (see also interview in Chapter 6.2) and implemented the new knowledge in the project: Sprint timeframe, dailies, sprint planning sessions, sprint refinements and retrospectives were defined in order to get closer and closer to the common goal of a self-developed solution from sprint to sprint. Agile working helped in this project phase to concretize the complex and initially partly uncertain requirements from Sprint to Sprint.



During a transformation, you will often recognize potential for improvement and new forms and opportunities for collaboration that you did not even have in mind at the beginning of the transformation process. In this way, you will almost inevitably come across "low hanging fruits" that can be collected without much effort and that can bring about process improvements, or you will learn in an exchange with other departments that they have started similar projects and discover undreamed-of potential for cooperation. It is important to always remain curious, to question processes, and to try out ideas. There is nothing to lose – but there is a lot to gain!

BOSCH – Dr. Dierk Schindler, Carolin Schrott

> *In the meantime, a lot has happened! Since we switched to the agile way of working in conjunction with Kanban and SCRUM, my daily work routine has changed.*
>
> *The bi-weekly exchange appointment has been replaced by daily short, high-frequency appointments of 15 minutes each. In addition, there is a one-hour weekly appointment. Due to the number of people on our team, the team was split into two squads. We also discussed the familiar SCRUM roles on our team and assigned them to specific people. These changes alone now enable me to have a daily exchange with my squad, where I can get feedback from colleagues for specific cases or give feedback myself. Our Scrum Master pays meticulous attention to time in the individual appointments, so that each member of a squad can claim the same amount of time for his report. Of course, the exchange as a complete team must not be neglected, which is why I will now come back to the one-hour weekly meeting. This serves as a platform for cross-squad topics that need to be discussed as a team. Last but not least, at the end of the work week, we have a review in which we identify problems that we faced this week but could solve differently in the future.*
>
> *The introduction of a digital Kanban board has also eliminated the need for separate maintenance of the team board software, as this board is now our interface for daily work. As a result, all of our cases are transparent and always kept up to date, and meaningful and up-to-date information is available "live" for the SCRUM meetings.*

This whitepaper is designed to give you a glimpse of what the members of our working group did, how, why, and what we learned, and what next steps we envision on our journey to combine digital and agile technology for Legal Operations.

1. AGILE PRACTICES AND AGILE MINDSET

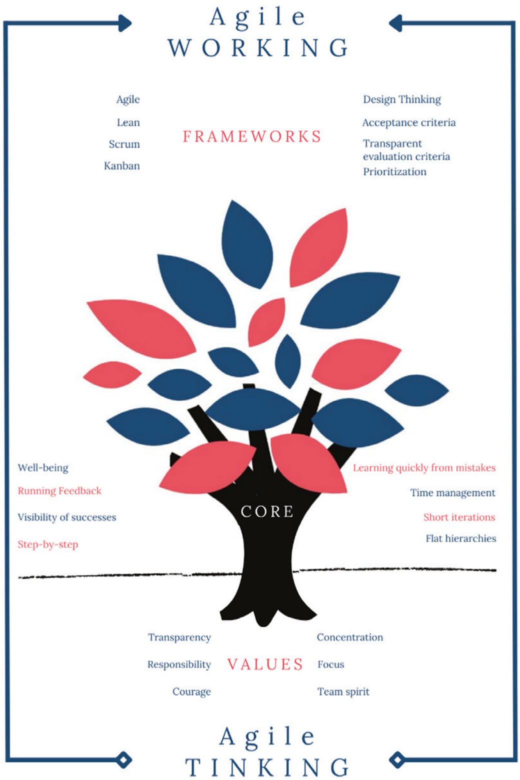


Figure 1: Agile Methodology Tree

At the beginning of every consciously initiated change, there is usually a realization. For us, this realization means: A legal department cannot work in a digitalized working world in the same way as before. The approach and established processes of a legal department come from an analog and highly bureaucratized working world. Requests are received, filed, and processed. However, while the entire company is transforming as part of the digital revolution and department after department is adopting agile processes, legal departments are often still left out in the cold. However, legal advice at eye level can only take place where the legal department is also connected to agile work processes. Otherwise, it would always be the predetermined breaking point of every agile process. So much for the realization.

This insight is countered by experience: Lawyers are not particularly receptive to rapid change. This is hardly surprising when you look at the object of their actions: the law. Law is the rock in the surf of daily politics and does not follow every "hype topic" for good reasons.

However, agility is more than the next hype – it is here to stay. This is related to the logic of digitization whose basic maxims are speed and complexity. Hence, agile principles also come from the digital core business: software development in IT companies. This agile approach was so appropriate and successful in the dawning digital age that it was successively adopted by more and more departments outside IT. Agile project management makes it possible to start without delay in complex situations such as product development and to achieve an initial result quickly. The focus is not on the plan but on the goal, not on the contract but on the "getting along" of the parties involved. This and other agile principles were first formulated by leading software developers in the Agile Manifesto in 2001.

Agility is here to stay.

The principles and values defined there are the basis for a variety of agile process models that have been developed in different industries and for very different use cases. Some, such as SCRUM and Kanban, are well known and established. As can be seen in Figure 1, there are countless other agile methods.

So how do we reconcile the stable, preserving, and reliable nature of law and its guardian, the legal department, with the latest developments around digitalization and new ways of working and producing? That is now our task. According to the insight, this requires an open, an agile mindset. We lawyers have to find our own path to agility. To do this, we have to be prepared to make changes, restructure processes, and even fail in the process. Other departments have led the way, but we legal departments and law firms are probably facing the greatest challenge. In doing so, we should not impose dogmas or prohibitions on thinking. Everything is possible and possibly "right", e.g. focusing on an established model and equally a combination of different approaches. Here, we take an iterative approach with an agile mindset and move toward the goal in a complex environment: the fully integrated legal department in a digitalized corporate and working world.

The trigger for transformation usually happens top-down because hierarchical structures are the current reality in legal departments and law firms. The way forward will not necessarily be hierarchical because the Agile Mindset demands that hierarchies and reporting lines also be put to the test. An agile way of working is not compatible with the waterfall model or any other fixed plan imposed from above. Old structures become a bottleneck. Instead, the benefits of agile flow from the team structure and the responsibility each team member takes for achieving team goals. However, team members must first be empowered to assume this responsibility. The prerequisite for this is that management creates the greatest possible transparency. What work needs to be done, based on what specifications, and with what resources? This information must be available not only to the management, but also to all team members at all times. This is an elementary prerequisite for shifting responsibility from management to the team and giving team members the opportunity to develop an agile mindset in their work themselves. In its most radical form, this means: self-determined teams, joint decisions commitments, no reporting lines but instead a pull principle for upcoming tasks, and much more. Impulses for further development come from the team in regular reviews and are tackled iteratively. Each team should decide for itself to what extent titles and functions are still necessary.

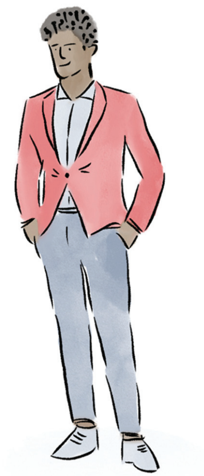
> ***We must be willing to fail.***

The autonomous decision-making capability is a very important point. An invaluable advantage of the agile way of working is the ability to constantly adapt to change. A company and the economic context in which that company operates are complex systems that are constantly changing. An agile legal department or law firm structure can quickly absorb this change and respond when necessary. And so there is no blueprint for agile legal. This is because each legal unit operates within its own complex system and must find its own way. Nevertheless, there are tried-and-tested examples on which it can orient itself and from which it can extract best practices if it deems this helpful.

2. WHY IS AGILE WORKING WORTHWHILE IN A LEGAL DEPARTMENT?

2.1. ONE TEAM, DIFFERENT PERSPECTIVES

For the agile way of working to be a success for the employees involved, the different roles and positions of the respective employees must first be identified. The background to this is that the added value that the stakeholders gain from the agile way of working differs significantly depending on the role and position of the various stakeholders and their perspectives on the workflow. Adoption of the new workflow should be made as easy as possible, and the additional effort required as part of the implementation should be justifiable in the best possible way. For this purpose, it is obvious for which problem solutions can be achieved without high effort for the respective groups, and which solutions represent the greatest added values. It is ideal if the respective groups participate in the "anamnesis". Forming a pilot or pioneer team seems to be helpful here. This team gathers initial experience and challenges with regard to the acceptance of the new workflow. When staffing the pilot team, it is important to ensure that the team is of a manageable size and that different seniorities, personalities and roles are represented in the team.



From our experience:

The authors have opted for a maximum size of 6 people. It has proven successful to mix colleagues with potential for extraordinary ideas with those who have a deeper understanding of processes and a willingness to deal with the fine mechanics of IT processes and algorithms and to carry this knowledge into the larger team after the adoption phase has been completed.

Provided that the change in working methods shall take place exclusively within the department, a separate consideration from the point of view of executives (managers) and employees would appear reasonable. Depending on the size of the department and its composition, other differentiators can also play a role, such as different seniority levels of employees, etc.

As far as the change in the way of working also affects interfaces to other departments that do not necessarily work in an agile manner, the perspectives of the respective other departments must also be included in the analysis of the added values. This is particularly important in interdepartmental collaboration because there is no possibility of "imposing" a new way of working due to the lack of authority to issue directives.

Once the different roles and positions have been identified, it is advisable to consider the added value according to their perspectives.

2.2. TRANSPARENCY

One of the greatest added values resulting from the agile way of working is transparency. The Kanban board that forms the backbone of the Scrum sessions serves as a central element.

2.2.1. The manager's view

In the Scrum sessions, managers first get a daily insight into the central topics on which the employees from their team (and possibly also employees and managers from other teams in the same department) are working. This not only gives them insights into the specific topics and work packages (Eng: "User Stories"), but rather also an overview of the total number of topics the team is working on, as well as the distribution of the workload within the team. This overview gives managers the opportunity to identify work overloads of individual employees and potential process bottlenecks at an early stage and – if necessary – to quickly reallocate work in the team according to priority and capacity criteria. In addition, managers also receive important suggestions regarding the approach of other managers in the same or other departments, and they can critically question workload, leadership approaches, processes and their own actions.

From our experience:

The overview of the department's workload gained by the constant feedback loop saves the manager a lot of time, as he does not have to gather the information first. As a result, several reporting lines can be saved. The daily, structured exchange on relevant operational topics links the manager more deeply than ever with the team. Small coaching opportunities and a good picture of the mood in the team arise on an ongoing basis. This relieves the existing one-on-one time between manager and team member and creates space for exchanges on strategic or personal topics.

2.2.2. The employees' view

In the peer-to-peer relationship, employees gain insight into those user stories that are being worked on by their colleagues through the agile way of working. This gives them the opportunity to recognize when other employees are working on similar topics or topics for the same customers, for example, and they can then enter into a direct exchange with the respective employee in order to coordinate the activities together if necessary or to exchange experiences already gained among each other.

Employees can also see whether their colleagues are currently suffering from a heavy workload and can offer to take over their colleagues' user stories of their own accord. The joint working method in the Scrum sessions and the openness and transparency created in them, also with regard to employee work overload, promotes the willingness in the team to support colleagues when the workload is high.

From our experience:

The transparency created and the resulting overall picture of team activities help employees to identify more strongly with the department as such, since their own contribution to performance becomes visible in the shared team experience of the Scrum Sessions and is appreciated accordingly by the team.

Finally, the team also gains insight into the manager's activities, unless these are blocked or anonymized from the team for confidentiality reasons in exceptional cases. This results in closer networking between the different hierarchical levels in the team. The agile way of working brings an element of equality into the team since transparency does not only take place at the same level or within the reporting structure. In this respect, the Kanban board acts as a democratizing element that on one hand objectifies the reporting structure (through the corresponding database) and on the other hand focuses on the really important issues. A detailed examination of smaller matters becomes unnecessary since they can be viewed on the Kanban board at any time.

Important: In a legal department, you should reach a consensus regarding the question of the complexity threshold at which a task to be completed should be included as a user story on the Kanban board. Not every short work process justifies inclusion as a user story. On the one hand, the inclusion of all activities without exception would result in an information overload since the expected mass of user stories would obscure the view of the essential work content. On the other hand, there would also be a risk that the teams involved would shy away from adopting the new way of working due to the considerable administrative effort this would entail. Experience has shown that the acceptance of the new way of working by the employees depends to a large extent on the added value outweighing the potential effort required to maintain the user stories. If the time required to simply create a user story is equal to the time required to complete the task itself, this would be disproportionate (even if, in exceptional cases, tracking a task as a user story that may also have been completed quickly may nevertheless be important or necessary for certain reasons). This materiality threshold must be agreed upon jointly in the team. Such an agreement will clearly define the relevance threshold and also ensure that it is well accepted by the team, since the decision is made jointly. We have had good experience with setting the threshold for the inclusion of a user story where the workload exceeds the quick adjustment of a commercial offer (quota) or about 30 min.

2.2.3. The view of affiliated departments

At the gateways, where teams from several departments have to collaborate and work together, the agile way of working also offers transparency. It is crucial to determine which points of contact the teams have with each other and whether they are working on an overarching product, and, if so, what added value can be gained from this for everyone involved.

From our experience:

An author's team is responsible for the legal drafting of license agreements. The responsibility for ensuring that the contracts also meet the required criteria in terms of revenue recognition lies with the Finance department; the responsibility for ensuring that the contracts meet the economic key figures and that any exceptions to the internal business rules have been properly obtained and documented lies with the deal desk.

In the above example, the three departments mentioned (Legal, Finance, Deal Desk) are jointly responsible for the overall product "contract". The work on the product (the contract) runs continuously and in sequence or, for example, through the use of cloud/SaaS technology, also in parallel; the responsibilities and actions change continuously between the departments. In addition, departments collaborate with different members on a variety of different products (=contracts). Through agile collaboration in Scrum sessions, supported by the Kanban board as a central data repository (Eng: Single Source of Truth) for the product (the contract), the departments involved regularly compare notes on current developments, keep each other up to date throughout and also have an established meeting place to make critical decisions and reflect on existing bottlenecks. This results in a high degree of efficiency. Particularly in the case of collaboration between several teams, transparency leads to the creation of a common data and work platform across departmental and associated differences in mentality. This not infrequently leads to mutual enrichment through innovation and improvement ideas beyond the specific case – because many use cases for radical innovations only become visible when one breaks through the mental boundaries of one's own department.

From our experience:

The authors have had excellent experience with the introduction of cloud-based documents and their subsequent negotiation. By working together on a cloud-based version, you avoid the risk of conflicting parallel versions and have a faster cross-functional exchange towards a ready-to-send contract version.

The interlinking of the Kanban board (methodical component of cross-functional workflow control) with cloud-based documents (technological component of interdisciplinary "product creation") – e.g. as a link in the corresponding user story – creates an always available, traceable, and comprehensive (in contrast to e-mail) database for all cross-functional participants, increasing transparency for all sides and enabling collaboration on a new level.

2.3. EFFICIENCY

2.3.1. The manager's view

By taking a look at the entire portfolio of activities, managers have the opportunity to identify potential for optimization or to shift the focus if it becomes apparent that, in their view, too much work is being generated by those topics that are of secondary importance for the actual core business of the company. Based on the Scrum Sessions and the collected data, managers have a decision-making basis to initiate appropriate changes. Managers are supported in this by the database created "coincidentally" as part of the use of the Kanban board. Each step in the lifecycle of a work package (user story) generates metadata that can be evaluated in relation to the legal department's key performance indicators (KPIs) and used for data-based management decisions. In the start-up phase of the project, it is recommended to initially focus the KPI analysis on the adoption of the system, e.g., appropriate filling of user stories and their movement in the system. As the project progresses, interesting perspectives unfold for the manager to identify and control trends even with more complex algorithms. These include, for example, the following questions: What is our need for legal advice by business unit, region, by sales of the affected products and sales leads? What are the areas in which our activities are focused, and how do these fit in with the strategic goals of the company?

Furthermore, managers learn in Scrum sessions which external obstacles (end: roadblocks) the employees encounter in their work and can help the team to overcome the obstacles based on this knowledge.

In addition, if employees need a management decision on certain topics in order to continue working, managers can also make this decision at short notice during a Scrum session, thereby enabling employees to continue working immediately on the basis of this decision.

From our experience:

The high-frequency exchange flushes the top issues onto the common radar. The digital framework provided by the Kanban board makes all the information easily accessible to everyone on the team and in the management line at all times. And the added bonus is the ability to analyze the work – again, for everyone – to drive the team's advancement in a fact-based manner.

Finally, when working at the interface with other departments, the manager gains valuable insights into the way they work together and can also address other department managers directly at short notice and on the basis of his or her own perceptions, addressing any inefficiencies and potential for improvement and initiating process changes at short notice.

2.3.2. The view of the employees

At the employee level, efficiency considerations offer a wide range of different aspects that create added value for employees.

1. Quick support from the management. The possibility of obtaining help at short notice and obtaining management decisions in the event of external obstacles has already been listed above and will therefore not be discussed in depth here.
2. Quick support from the entire team. A central, if not the most important aspect of increasing efficiency from the employees' point of view, is that employees have the opportunity to ask the entire (expert) team for help in the Scrum Session. It is particularly helpful if they themselves are faced with a problem and have not yet found a satisfactory approach to solving it. In such a case, the collected team can develop ideas by brainstorming together, referring to past ap-

proaches to solving similar or identical problems, referring to people outside the team who can help with these questions, etc. Immediately after the end of the Scrum session, the employees are able to overcome the deadlock and push the topic further. It is essential to regularly encourage employees to ask questions in order to avoid that they do not make use of this key element of Scrum Sessions out of concern to be considered dependent or ignorant.

Another central aspect is the continuous reminder that a Scrum call is not intended to provide the entire team with an overview of all aspects of their own work.

3. Incidental learning. Third, the Scrum Session provides an opportunity for employees to casually learn from other employees and the projects they are working on. An established element in Scrum Sessions is that an employee reports to the team on what they have learned from that User Story when they have completed it – if that User Story has led to new insights. In doing so, the employee reports on challenges in the project and how they were eventually overcome. The team has the opportunity to ask questions and thus learns in passing, so to speak.

4. Onboarding and transfer of employees. The agile way of working also contributes to a fast and efficient onboarding of new employees. The new employees very quickly get an overview of the overall portfolio of work that arises in the department. They experience (exemplified by more experienced employees and/or supervisors) that asking questions is part of the team culture – in other words, that it is okay not to know everything. They learn from the experiences of their colleagues, quickly achieve their own sense of accomplishment by telling the team about their own user stories, receive immediate help when needed, and can network very quickly with other employees. This is particularly helpful when employees are located at different sites or work together "virtually" for other reasons (especially in exceptional situations such as the Covid-19 pandemic, which in many cases precluded joint office presence).

   The Kanban board also creates an excellent basis for the transfer of work processes in the context of vacation, sick leave and parental leave replacements or serves specifically as a means of mentally and graphically "breaking down" a more complex work process into agile components with different participants and responsibilities – in contrast to the end-to-end responsibility for the entire process hanging on a single person. This is made possible because the corresponding database and history, as well as the document links and cross-functional participants, are centrally visible and available in a single place. This aspect contributes significantly to the acceptance of the new system in the team and strengthens the agility of the employees among each other.

5. Functionalized collaboration with other departments. The process of formalizing collaboration at the cross-disciplinary interface also helps to speed up work

on joint projects. Legal departments often have the role of actively driving negotiations forward in companies from a certain level of maturity in customer negotiations. In these situations, legal departments must rely on receiving the necessary information, input, and decisions from other departments in a timely manner. Fixed, institutionalized Scrum Sessions help legal departments to query and proactively manage contributions from other departments that are still missing in this meeting.

6. Metadata collection, evaluation and utilization. The agile way of working on a digital Kanban board generates measurable metadata and enables corresponding process analyses. The metadata are ideal for determining how the legal department is performing against defined KPIs, and they create a data-based foundation for discussions with higher management and adjacent departments. Process analyses, on the other hand, are based on subjective perceptions of those involved, but these in turn can be substantiated by the metadata. If, for example, there are repeated time losses in collaboration with certain departments or processes, this – enhanced by the number-based support – may lead to a productive discussion and solution with those responsible.

7. Recognition. Not every type of legal department activity has the same appeal. Discussing long-term and routine (although this does not make them any less mission-critical) tasks in scrums leads to increased appreciation and recognition for such work, and thus to appropriate attention being paid to those projects that would otherwise have remained unexposed. The increased recognition in turn leads to higher self-identification with the company among the employees concerned.

2.3.3. The view of affiliated departments

The potential for increasing efficiency of connected departments lies in ensuring smooth cooperation and a constant flow of information in the interfaces, especially in the cooperation in such projects where several departments are responsible for a common product (see above). In Scrum Sessions, the departments can make critical decisions in a meeting, eliminate information deficits, incorporate additional persons or even departments, and thus drive the process forward in a targeted manner and accelerate or escalate it, if necessary. In this case, formalizing agile collaboration reduces pressure during high-frequency periods (e.g., quarterly or year-end) and ensures that no information is overlooked.

Finally, the above explanations on the onboarding of new employees also apply accordingly to new employees of affiliated departments. This offers them the opportunity to become familiar with the collaboration at important gateways and the best practices established between the departments.

3. HOW DO I START THE AGILE TRANSFORMATION?

In 10 steps to an agile working method in the legal department!

1. **The realization:** Something has to improve – it can't go on like this!

If you can describe the mood in the team in this way, it is time to introduce something new. The Agile working method stands for a mix of methods such as Lean, Kanban and Obeya, all of which have their raison d'être and must be adapted for the world of lawyers in a legal department. The affected team must therefore consciously embrace Agile working in the legal department.

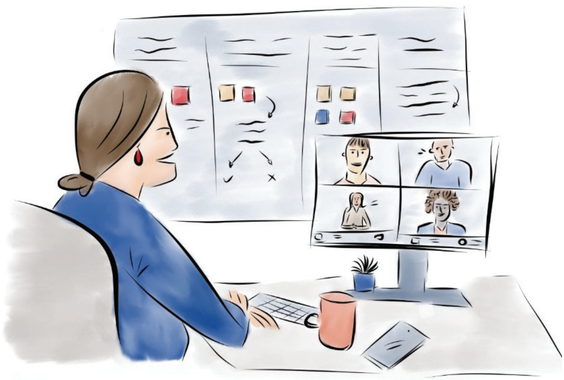
> ***"It can't go on the way it is now. I constantly have to search for information in different sources. That's annoying! Things have to improve."***

2. **Genuine interest:** What might this "better" look like – what are the others doing?

What pieces of information are missing to get the job done more effectively and efficiently? In which work steps do you lose time searching for such information? What could a better structured work environment look like?

> ***"If only I had some idea where to get the information I need... And even if I do find something – who's to say if it's still current?"***

The easiest way is to get some inspiration from outside and talk to people who have gone different ways and tried out new methods. From this, you can derive a vision for your own environment of what the "new legal work" could look like in concrete terms.



3. **Off we go:** We need a workshop – we need to shape our future together!

When the desire for change is strong and a vision has been formulated of what "better" could look like, it is time to sit down together and consider in a workshop what could be done concretely, as a first step, so to speak.

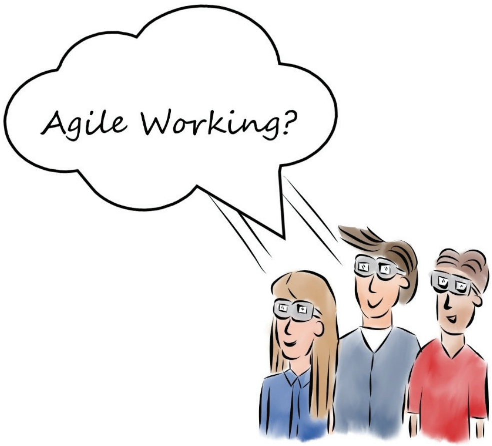
> ***"I'm curious to see what it will be again – every year there is a new method, we'll see!"***

In this workshop, it is worthwhile to compile how many meetings and agreements you have today to coordinate with each other and to add up the minutes. Then you should take a look at the organizational structure and consider who has which overlaps with whom – this sometimes includes the internal customer if the legal department works very closely with product development, service or purchasing, for example. However, it is easier to start within the legal department first. Then you need to teach the basics of agile working and recognize its value.

4. **Setting the course:** Start small, yes – but think big!

> ***"So now Agile – we already had Lean and Six Sigma!"***

Agile working has been around for many years and has unfortunately been used as a term in an inflationary manner over the years and thus diluted. Now there are the purists who have a very narrow idea of Agile working and rightly refer to the Agile Manifesto and the methods developed, and there are the pragmatists who focus on what is best for the concrete team in the concrete situation in the concrete environment. Both are defensible views. What is important is an Agile mindset that allows to correct a chosen path and even to take a step back if that is what the team wants.



5. **By yourself or with others?:** If in doubt, ask a coach!

> ***"Wow, that was easy – didn't think we could make that happen so quickly!"***

The team is at the center. If you follow the Agile method, you define two roles right at the beginning, the Scrum Master and the Product Owner, and fill them. The product owner is someone who has good knowledge of the strategic environment, i.e. someone who has information about where the company wants to go. He maintains the backlog and proposes a prioritization of tasks for the next sprint. The Scrum Master has the task of giving the team a hand and clearing roadblocks out of the way. Both roles are important – but ultimately the team decides for itself. But who knows the structure of these roles? Who has experience in the practical implementation? Who knows the pitfalls of implementation? – It makes sense to bring in expertise on agile working, an agile coach. This person doesn't need to know anything "about the law" or the legal department, because the team already does that. Their expertise is complementary.

6. **Here we go:** The first sprint!

> ***"I'm curious to see whether dailies actually prove their worth, or whether we drift back into our old ways..."***

Anyone who has worked in a (large) company knows that the quality and goal achievement of meetings (whether physical or virtual) depends very much on how the appointment is prepared, conducted, and followed up. A clear agenda (tailored to the length of the appointment), the right participants, stringent moderation, and an apt summary of the appointment (with all action items) delivered in a timely manner is desirable – but often the exception. We usually suffer from meetings scheduled on short notice with vague content and no transcripts at all.

In contrast, the Agile method relies on high-frequency communication – i.e. if possible, the team meets daily for no longer than 15 minutes and with a maximum team size of six to seven people. The speech of the individual members, ideally always aligned with the question: "Yesterday, Today, What's in the Way" and if necessary focused on previously selected highlights, lowlights – and general attention topics, is max. 90 seconds. After 15 minutes it's over! Definitely – because time-boxing also belongs in the Agile toolbox.

7. **Digital first:** Technology instead of post-it stickers!

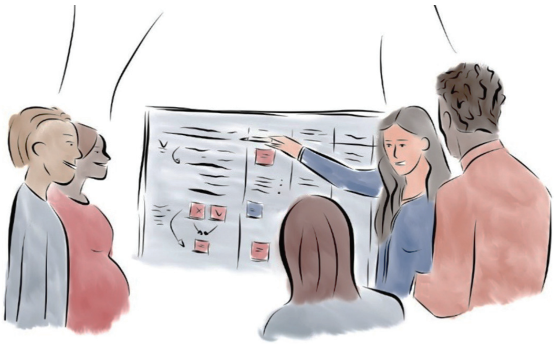
> ***„ Didn't think Corona could have a positive impact on the way we work."***

Post-Its from 3M have been around for over 40 years, and people have been sticking their tasks on whiteboards or walls to organize and structure their personal workload for just as long. Gradually, teams are moving to pinning tasks – at least those tasks that need to be done collaboratively – on a central Kanban board to have a single view of project progress. Huge progress!

Due to the Corona-induced push for digitization, these boards have moved online very quickly, with Scrum teams using technical solutions (such as Trello, Jira, or Azure DevOps). The team now meets on Zoom, WebEx or MS Teams for a fifteen-minute video conference. Everyone looks at the shared Kanban board. It's important to maintain the typical haptic of moving on, even in the digital. Drag-and-drop is an important feature and is perceived as pleasant by many.

What sounds like a small change in the way of working has far-reaching, extremely positive effects – because every action on the virtual Kanban Board leaves data traces that can be evaluated without any additional manual effort.

Without any effort, the number of user stories and tasks, start and end dates, changes, etc. can now be assessed. Through additional maintained tags and other metadata, you can create the data basis for amazingly meaningful dashboards. With one click, you can see efforts, trends and correlations that were previously either impossible or difficult to create.



8. **Whew:** Strengthening resilience!

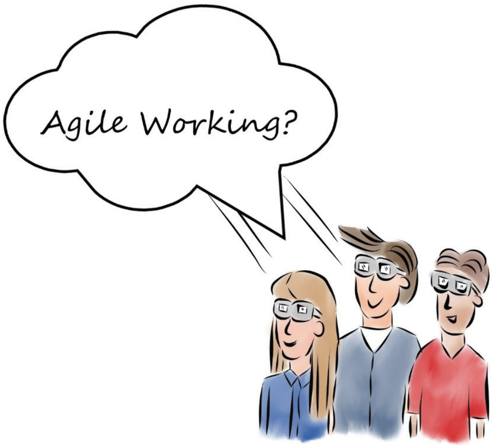
After about six weeks, the teams experience a fatigue phase. The first euphoria is gone and the new working method shows its weaknesses: too many boards, the descriptions are missing or incomplete, acceptance criteria are not maintained, the learned method is not followed like e.g. no mapping to the features, no sprint planning. Retros and important deadlines are postponed again and again and are cancelled completely...

> ***"Started out well, but now it's starting to get annoying – now I'm in three squads and still have dailies in the morning, at noon and sometimes in the evening."***

This is where a coach can help, explaining, cheering up, taking on tasks such as maintaining the backlog, and temporarily advising and guiding the team.

But what went wrong?

Each team has its own challenges and specifics that only reveal themselves over time. Some have goals that can be easily broken down into user stories and tasks and distributed over several sprints (usually two weeks). Others have highly volatile day-to-day business that can't be planned into sprints – now what? Existing teams vary in size, some have only three members, others ten. So how do we arrive at the optimal squad size of five to seven people? We've put so much effort into defining the Features during the workshop – and now nobody uses those Features anymore. Even worse, there are new user stories that are constantly added, and no one knows where to assign them to? This then also "shatters" the reporting, because the roll-up no longer works.... The key here is: Keep your nerves and keep going. This is exactly why retros were invented! Simply ask: which three things went rather well in the last sprint and which three things did not go well. Based on this, the team should define three concrete measures that they want to improve. Most of the time this already helps to bring the ship back on course.



9. **On course for expansion:** Communicating success!

People expect – no, we expect from ourselves – that working according to the Agile method will now become better and better. But that only works if everyone follows along and adheres to a few simple rules. Here is a selection:

- Dailies are fixed appointments and are always attended – if only out of respect for colleagues.
- It's best to think about what you want to cover (in the allotted 90 seconds) ahead of time.

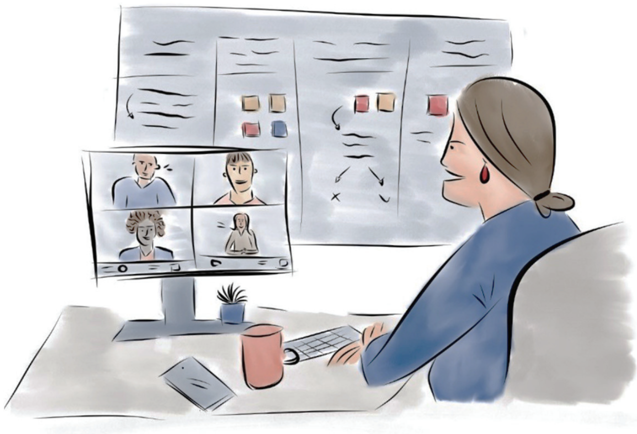
- As the person responsible, you write down user stories promptly and keep them up to date if necessary.
- You assign storypoints and coordinate them with the team if necessary.

"It's crazy who suddenly approaches you and wants a demo of how we now work in the legal department. It's fun to be seen as an innovator for once and not just as a worrywart!"

- Internal (and possibly external) communication only takes place in DevOps.
- Documents are linked to the user story.
- and many more.

Idleness is a setback!

In addition, the desire for a deeper integration of the agile working world with the rest of the company's IT will very quickly come to the fore. The possibilities are endless, but it is particularly easy to implement things that can be realized in a Microsoft Cloud environment.



Anyone who has come this far never wants to go back.

With Logic Apps, it is very easy to build deep links between DevOps and purchasing (e.g. iValua, Jagger) or the Matter / CLM systems (e.g. iManage, iCertis, Sirion Labs), via which metadata can be exchanged. Re-entry of data (and thus potential sources of error) is avoided.

Reporting can be extended with Azure Queries, Power BI, but also third-party applications such as Tableau.

10. **Well-being:** The team carries out the course correction!

> ***„ And who is this dedicated new colleague who is driving the agenda with me?"***

The topic of agile working is on everyone's lips and interest is correspondingly high. The major organizers of legal congresses are looking for practical reports. Such self-promotion fulfills several goals at once. One mirrors one's own transformation against the market and thus arrives at an assessment of where one stands. One also strengthens – and this should not be underestimated – one's own corporate brand. When ING Bank's legal department reports on its Agile Transformation, many customers and potential business partners are listening attentively.

> ***Do good and talk about it!***

But the last sentence belongs to the Happiness Index! How is the team and the individual team member doing at each stage of the transformation? Are we moving too fast or too slow – is everyone still on board? Are the suggestions or reminders being heard? A regular Watercooler meeting can give the necessary space here to exchange ideas (without a stopwatch) once in a while and to be happy about what has been achieved!

4. DIGITAL IMPLEMENTATION

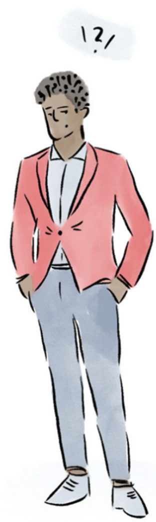
After this very practical experience report on how the introduction of the Agile method feels in fast motion, we would like to provide very concrete assistance on the technical implementation in the following. At the very beginning of the project, we gave each other insights into our respective new Agile work environments. Due to the Corona-related home office obligation, we were all already equipped with virtual tools – with some reporting early walking attempts with Post-Its and white-boards. In addition to Jira, Trello and Planner, DevOps came up again and again. Why? You will now find out.

4.1 MICROSOFT ENVIRONMENT: AZURE DEVOPS SERVICES

Why do we report so much on Microsoft? This is simply due to the fact that we are all running this software and consequently all using the same environment.

4.1.1. Introduction

The range of services in Azure DevOps is large. In this section, however, we will limit ourselves to Azure Boards and Azure Overviews, since we mainly use them.



Your motivation:

You are looking for a software in which you can set up your Kanban board with its respective columns individually tailored to your use and also adapt it at any time? Furthermore, it would be great if you could specify the contents of the individual tasks to your team? In addition, you would like to search your Kanban Board by keywords, filter by individual employees, or similar? Furthermore, a color highlighting for tasks that have not been processed for a certain period of time would be a nice addition as well?

Then Azure Boards is a very good solution for this – because all this is possible with it.

4.1.2. Azure Boards and Azure Overview

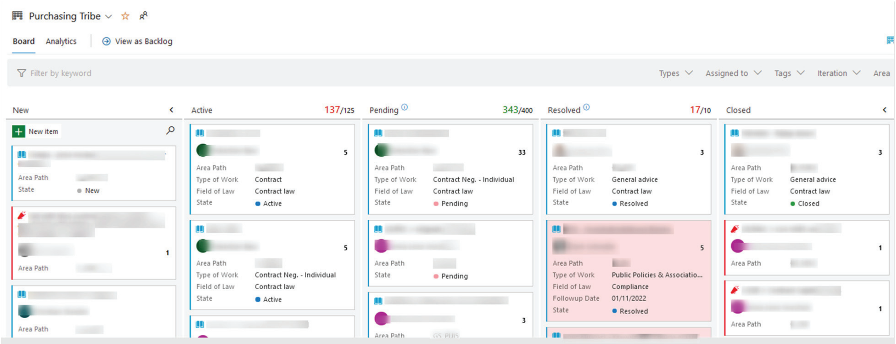


Figure 2: Kanban-Board in Azure

Your Kanban Board has been created and is being diligently filled. However, a visual evaluation function with individual filters – outside of the Kanban Board – would be a valuable addition? Then you will find the right solution for this under Azure Overview and the item "Dashboards" below it. If you create dashboards for specific legal areas, for example, you can then display the overall overview grouped by the status of the respective Kanban task – and much more.

AzureBoards is therefore perfect for tapping one or more data fields from the Kanban board (AzureBoards) and making them visible in an aggregated and visually catchy way. All fields that are filled are later flexibly available for such a specific evaluation. This can be complemented by simple "tags" in the Kanban Board, which can then also be used for dashboards. Examples for such simple dashboards are:

- *„Client View":* Number of cases per client and sorted by status (New, Active, Pending, Resolved, Closed)
- *„Weekly Radar":* "Highlights", "Lowlights" and "Top Priorities" marked by corresponding "Tags" can be displayed as a report.

4.1.3. Power BI

Your motivation:

But now how about even more complex analysis by crossing and combining data, again of course using the specific inputs in the Kanban Board?

For this, a professional dashboarding engine is the right solution, such as PowerBI or Tableau. We use PowerBI as an example from our practice.

The good news is that such a solution exists in practically every company to monitor core operational processes. So be sure to find out which solution is the standard in your company. This will save you a lot of money, because first of all, a license (maybe even an enterprise license) might already be available and purchased, and secondly, there might be experts in IT or other departments who can support you. The not-so-good news: You need such experts because these tools are so powerful that you can't just learn them "on the side".

Given the above, it is advisable to use PowerBI in a planned and static manner. Simple dashboards that change from time to time should be set up in AzureBoards (at least initially); PowerBI is better suited for more complex and standardized analyses. Examples of such complex and standardized analyses are:

- *Workload*: Number of new & closed cases per week, comparing weeks and weighted by complexity (e.g., number of StoryPoints)?
- *Turnaround time*: How long does a case take on average from the status "Active" to "Closed" – and how does this time span unfold (again, different time periods in comparison)? And how does this differ, for example, according to client groups?
- *Focal points/trends I:* Which area of law (possibly again cut by client group) occurs most frequently and what is the trend?
- *Focal points/trends II:* Which type of legal work (possibly again cut by client groups) predominates or is decreasing or increasing?

These analyses are very valuable for strategic planning in leadership and with the team, as well as for recognizing where we can work together to reduce burdens or recognize and absorb trends early on, before they lead to gaps in consulting or overload in the team, for example. This puts you "in front of the wave" and provides valid data and facts as a basis for decision-making.

4.1.4. Integration into MS Teams

Azure DevOps is used via the web browser by default. Opening user stories or items automatically opens the default browser.

For teams working with MS Teams, it is also possible to embed Azure DevOps directly in MS Teams.

Furthermore, Azure DevOps can not only be displayed in MS Teams, but also further linked to the Teams channel. For example, conversations and comments can be displayed directly in the MS Teams channel or addressees can also be informed directly about changes or events via notifications.

An additional advantage besides the embedded notification, access and other functions is the handling of the tool in an environment that is "known" to the users. If users do not always work via the browser, but the Kanban Board is also visible directly in MS Teams, this can lead to better adaptation of the tool.

4.2. HOW DO YOU BUILD YOUR ENVIRONMENT?

4.2.1. Technical requirements

The technical requirements vary considerably depending on the choice of tool(s) and the existing IT infrastructure. It is important to involve the respective IT department in good time in order to clarify any preliminary queries, authorizations and access requirements. Although Azure DevOps is part of the Microsoft Suite, not all companies have this application in their regular portfolio yet.

Other evaluation tools such as Power BI often have to be purchased first. Depending on the internal structure, you should therefore plan enough time and also resources here. Normally, a company with current Microsoft IT infrastructure and support is well equipped to use standard add-ons such as Azure DevOps and Power BI.

Basically, you should familiarize yourself with the cost structure and integration into existing systems such as Microsoft Teams in advance.

4.2.2. Skills and experience

1. External Technical Support/Agile Coach

In our experience, setting up such an agile working environment is almost impossible without technical support or the necessary background knowledge of experienced employees or an agile coach, and can quickly lead to discontent. This option should therefore be considered and taken seriously right from the start. What could be worse than being in the "starting blocks" and then failing at the technical implementation?

2. What do we need as a team?

In general, you should not underestimate the time and personnel resources required, especially at the beginning of such a project. Therefore, you can hardly do without an agile coach or a dedicated experienced employee who is only responsible for the project in the start phase and also keeps all other employees up to date with corresponding timeline ideas and plans. This person takes care of the technology, sets up meetings, initiates first sessions with some employees who are starting to use the tool, and keeps the team and the project together while all other employees continue to handle day-to-day business in addition to the project launch.

Basically, it makes sense to be shown many different ways to technically implement or display the data in order to have a broad range of choices. Ultimately, each team must decide for itself which options make sense and which do not. Test phases have proven to be the best way to do this. If it is determined that an option does not add much or any value, it should not be retained just because it is still available from the initial phase. This is where an agile team proves its worth by reacting quickly to changes and adapting the way we work together.

3. Tools on their own? Is the agile way of working necessary?

We were often asked internally whether it is possible to use only the technical tools without the agile approach and way of working. This is of course possible, because the agile approach is about choosing and using the tools that suit your own needs. For example, it may make sense for someone to organize only themselves with a Kanban board and thus perform evaluations via queries and charts. Of course, you can also let a whole team work this way without holding scrums or tribe meetings. On the other hand, you can certainly do stand-ups or scrums without a Kanban board or technical support. If the whole team gets together in one place, this certainly works very well. When working from home, it will probably be a bit more difficult without visual aids. Introducing both the technical tools and the agile way of working together has led to easier onboarding and adoption in our experience, though each team should certainly pick the tools that are right for them and their way of working and use them.

4.3. HOW DOES THE DATA COLLECTION WORK?

Having provided an overview of how to transform the way you work using the various Agile tools, let's now turn to the collateral benefit: the effortlessly generated data – because every user interaction in the new environment leaves a data trail that we can understand and harness.

4.3.1. Fill the tool with data

As mentioned earlier, you are free to design your user story template, so there should be no strict guidelines here, but the following question should be addressed to each team itself: What data makes sense for us?

Following are a few examples:

- Which customer is concerned by the request?
- Which area of law is concerned by the request?
- Which field of work is concerned by the request?

In addition, the effort of processing the request must be in a healthy relationship with the filling of the user story. Therefore, it can make sense to create a second template for filling. In the second template, fewer fields would then have to be filled in for requests that could be handled with an e-mail or a short phone call, for example. This variant has already proven successful for us.

4.3.2. Using the data correctly

1. Custom dashboards

As described before, we also use our data for individual dashboards that we create ourselves. With some practice, the Scrum Master, for example, can be enabled to create these independently and at short notice.

This makes sense whenever one wants to visually evaluate the Kanban Board data with certain filters. This evaluation could, for example, have the form of a line chart or a pie chart.

The dashboards always remain connected to the data, so that by clicking in the dashboard, you can always see the data behind it. In addition, it is also possible to display data or individual user stories, without visual preparation.

2. Queries and Dashboards in AzureDevOps

The easiest way to extract all the data tracked in the user stories and the Kanban board is to run a so-called "query". This is a reporting function. It allows to generate quick queries or reports about all data located in the User Stories and the Kanban Board by simply selecting filter criteria (see screenshot).[2]

These reports can then be further customized and extended by additional source data, for example by displaying the user story's processor ("Assigned to").

After that you can save these reports in the project and sort them into folders. They can either be stored privately or made available to all project members, so that 24/7 access to the report is possible for all approved persons.

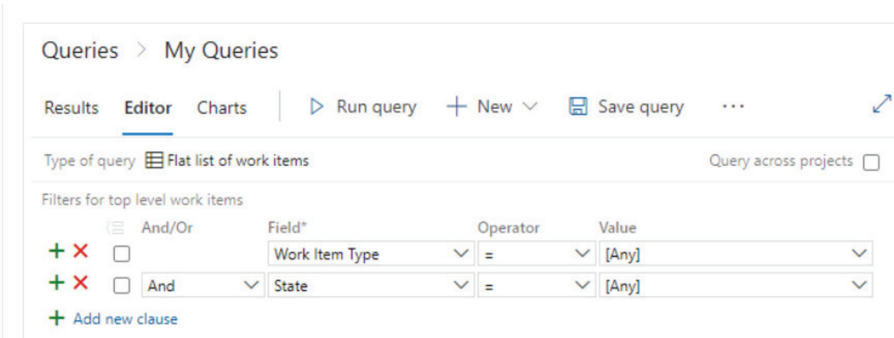


Figure 3: Querying using Azure Query

Another simple but effective additional function after generating and finalizing a query is the creation of dashboards, see *Figure 3* and *Figure 4*.

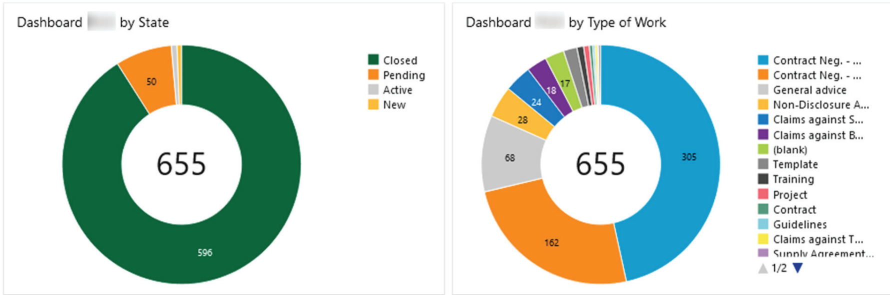


Figure 4: Visualization via Azure dashboards

Without much effort, various diagrams can be created, and edited, and they can also be saved and continuously updated.

These queries enable quite intuitive reporting, which, unlike Power BI, can quickly create results and overviews without much prior knowledge on the part of the user.

4.4. JIRA – AN ALTERNATIVE TO THE MICROSOFT ENVIRONMENT

There are also some tools on the market outside the Microsoft Suite that enable an agile way of working. Depending on the existing technical requirements in the company or whether the procurement of IT infrastructure is rather complicated or simple, it may therefore also be worth looking outside. There are also variants already adapted to specific departments here, e.g., with a focus on the Legal Department, where there are fewer elements from software development and a stronger adaptation to the respective needs of other users of agile working methods. It should be noted that the costs here can be higher in most cases than when using tools from the Microsoft Suite which is already available or easier to acquire in most companies. Both acquisition and support costs should be considered here. On the other hand, a look into the company's software architecture can lead to discovering an application that is already available.

Our experience:

When our legal department wanted to introduce a ticket system to handle the company's legal issues, Jira quickly caught our eye. The reason: We already use Jira for software development and other tasks.

Jira is a software for process and project tracking from the provider Atlassian. For each individual process, a ticket is created and automatically assigned to a processor. The tool almost perfectly fulfills all the requirements previously defined by the legal department.

First of all, it is crucial to bundle the communication channels to the legal department and make them transparent for all parties involved. Relevant information is no longer stored in chat histories or e-mail threads of individual employees, but can be viewed at any time in the ticket. For colleagues from the company, application hurdles are avoided. They are already used to working with Jira from their department and can use the tool immediately without additional training.

Once a ticket has been created by the selected issue, it is assigned to the right person for processing in an automated process. No issue can "slip through the cracks". If the legal topic was incorrectly designated, the person processing the ticket can forward it to the correct person with a single click.

All relevant documents can be found in the ticket, can be added there later and no longer have to be searched for from different sources. Prioritizations and internal as well as external deadlines can also be mapped. All information and processes are transparent for those involved. Ticket authors and editors can determine which persons – e.g. managers – are allowed to view and edit the process. This enables a strict need-to-know principle in the sensitive area of law and data protection.

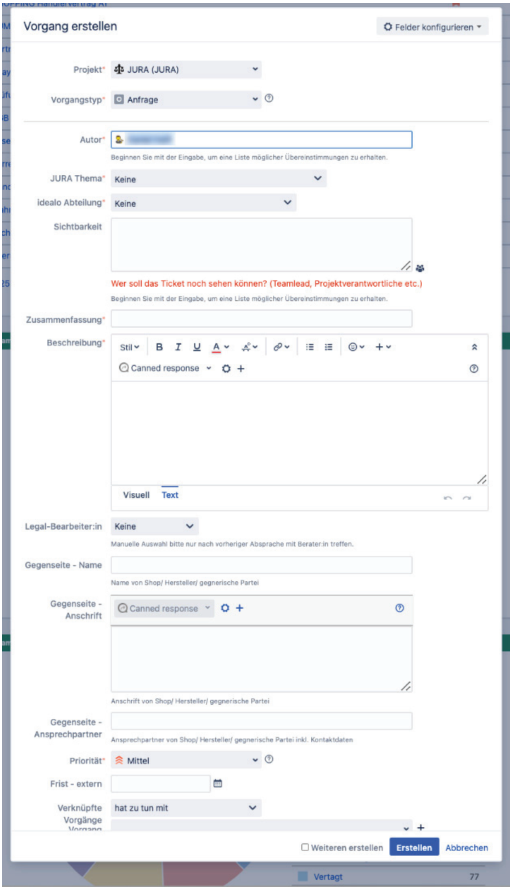


Figure 5: Input mask for ticket creation

Our experience:

It happens again and again that legal questions are asked by another department or that follow-up projects arise. In this situation, it is easy to reference previous tickets or to create internal links to other tickets (e.g., in the case of contract reviews, to the tickets of the purchasing department).

There are further advantages that should not be underestimated in working practice. The setup effort for Jira is usually low, as it is already in productive operation and would only need to be adapted to the needs of the legal department. The licenses are often already available in the company. It is not uncommon for the internal IT department to be familiar with the software.

Our experience:

It is always worth looking at what software is already being used in the company and whether it can be built upon.

Of course, not everything can be perfect right away. Sometimes the ticket creation process needs to be reworked to better capture the use case at hand with different input masks. Sometimes something else needs to be adapted. For example, processing a ticket for a copyright warning requires different information than a contract review. This information should be available as early as possible in the Jira ticket and not only be requested by the agent after creation.

Our experience:

Setting up an agile tool is an iterative process.

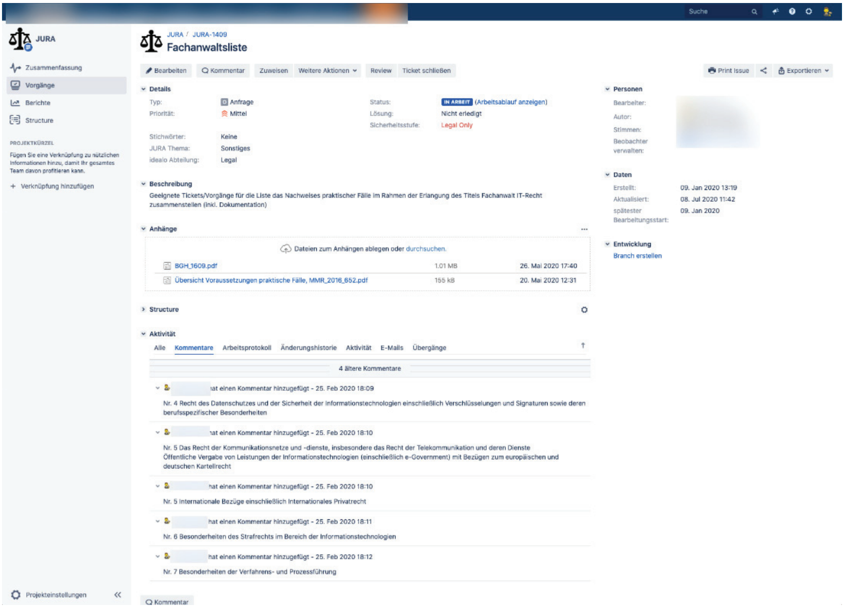


Figure 6: Example ticket

With just a few settings, evaluations can be made in Jira directly from the system and key figures can be obtained that are valuable for the evaluation and further development of legal departments and ticket systems: What is the workload per employee? Which departments make the most requests? Which subject areas are particularly frequently affected?

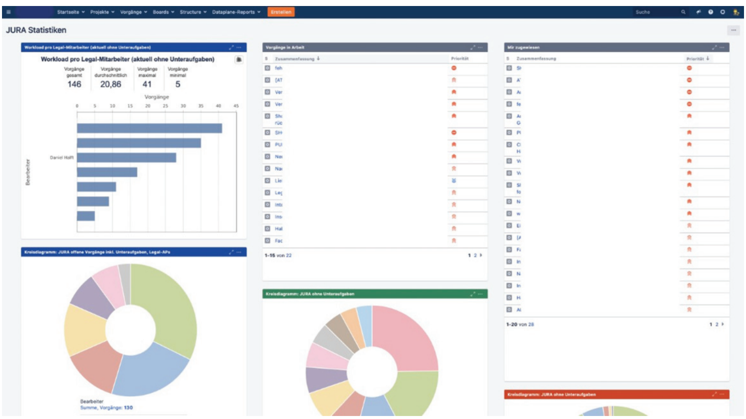


Figure 7: Overview and evaluation via dashboard

5. LEADERSHIP AND AGILE WORKING

In the previous chapters, we have already examined the management perspective in the concrete application of agile working. This section is dedicated to an attempt to take a step back to define, on a more abstract level, the role of the manager in identifying and implementing New Work in the legal department.

5.1. INSPIRATION – LOOKING BEYOND THE HORIZON

It is certainly not the exclusive right of managers to question the status quo and identify innovative potential for improvement – but it is in any case also a core component of their very tasks. It requires a "growth mindset", the ability – or even the desire – to deal with diverse challenges and rapid change for oneself and the team.

The question is: What are the sources of a corresponding mindset? In numerous webinars and similar formats on digital transformation for lawyers, it is eloquently stated and indeed lamented that "Legal" is lagging behind other disciplines in digital transformation, or even more so in the introduction of agile working. Unfortunately, however, it is not uncommon for these observations to be confined to the self-congratulatory rhetorical spin with the parenthesis that "legal" is, after all, somewhat "different". So it is often the soft justification of a "static mindset" and not an encouragement to a profound rethinking. After all, when viewed in the light of day, every department in a company is "different." Each sub-organization has special needs and must therefore adapt the agile methods originally intended for software development. Many departments are ahead of Legal here.

But if the assessment is correct, the next step is obvious: looking beyond one's own horizon. What are finance functions, sales, and last but not least the "teckies" or even the customers or clients doing to make their processes more flexible and digitized, and to flank and shape the opportunities thus gained with innovative ways of working? What problems are identified and how are they solved? What means are being used to do so? And what corresponding experiences can be cultivated?

In addition to gaining insights and ideas, a look at the cross-functional environment has another helpful side effect: it develops a better understanding of the needs and problems in the areas with which Legal collaborates closely. Since a central effect of digitization is networking, it should be helpful to understand the processes and challenges of other disciplines in the collaborative network in order to be able to address them better or for the first time in a targeted manner. In doing so, one will notice, among other things, that the legal profession not infrequently and also rightly complains about not being included in a timely manner in the cross-functional processes that affect it. However, this is sometimes also due to the fact that a legal process does not exist, is not defined or at least not sufficiently transparent, or is simply not effectively interlocked with process-driven other organizations. So some flies that could be killed with one stone.

Keyword *networking*: There are definitely also sufficiently willing and capable representatives of our craft who dedicate themselves to topics such as digitization and agility with great panache. The idea of networking and the resulting effects can therefore be lived and experienced not only "in other places," but also in a circle of open-minded and like-minded colleagues. You just have to go there. Entirely in the sense of the agile principle of fetching. Innovative and productive legal platforms, think tanks and other associations, not least the Liquid Legal Institute, are thus another important source of inspiration and provide answers, or at least directions, to the question of how the new enters the world.

5.2. TRANSFORMATION – WHAT DOES IT MEAN FOR MY AREA OF RESPONSIBILITY?

Once I have sufficiently explored the worlds of experience of others and broadened my horizons accordingly, it is another exciting step, especially for the manager, to translate these learnings and ask myself: what do they mean for my own area of responsibility? Which ideas and results can I transfer, adapt and, just as importantly, where are the limits of transferability and what constitutes the genuinely "other" aspect of my area of responsibility, which I must therefore also address in a context-appropriate and possibly different way?

Once I have understood the concept and business value of digital networking in production, e.g., with regard to the potential of "data-driven insights and decision making," the question arises as to how I can transfer these concepts to the legal department. I have neither machines nor sensors in the production process, nor am I interested in predictive maintenance use cases. BUT: Aren't there legal work methods and processes that generate data along the way, so to speak, that I can evaluate? And if this is the case, or if the corresponding prerequisites have been created: Which data is relevant? And: What do they want or should they tell me? Or, here intensively illuminated: I understand the benefits of agile processes in software development – but what are the technological requirements and the methodological ingredients, and which areas of legal work are at all suitable for picking up interesting agile ideas and implementing them profitably?

It is worth taking a closer look here, because this data exists and valuable insights lie dormant in it. From which departments do most inquiries come, which legal areas are affected more frequently, where is the company particularly vulnerable, which clauses are negotiated particularly often and what are the reasons for this? This data is also valuable for internal transparency within the company's own business unit. What is the workload, both overall and individually, what are our response and completion times as a department, and what issues are currently being dealt with?

Perceived knowledge becomes data-based knowledge, which provides a solid foundation for one's own decisions or decisions at the C-level.

5.3. VISION – DEVELOP AN IMAGE

Methods are not merely an end in themselves. The question "Why agile working?" cannot be answered in theory, but only in the specific context of your own legal department and the company as a whole. But be careful – it's all too easy to immediately end up on the technical level and with topics like: Do we need daily stand-up meetings? What should the Kanban board look like and what "must" be on it? All these questions are right and important, but they should not be at the beginning, because they can only be answered when the big picture is clearly defined.

As a manager, the first thing to do is to anchor agile working in your own vision for the modern legal department. Why, for example, are methods like Scrum and Kanban the leverage to realize this vision? How do they fit with the profile and business reality of internal clients? How do they also reflect the wishes and ideas of the team? A fundamental change, such as the introduction of agile working, is a perfect moment to develop a new or renewed vision with the team and at the same time get to know and think about the new, agile approach.

5.4. CULTURE – "THE CHICKEN OR THE EGG"?

Agile working and the culture in the team are directly related. However, agile methods are not fairy dust that magically strengthen or improve the culture. First of all, agile strengthens what is there – be it strong elements such as sworn sub-teams, groups in the team on the "same wavelength", but also areas of tension between groups or individuals. But what is the reason for this?

In our experience, two effects are primarily responsible for this: transparency and frequency. Let's look at these from both possible sides. Transparency: A Kanban board makes the work visible – for everyone. Daily stand-ups massively increase the points of contact between team members. In a positive sense, this leads to the high level of exchange already described, learning from each other, helping when overloaded, having fun when completing large projects. In a negative sense, there can be a "spotlight effect." Everyone sees what I do, how many cases are with me, how fast I move them – pressure! I can't avoid colleagues I don't get along with at all in Daily Stand-Ups. We talk on a daily basis, are supposed to hand over cases and knowledge proactively – existing personal tensions can thus increase.

The challenges described are at the same time a great opportunity – mere "doing nothing" is not a good idea. The introduction of agile working should take cultural aspects into account and the change workshops for the introduction should include the topic of values as well as the development of rules for collaboration. And there are perfect starting points for this: For example, squads – the small agile teams that meet in the Daily – should give themselves a squad agreement. Let your teams in the future squads work out these agreements!

In addition, it is a core component of the leadership task to actively focus on the working relationships and personal reservations or even fears that may become visible when the team moves much closer together in an agile manner. However, there is now more room for this in the 1-1 conversations with the individual team members – because they already receive the "updates" on the most important work topics in the dailies or via the Kanban board. The new principle "1-1-Time is Quality-Time" takes effect, i.e. the space to coach each individual in the team and to openly take and give feedback.

5.5. ORGANIZATION – CREATING CONDITIONS

There are examples of (quite large) legal departments that have changed the entire structure and massively eliminated hierarchical levels when they introduced agile working. From our experience, this is just as non-compulsory as it is always a realistic and promising option to leave a small and multi-layered legal department as it is and make it successfully agile. Agile working requires flexibility and fast, simple communication: the flexibility to shift work very quickly and dynamically or to form teams for a short period of time based on events or topics and then to dissolve them again; the simplicity in communication means that high-frequency daily communication is not just passive but leads directly to action – to the handover of a task, to a spontaneous change in priorities.

Neither the organizational structure nor the leadership behavior should hinder this. The steeper the hierarchy, the greater the danger that communication will take place only in "silos" or that the possible speed will be consumed by coordination requirements between managers. Agile methods therefore require less hierarchy – and even make extremely flat hierarchies possible. The freedom for the team and the individual to self-organize drastically reduces the need for daily "management". Part of the classic operational management task migrates to the team because each team member leads in a different place. This offers the chance to significantly increase team satisfaction, creates completely new development opportunities and frees the manager from administrative ballast – "less management – more coaching"!

5.6. IMPLEMENTATION, THE HARDEST PART

If you want to introduce agile methods in the long term, this means a fundamental change for the team – period. It is important to face this from the beginning and act accordingly. For general counsel, it is of central importance to clearly state the topic with the executives, because especially those executives who have doubts – about the method as such or the meaningfulness of the change – will be tempted to talk down the change. It is "only the logical continuation of what we are already doing", or it is "essentially new tools and a new meeting structure" – and these are alarm signals!

The fundamental change must be recognized and dealt with. A change workshop is an effective means of working on three things in particular with the team:

1. Why, why, why? – Why are we doing this, i.e. what problem do we want to solve with it? Why then agile methods of all things? And why then Scrum and Kanban of all things (if these are the chosen agile methods)?
2. How exactly does agile work? How do the methods work? What are their advantages and disadvantages?
3. What do we want to do – and how do we go about it?

What you can see or experience becomes tangible and credible. It is advisable to enable initial agile experiences in the workshop. An agile coach – who should be involved in the preparation and perhaps even in the moderation – will be able to show various options for making the effects of agile working visible in a playful way in small teams.

Another goal should be to work out the roadmap for the pilot phase and to adopt it with the team. The message to the team is: We are trying this together. We are constantly testing and improving. The team is in the driver's seat. There is a massive difference between "presenting" agile methods and solutions ready-made to the team and making the goal and the method clear – and then handing over the leadership to the team on how they want to achieve the goal. This not only generates much more support – it also massively improves the result, because the team will immediately find the "bugs" and the small or large adjusting screws for improvement.

And the following key messages should always be in the foreground:

- There is no "right or wrong" – only the best solution for us.
- There is no "done", only a setup that we then continuously improve together.
- „Legal is different – just like any other function" – so it will also work for us if we make it our own.

In conclusion, thinking, planning, and deploying digital tools from the start and having the necessary technical expertise on board has proven its worth. The digital leverage via applications, such as Azure DevOps, etc. is very large and will increase the user experience just as much as it opens up the immediate opportunity to use data that is generated automatically. If the pilot team can already experience live how the tools grow and adapt from one sprint to the next, then this immediately increases the readiness for change.

6. IMPULSE INTERVIEWS

6.1. FROM THE LEGAL DEPARTMENT'S POINT OF VIEW

Interviewed: Dr. Rasmus Furth, ING Germany

▶ Where and in which position do you work?

I am Expertise Lead and head the Legal Operations team within the Legal Department.

▶ Have you been exposed to agile working in your current (or previous) role?

Yes, I have. The agile transformation of the bank started in 2017. There was a lot of interest at the time, but also a lot of concerns regarding the transformation of the entire bank into an agile organization. At that time, I accompanied the agile transformation of the legal department both in terms of content and from a regulatory perspective.

▶ Based on your experience: Why and how should the legal department work (more) agile?

To understand the needs of internal customers and meet their expectations. The economic reality around companies has changed. It has become more fast-moving and multi-layered; cause and effect cannot be identified, or only with a great deal of effort. In this world, a company needs lawyers who not only have a high level of technical expertise, but also understand the business and economic reality and can adapt to changing circumstances as quickly as the business units do. In my view, the core of agile working is not the mere application of new working methods (such as the use of Kanban Boards, Scrum or Design Thinking), but a cultural change within legal departments. The agile lawyer identifies with the client and the products and quickly adapts his/her advice to changing conditions with a view to the economic goal. He/she thinks entrepreneurially and is willing to take responsibility.

▶ Do you think agile working is transferable to all areas of legal work?

A distinction must be made here: the cultural change of agile working should completely permeate a legal department. The application of agile working methods should always be subjected to a cost-benefit analysis: How big is the added value of the method compared to the (time) effort that has to be put in? The problem here is: someone who has never really experienced the added value of an agile working method himself will not be able to make an objective weighing.

▶ Where do you see the biggest efficiency gains?

The greatest efficiency gains lie in the preparation of matters and communication. Coordination processes supported by agile working methods are more factual and faster due to the transparency created.

▶ Why did you / have you decided to work agile?

The entire bank was converted to agile working methods and structures, so the decision was not particularly difficult for us.

▶ How did the change process go? Did you have internal/external support from an Agile coach, for example?

At the beginning of the transformation, we took the change into our own hands. It was a great atmosphere with a lot of excitement and trial and error! For the cultural change, this in particular brought a lot. At a later stage, we were supported by an internally trained Agile coach and the application and use of agile working methods was refined.

▶ Do you also implement agile working with software solutions? Which tool(s) do you use? Are you satisfied?

Yes, for example digital Kanban boards.

▶ If you could start over – what and if you would do differently?

With regard to the change process, the answer and explanation of the question "Why?" is very important. Here we could have explained more and longer.

How do you collaborate with other departments and units while working agile?

Projects often use their own digital Kanban boards which are integrated into the agile routines.

What alternatives do you see to agile working? How do you see the future of agile working?

The great added value of agile working lies in transparency and thus the faster consideration of different information and points of view. This creates a speed advantage. Whether this speed advantage is then exploited depends in turn on the decision-making and implementation culture of the company. With increasing digitization, speed can also be achieved with conventional ways of working. The advantage that agile working offers is that it broadens one's horizon and is simply more fun! 😊

Interviewed: Dr. Daniel Halft, idealo

▶ Where and in which position do you work?

I work for idealo internet GmbH – for a few years now with the title of General Counsel.

▶ Have you been exposed to agile working in your current (or previous) role?

In my former function, unfortunately, not at all. I worked as a civil judge in the judiciary. But idealo as an IT and e-commerce company is a largely agile organization. In the long run, this cannot bypass the legal department either. We do our best to keep up with the development of the overall organization.

▶ Based on your experience: Why and how should the legal department work (more) agile?

The legal department will only defend its position in the company in the long term if it continues to add value for the other departments in the future. However, it can only do this if it is able to provide advice at eye level. Agile processes have been adapted to develop complex (software) products in rapid iterations. No one needs colleagues who cannot follow the process.

▶ Do you think agile working is transferable to all areas of legal work?

Absolutely! Anyone who claims the opposite either does not yet have sufficient imagination, creativity, or courage.

▶ Where do you see the biggest efficiency gains?

For me, it's less a question of efficiency than of necessity. In a (corporate) world that is changing ever faster, there is no room for inflexible departments. Either the legal department learns or it is marginalized. Flexibility is therefore the skill of the future.

▶ Why did you / have you decided to work agile?

This is how our company works and we are team players.

How did the change process go? Did you have internal/external support from an Agile coach, for example?

In addition to the challenging day-to-day business, we are trying to become more agile step by step. The IT department supports us in this process, as does a coach from time to time, for example when it comes to internal team processes. But not systematically as a change process in the sense of a completed project.

Do you also implement agile working with software solutions? Which tool(s) do you use? Are you satisfied?

We work with Jira from Atlassian (as a ticket system) and with Miro (for creative and planning processes). We are satisfied with both for the respective area of application.

If you could start over – what and if you would do differently?

A real project with a lot of time and money would be great.

What alternatives do you see to agile working? How do you see the future of agile working?

I do not see any alternative. Our task as a legal department is now to adapt the approaches and concepts of the pioneering disciplines to the specific needs and opportunities of legal services.

6.2. FROM AGILE COACHES' POINT OF VIEW

Interviewed: Florian Schüttke, Internal Agile Coach

▶ **Where and in which position do you work? How did you get into agile working?**

I work at E.ON in the d lab_ as a product manager. Here we develop individual software solutions for all units within E.ON. My job is to make sure that everything runs smoothly in terms of organization and methodology. Agile working methods have been with me since my first software project in 2006.

▶ **How does agile work scale across large teams and increasing numbers of customers?**

In my opinion, increasing customer numbers do not have that much impact on the way we work. As a result, the complexity of the work itself increases. When the team grows, the complexity of communication increases. You should look to keep the structures as lean as possible in order to keep decision-making paths short. Here, too, there are great frameworks such as Scrum@scale or Nexus. SAFe is quite popular in the E.ON Group, but in my opinion it is too complex. You want to be able to react quickly to changes. This applies not only to the content work, but also to changes that take place within the system. There are enough examples (spotify, for example) that show that agile working methods also work very well in large teams.

▶ **What distinguishes working with lawyers from working with other professionals?**

Lawyers are very structured by nature. That simply comes with the job. It was exciting to see how, at the beginning of the project, we tried to capture all the requirements in as much detail as possible. In the course of time, however, it became clear that the requirements change with new findings. As a result, the colleagues from the legal department were able to experience firsthand what it means to react flexibly (agilely) to changes and very quickly internalized this way of working.

A comparison with other professions is not so easy. Of course, there are areas in which the way of working is inherently quite similar. Ultimately, it's important that everyone involved is open to new things and embraces this way of working.

What are the success factors in legal-agile work? How do you evaluate them?

Care should be taken to ensure that the underlying values of courage, commitment, focus, openness, and respect are lived. Over time, the team should then notice that the work culture is changing, which of course has an influence on the quality of the work.

It is felt that work in the legal sector is already very self-organized. Agile working methods should be noticeable in that there is more intensive collaboration and thus more transparency.

Colleagues should be open to the new way of working and everyone should be aware that it is ultimately only a tool that should be used when it is needed.

Interviewed: Karla Schlaepfer, Professional Coach and Change Manager.

▶ Who are you, what is your expertise?

Karla Schlaepfer: PCC certified business coach, scrum master, product owner, and design thinker at heart and practice. Book author on cultural change processes. Born in Southern California, first degree UC Berkeley, M.A. Freiburg University. I have been living and working in Germany and internationally for 25 years. Active in LLI since 2019. I am the founder and CEO of the innovation agency Design Change.

▶ How can you help legal teams and leaders understand and take steps towards new agile ways of working and change?

Setting up the right environment for change is key. Legal leaders and partners are the empowering agents of change; curious to try out new technology, agile processes, and leading the way with a "growth mindset". For digitalization projects and other agile changes to the legal workflow to succeed, leaders are invited to develop a growth or open mindset to learn to approach change issues from a different angle. To mentally reset problems into challenges. An individual with a "growth mindset" (coined by Dr. Carol Dweck) thrives on challenge, learning new things, and uses feedback and setbacks as an opportunity for self-improvement. Innovating change calls for a meaningful shift in an individual mindset; from knowing all the answers to asking good questions. There must be a payoff for change and the courage to look within. Change coaching by a professional can get the neurons sparking, unblock, and help realize more potent ways to apply strengths and passion. To ensure long-term results, however, it takes the entire organization. Forward-thinking legal firms reward their people for important and useful lessons learned, even if a project does not meet its original goals. What was the learning for the next time? And there is always some form of learning for the next time! With management and partners as allies, legal professionals should be encouraged to collaborate across silos and collect valuable data from small agile experiments. Continuous learning can be unexpectedly inspirational, increase a sense of achievement, and strengthen the sense of belonging to an organization that values skill development and employee growth.

▶ How should an agile change project be started? Steps and examples:

Agile change management is the philosophy of introducing process and structural changes in the organization while using an iterative agile framework. Legal organizations must identify the need and communicate the purpose of change initiatives to all. One way is to adopt a transparent agile decision-making process to prioritize *change strategies and ideas and put them into action. Set up a Scrum or Change team that includes representatives from all the affected departments. This team and their work should be responsible for planning, carrying out, and measuring the impact. Adopt a transparent agile decision-making process to define and prioritize those ideas and put them into action. While culture plays a pivotal role in an organization, people's perceptions and feedback are the compasses by which we measure change buy-in. What shapes people's eagerness to change and willingness to adopt is very much part of the organizational fabric. While each of us is unique in our own disposition to change, it is the organizational culture that has a major role to play in the way teams perceive and deal with change.*

Here are 5 steps to help you align your change process to a new culture and behaviors.

First, solidify your understanding of the existing culture. As part of the change planning phase, you and your team would have built an understanding of the existing organizational ways. You would also know how things normally work in this environment and have a clear understanding of the current foundation.

Second, outline new cultures and behaviors. A transformation requires people to think deeply and be bold in trying out new aspirational models. Why not try out an agile Design Thinking framework where legal stakeholders take on new roles in teaming, applying lateral thinking and shaping the future? Perhaps starting with a redesigned, client-centered NDA? Or a product or digital service or agile process that they themselves may later use?

Important is the frequent communication and collaboration between your change team and their results with human resources, corporate communications, and change agents so that all parties can work together to access learnings, define the new characteristics, and regularly iterate desired outcomes.

Third, showcase the results that underline the new culture. Define stakeholder engagements and ensure that culture and behaviors are built into the agendas. These could be direct communications, team meetings, videos, town halls, and fireside chats. Again, change leaders and change agents can model the new behaviors through clear actions during these engagements but allow space for. Human resources can help navigate the cultural change and bring people along on the journey.

Fourth, make it visual and build the changes into performance reviews, recruitment processes, and business planning. Display the new culture and behaviors using visual references throughout the company. Make it easy for stakeholders to genuinely *understand and to question the new model. For this, you might try out a sounding board technique (also called sounding board feedback).*

With the sounding board, employees from different departments, divisions or even from different locations take part in moderated discussions. The topics come from the participants themselves. The facilitator guides with a light hand, mainly ordering and listing all the contributions and as a timekeeper. One big advantage of the method is that management can "put its ear to the ground" and gather unfiltered information. The open format means that virulent topics or worries – those that affect the workforce – will emerge. The sounding board technique can be seen as a kind of mood barometer for the change process.

And lastly, bring the changes to life. It is vital that you embed the new culture and behaviors into the company's way of working. Agile teams will also be more adaptable to the change because the management didn't dump the entire plan on them – instead the change or agile team was involved not only in the execution but also in the planning of the change.

▶ What role does resistance play in change management?

There will be resistance and as contrary, as it seems, the best maxim is to embrace the resistance you receive. This gives you insights as to the action you need to take. It allows you to tailor your change plan, making it even more relevant to your stakeholder needs and giving clear direction for the future. Second, over-communicate versus under-communicate. Look for information gaps or misconceptions and tailor your messages to correct them. Cultural change and development in teams are based on cultivating interpersonal openness and trust. I've worked in a large multinational coaching several teams during a pivotal change process. One team struggled very much with these issues. Over several months, we were able to co-create a safe space where all team members – even the "old guard" – were able to bring their whole self, questions, and problems openly into the team discussion. Something to note here is that questions from stakeholders can sometimes be interpreted as resistance, when, in fact, they are seeking more information. Provide a safe environment to discuss challenges and fear factors. Empathy, encouragement, and an opportunity to be heard are sometimes enough to demonstrate that the change team and leadership are prepared to listen and understand concerns.

▶ What are concrete success factors?

The core philosophy of agile change management is people over processes. This is at the heart of all agile philosophies and agile change management. Each step *of the process can change if it serves the stakeholders and the team better. Their satisfaction takes precedence over everything else and will often later play out in employee satisfaction and health. No agile change management approach is set in stone. Feel free to adapt according to the unique needs and the culture of your team. Change never ends. Not in life and not in the legal business. But there are some clear success measures, and these should be tracked. Recognize the involvement and hard work of the people and teams willing to innovate and put the effort and long hours towards overcoming challenges. This inspirational support helps create a culture of growth, loyalty, and resilience. Make sure you celebrate the wins and highlight the success stories along the way. Appreciation, recognition, trust, and a good working atmosphere are essential in working environments. But not only on the emotional individual level but also on the operational level, the demands of employees have changed significantly. More flexibility is expected: no rigid "nine-to-five job" structures, self-determination, and more participation in decision making. With transformative change measures now firmly on successful corporate agendas, these proactive steps create the right conditions for an agile, forward-thinking legal firm people-centered culture where legal professionals want to engage, achieve great work for great people. After all, changes in companies are always about changes for the people – both employees and leaders who work there! In fact, one silver lining of the pandemic is that it taught us all a big lesson: if you don't focus on the "whole person" at work, all these individual steps won't add up. Providing your people with holistic support on the change journey is the core of successful change management.*

Interviewed: Stephan Mok, interner Scrum Master

▶ Where and in which position do you work? How did you get into agile working?

My name is Stephan Mok, I am from Cologne and I am currently working as a Scrum Master for an international company that develops and produces software and hardware products in the IT security area. I have been working as a Scrum Master, Agile Consultant and Agile Master for several years now and have accompanied various teams and organizations of different sizes in technical and non-technical environments.

My first contact with agile organizational forms was years ago, when our IT department was transformed into a self-organized team.

Why Agile? Many aspects of agile working correspond to my nature anyway and therefore working in agile organized environments is something I personally enjoy much more. Furthermore, especially in complex areas of activity, agile working is clearly more successful and has obvious advantages, at least from my point of view.

▶ How does agile work scale across large teams and increasing numbers of customers?

A frequently asked question that is not so easy to answer and on which masses of books have been written. A popular answer to this is "It depends". Whereas this very phrase tends to cause frustration for most people seeking solutions to their organizational challenges.

Going into the various frameworks of agile scaling at this point, such as LeSS, Nexus or SAFe, would clearly go beyond the scope. Let me therefore go into a few basic principles.

In general, it is advisable to scale only where it is needed. A common mistake is to pick a framework or have it recommended and then replace it with the current structure without regard to the organization's initial situation.

Getting as complete an overview of your organization as possible sounds obvious, but is often missing in large or old organizations or is not up to date. Then understand what your biggest problems actually are and only then start applying the elements from scaled agile frameworks that can specifically solve your worst problems.

At this point, it is absolutely worthwhile to bring people with experience in this area into the organization, such as Scrum Masters, Kanban Coaches, Agile Coaches or Change Managers, and with practical experience. The theoretical knowledge for this can easily be found on the web for most agile methodologies. However, this usually does not help to select the appropriate elements for your problems from said agile frameworks. It also doesn't help you to avoid or master the most common stumbling blocks when implementing and applying agile methods. If you have the luxury of gaining this experience yourself as an organization or lack the resources to hire experienced people for this task, you can go this route alone.

The employees who are explicitly assigned to the topic of "agility" or "transformation" should ideally be exclusively concerned with this topic and have the necessary decision-making power for change. The less an organization pays attention to these factors, the longer a transformation to an agile way of working will take and the more avoidable mistakes will be made. The argument that "It costs too much to hire or provide explicitly experienced staff for our agilization." is a clear miscalculation in the medium to long term, and possibly even in the short term.

Another fundamental aspect of adopting scaled frameworks is dependencies. As long as it is a matter of individual teams that can act independently of each other, overarching agile frameworks are often not even necessary or, in the worst case, can even cause additional work without generating any added value for the organization. Scaled agile organizational methods become relevant primarily in the case of strong dependencies and frequent coordination between teams or groups within the organization. As long as this is not the case, you may not need a scaled framework at all, but are already well positioned with simple agile methods, such as Scrum or Kanban.

These are very general and basic recommendations, as a rudimentary introduction to a single scaled agile framework alone would take several pages and still not address your organization's individual problems, which can be found in almost any complex environment.

▶ What distinguishes working with lawyers from working with other professionals?

Since I have not yet had the opportunity to work with lawyers, I could only speculate at this point. However, there are some aspects which are relevant regardless of the field of application.

An alarmingly widespread mistake in organizations is that employees do not communicate with each other at all or do so inadequately. A simple regular exchange of information on the tasks currently being worked on can already solve many problems in the coordination of complex tasks. However, this does not mean the weekly memo, which merely carries information, in the worst case misinformation, from one point to the rest of the organization, as in a one-way street. Rather, it's about creating repetitive points at which everyone has the opportunity to bring new insights into the organization and make further steps or adjustments to current plans.

You don't need to have a meeting with 500 employees every day where everyone delivers their status report. Start with daily syncs of 15 minutes or less at the team level. Here, each team member can share their findings or updates and if there is a need for further coordination or communication, the necessary participants can then meet for further meetings. The trick here is usually to focus on the key message without getting directly into rambling discussions and discuss the details downstream with the necessary participants.

At this point, the counter-argument "If all employees are in a meeting for 15 minutes every day, it costs us X euros per month" is often thrown in. Search your personal experience for projects or events where problems arose only because relevant information did not reach the right people you needed for your work. Then add the much worse cases where you and your colleagues asked yourself: "Why are we doing this? Don't they know that because of XY this is a bad idea or not even necessary anymore?" Approximately estimate the cost of doing this and then ask yourself again if regular short points to synchronize and adjust plans are too expensive an investment.

If, in addition to the regular points for synchronizing and gathering new insights, you also manage to incorporate this new information into your plans, you are already a big step closer to agility.

In the legal environment, this could mean more successfully completed processes or being able to run processes with less effort.

I would recommend to first identify the similarities that exist in the legal environment to other areas and to start applying agile methods there. The particularities and differences could be identified relatively easily in the next step, also using agile methods, and then, using the same methods, suitable solutions could be found for them. In Scrum, for example, mechanisms are firmly integrated, such as joint retrospectives and joint planning, in which groups identify and define problems together and find solutions for them. Here, the input for the problem comes entirely *from the group and the solution also comes from the group. A universally applicable approach is to start with moderation and guidance by experienced Scrum Masters, Agile Coaches, Kanban Coaches or Change Managers in complex environments and thus quickly arrive at concrete improvements and solutions regardless of their legal background knowledge.*

What are the success factors in legal-agile work? How do you evaluate them?

Again, while I can't personally speak much to the specifics of the legal environment, cross-cutting approaches to solving the problem can be found. The simplest approach is to work out the decision and assessment by the members of the organization. Ask yourself the question "When do we know that our work is successful? When do we know if our agile methods are adding value?" to the organization and let employees find possible parameters. Again, this is not about packing hundreds of people into a meeting room or video call at the same time and then making an impossible attempt to have a productive discussion with a concrete outcome.

Have the discussion in smaller groups, at team level, management level or in the workgroups, put together the results of the smaller groups and then decide, based on these findings and suggestions, which parameters can work for measuring success. Simple modern tools are perfectly adequate for this and can deliver the desired result with just a few documents in Sharepoint, Google Docs or comparable apps. It is more crucial to integrate the input of the employees on an operational level. If you can identify concrete data and numbers in this process, all the better, and if you already have data for a before/after comparison, even better. For those who don't know it yet, I would recommend, for example, to familiarize yourself with the terms "S.M.A.R.T." values or "OKR".

However, it is not always possible to collect concrete and, above all, reliable data and figures directly and without great effort. If no reliable data can be identified or collected, then feedback from colleagues can at least be a helpful indicator of whether the organization is improving or not.

6.3. FROM CLIENT'S POINT OF VIEW

Interviewed: Yunyun Wang, Head of Department Purchasing Direct Material Software & Data

▶ **Where and in which position do you work?**

Stuttgart, Germany; BBM Purchasing

▶ **Have you come into contact with agile working yourself in your current role?**

Yes.

▶ **What was the motivation or trigger for the switch to agile working? How did the use of agile methods in the collaboration with the legal department come about?**

After hearing about the good practice of our legal department, I introduced the agile method to us as well. Since my team and the legal department both work with agile methods, the use of agile methods in collaboration immediately seemed to make sense.

▶ **Which agile method do you or your department specifically use in collaboration with the legal department?**

Azure DevOps Team Board

▶ **Has the use of agile methods proven successful? What are the advantages from your point of view?**

Transparency in the team, flexible in case of task fluctuations, team spirit gained.

▶ **Based on your experience: Should lawyers use agile working methods to collaborate with clients?**

Yes.

7. THE AGILE MANIFESTO – "LEGAL-IZED" (ADAPTED TO US LAWYERS)

7.1. WHY DO WE DO THIS?

If you want to apply the classic Agile Manifesto to the way lawyers work, you are faced with four somewhat unwieldy values and twelve supporting principles, the meaning of which is not readily apparent.

The values are as follows:

We appreciate...

Individuals and interactions	more than	Processes and tools
Working software	more than	comprehensive documentation
Cooperation with the customer	more than	Contract negotiation
Responding to change	more than	following a plan

That is, although the founders of the Agile Manifesto also consider the values on the right to be important, they rank the values on the left even higher.[1]

In the following, we have attempted to approach and adapt the values and principles of the Agile Manifesto from the perspective of a legal department. We assume that these values and principles are relatively generally applicable to the legal profession, regardless of whether it is in-house activities, attorney work or any other legal activities. However, when transferring all these values and principles, you should keep in mind that software development is a fundamentally complex

[1] *For Manifesto for Agile Software Development see www.agilemanifesto.org.*

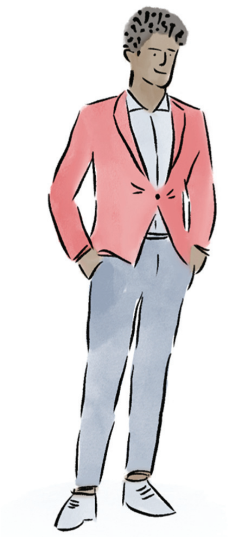
undertaking, which is already limited in terms of planning and static execution. So when we formulate transferability to legal work here, this usually presupposes a certain minimum level of complexity and inherent dynamism of the underlying legal process.

7.2. THE LEGAL-IZING

7.2.1. Communication density, proximity to the (internal) client vs. ivory tower and "computer says no"

Individuals and interactions over processes and tools

The advancing technologization in companies and the acceleration of the "time to market" require that the response cycles of the legal department also become significantly faster. To accommodate this, the legal department must be closer to the internal customer and increase the number of iteration cycles. Personal interaction (e.g., through dailies) moves to the forefront as this enables faster responses in contrast to static processes, misunderstandings can be cleared up immediately in direct exchanges between departments, and the legal department can more easily put itself in the client's perspective. In this way, it can be ensured that the work result to be delivered by the legal department will actually be usable for the internal client, since the departments involved always coordinate their progress through the regular checkpoints and the "acceptance criteria" in the process are never lost sight of. This dimension of interaction between legal and (internal) clients is particularly important, among other reasons, because increasing technification and automation could lead to the opposite: An endless struggle through digital processes and static checklists of questions paired with an automated result that does not correspond to the individualities (!) of the concrete case will probably not contribute to client satisfaction.



7.2.2. Smaller work packages vs. static overall result

> **Working software over comprehensive documentation**

Not all workflows can be narrowed down into small sub-packages. For example, it will not be possible to expect that a sales contract for cloud-based software products can be presented to the customer in parts at the beginning of the joint interaction. However, subsequent workflows of a legal department can be clustered into individual components that can be completed and presented relatively quickly to the internal client to then be adapted in turn. Our experience has been that this leads to a change in thinking about one's own work, especially with an internal matter management system based on user stories. Once a larger work order is broken down into user stories with acceptance criteria and tasks, it can be processed more efficiently and precisely in a targeted manner and in coordination with the clients (see point 1 above). Incidentally, the repackaging of the work order into smaller, faster to complete sub-packages also makes it possible to identify those activities that are not on the critical path and could therefore be processed in parallel by another colleague from the legal department if time is critical (depending on the nature of the legal service to be provided). In summary, translating this aspect of the Agile Manifesto to legal work incidentally also means finding pragmatic solutions to a concrete (sub-)issue, especially when dealing with dynamic "moving pieces" of a more complex process versus getting bogged down in a supposedly big picture whose "pixel composition" is still unknown at the time of the attempted assessment.

7.2.3. Collaboration in the project vs. completed specification sheet

> **Customer collaboration over contract negotiation**

In the past, the so-called waterfall method was used in IT development projects. This meant that a specification sheet was first written and then worked through step by step. Adjustments in the project then required a change to the relevant performance specification, which increased the administrative effort and not infrequently led to errors or incompletely documented agreements. Therefore, in practice, such development projects today increasingly follow the agile or combined approach, within the framework of which the parties first jointly work out the details of the later performance in the initial phases of the ongoing project (in agile sprints).

Applied to the work of a legal department, this means that greater, especially iterative, involvement of internal clients in the development of a legal solution can produce faster solutions that are more tailored to the needs of the clients. In our practice, for example, simultaneous work on cloud-based documents, as well as regular, short touchpoints with the cross-functional project teams, have proven effective for this purpose. It often helps if one party takes on a moderating or driving role in this. This could be the legal department or a dedicated organization (e.g., a so-called "deal desk" or, in more complex processes, a project management function).

This demands a willingness on the part of the legal department to commit to a final result that is currently still unknown and to get to work even when the final result or the path to it have not yet been determined. Another advantage of this approach is that the departments negotiating contracts together with the legal department and the external client, for example, are always close to the product (here: the contract) in terms of content. The internal clients (e.g., the sales department) and the legal department are well synchronized through the regular touchpoints, are aware of the concerns and red lines of the other specialist departments previously involved, can adopt their positions and represent and argue them accordingly and convincingly as their own position in the context of negotiating a contract, and can set clear expectations and limits. They are much more able and empowered to make decisions "at the negotiating table" without having to make agreements subject to internal approval and can thus help to use the momentum in negotiations to reach a conclusion. In a nutshell, the principle of the Agile Manifesto could be translated as "customer collaboration through agile contract shaping and negotiation".

7.2.4. Reacting to changes vs. following a plan

Responding to change over following a plan

Changes are also often possible in the work project itself as part of an agile approach. It will depend on the specific work assignment what is the right balance between focus on results and willingness to adapt. Particularly in innovative projects, our experience has been that it makes sense to cut the deliverables small and concrete and subject them to frequent adjustments. In particular, it is advisable to prepare processes graphically and to develop the willingness to abandon project parts if they can no longer be operated in a goal-oriented manner.

7.3. THE 12 PRINCIPLES OF AGILE LEGAL: THE LEGAL-IZED MANIFESTO

In terms of the activities of a legal department, the twelve principles of the agile manifesto could be described as follows:

No	Original	Adapted for "Legal" – Legal-ized
1	Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.	Early and continuous involvement – through frequent interaction, collaboration in project teams, and joint work on e.g. cloud-based documents – leads to fast (partial) results that allow a more complex process to be both decomposed and (dynamically-adaptively) designed.
2	Welcome changes in requirements even late in development. Agile processes leverage change to the customer's competitive advantage.	Openness to (unavoidable) changes during the work process – the primary goal is responsiveness to the needs from a client perspective, when this is a prerequisite for achieving a higher quality result.
3	Deliver working software regularly within a few weeks or months, preferring the shorter time frame.	Where appropriate, regularly deliver work packages – through frequent iterations and breaking down to individual tasks, smaller iteration cycles.
4	Subject matter experts and developers must work together on a daily basis during the project.	Lawyers and internal clients (and other stakeholders) should work together in defined or institutionalized operating rhythms – regular cross-functional coordination increases decision quality and shortens iteration loops.
5	Build projects around motivated individuals. Give them the environment and support they need and trust them to get the job done.	Motivated lawyers create extraordinary things – legal departments need a technologically and organizationally functional environment, support, and creative freedom (trust) to deliver their best performance. This is where the "Scrum Master" and "Product Owner" play a central role.

No	Original	Adapted for "Legal" – Legal-ized
6	The most efficient and effective way to communicate information to and within a development team is face-to-face.	Face-to-face interaction is irreplaceable – where possible, teams should meet, at least on camera in video calls and at joint events.
7	Functioning software is the most important measure of progress	Working solutions are the main indicator of progress. "Working software" defines progress in the world of agile software development. The primary measure of progress in the legally supported process are concrete, practically feasible and quickly delivered solutions to client problems.
8	Agile processes promote sustainable development. The clients, developers and users should be able to be able to maintain a steady pace indefinitely.	Agile is not a state, but an ongoing process – it is not about achieving a state but striving for a continuous process of improving one's way of working that can be sustained not just sporadically, but continuously.
9	Constant attention to technical excellence and good design promotes agility.	Technical (as well as "hands-on") skills and an appealing, complexity-reducing as well as easily manageable presentation of the work products (e.g., from a design thinking perspective that focuses on the "user" and his or her needs) are essential prerequisites for the successful application of agile working methods.
10	Simplicity – the art of maximizing the amount of work not done – is essential.	"Legal lean production" – concise communication and processes, systems that are easy and pleasant to use, and innovative work products that are comprehensible increase the self-identification of the team and enhance the likeability of the legal department within the company. "Legalese" and watertight contractual formulations have their functional purpose. However, in any communication beyond this, lawyers should write with "the reader in mind".

No	Original	Adapted for "Legal" – Legal-ized
		In addition, a consistent solution and result orientation helps to avoid unnecessary loops, because, for example, by the lack of a technically competent assessment of the facts or by approaches that are too static, and helps the client to find a solution to his problem.
11	The best architectures, requirements, and designs are created by self-organized teams.	"Let my people go"- Motivated, self-organizing team members with a high level of responsibility, intensive communication, and the space to make their own decisions deliver better work results and enjoy coming to work. Management work is not eliminated, but consists of creating a safe, positive and "empowering" environment.
12	At regular intervals, the team reflects on how it can become more effective and adjusts its behavior accordingly.	"Sharpening the saw"- Regular self-reflection and improvement of the team through debriefs, postmortems and retrospectives with the goal of continuous improvement.

8. GLOSSARY / AGILE DICTIONARY

Definition of Done [ˌdɛfɪˈnɪʃən ɒv dʌn] defines when a task is considered completed.

Kanban Boards [ˈkʌnˈbʌn bɔrdz] provide a simple overview of the status of the sprint.

MS Azure DevOps [ˈmaɪˌkroʊˈsɔft ˈæʒər ˈdɛv ˈɑːps] is the environment created and self-used by Microsoft developers for Agile work.

MS Teams [ˈmaɪˌkroʊˈsɔft timz] is the world's leading collaboration platform from Microsoft.

Output [ˈaʊtˌpʊt] describes the work result of a user story.

Planning Session [ˈplænɪŋ ˈsɛʃən] is the date when the team, led by the product owner, defines the scope of work.

Planning poker [plʌnungz ˈpoʊkər] is a tool of the MS Azure Boards solution, with the help of which all team members can estimate the effort for an activity for themselves and then compare it in the planning session with the estimates of the team colleagues.

Product Owner [ˈprɑdəkt ˈoʊnər] refers to the role of the person who defines the work (user stories), estimates the effort, and proposes prioritization – the decision is always up to the team.

Retrospective [ˌrɛtrəˈspɛktɪv] is the structured review of the entire team after the end of a sprint, in which everyone strives to learn from mistakes and make good things even better. Usually, 1-2 things are planned for the next Sprint that you would like to improve.

Scrum [ˈskrʌm] is not an abbreviation, but comes from American football and translates as "tight huddle".

Scrum Master [ˈskrʌm ˈmæstər] designates the person whose job it is to shield the team from unnecessary distractions. Because only a focused team will be able to perform well.

Squad [skwɑd] is an agile team.

Sprint [sprɪnt] is a defined period of time in which the team aims to complete a defined amount of work. Usually, a sprint lasts one to two weeks, starts with the planning session (i.e., defining the scope of work) and ends with the retrospective (a structured review of what went well and where one sees potential for improvement).

Storypoint [ˈstɔri pɔɪnt] is a self-selected unit of time that is easily tangible for the team, instead of minutes / hours or days, we talk about 1 / 3 / 5 etc. Storypoints.

Tag, or tagging [tæg / ˈtægɪŋ] is a marking of content where a so-called tag is set. In the process, content is assigned further information.

Tasks (Description) [tæsks] describes below the user story that activities have to be completed so that the user story can be concluded successfully.

Team [tim] is the king! Everyone contributes and together the team achieves what the individual is only able to achieve with disproportionately greater effort.

User Story [ˈjuzər ˈstɔri] defines what is to be done: the task. The name emphasizes that the task at hand must always be thought of from the user's perspective.

AUTHORS

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Tobias has been with PTC since 2004, a US software company that enables and supports the digital transformation of its customers in the industrial sector with its products and services in the areas of CAD, PLM, IoT and Augmented Reality. Tobias leads PTC's European legal department as EMEA Counsel and is one of the first members of the Liquid Legal Institute. Prior to joining PTC, Tobias practiced IP, IT and telecoms law at major international law firm HoganLovells.

Tobias is particularly interested in technologies and methods of agile digital transformation and how these can be profitably applied in different industries and disciplines of entrepreneurial activity. Together with his team, Tobias has increasingly been able to transfer the experience and insights into the opportunities and challenges of digital transformation in the industrial sector that he gained during his many years of working for PTC to the specifics of the work in the legal department and its interdisciplinary interfaces with other functions in the company, where he has been able to harness them. He described this "personal transformation" in the article "What Digital Legal can learn from Industrie 4.0 Collaborations", published in the second book "Towards a Common Legal Platform" by the Liquid Legal Institute.[2]

More recently, Tobias and his team designed and successfully implemented a Digital Matter Management solution based on Microsoft's Azure DevOps and Power BI: HALO – The Hub for Agile Legal Operations. This project was also developed in close collaboration and mutual inspiration with the Liquid Legal Institute and was one of the sources for this publication.

2 Verfügbar unter https://www.springerprofessional.de/en/what-digital-legal-can-learn-from-industrie-4-0-collaborations/18321978.

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Katharina Debray joined the European legal department of PTC, an international software company focused on industrial digital transformation, in 2015. In addition to her studies in multilingual communication with a focus on business, Katharina can draw on professional experience in the areas of law, project work, human resources, finance and sales, which she has gained in various countries and industries ranging from banking to the oil and gas industry.

As an EMEA paralegal, she has been active for several years in projects in the sustainability environment and primarily in the area of legal tech and legal operations, in addition to a focus on commercial contract management, and drives process analyses, change management, and team communication. For PTC, she has been instrumental in the implementation of an agile matter management system that enables data-driven decision making and manages the technical side of the tool as well as reporting, analysis and collaboration within the team and cross-functional collaboration with other departments.

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Michael Goldstein is Senior Director Legal EMEA at PTC. Michael and with his team oversees legal matters in the CER, UKI, EER regions. Prior to joining PTC 8 years ago, Michael worked at a major international law firm in M&A and Commercial. He has a particular interest in technology initiatives at the interface between the legal department and IT, with a special focus on work process automation, Sharepoint-based collaboration forms, and agile methodologies in team management. In addition, Michael has been acting as a Scrum Master for one of the two squads of the PTC Legal EMEA Tribes for 1.5 years and has a strong practical interest in the various facets of agile collaboration in legal and at the interfaces with other specialist departments.

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Dr. Daniel Halft is an expert in flexibility, digitalization & change. He started his career as a civil judge in the Berlin judiciary. Today Daniel works as General Counsel @ idealo, lawyer and university lecturer. He is also an author, actor, teacher of improvisational theater ... and surfer. As a speaker, Daniel shows companies and decision makers how to overcome inhibitions about change and develop strategies for change. Together with the German Institute for Legal Departments and Corporate Counsel, he published the anthology "The Digital Future of the Legal Department: How Agility, Artificial Intelligence and Technology are Changing the Work in the Legal Department" in November 2021.

His mantra is, "Those who master the skill of flexibility have a tremendous competitive advantage in a rapidly changing world!"

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Evgeny Ioffe is the Head of Business Development & Administration at the Liquid Legal Institute and the project manager of this publication. He holds an M.Sc. degree from the University of Ulm, Germany, specializing in management, economics, auditing and computer science. Evgeny is passionate about process management, psychology, digitalization and the interplay of these aspects with his field. He believes that the emerging world of new technologies, disruptive innovations and business opportunities will mean salvation for some and damnation for others. In agile working, he sees the opportunity to master the challenges of unstoppable change. He likes to say, "Innovation takes longer than you think, but comes faster than you thought."

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Kai Jacob is co-founder and co-chair of the Liquid Legal Institute. He is also a Partner in Legal Operations & Technology Services (LOTS) at KPMG Law since 2021. Kai is involved in various projects and initiatives dealing with agile working in the legal department, the state of health in the legal market, and the future of legal managed services. He regularly publishes on these and other topics in journals, books (at Weblaw) and in the publication series Liquid Legal (at Springer) that he cofounded. Before joining KPMG Law, Kai Jacob was a partner at Deloitte Legal and before that worked for many years at SAP SE. Kai Jacob was admitted to the bar in 2004 and studied law in Marburg, Göttingen and Osnabrück.

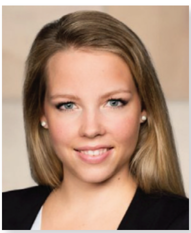
Manuel Krahl

Manuel Krahl is Vice President Legal EMEA at PTC and leads an international team with a transactional focus on Central, Western and Southern Europe, working closely with other departments. Prior to joining PTC in 2011, Manuel already worked for over 10 years as in-house counsel in various companies in the film and television industry. Manuel's enthusiasm for agile working stems, among other things, from the fact that it greatly facilitates collaboration in a team spread across several locations, enables smoother and more efficient cooperation at the interfaces with other specialist departments, and makes the know-how gathered by individual employees available to the entire team along the way.

Stefan Grassee

Stefan is Legal Counsel to the E.ON Group, an international energy company focused on smart energy networks and innovative customer solutions. He currently advises E.ON Group companies in particular on antitrust and investment protection law. In the future, corporate and capital markets law will be the focus of Stefan's advice in the E.ON Group.

In addition to his legal consulting, Stefan is committed to the digitalization of the E.ON Group's legal departments. He is Scrum Master of the E.ON-internal project LegalTech@E.ON, which aims to relieve employees in the legal departments through digital solutions.



Alicia Mühter

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Alicia studied Business Communication and Business Management in Berlin.

Dr. Dierk Schindler

Dierk Schindler is one of the co-founders of Liquid Legal Institute e.V. and serves as Co-CEO together with Kai Jacob and Bernhard Waltl. He is co-author and co-editor of numerous publications on innovation and transformation in the legal industry, in particular the two previous volumes of the book series “Liquid Legal” (Springer) in 2017 and 2020.

In 2019, Dierk joined Robert BOSCH GmbH as Vice President Corporate Legal Services, Mobility Solutions, Supply Chain and Logistics. In his role, he drives the adoption of digitally-enabled agile practices and, together with the leadership team, the digital transformation of the legal team. Prior to joining BOSCH, Dierk spent 14 years at NetApp Inc. where he built the EMEA Legal team, established the deal management function and implemented the Global Legal Shared Services team.

Dierk’s teams were awarded the IACCM “Global Innovation Awards” in 2014 and 2015. He teaches at Management Center Innsbruck (MCI) on innovation management, digital business law and compliance. Dierk is a fully qualified lawyer, holds a PhD from the University of Augsburg, Germany, and a Master of International Law from Lund University, Sweden.

Carolin Schrott

Carolin Schrott is a legal assistant and joined Robert Bosch GmbH in 2019 as an assistant in the Corporate Legal Services, Mobility Solutions, Supply Chain and Logistics department. Since the beginning of 2020, she has taken on the role of Scrum Master in her team. In her role, she leads the design and development of the digital environment that supports the agile movement of the team. In July 2022, she will complete the Certified Scrum Master training to deepen her knowledge.