Outwit, Outplay, Outlast: Surviving a DMS Migration

I’m a die-hard “Survivor” fan! In the show’s premiere episode, the host announced: “Sixteen strangers [will be] forced to band together, carve out a new existence, totally accountable for their actions — they must learn to adapt or they’re voted off.” This ultimate change experiment reveals what happens when different personalities must accomplish the same goals.

This concept got me thinking about the survival strategies law firms employ as they plan and execute their document management system (DMS) migrations. Here I will share tips from past survivors and give you the secret advantage to outwit, outplay and outlast.

OUTWIT RESISTANCE

In the game of “Survivor,” those who outwit execute on the social elements of the game, such as emotional intelligence and building alliances. During a DMS migration, you will need to outwit resistance. People resist change for different reasons, and it can be expressed vocally or as apathy or indifference. You’ll experience more acceptance taking these steps:

• Form trusted alliances. Develop a strong sponsorship coalition early on to lead the change. Engage supervisors and other key stakeholders, and have them help create the “why” story and provide input on the strategy and goals. They can provide assistance when people want to know what’s in it for them.

• Avoid the blindside. People resist decisions imposed on them suddenly, so avoid the temptation to develop changes in secret. Instead, communicate early and often using multiple channels.

• Invite others to the party. Change can make people feel like they’ve lost control. Invite others into the planning, giving them ownership. Early employee involvement and input are key factors for adoption.
• Minimize uncertainty. If change feels like walking off a cliff blindfolded, then people will reject it. Create certainty with an inspiring vision from the right person of influence and with clear, simple steps and timetables.

OUTPLAY THE STATUS QUO
Outplay, in “Survivor” language, means you’ve worked hard to meet basic needs, win challenges and deal with the unexpected. Taking on a DMS migration means that change is necessary — to strengthen the firm’s security posture, enable mobility, promote collaboration or improve client service. To fully realize a return on investment and outplay the status quo:

• Solve the right problem. Identify competing systems in your environment and seek to understand why they are being used. Review service desk data and conduct interviews and focus groups to determine previous barriers to DMS adoption to ensure that you are solving the right problem.

• Connect to the business. Adoption increases when you explain “why” and “how” this is a business project rather than an IT project. Identify how this project aligns with the firm’s values and strategy.

• Maximize user adoption. Provide performance support tools. Identify obstacles in advance and remove them when possible.

• Map and measure. Define success and identify what measurements will indicate when success has been achieved. Well-defined metrics drive performance and provide focus. Take a baseline measurement to help show the growth.

OUTLAST REGRESSION
Outlast, the final phase of “Survivor” game play, is the most critical. The same people you outwit and outplay are now on the jury and must respect your strategy for you to win. Similarly, it’s not enough to outwit and outplay during a DMS migration. To institutionalize this change, you must outlast regression — so deployment doesn’t mean the end of work.

DMS migrations typically take place in tandem with information governance policy revisions. Therefore, user adoption of the system is critical to the overall risk posture of the firm. The challenge we are up against is that competing DMS systems exist, so use is a choice. Outlasting the potential for regression requires a carefully crafted reinforcement strategy and a commitment to fully executing the plan:

• Continue learning. Develop a learning strategy with targeted workshops offered soon after deployment. Research shows that when we repeat information with timed intervals in between, it forces our brains to “retrieve” information and thus create new learning pathways.

• Provide opportunities for feedback. Keep the lines of communication open to seek feedback from those impacted. Share with others how the tool is being used.

• Celebrate success. Celebrate wins as you have them. That will help keep people motivated to continue the hard work that comes with big change.

• Keep it up! Until you can measure that people have changed their behavior for a sustained period, you can’t let up. Continue to use your sponsor coalition to reinforce the change’s necessity and benefits. Determine whether the initial business drivers for the change have been realized. Has profitability increased? Have client demands been met? Measurement shows you what’s successful and where you might need to go back and close gaps.

Successful leaders have shown that the key to surviving a DMS migration and bringing about maximum user adoption is executing a great strategy and having the grit to not give up. With these words of wisdom, you now have the edge to outwit, outplay and outlast!