POLDERON
digital agile masters

Customer Success Story

In just a few months, PTC's in-house Legal team adopted a series of business agility practices and developed a scaled cloud-based solution to provide them with data-driven insights.

Customer
PTC

Industry
Software

Business Function
Legal

Technology
Microsoft Teams,
Azure Boards &
Power BI

Business Agility Practices
Kanban. Scrum

Scaling Framework
Scrum@Scale

Department size
<20

Country
European Union

About PTC Legal
With an annual revenue of nearly $1.5 billion and employees in over 30 countries, PTC is a global software company that creates solutions to unlock the value of digitalization in the industrial space. Within PTC, the EMEA Legal department had identified the need to **empower** their team members and leaders with world-class **cloud collaboration tools, practices and analytics**. They had already started the journey by using a Microsoft Excel-based solution but were finding that collecting reliable data for business insights in a scalable manner was costing them significant time and effort.

PTC Legal wanted to use their existing investment in Microsoft Cloud services and reduce the effort to produce **live reliable analytics**. The goal was to increase the Legal team's capabilities in delivering **overall business value**. To give focus to the Legal team, a project dubbed 'HALO' (The Hub for Agile Legal Operations) was set up. This was also the inspiration for a logo used to bring identity and focus throughout the process.

As an expert in legal agility architecture, Polderon was able to work alongside the team to re-invest the knowledge gained from the Microsoft Excel-based solution into shaping a scalable cloud-based Microsoft Teams/Azure Boards solution that would enable and **boost operational business agility practices** while at the same time providing PTC Legal with **data-driven insights**, enabling them to reduce latency in decision making on their continuous improvement journey.

Demand - How Varied
What is the percentage split each week on the work we do?
Goal: Balance the completion of transactional vs. non-transactional work.
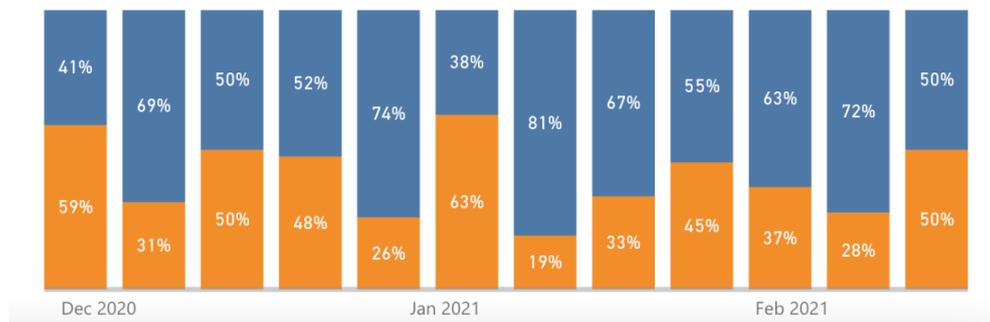
Insight into efficiency and collaboration

PTC Legal wanted quick and easy metrics on **team efficiency and effectiveness**, including **intra- and inter-departmental collaboration**. "Rather than being reactive and doing additional, manual reporting-style work later on to fill in a spreadsheet, we started collecting data as soon as work arrives. This enables shorter and faster feedback loops, which in turn helps deliver better outcomes", explains Jason Padman, founder of Polderon.

"The idea is to use the system to help you get that work done, rather than just as a reporting tool".

This created the opportunity for **visibility** and for the team to collaborate on work, resulting in more data being created automatically – **data without effort**. PTC EMEA Paralegal Katharina Debray reflects on the enhanced team collaboration:

"One of the best parts ... to me is the frequent exchange about actual work items. This connects the team very well and gives a great overview on the capacity level of the team as well as a feeling of belonging and being seen for every single team member."

Increasing the value Legal is adding

As the Legal department within PTC, they wanted to **build on the value** they bring to the wider organisation. The longer-term goal is a new value proposition for Legal and from Legal.

One of the key business agility concepts introduced by Polderon to support this goal was the user story format. As soon as a matter is captured, the user story format gets everyone **understanding the business value early on** and thinking about how the work they are doing is adding value to the business. As Jason explains, "PTC Legal started to ask the right questions much earlier on in the process. Now they are using that business value they've identified as a kind of north star for completing the work".
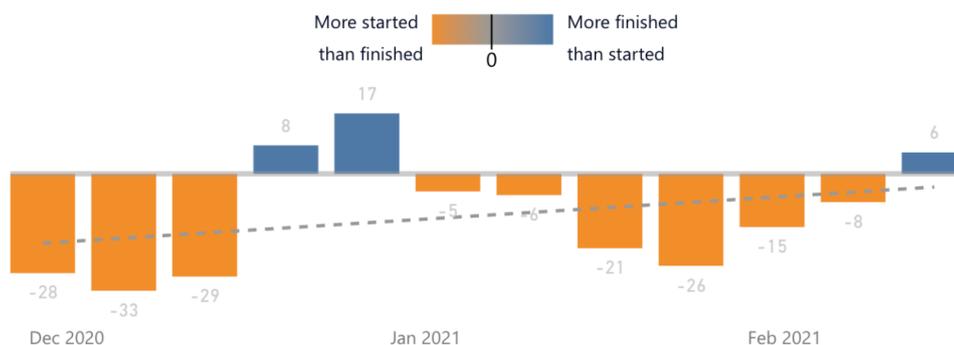
"I feel like we're now really 'telling the story of each case' rather than just reporting them in a list."
Luca Volpi, Legal Counsel, PTC Legal EMEA

Predictability - How Repeatable
How consistent is our completion pace?
Goal: Keep around zero. Stop starting, start finishing.

More started than finished | 0 | More finished than started

8   17

-28   -33   -29   -5   -6   -21   -26   -15   -8   6

Dec 2020   Jan 2021   Feb 2021

Coaching the team to make their own path

Another goal was to coach the team in business agility practices using their new standard Microsoft tooling to achieve their normal daily tasks. The mindset for the team was:

- Build on existing foundations
- Evolution over revolution
- It's a process, step by step
- It's a team effort

"What really thrilled me was the entire team's openness for change and the quick adoption of the system"

Manuel Krahl, Senior Director Legal, PTC Legal EMEA

As one of the other goals was to achieve an efficient way of collecting metrics, Polderon coached the team to come up with their own way of **shaping the tooling** to achieve that goal. With the right mindset and a 'local guide' expert showing them around the Microsoft technology, the team shaped not only how they wanted to use the data but also where to get it from. They also configured the tooling to match the terminology they use with their customers in order to enhance communication flow.

Key Results

The transformation helped the team achieve a number of key results:

- A scalable platform to manage legal matters in a flexible and transparent way.
- High level of knowledge sharing, even in the earliest pilot phase.
- Access to data-driven insights and reporting through Microsoft Power Bi.
- A workflow to enable ongoing improvements to business agility practices & technology in the team.

"The results achieved with HALO so far propel us to a new level of operating, knowing and being able to communicate with data, all that without really spending much time on the tracking itself or any kind of red tape (it is very easy and comfortable to use)."

Michael Goldstein, Director Legal, PTC Legal EMEA

Jason sums up the engagement with PTC as follows: "PTC Legal really wanted to be data-driven; they just needed a bit of help and some more sophisticated tooling to get there. The engagement shone a light on a path that led them to gathering quality data in a quicker, easier and more valuable way."

Pending Ping Pong

The number of times each week items moved from Active to Pending then back to Active.
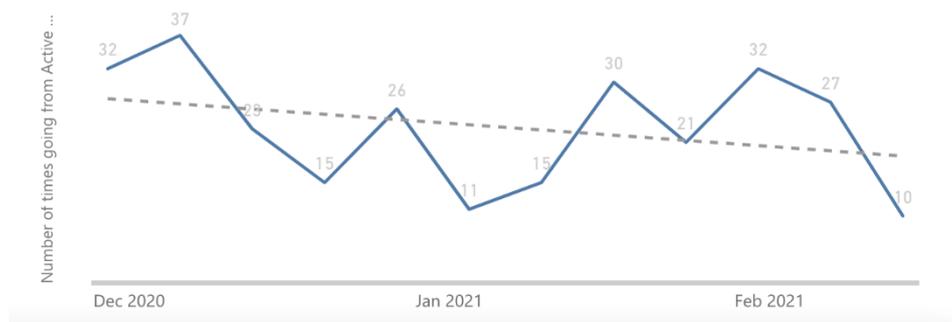
Looking Ahead

Now that the foundations within the PTC Legal team are in place, they are turning their attention to **cross-collaboration** with the wider organisation. They plan to onboard other departments like Sales and Finance so that requirements to the Legal team can be made directly using the technology. Moreover, HALO 2.0 will also look at **automation** and **linking** other platforms like Salesforce.

"In my view, we are only scratching the surface of what can be achieved moving forward. Connecting HALO with other key business software (such as Salesforce) and existing initiatives can be a game-changer in terms of streamlining our legal reporting with the business and driving further efficiencies."

Agisilaos Karpetas. Senior Legal Counsel, PTC Legal EMEA

Alongside that they will continue to iterate on their Power Bi analytics to enable **end-to-end business agility** from the data that is available to them.

"HALO is all about establishing a digital thread for legal operations combined with an agile collaboration scheme that together enable and enhance operational efficiency and effectiveness – while capturing data along the way that provide insights into improvement opportunities for the foregoing. This leads to a continuously learning and self-improving organization through "effortless" knowledge transfer and information exchange."

Dr. Tobias Broda, SVP EMEA Counsel, PTC Legal EMEA

Some more reflections from PTC Legal members:

"The non-transactional and non-commercial fields of our work such as HR questions and cases, as well as the structural topics that result from fruitful discussions in the team are more visible, traceable and get improved attention and execution."

Axel Heltzel, EMEA Corporate Counsel Director, PTC Legal EMEA

"The Agile methodology also helps us direct our team mindset to enhance more and more our collaboration so the output is that of a true team instead of a collection of individual work from members of the same team…. I feel even more connected to the team and feel more fulfilled in my work."

Mariana Genton, Senior Legal Counsel, PTC Legal EMEA

"…we will be able to have all stakeholders of a deal (or a project) around a unique platform, thus interacting in a much more agile and connected way, speeding up closing for example."

Marion Kischkat-Eloit, Senior Legal Counsel, PTC Legal EMEA

"HALO helped me to have a better and quicker on-boarding!"

Meriem Bonet-Monserrat, Legal Counsel, PTC Legal EMEA

(Meriem joined the PTC Legal team just on the very first day of implementing HALO)

"HALO will make our data collection more effective, efficient, finer (more metrics). Thanks to MSTools like Azure DevOps and PowerBI we are already able to see many different analytics."

Fabian Großkopf, Legal Counsel, PTC Legal EMEA

"It is a very powerful tool and if all our internal PTC contacts could work with HALO, it will save a lot of time, energy and make information sharing smoother."

Sophie Marmorat, Senior Legal Assistant, PTC Legal EMEA

Visit www.polderon.com to learn more about what Polderon can do for your business teams today.'