Amplify 2026

November 2-5 Scottsdale, AZ

Fresh Eyes, Tested Lessons: What New Implementations Reveal

November 3



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Today's conversation

1

Start with the standard

Process documentation and customization choices

2

Protect the hard work

Data migration and UAT lessons

3

Design adoption

Training, focus groups and TyMetrix 360° tips

4

Benchmark your program

Audience reflection and closing takeaways

Confidential

Fresh eyes: Start with the standard

“Match the workflow to the product, not the product to the old workflow.”

1 See it first

Deep-dive discovery before requirements

2 Make the choice

Customization must earn its complexity

3 Change the work

Shift responsibility to the right users

AEP’s flagship example: Redesigning accruals so responsible professionals owned work previously managed by legal operations.

Greystar: Document each integration’s process and handoffs before build.

Tested lessons: Protect data and UAT

Data migration

Assume the last 10% will consume disproportionate effort.

- Inspect source and backup data early
- Pair client experts with migration specialists
- Define cutoffs in plain language
- Validate inclusion before the final load

User acceptance testing

UAT is where internal experts learn the new operating model.

- Ring-fence testing time
- Test complete business scenarios
- Capture best practices as they emerge
- Make trade-offs explicit if migration slips

Greystar: Targeted under 90 days, including holidays. Discovery and build overlapped, and the team launched before it felt fully ready.

Go-live is a launch, not a finish line

1

Focus

Two four-hour choices on day-one capabilities

2

Be available

Open Teams office hours for immediate help

3

Create allies

Train support staff to reinforce adoption

4

Set expectations

Bring practice leaders into demos earlier

Adoption accelerated when help was immediate, expectations were visible, and users had trusted people nearby.

AEP: Open office hours, proactive sharing of repeated content

Greystar: Weekly litigation-team focus groups surfaced questions.

One-page “TyMetrix 360° tips” shared answers across teams.

Benchmark your own program

1. **Where are we still recreating an old process?**
2. **Which migration assumption have we not tested?**
3. **What UAT time are we truly protecting?**
4. **Who will own support and be available at the moment of need?**
5. **Which leaders and internal allies must be involved earlier?**

Fresh eyes are useful at go-live. They are just as valuable years later.