

# That Wasn't in the IT Budget!

Today's Challenges and Opportunities with  
IT Planning and Budgeting

# IT Challenges

- ◆ Explosive Technology Evolution
- ◆ Social Media and Collaboration
- ◆ Increased Demand (speed, functionality, anywhere/anytime, services etc.)
- ◆ Unplanned Projects
- ◆ Tight Funding/Reduced Budgets
- ◆ Security and Compliance Issues

# Rethink Everything! New Opportunities

- ◆ Align IT With Business Goals and Objectives
- ◆ Elevate IT as a Strategic Business Partner
- ◆ Add Measureable Value
- ◆ Redefine Service Delivery
- ◆ Become a Proactive Partner

# Re-imagine the IT “Ideal” with a New Plan and Budget

## Start with a Good Background Understanding

- ◆ Identify Needs
  - ◆ Firm Goal initiatives
  - ◆ Practice and Administrative Group Initiatives
  - ◆ Maintenance Initiatives
- ◆ Inventory Current Status
  - ◆ Infrastructure and Telecommunications
  - ◆ Applications
  - ◆ Projects
  - ◆ IT Organization
  - ◆ Spend (Baseline current operations and projects)
- ◆ Evaluate Successes, Problems, Potential
- ◆ Target Opportunities for Re-direction and/or Change

# Build the IT Plan Using a Grid Approach

- ◆ Define the scope
- ◆ Lay out options
- ◆ Enhance with Metadata that supports what if modeling
- ◆ Visually code attributes like priority, or sponsoring group
- ◆ Technique lends itself to fast completion and quick review by technical and non-technical contributors
- ◆ Grid approach focuses underlying research and analysis

# Build an IT Roadmap

Planning Category	Planning Sub-Category	2014	2015	2016
Business Continuity	Continuous Operation			
	Catastrophe Recovery			
	Risk Management			
Security	Networks			
	Mobile			
	Data			
	Facility			
Compliance	Privacy Laws			
	Client Specific			
Legal Research	Search Services			
	Services Providers			
Records Management	Records Systems			
	Retention Policies and Management			
Data Management	Big Data Mining			
	Universal Search			
	Analytics			
	Storage			
	Cloud			

# Build an IT Roadmap (cont'd)

Planning Category	Planning Sub-Category	2014	2015	2016
Infrastructure	Servers			
	Switches			
	Appliances			
	Routers			
	Cabling			
	Operating Systems			
	HVAC			
	Power Systems			
	Storage Systems			
	Backup Systems			
	Copiers and Scanners			
	User Workstations			
	Printers			
	Special Purpose Infrastructure			
Desktop	Operating Systems			
	Applications			
	Backup/Synch			
	Security			

# Build an IT Roadmap (cont'd)

Planning Category	Planning Sub-Category	2014	2015	2016
Mobile	Device Management			
	BYOD/Policies			
Telecommunications	WAN			
	Phones/VOIP			
	Video Conferencing			
	WIFI/MIFI			
Production Applications	Document Management			
	Financial			
	CRM			
	Intake/Conflicts			
	Docket			
	Document Assembly			
	Human Resources and Recruiting			
	Travel			
	Training			



# Build an IT Roadmap (cont'd)

Planning Category	Planning Sub-Category	2014	2015	2016
Portal	Intranet			
	Extranet			
	Integration of Applications			
Enterprise 2.0	Facebook			
	Twitter			
	Wikis			
	Blogs			
	Other Social Media			
Ideation	Idea Generators			
	Innovation Programs			
	Re-Engineering			
Eliminations	Obsolete Applications or services			
	Death March Projects			
	Legacy Systems			

# Enhancing the Roadmap

- ◆ Color Coding Based on an Assumed Priority or other factors
- ◆ Adding expected One-time and Ongoing Costs to each “block” and tagging Expense versus Capital so “what if” cost models and sample budgets can be generated
- ◆ Identifying by “grid block” project management metadata such as milestones, elapsed time, staffing requirements, champions and project leads so task plans can be generated

# Best Kind of IT Plan

- ◆ Has a “Good Story”
- ◆ Something for Everyone
- ◆ Low Hanging Fruit so Champions can get behind immediate results
- ◆ Spend Timing keeps Finance happy
- ◆ Strategically positions Firm well in terms of technology evolution and client perception

# “Focus Group” the Roadmap

- ◆ IT Leadership Team
- ◆ Sub-sets of Attorneys, Legal Staff and Other Potential Users (Selective Plan Components)
- ◆ Technology Committee
- ◆ Practice Group and Administrative Department Leadership
- ◆ Firm Senior Management

# Prepare to Answer the Big Questions

- ◆ How will we pay for this?
- ◆ How will you accomplish the projects?

# Finding the Funding

- ◆ Understand Your Firm's Current IT Spending Trends for the Past Three Years
  - ◆ IT Expense
  - ◆ IT Capital
  - ◆ Shadow IT Organizations and Projects
  - ◆ Planned versus Unplanned
  - ◆ Fixed versus Variable
- ◆ Define Budget Scenarios (Expense and Capital, Operating and Project)
  - ◆ Bare Bones Operation and Maintenance
  - ◆ Moderate Technology Evolution with and without Firm Expansion
  - ◆ Proactive Technology Evolution with and without Firm Expansion

# Finding the Funding (cont'd)

- ◆ Target Funding Sources
  - ◆ % of Expected Firm Revenue
  - ◆ Return on Investment Justification
  - ◆ Recasting IT
    - ◆ Reorganize, consolidate, align staff talents to needs
    - ◆ Reduce service delivery costs
    - ◆ Renegotiate contracts for improved terms
    - ◆ Consolidate shadow IT organizations
    - ◆ Eliminate unnecessary technologies and systems in lieu of more cost effective alternatives
- ◆ Firm or Practice Group Championed Special Projects - Propose Special Budgets

# Staffing the Projects

- ◆ What skills are needed?
  - ◆ Project Management
  - ◆ Technical Talent
- ◆ Are they In-House?
  - ◆ Experienced
  - ◆ Available
- ◆ External sourcing strategies?
  - ◆ Experienced Project Management
  - ◆ Experienced Technical Talent
  - ◆ Partnerships with outside Professional Services
  - ◆ How will you manage the resource?



# Special Applications or Tools Required

- ◆ “Utility Applications”
  - ◆ Search
  - ◆ Workflow
  - ◆ Portals
  - ◆ Web
  - ◆ Mobile
  - ◆ Programming Languages
- ◆ Methodologies
  - ◆ Business Analysis
  - ◆ Financial Modeling
  - ◆ Analytics/Mining
- ◆ PM Systems and Approaches

# Finalize the Plan

- ◆ Recommend a Final Plan and Proposed Budget with Funding Strategies
- ◆ Highlight Benefits and Strategic Advantages
- ◆ Get Final “Blessings” from Champions and Management Approvals
- ◆ Implement Staffing and Project Management Plans
- ◆ Track, Evaluate, and Report
- ◆ Remember - The Best Plans are Alive and Iterative