Solving Attorneys' Real Problems - Not the Ones They Think They Have

August 23, 2010
Ironwood 3
10:30am
Your Panel

- Catherine R. Reilly, Executive Director, Martin Clearwater & Bell LLP
- Lawrence Gianneschi, Legal Information and Technology Director, Colgate-Palmolive Legal Department
- Jo Haraf, Director, Haraf Professional Services LLC
- Donna Payne, CEO, PayneGroup, Inc.
- Sherry D. LaLonde, (former) CIO, Cooley LLP
On Video Segments

Bob Blackstone
Senior Partner
Davis Wright Tremaine LLP

John Robertson
Partner in Charge, Seattle
Cooley LLP

— Interviewed by Donna Payne on August 6th, 2010
HOW DO YOU SOLVE YOUR ATTORNEYS’ PROBLEMS?

Warning: This part of the presentation involves bribes.
Cathy Reilly
Communicate and Understand
The Fact

“Information technology and business are becoming inextricably interwoven. I don't think anybody can talk meaningfully about one without the talking about the other.”

Bill Gates
When the Managing Partner has a Darth Vader desk and Gallactic Chair – be afraid!
You’re not a lawyer but...

- Learn the Lingo
- Understand the Practices
- Read
- Think
This is a Business

- Technology just because it’s new
- Time is money – that’s the 1st rule
- It’s their money – that’s the 2nd rule
The Old Way...
Technology is now a part of life...
And Practice...

Trial Strategy:
Using Technology, Psychology and the Latest Trends in the Courtroom
Who we are, how we think...

Connecting attorneys & technologists

do right things

do things right

customs & practice

creative dialogue

assumption-surfacing | spirit of inquiry

learning to network & networking to learn
Larry Gianneschi
Larry
The Temptations!
The Spinners!
Compassion
Leader
Customer
Life Changer
Leader
“Know yourself. Don’t accept your cat’s admiration as conclusive evidence that you are wonderful.”

— Ann Landers
Sally,

We very much appreciate the effort you and your staff put forth in dealing with the "show you" issue.

You exhibited the initiative and leadership capabilities that we applaud in dealing with a difficult situation. Your actions again validate our decision to have you join us as our Director of Information Systems.

Please extend our thanks to your staff members.

Buddy DuBose

May 9, 2000
“The way to get things done is not to mind who gets the credit for doing them.”

– Benjamin Jowett
Customer
Life Changer
“Seek First to Understand, then Be Understood.”

– Stephen Covey
Success!
Unmet Attorney Needs
Jo Haraf
To Meet Organization Goals, the Customer Experience is ...
The Best Customer Research is ...

Systematic
Objective
Focused
Actionable

SOFA
"I’m proud to be considered well-connected."

"Before I became partner, I loved to sail. Now there’s no time to get out on the bay."
Objective & Focused
Actionable
Hey, What’s Your Problem?
Donna Payne

Communication Gaps
“A problem well stated is a problem half solved.”
Charles Kettering
“Stop Spamming My Inbox”
Attorney to IT Department, Name Withheld
3-Type Alert System

- **T1 - Ability to Work Affected Today**
- **T2 - Scheduled**
- **T3 - Intranet**
“I’m Not an IT Geek But if You Explain it Too Me in Plain English, Maybe I’ll Go Along with the Program.”
“If I Get a Survey From IT, I Either Ignore it or Have My Secretary Fill it Out for Me.”

Attorney, Name Withheld
Someone’s Going to Get Hurt
DONNA’S FINAL EXAMPLE
EVOLUTION OR REVOLUTION

Sherry Lalonde

Evolving or Revolting
THE DOWNSIDE OF MISSING A MEETING
CHANGE MANAGEMENT

• Is the required technology anticipated and budgeted?

• Implications of the *Dreaded Different Perspective* and its resulting cascading change
CHARACTERIZATION OF THE REQUEST

• There are only details and specifics; avoiding the *Pit of Despair*

• Development of concise requirements to create consensus; the rough draft as a means to establish credibility and to act on requests

• Avoiding “yeah….but now…”
WHAT?

- Cost effective, available solutions that actually work and are elegant, sustainable and spandex
- Hunting vs. gathering: The RFI, RFP, RFCS (Request for the Cosmic Solution)
- Does this exist?
- Variations on the Theme: What is “it”? How does “it” work? What will happen if “it” does not work? (Anticipating impact, preparation for the hidden quirk, unanticipated consequences.)
MAKING THIS HAPPEN

• The 70/30 split in a traditional IT Team
• Mentoring IT Managers into Strategic Leaders; the high price of a poor choice
• Endurance
• Defining Success
THE DARK SIDE OF SUCCESS

• “YOU ROCK!!!!”

• Now...here is what we need to do next......
GOT QUESTIONS?