

How to Make a Smart Choice for Law Firm Experience Management

Step 1: Strategy & Goals

- Clearly articulate where you are trying to do in business—not technical—terms
- Be able to answer “What’s the point?” in terms that resonate with your audience
- Keep your goal(s) streamlined in style and number

Step 2: Business Objectives & Initiatives

- Identify specific business objectives that support the strategy and goals and focus on the behaviors you want to encourage, the decisions that need to be made, or the answer that needs to be provided
- Avoid jumping straight to “What fields / values / columns do you want?” and, instead, ask questions that focus on the end result such as “What action do you want to be able to take?” or “What decision do you want to be able to make?”

Step 3: Solution Stories

- Describe what success looks like through stories and use cases
- Consider the points of view of each segment of your audience or group of stakeholders - get input from those stakeholders early on

Step 4: Business & Technical Requirements

- Identify what information is needed from a business perspective and enlist subject matter experts to define technical requirements
- Be sure the requirements incorporate all three components of a complete solution—people, process, AND technology

Step 5: Evaluation & Selection

- Share your vision with the vendors or service providers so they understand the “big picture” and priorities
- Focus demonstrations on your specific goals, objectives, use cases and requirements, and ask questions
- Remember that anything can “demo” well in a controlled environment—do your homework by checking references AND tapping into your personal network to find out what it does in reality

Step 6: Implementation

- Evaluate scope changes against the strategy, goals and objectives. If a change is consistent with the strategy, goals and objectives, go for it! If the change isn’t consistent, either reject it *OR* change your plan. Either way, it should be a conscious, deliberate decision.
- Leverage the work you already put into the strategy, goals, and objectives as the foundation of your communication strategy



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