KNOWLEDGE MANAGEMENT ATTORNEY SUMMIT

THE LEGAL INNOVATION LIFECYCLE

HOW KM&I ATTORNEYS CAN SUCCESSFULLY INTRODUCE NEW PRACTICE TECHNOLOGIES AND ATTORNEY WORKFLOWS

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PLI PRACTISING ᔕᴹ LAW INSTITUTE

Speakers

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Global Director of Knowledge
Management
**Fried, Frank, Harris, Shriver &
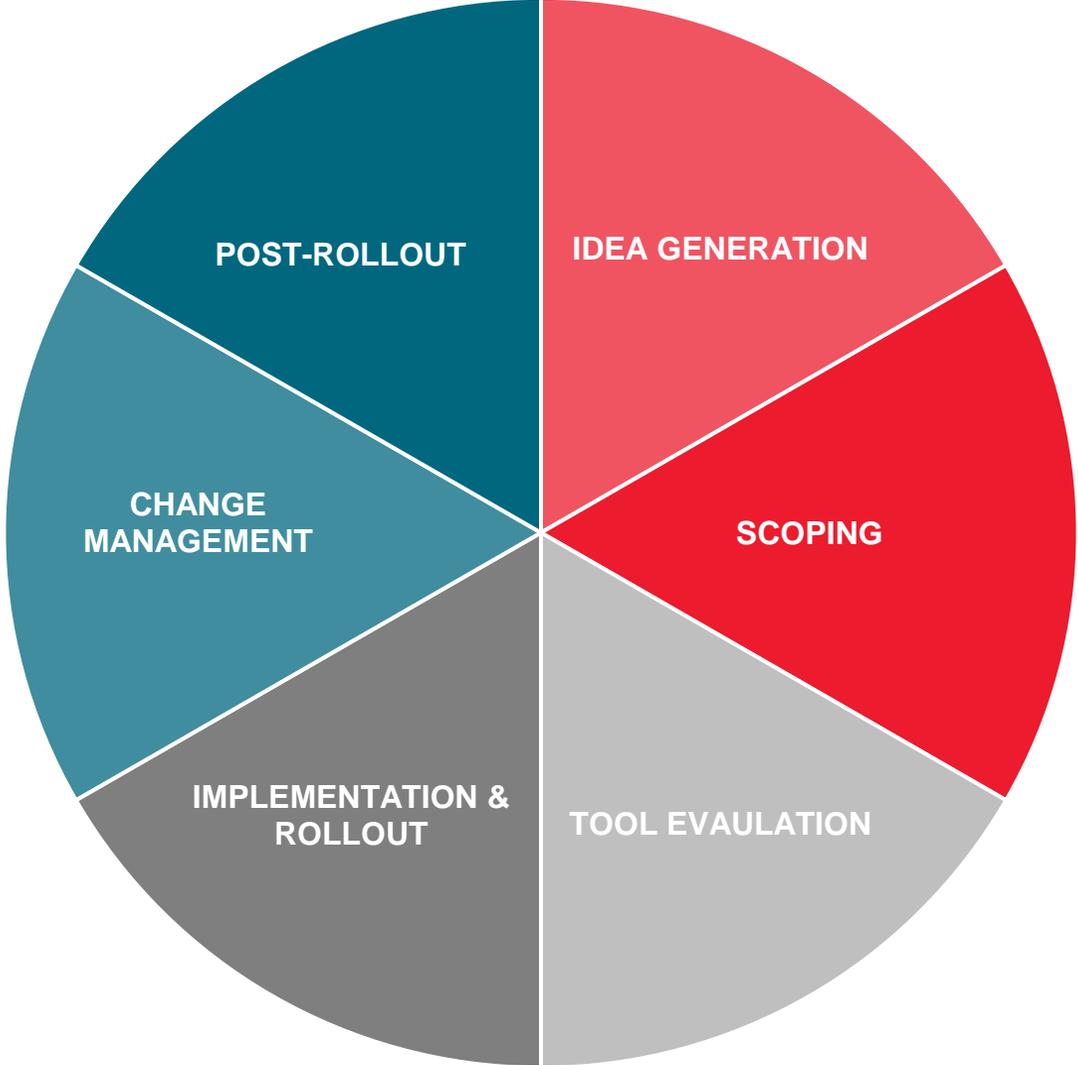Jacobson LLP**
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Innovation Lifecycle

Once Upon a Time in KM…

You are the Knowledge Management & Innovation ("KM&I") Attorney for the Tax group at your firm.

It's Monday morning, and you open an email sent by a Tax partner forwarding an email sent by a sales rep for Chart-O-Matic, a new legal technology that creates structure charts. The partner asks you if this is something the group should look into.

Later at the Tax group lunch, you chat with an associate who tells you how time consuming it is to use PowerPoint to create structure charts and wonders if there is a better way.

In the afternoon on a coffee break with a fellow KM&I Attorney at a peer firm, he asks if you have heard of Structure Charts 'R Us, a competing vendor to Chart-O-Matic.

You take it as a sign to hear about structure chart technology three times in the same day and wonder if it is something the firm should pursue.
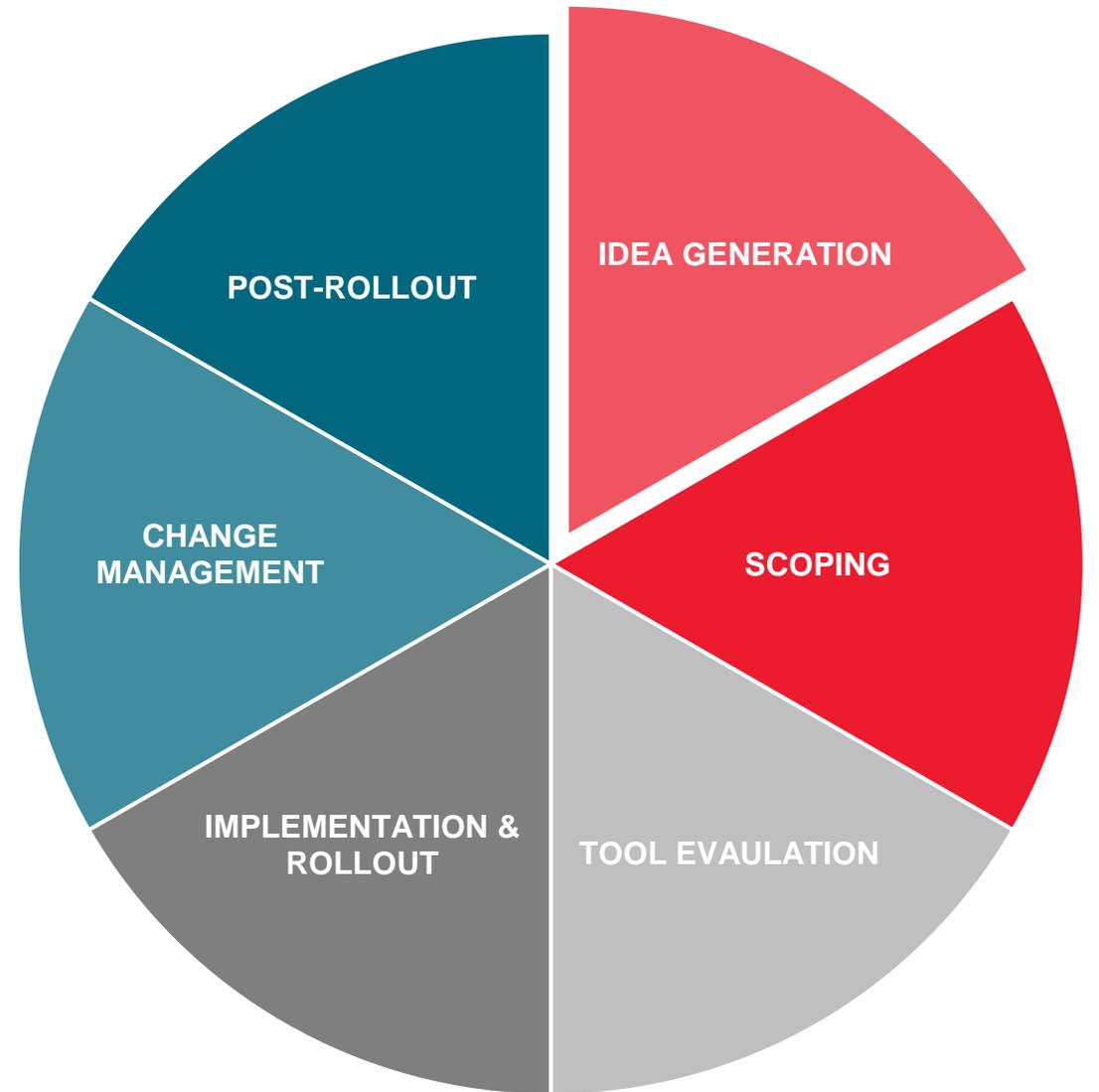
Poll: 1. What's the big idea? What are good way to discover pain points and generate ideas?

Idea Generation

- Formal Communications

- Informal Communications

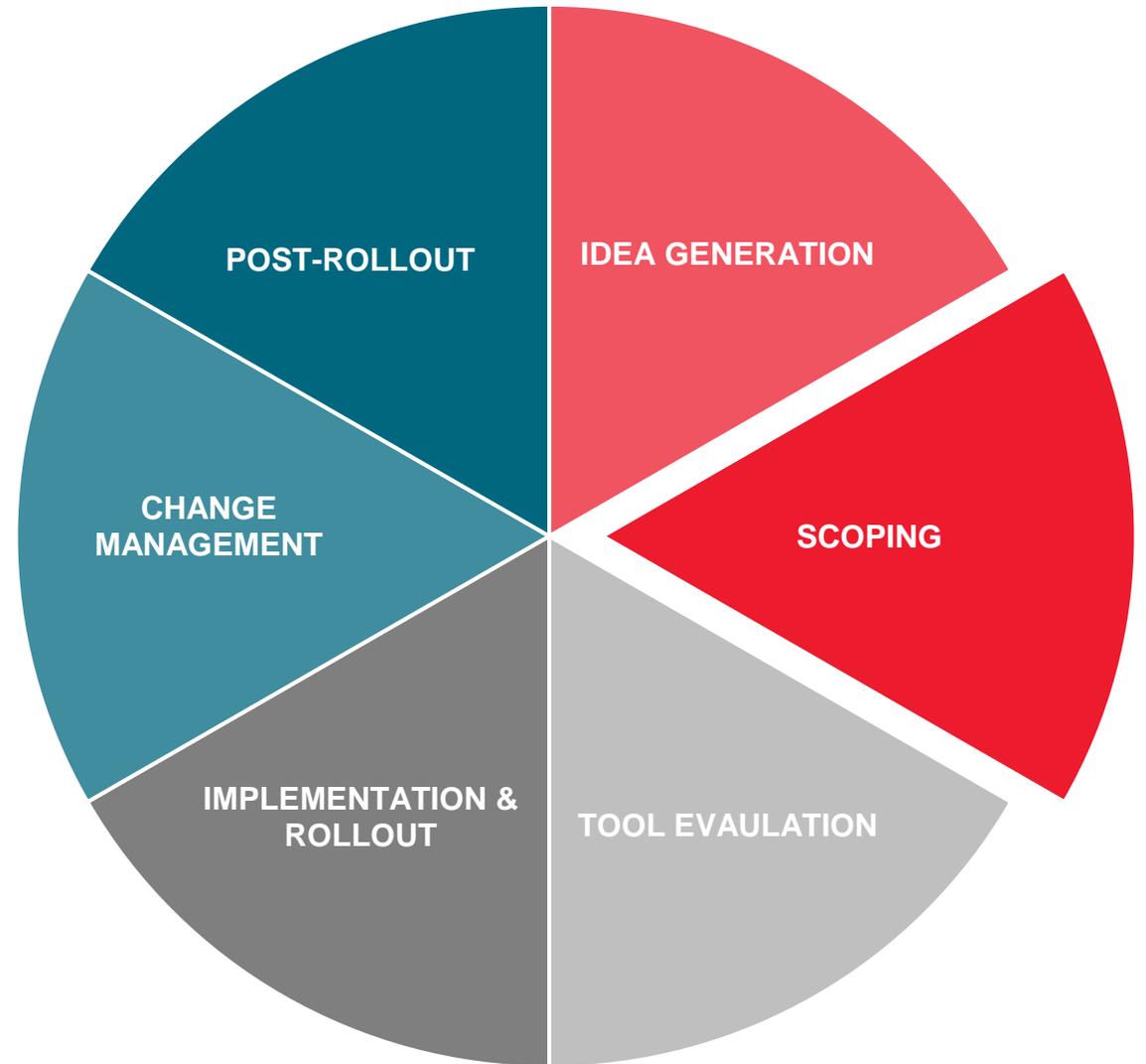- Data Assessment

- Avoid Solutionizing

Poll: 2. So you have an idea. Now what? When scoping the potential purchase of a new tool, you should start with:

Scoping

- Define the problem

- Map the current state – process, not just technology

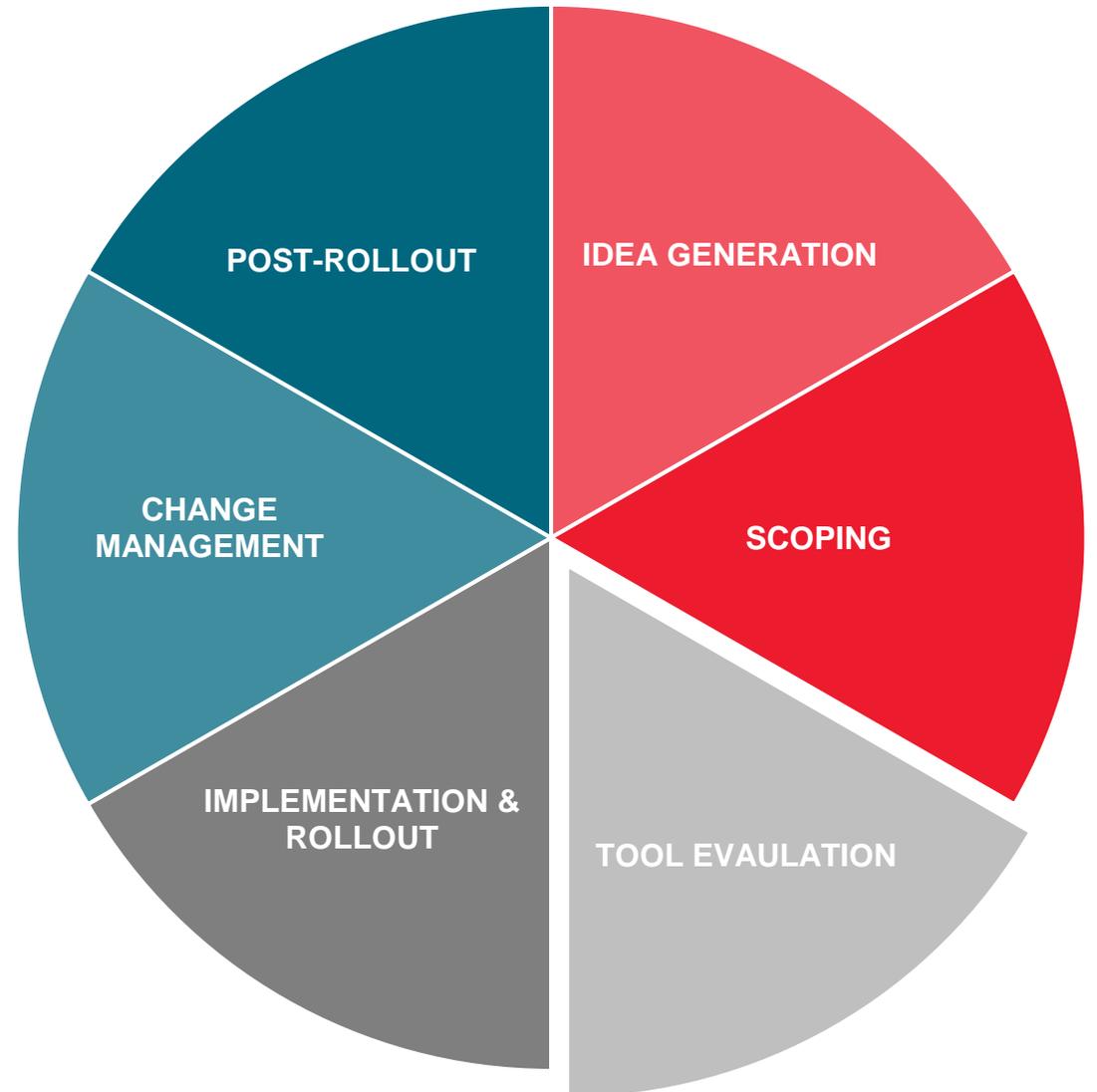- Understand the who, what and when of a solution

- Make the business case

Poll: 3. A partner is interested in a specific vendor with a solution that seems perfect. How should you proceed?

Tool Evaluation

- Market Evaluation
  - What currently exists in the market?
  - Identify viable products
  - Feature matrix
  - Build or Buy
- Demos
  - Introductory demos
  - Targeted stakeholder demos

Tool Evaluation

- Additional Considerations
  - Cloud v. on-prem
  - Security & Privacy
  - Pricing structure & Budgeting
  - Procurement / Contract review
  - Compatibility / Integration with existing systems
  - Usage tracking
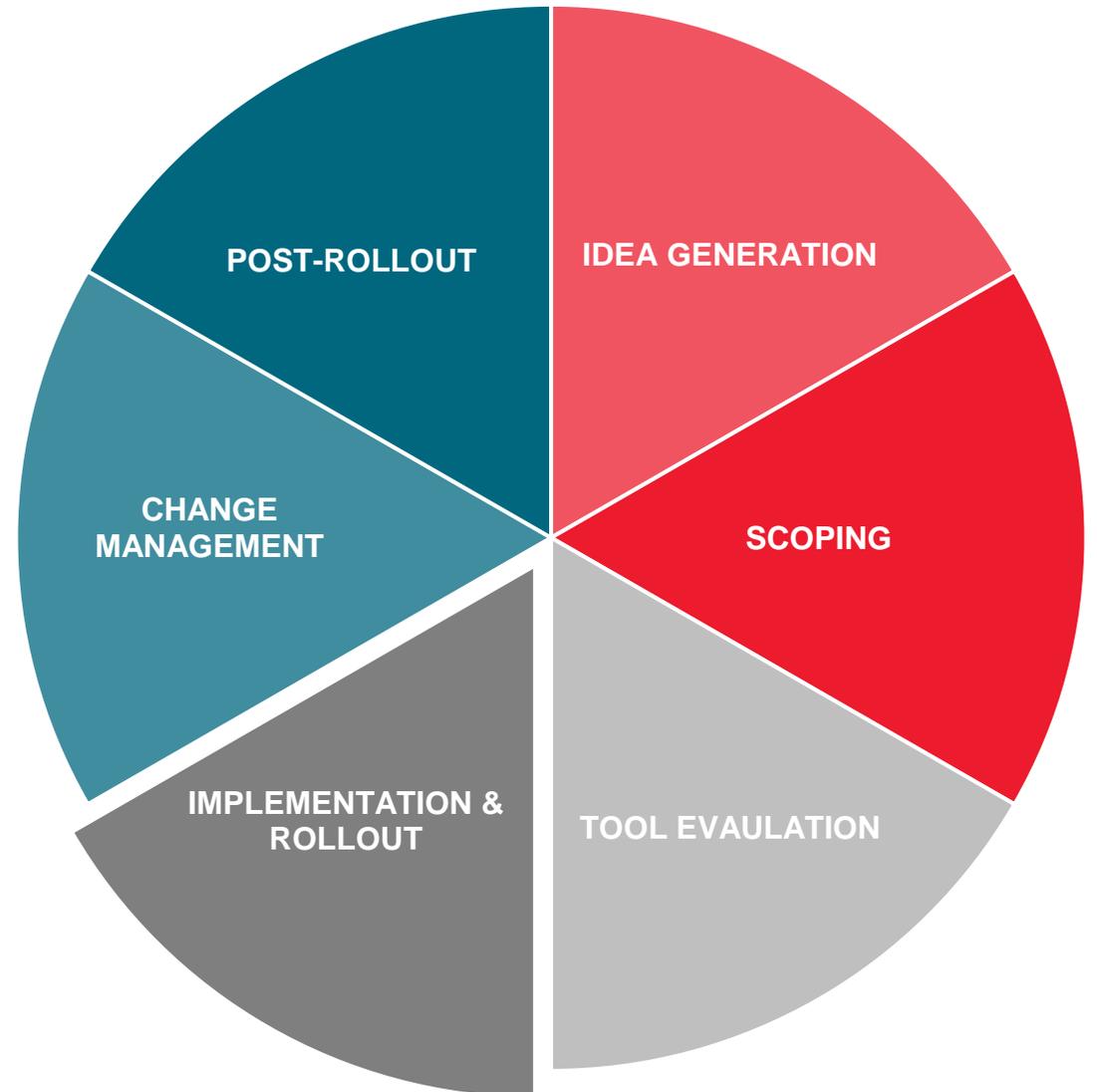- Piloting
  - Success criteria
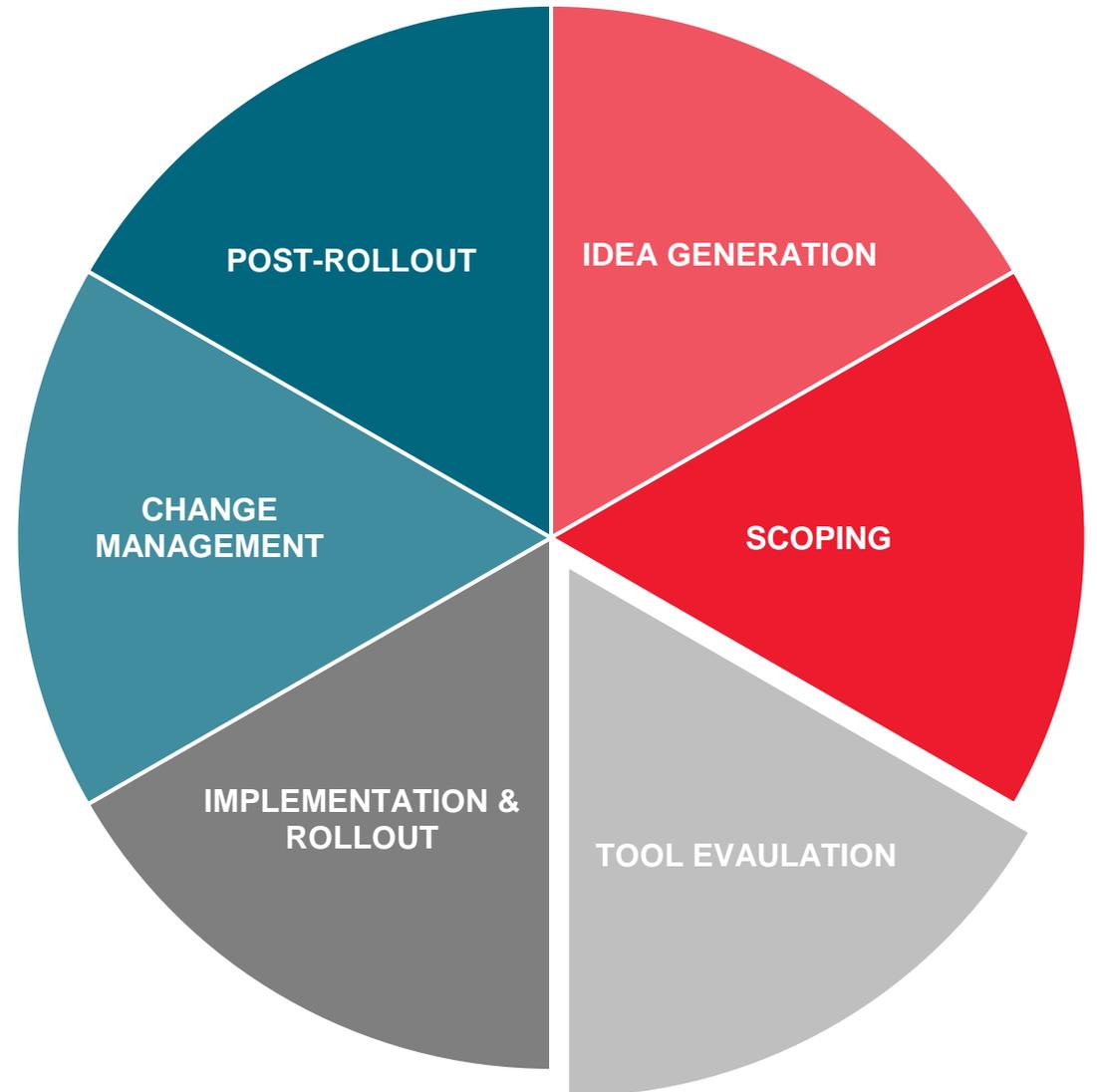
Poll: 4. Congratulations! You've signed on the dotted line and it is time to get teams using your structure chart solution. When rolling out a new tool, which of these should you avoid?

Implementation & Rollout

- Target "best" user

- Communications – why should I care?

- Training – short, focused, on demand

- Insert into workflows

- Find your champions

# Poll: 5. So your solution has been brought in, how do you get people to use it?

Poll: 6. You've rolled out the solution and everything seems to be going well. What's next?

Change Management

POST-ROLLOUT

IDEA GENERATION

CHANGE MANAGEMENT

SCOPING

IMPLEMENTATION & ROLLOUT

TOOL EVAUALATION
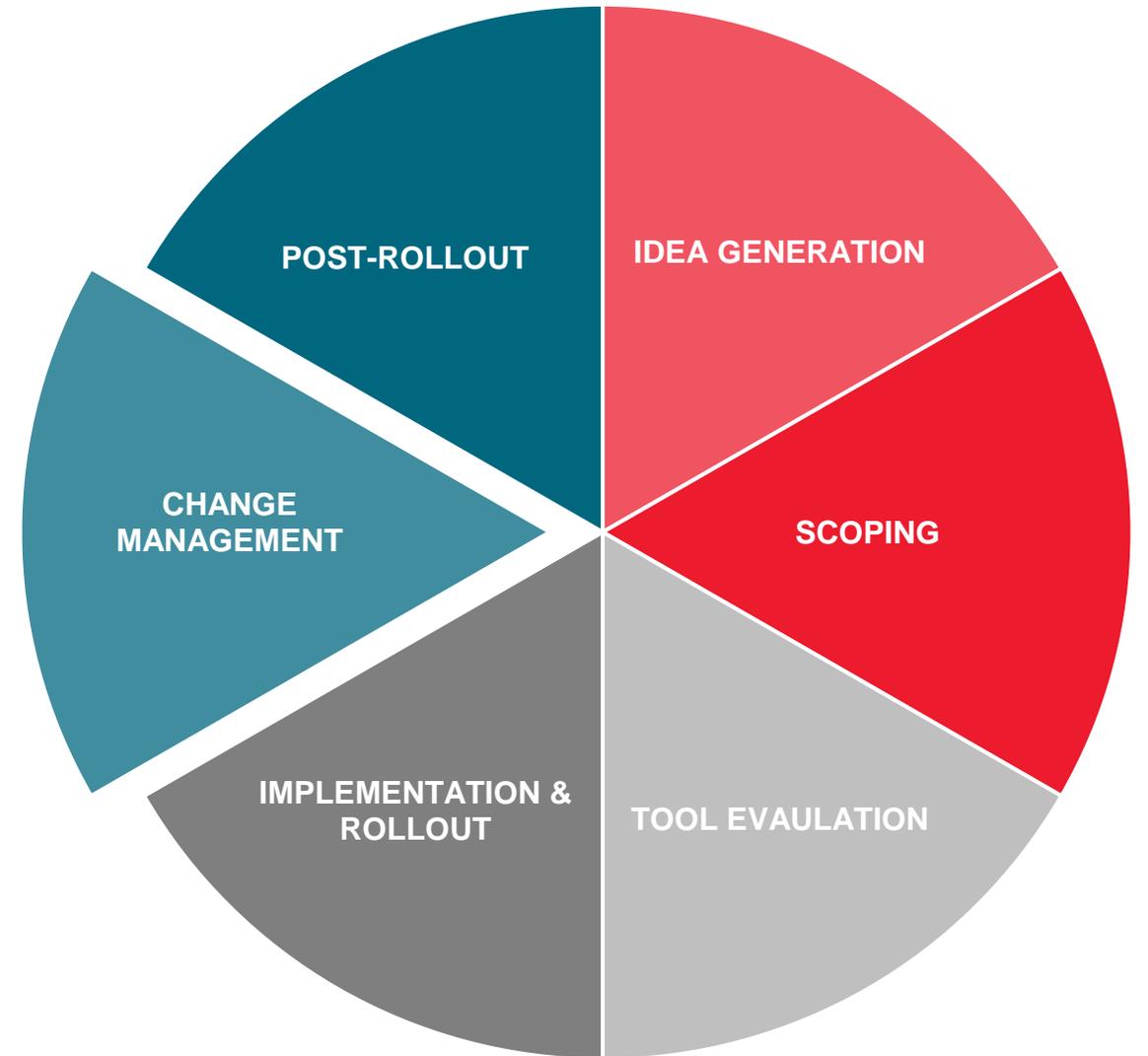
Change Management

- Change is a Pain!

- The 9X Effect

- Kübler-Ross Model applied to organizational change

- Many change management models, books, certificates, degrees, etc.
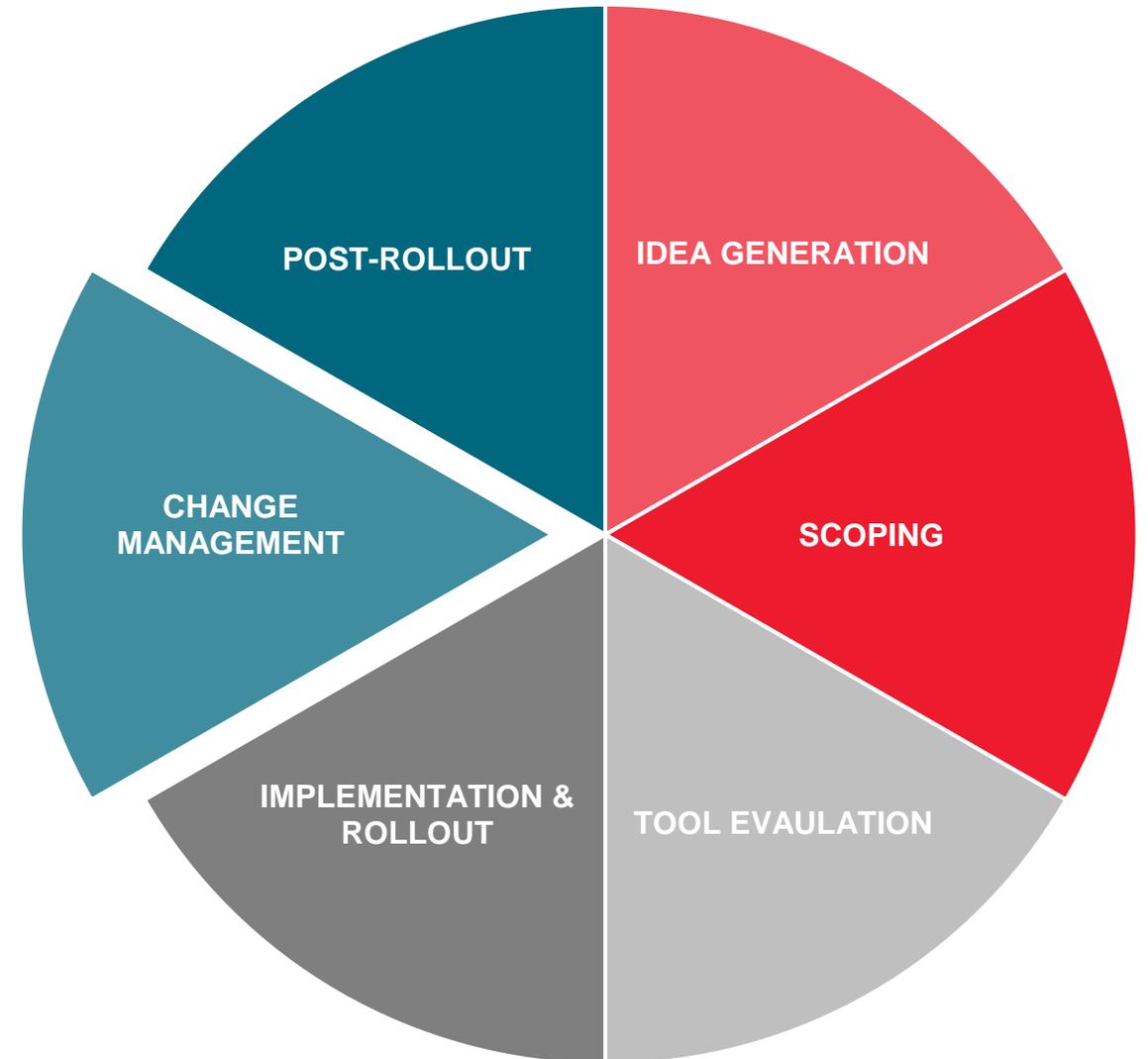
Kotter Model of Change Management

Step 1: Create a Sense of Urgency

Step 2: Build a Guiding Team

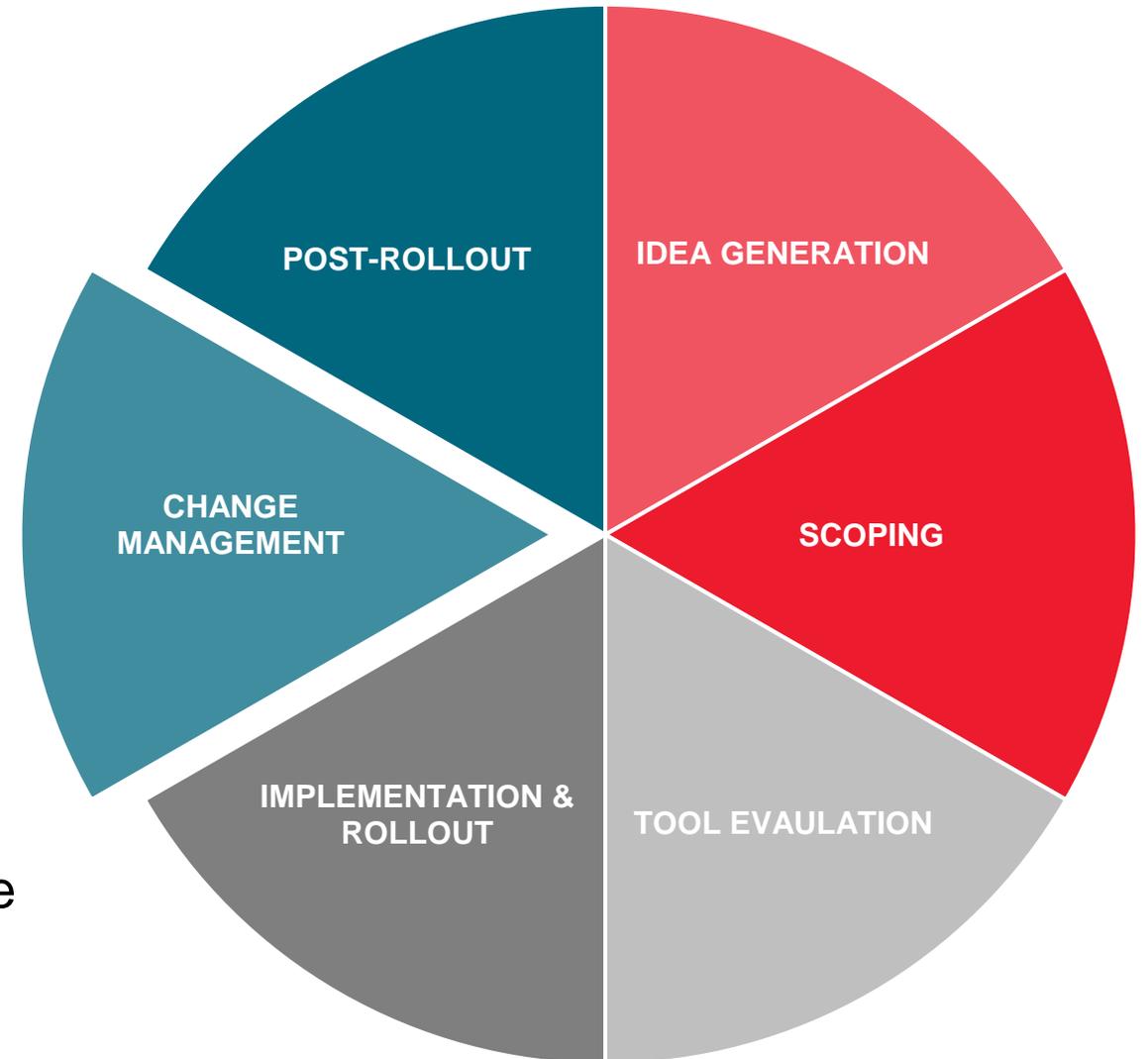**Step 3:** Form the Right Vision

Step 4: Communicate the Vision and Get Buy In (champions!)

Step 5: Enable/Empower Action & Remove Obstacles
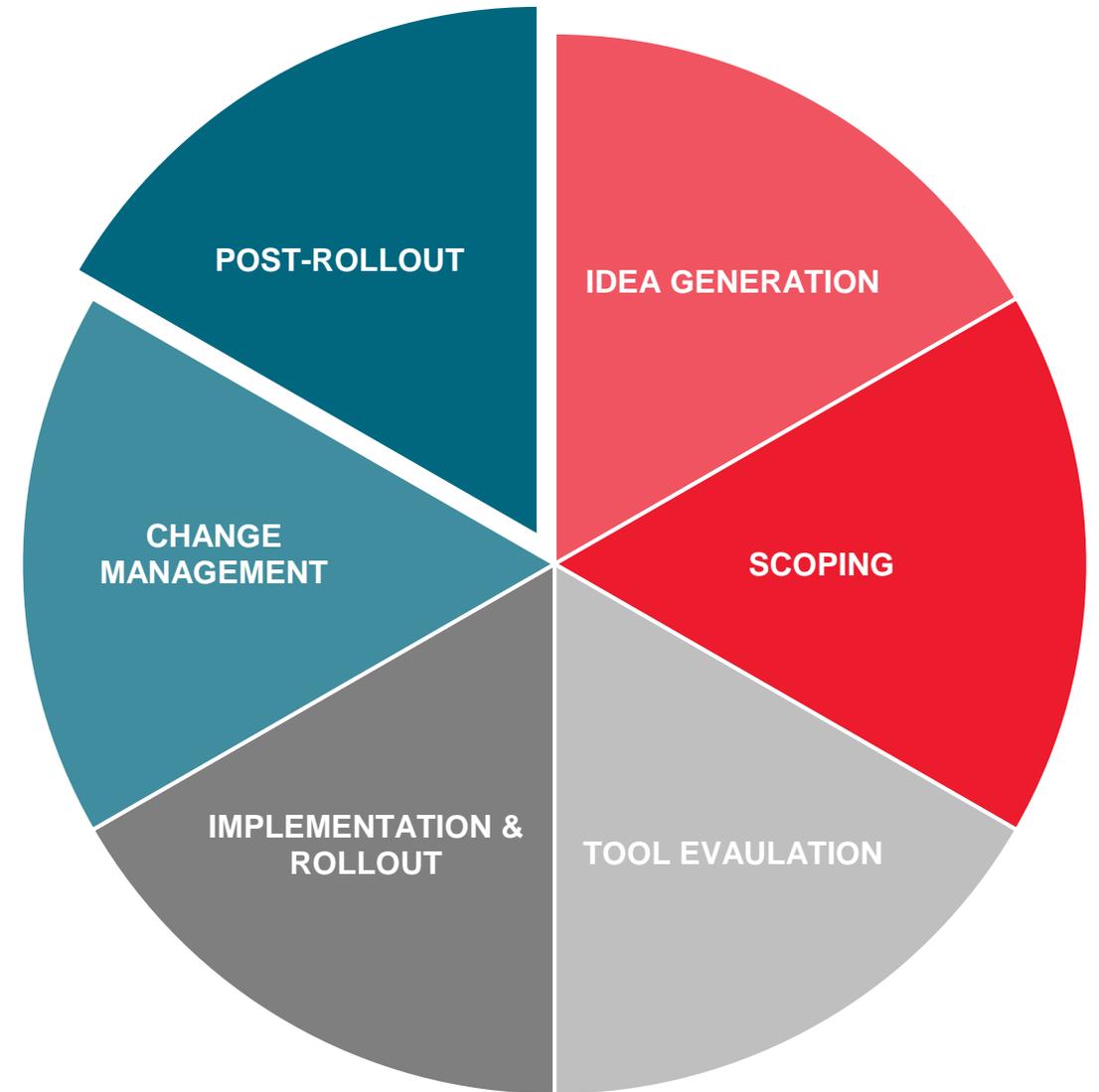
Step 6: Generate Short Term Wins

Step 7: Sustain Acceleration

Step 8: Make it Stick—Institutionalize the Change

POST-ROLLOUT

IDEA GENERATION

CHANGE MANAGEMENT

SCOPING

IMPLEMENTATION & ROLLOUT

TOOL EVAUALATION

Post-Rollout

- Maintenance & technical support

- Usage

- Feedback

- Continuous promotion

- Ongoing training

- Renewals

- Consider competitors

Questions?