Best Practices

in Predictive and Pivot Planning

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PLANNING FOR THE FUTURE...
Best Practices in Predictive Planning to Impact Technology Decisions

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Disruption, innovation, new market creation, value displacement. As International Legal Technology members, we are at the crux of many colliding legal, business and technology ideas that may be transformative, sustaining or even destructive to our firm's growth strategies. When we think about harnessing technology in our planning systems and firm cultures it may be useful to assess whether or not we have appropriate resources, partners and policies in place to conduct both Long Range Predictive Planning practices (cyclical, adaptive forecasting based on traditional and historical market conditions) and Pivot Planning competencies (proactive strategies and value networks to ensure enough flexibility to adapt based on unforeseen market and culture issues). Both types of legal technology planning are inherent in creating and sustaining organizational and practice success.

Let's take a look at both types of law firm approaches as related to planning and technology needs. Traditionally, law firm technology organizations have an annual planning process in place that includes **Long Range Predictive Planning** exercises such as an annual staffing plan to determine infrastructure, hosting, redundancy, hardware, software, and training needs. As part of this budgeting exercise, most firms also leverage software to predict annual revenues, expenses, accounts receivables and risk to the budget based on technology expansion and support. Ticketing systems, up/down time reports and other tracking tools allow for seasonal trend comparisons and real time data to help with storage and security needs on an annual basis.

The second type of planning, **Pivot Planning**, requires a new way of incorporating real time feedback into the technology planning process. Using data inputs from a broad spectrum of software tools and interdependent departments, nimble firms today meet unexpected demands for scalable and flex resourcing, data, storage and security by analyzing results on an ongoing basis. Rather than waiting for monthly or quarterly formal reports, leading firms have learned how to create a culture of constant feedback. Internal feedback about what's working, as well as, insights into what's not working allow managers to make smart decisions based on actionable data when Pivot Planning tools are utilized. Notice an uptick in Help Desk requests related to a new software rollout? See training logs shift towards case management video downloads? When iterative planning processes include mechanisms

for identifying trends in real time, proactive solutions can be employed to provide tips, tools and updates to ensure highest user compliance and firm productivity.

> *"Legal IT teams that have harnessed the data from their Service Management tool have valuable insights into the firm's support trends in order to determine their customers needs going forward. For example, looking at ticket data over the months of May June and July will help a firm understand the technical training needs of their summer associates, while at the same time identifying where additional staffing may be needed to ensure service levels are met."*
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> *Craig Friedl, COO, VP Client Services, Frontline Managed Services*

Forward looking firms also know Pivot Planning includes an emphasis on building partnerships with outsourcing experts so trusted advisors are in place when needs adjust up or down to avoid staffing, bandwidth and security shortfalls. Investing in training and networking is critical to understanding when systems may be prime for upgrades, overhauls, and replacement. Further, interactive dashboards and feedback loops are critical to Pivot Planning to ensure that all team members are empowered to share insights before an unseen change in policy, bandwidth, client structure or economic conditions disrupts consistent firm output.

> *"Legal IT departments that work with an outsource provider typically have the greater benefit of being able to leverage comprehensive data collected across multiple organizations. Powerful information such as this can help a firm predict some of the most common questions that will occur during a software transition and be able to proactively provide training in those areas."*
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> *Missy DesRoches, Frontline Managed Services*

In either case, whether Long Range Predictive Planning or Pivot Planning, Legal IT planning is most often impacted by one other critical business issue and that is Culture and Training. Even with the best technology that money can buy and the best laid plans for interactive feedback, a firm's success is largely dependent on technology users. Whether for lack of training, non-compliance or the need to balance security without disrupting the practice, law firm CTOs will need to implement planning strategies that include significant investment in resources to close the gap between technology and people. Often overlooked elements of the planning process, Technology Training and IT support are the single easiest way to impact your Technology Planning process both in the short and long term, paving the way for increased contribution to the financial success of the firm's bottom line.

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