

## How to Make Good Technology Decisions

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A good management decision is one that produces useful results. A well-executed technical result, say, installing a document management system, is not necessarily useful. That's because usefulness, like beauty, is in the eye of the beholder. In a law office, usefulness is ultimately judged by the clients who pay, the attorneys and staff who produce, and management who accounts who together constitute "your clients." This article looks at some practical steps and processes that will improve the odds of getting useful results out of your technology decisions.

### Step 1: Know who needs results.

The person who needs results is not just your boss, the senior attorney, or the squeaky wheel. The firm's success and your future depend on the performance and satisfaction of your clients. You need to know who your clients are and the role they play in the success of your business. List your clients. Who "buys" or depends on your services? Talk to your boss and to senior management about your clients. Are you in agreement on who is on the list and who is most important?

### Step 2: Find out exactly which results are needed.

If you think you already know, then you're wrong! Your knowledge and experience might enable you to see "objective" technology requirements, but your clients have practice and personal needs that are beyond your view. Even if you could spot them, you would never be certain of your clients' subjective evaluation. That uncertainty can be minimized if you tap into your clients' knowledge and experience. A good way to do that is to ask them what they need. A better way is to involve them in your technology decision processes.

### Step 3: Include your clients in technology decision-making processes.

Ad-hoc technology decisions might be quick and easy, but they are risky. Without

input from clients, you have no certainty of the results they need or expect. Without clients' participation, you have little influence on their evaluation of the results. But how can you include clients without endless meetings and "too many cooks?" Here are four processes that can help:

### Process 1: Strategic technology planning.

Once a year, develop or revise a written technology strategy for the enterprise. The technology strategy is a high-level view of the business advantages technology will provide the firm over the next three years. The process elaborates the strategy and then narrows it down to a short list of strategic initiatives or goals, (e.g., all attorneys and designated staff shall have wireless messaging capability). Including your clients in the strategic planning process enables you to learn their critical business needs and to give them valuable technology insights.

### Process 2: Technology operations planning.

At least once a year, list, prioritize, and schedule your major objectives and projects, namely, those that are needed to execute the technology strategy and administer the firm's system during the next 12 months. Also, explain what you will need to get the job done, such as staffing, budget, and other resources. Including representative clients can help you incorporate their needs into your annual plan and also influence their expectations regarding the services you can provide. If they want you to do more, they can help you get the necessary resources.

### Process 3: Project management.

Technology initiatives are almost always projects-temporary activities (usually by a team) to produce specified results within defined time frames. Project management includes methods for decision-making on all the details required to plan, execute, and deliver the project results. Including interested and affected clients in the planning and delivery phases of the project can help you incorporate their needs and influence their expectations.

### Process 4: Needs Assessment.

Before considering any major technology investment or changes to your system and related processes, you should conduct a needs assessment. A needs assessment is an investigation of user needs and a report of findings and recommendations on priorities and possible solutions. Typically, this includes interviews with representative groups of users and management. As with the process mentioned above, involving your clients not only yields knowledge about their needs, but also influences their expectations and perceptions of results.

### Step 4: Develop your access to external knowledge and information.

To produce useful results from a technology decision, you also need knowledge and creativity concerning technology solutions. Internal technology resources are essential, but internal knowledge is not enough for your firm's survival and your success. See Haim Mendelson & Johannes Ziegler, *Survival of the Smartest: Managing Information for Rapid Action and World-Class Performance*, John Wiley & Sons, Inc., New York, 1999. Over-reliance on internal knowledge has both direct costs - such as higher risk of error - and opportunity costs - such as missing a better or cheaper solution. In contrast, joining networks of your peers, such as ALA, and developing relationships with outside technology experts gives you access to a larger, richer knowledge base to support your technology decisions.

### Step 5: Communications planning.

The technology decision and the results it produces are often misunderstood or unknown. You need to tell your clients about your decisions and results. That's not to say you should tell everybody about everything - which would be impractical and counterproductive. Instead, before making an important decision or reporting useful results, think about the audiences you want to reach and the specific messages you would like them to hear. Then plan how to deliver those messages.

To make good technology management decisions, you need to focus on useful

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## Wisconsin Administrators Lending A Hand

By Roe WiersGalla, Chair  
WALA Community Challenge Committee

**T**ime and energy spent lending a hand to those less fortunate have proven to be rewarding to many WALA members. Many of us have enjoyed the most recent community challenges and hopefully more members will contribute to the upcoming events. The committee has offered a variety of ways for members to get involved, and the plan is to continue doing so monthly.

For our December event we hosted a holiday party on the 14th for La Causa Crisis Nursery. From 10 a.m. to 1 p.m. seven members (Brenda Majewski, Kathy Johnson, Terri Famer, Maria Morales, Judy Osborne, Sandi Wakefield, Roe WiersGalla) spent time with the children, making a paper chain, frosting and decorating giant gingerbread cookies, playing games, singing songs, reading a story. Lunch was served by us, consisting of pizza, juice, ice cream and homemade cake, all of which was donated by the volunteers. After the children's lunch, it was nap time for the little ones and the WALA members headed over to La Perla for lunch and revelry.

The January challenge was to read about Dr. Martin Luther King to children at the public library. Those



**2002 Community Challenge  
Roe WiersGalla reading to children  
at LaCausa Nursery**



who participated were Betsy Prinz, prospective member Lisa Greenwood from Foley & Lardner, Terri Famer, and Linda Wachowiak, and they expressed great enjoyment in meeting and entertaining the children.

The challenge for February was to motivate members to donate blood at any of the blood center sites in Wisconsin. An email with the toll free

number, along with the locations of Milwaukee area and Madison sites, was sent to WALA membership. Whenever a member donates under the WALA name, WALA is credited. Monthly reports will be provided by the blood center. This will be ongoing, and was especially encouraged for February.

The March event is to collect old eyeglasses from members at our March luncheons in Milwaukee and Madison and donate to the Lions Club sight program through Lenscrafters. Members will also be asked to contribute any cell phones no longer in use, to be distributed to women's shelters for 911 calls. This will be announced with the luncheon notice.

In April, since the 24th is "Take A Child To Work Day," members are asked to participate by sponsoring a program at their law firm, and bringing their child to work, or "adopting" a child from a local school. A helpful website for WALA members to obtain all the details on participation is [www.daughtersandsonstowork.org](http://www.daughtersandsonstowork.org).



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results and effective communications. This article has suggested a few steps and processes to help you do that. Making the results happen, by executing well, is another story.

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