PUTTING THE "I" BACK IN CIO

SESSION DESCRIPTION

What opportunities exist for information professionals in the next five years, and what should today's role encompass? What services should be provided, where is the need, and what innovations are already working? This panel will address how CIOs and their teams can take the lead in becoming information managers who are empowered to provide useful information anywhere, anytime, and in useful formats.

SESSION SPEAKERS

Jim Darsigny, CIO, **Brown Rudnick LLP**

As Chief Information Officer at Brown Rudnick, Jim Darsigny oversees the Information Technology, Records, and Library functions for the firm. He is responsible for strategic planning, security, and the delivery of information and communication services to all firm employees. Jim has over 25 years of experience in law firm IT with a broad knowledge of project management, staff development, budgeting, and vendor relationships. Prior to joining Brown Rudnick, Jim was the Manager of Information Systems at Morrison, Mahoney, and Miller.

Ted Ferguson, Chief Information Officer**, Kasowitz, Benson, Torres, and Friedman**

Ted Ferguson, CIO at Kasowitz -- a 385 attorney firm specializing in complex commercial litigation -- is a technology executive with over 20 years of experience in delivering IT strategy, knowledge and project management, team building, and infrastructure support for national and international law firms. Current projects include e-discovery, enterprise search, and marketing-related initiatives. Prior to joining Kasowitz, Ted was the IT Director at Ropes & Gray, after eight years as a technology manager at Fish & Neave.

Vic Peterson, CIO, **Stinson Morrison Hecker LLP**

As Chief Information Officer at Stinson Morrison Hecker LLP, Vic Peterson manages an operational group that includes the Technology, Practice Support, Records, and Library Services departments. His purpose is to support strategic growth in the firm practice areas, from ensuring deployment of well-designed technology projects to the enterprise-wide digitization of firm records and online legal research. Vic and his team provide transformative information services to the firm, to support its business and client goals.

Eugene P. Stein, Director of Information Technology, **Choate Hall & Stewart LLP**

Eugene P. Stein serves as the Director of Information Technology at Choate Hall & Stewart LLP. He was previously the Executive Director for four years at Richards Kibbe & Orbe LLP in New York City. Mr. Stein earned his Juris Doctor, magna cum laude, from St. John's University School of Law. Mr. Stein has accumulated over twenty-five years of experience in professional service firms and government agencies. Mr. Stein is repeatedly recognized in and out of the industry as a pioneer and thought leader who is focused on meeting the future and present needs of firms through the effective use of information systems, knowledge management and technology. Mr. Stein has held Director and C-level positions in several AmLaw 100 firms and also practiced law at Wachtell, Lipton, Rosen & Katz for a number of years. He was named Legal IT Achiever of the Year by Legal IT Week and has frequently been quoted in publications, including CIO Magazine, American Lawyer, Legal Technology News and The Wall Street Journal.

Putting the "I" Back In CIO

Infrastructure, Information, Interaction

Jim Darsigny
CIO
Brown Rudnick LLP

Ted Ferguson
CIO
Kasowitz Benson Torres Friedman LLP

Vic Peterson
CIO
Stinson Morrison Hecker LLP

Eugene P. Stein
Director of Information Technology
Choate Hall & Stewart LLP

Agenda

- Opening Remarks
- Case Study: The “I” In CIO Stands for “Interaction”
- Case Study: The Birth to Death of a Matter
- Case Study: Changing the Work Allocation Model
- Case Study: Using Data for Library Savings

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KASOWITZ BENSON TORRES & FRIEDMAN LLP

Ted Ferguson – Case Study

THE "I" IN CIO STANDS FOR "INTERACTION"

Deploying Microsoft Lync

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KASOWITZ BENSON TORRES & FRIEDMAN LLP

- Technology projects in law firms typically focus on connecting people to data/processes.
- The most valuable interactions are among people – collaboration is a firm's *"raison d'être."*
- Physical proximity is expensive, limited.
  - Bloomberg's "bullpen," open plan.
  - Conference centers
- Technology does not provide a substitute – but a worthwhile extension.

Why Lync?

- With so many available tools – why Lync?
  - Lync feature set supports many use cases
  - Tightly integrated with MS Office platform, leverages existing investment
  - Security, groups via Active Directory
  - Inexpensive initial deployment: standard license included in MS EA license

Deploying Strategy

- "Soft Opening"
  - There are well-known generic reasons to implement collaboration technologies:
    - Document collaboration
    - Reduction in email volume
    - Reduce travel, conference room expenses
  - However – solutions must solve specific needs to be adopted.
  - Identify groups of users with a *specific problem* a collaboration tool can address.

Initial Use Cases

- CLE
  - Cross-office attendees, conference room availability
  - Session recording
  - Increased participation
- Case teams
  - Impromptu meetings, including offsite participants
  - Document review
- Managing Attorney
  - Court filings, document sharing

Lessons Learned – So Far

- Collaboration software presents a cultural change
  - Some will resist, reject
  - Lead by example – IT deployment, testing
- Privacy concerns
  - Presence information
  - Cameras
- Training and Follow-up
  - Offer a variety of materials, including (short) QREF
  - Post-rollout follow-up, and follow-up, etc.

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CHOATE

CHOATE HALL & STEWART LLP

Eugene P. Stein

BIRTH TO DEATH OF A MATTER

Birth to Death of a Matter

Information is Born: New Business Intake / Conflicts

Stuff happens during the lifetime of the client and the lifetime of the matter

Information Dies: Records / Destruction / Return to Client

The "Stuff" in the Middle

That "Stuff" is Information – and there is lots of it:

- The client
- The matter
- The legal issues of the matter
- The financial costs and impacts of the matter
- The people working the matter; full or part time
- External parties, adverse parties, experts, etc.
- The expertise used and obtained in the matter
- The learning through the matter
- The conclusion

Ex: Information Consistency

Financial System

- C/M Number
- Address
- Key Client Contact
- Hours
- Costs
- Write Downs / Ups

CRM System

- Client Name
- Address
- Key Client Contacts
- Contact History
- Matters
- Who knows whom at a client

Time Entry

- C/M number
- Hours
- Description of work
- Coding of work

Putting the "I" Back In CIO

You are the at the center of the information stream:

- Understand and know all of the data you have
- Help facilitate inter and intra departmental use of information
- Ensure the consistency of data in the organization
- Understand how data is updated and/or changed
- Ensure all applications are presenting information in consistent ways
- It is all about the data

Be the information czar and ensure the infrastructure can support the delivery of the information

Ex: Using Information

At the birth of a matter:

- Notify attorneys of new matter
- Let the library know so they can begin sending relevant information
- Marketing needs to know to ensure they have the most accurate picture of the work the firm is doing
- The knowledge management team might be able to help with examples, models, or similar matters
- Finance could participate with budgeting or project management

All systems need to have the same, consistent data to be useful

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BROWNRUDNICK

an international law firm

Jim Darsigny - Case Study

CHANGING THE WORK ALLOCATION MODEL

Firm Profile

- Stats
  - 220 attorneys
  - 105 associates
  - General practice firm
  - Seven locations
- Was / Is
  - Three allocation programs 2009
  - iAllocate/iAccomplish program 2009 - Present

Populate the Data

- Hours data from Carpe Diem
- Self assessment of availability
- Benchmark criteria formulated by dept
- Self assessment of skill level

Target the Issues

- Break “neighborhood” work assignments
- Eliminate “associates in hiding”
- Direct work to available resources
- Create development opportunities

Leverage the Data

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BROWNRUDNICK
an international law firm

- ADPs assign work and deliver evaluations
- Legal teams span office locations
- Record of cross training in disciplines
- Associates buy in to the process
- Partners accept departmental direction

Last Name	First Name	Avail	Last Updated	Practice	Office	Year	Rate	7 Days	30 Days	Annualized	Planned Absence
[illegible]	Kristin	5	3/14/2013	CORP	BOS	ASSOC5	[illegible]	0	63.5	898.25	Vacation
[illegible]	Ryan	5	3/11/2013		BOS	ASSOC5	[illegible]	28.7	167.6	1987	
[illegible]	Jonathan	5	3/11/2013		BOS	ASSOC3	[illegible]	29.2	142.3	1735.9	Out of Office
[illegible]	Jacob	5	3/11/2013		NY	ASSOC1	[illegible]	42.6	164.1	1547.2	Vacation
[illegible]	Arkady	5	3/11/2013		NY	ASSOC1	[illegible]	31.7	142	1776	
[illegible]	Aidan	5	3/11/2013	GOVCONT	DC	ASSOC2	[illegible]	70.8	130.1	1704.8	
[illegible]	Shemane	5	3/11/2013		NY	ASSOC2	[illegible]	27.4	142.4	1416.3	
[illegible]	Steven	5	3/14/2013	CORP	BOS	ASSOC2	[illegible]	46.2	202.7	2304.8	
[illegible]	Kyle	5	3/13/2013	ERISA	BOS	ASSOC1	[illegible]	33.8	82	1073.6	

End Game

- Appropriate staffing of client teams
- Targeted professional development
- Even distribution of resources
- Encourage creation of interoffice teams
- Improved evaluation process

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STINSON MORRISON HECKER LLP

Vic Peterson – Case Study

USING DATA FOR LIBRARY SAVINGS

Case Study Write-Up

- Please see the other print materials in this section for a write-up of this case study.

Questions? Comments?

THANK YOU!

CASE STUDY: USING DATA FOR LIBRARY SAVINGS

Authoring Team: Information Governance
Audience: External
Description: How to Use Data for Library Savings

Using Data for Library Savings

- Vic Peterson
- Stinson Morrison Hecker LLP

Firm Profile

- Stats
  - 305 attorneys (now 329)
  - Approximately 50% are legal research users
  - High percentage of those are litigators
- Was/Is
  - Two source until 2008
  - Single source 2009-2010
  - New single source 2011

Data Sources

- Tie usage data to HR data
- Tie usage data to firm systems data
- Incorporate historical "old vendor" data
- Know where "old data" comes from

Use Data for Change Management

- Analyze data/identify patterns
  - Key users
  - Poor users
  - Weekend usage
- What to eliminate
  - Misunderstanding
  - Abuse
  - Indifference
  - Over reliance
- What to promote
  - Focused use
  - Knowledge of resources
  - Confidence in charge back

Track the Transition

- Watch for negative patterns that persist
  - Address them
- Track drop in costs
  - Promote drop in costs
- Feed data back into system
  - Research monitor
- Continue virtuous cycle

Results

- Major contract savings
- Increased cost recovery
- Easy to defend cost recovery
  - Library service catalog based more on facts than hearsay
  - Folds into larger efficiency pressures

- Vic Peterson, Stinson Morrison Hecker LLP

CASE STUDY: INNOVATION CASE STUDY, WORK ALLOCATION SYSTEM (WAS)

Work Allocation System (WAS)

Primary goals:

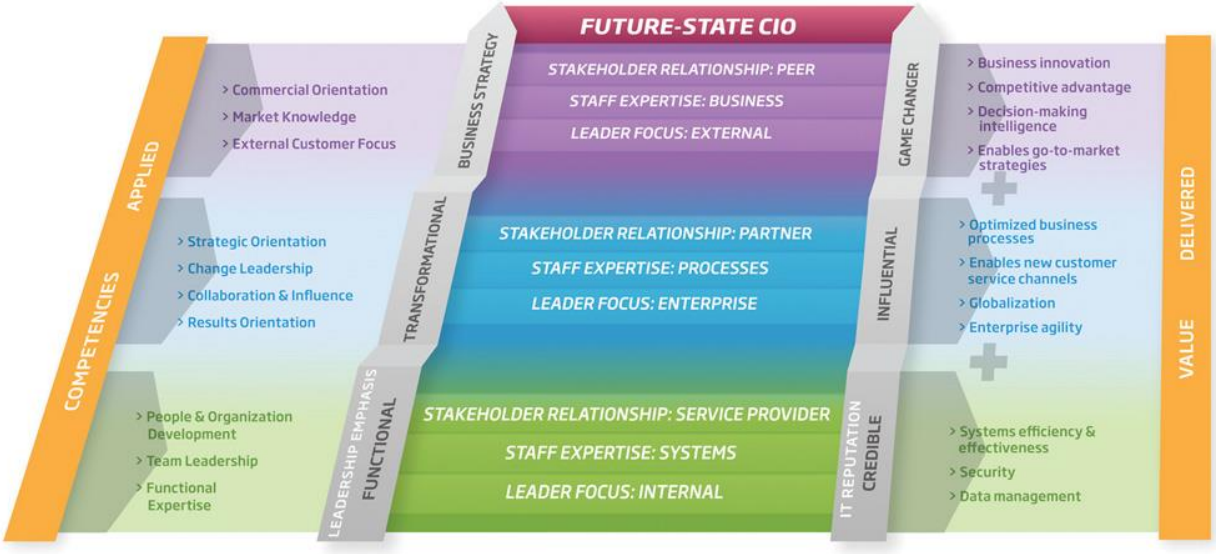
- **Insure effective use of all associate resources and avoid uneven distribution of hours.**
- **Assist with identification of rate-appropriate resources for matter budgets.**
- **Identify areas where associates require experience to further professional development and provide opportunities.**
- **Provide broader exposure to cross-practice legal work to help define career paths and provide guidelines for evaluation feedback.**
    - *Built a custom associate availability database with a professional skills profile per associate for each practice area.*
    - *Assigned partners as Work Allocation Coordinators (WACs) in each practice area and gave them access to associate availability and profiles across practice groups.*
    - *Established procedure for partners staffing case teams to contact WACs to help identify appropriate available associate resources and assign them.*
    - *Associate self-assessment feeds experience database and provides guidance for evaluation feedback.*
    - *Reports generated from both aspects of the database help determine who will be approached for evaluation input and on what skill sets.*

- Jim Darsigny, Brown Rudnick LLP

REFERENCE MODEL: THE FUTURE-STATE CIO ® JOURNEY

WHAT IS THE FUTURE-STATE CIO®? A CIO EXECUTIVE COUNCIL REFERENCE MODEL

The Future-State CIO® will not only be accountable for IT operations and overall business processes, but will leverage a company-external focus to spur innovation and strategic advantage as a key driver of the CEO's agenda.



Since the Future-State CIO® program began in 2007, the goal was simple – to define the future of the CIO role as a strategic business partner, not just head of all things tech. Our now widely accepted model divides the role into three distinct stages – Function Head, Transformation Leader and Business Strategist.

The good news is that since 2008 the number of CIOs classified as business strategists has more than doubled.*

Our members have made great strides in transforming the CIO's "head of tech" role into a C-level advisor, but we're not universally there yet.

Our members have developed tools for advancing the profession as a whole and for individuals looking for help in becoming a Future-State CIO®, including:

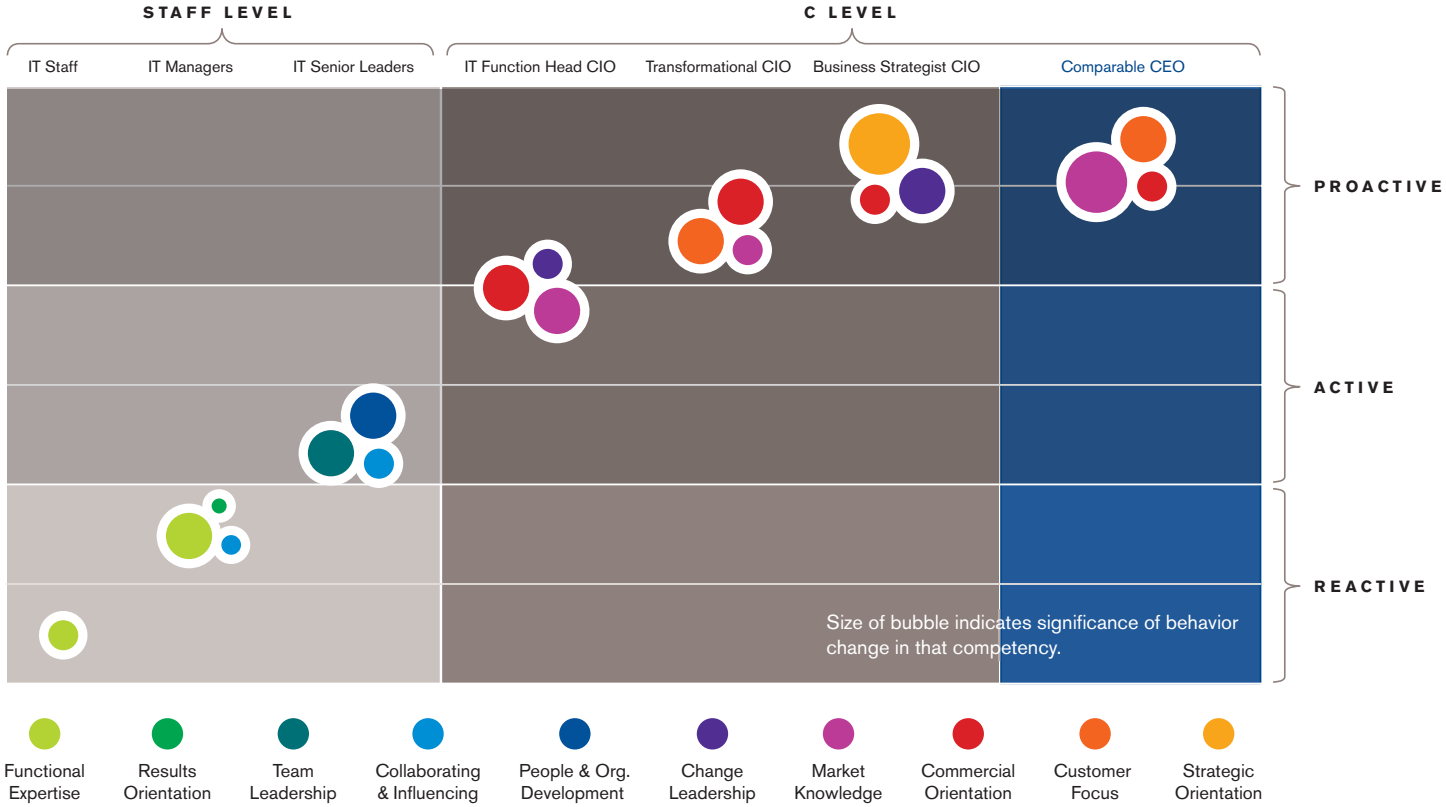
- A role advancement framework and competency development map (http://council.cio.com/assets/ezi_chart_public.pdf)
- Best practices research and field guide
- Assessment tools for your c-level executive competencies, your business stakeholder relationships and your senior leadership team's capabilities
- Online seminars for CIOs; Workshops, panels and peer roundtables for senior managers
- Peer advice for solving the challenges of the CIO Paradox
- Press and media opportunities to influence the profession and business expectations

**State of the CIO Survey(*http://council.cio.com/media/members-in-the-news/)

THE FUTURE-STATE CIO®

LEADERSHIP COMPETENCIES JOURNEY

This graph illustrates which competencies must be developed to achieve high levels of performance in each successive IT role on the journey to the Future-State CIO. For each role, the bubbles indicate a significant change in level of behavior for that competency — the larger the bubble, the more significant the change. Only the competencies that must change with each role are shown; prior competencies remain important.



DEFINITIONS OF REACTIVE, ACTIVE, PROACTIVE

The Egon Zehnder Leadership Competencies have seven detailed behavioral levels, where each level has qualitatively different behaviors. But there is a simple pattern within the scale: levels 1-2 are *reactive*, levels 3-4 are *active*, and 5-7 are *proactive* behaviors.

Reactive These are positive behaviors which are relatively basic: Responding to customer demands, working hard, thinking as needed, being willing to support others.

Active These are levels of active, spontaneous competency demonstration: Reaching out to customers, working to goals, anticipating future direction, taking action to support or lead others.

Proactive These are strategic levels, focused not only on personal demonstration, but leveraged impact — making long-range organizational impact: Providing unanticipated value to customers, improving processes in a calculated manner, challenging strategy, empowering one's team, partnering with others.

Egon Zehnder International | CIO Executive Council
Leaders Shaping the Future of Business

IMS PAIRED SERVICES

ROLES-TO-PEOPLE MAPPING

Having the right people, in the right place, to do the right job represents the efficiency every IT organization should strive to achieve. IMS' Roles-to-People Mapping provides an analysis of the organization's configuration of people and roles and an IT organization chart review. Among the deliverables is a "Best Practice-to-Your Practice" comparative mapping of ITIL recommended positions to the current organization, as well as the IMS perspective pulling from proprietary information regarding roles and structures to consider in preparing for the next 5-10 years of changes to IT and information management positions.

APPLICATION PORTFOLIO MANAGEMENT

Are you looking to slim down your portfolio of applications? Contact IMS about a high-level portfolio review, including preliminary options and insights. The purpose of the IMS Application Portfolio Management high-level assessment is for IMS experts to gain a detailed understanding of our client's applications environment, in order to develop an overall assessment of application usage and expenditures.

By reviewing the organization's agreements, usage, and trends, IMS experts can provide you with an outline of options and insights which you can use in immediate decision making, or roll into a greater initiative.

Thought to consider: as you evaluate and select applications for your firm, are you paying enough attention to their mobile access capabilities?

PROJECT PRIORITIZATION

Every firm has a long list of projects in process or in consideration and is challenged with deciding the project that best uses the limited time and money of the team. IMS will help review current and future projects to prioritize effort and support. IMS experts will make project recommendations considering the firm objectives, current trends, resource constraints and budgets..

MARKET STUDY: HOSTED VS. INTERNAL SERVICE DELIVERY

Cloud-based services have many different flavors, and there are benefits and challenges to each. Understand the benefits of cloud-based services and how they can impact your delivery model. Determine if cloud-based service delivery is a viable option for your unique environment from an operational, functional and financial perspective.

MARKET STUDY: COMMERCIAL VS. IN-HOUSE DATA CENTERS

IT Clients now expect 100% uptime of all IT services, which is increasing the demand for IT teams to provide a resilient environment. The data center is the foundation for your IT service delivery — allow IMS to help determine whether moving to a colocation facility is the appropriate option for you.

MARKET STUDY: HOSTED VOIP ANALYSIS

VoIP has been a key initiative of many enterprises and is growing in popularity. As the hosted VoIP marketplace is now growing, learn how a hosted VoIP service would benefit your firm and determine if it is an option to consider.