



System Implementation—It's More Than the Technology— Improve Adoption Through People and Process

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MARNI CENTOR: Hello, everyone. The Association of Corporate Counsel and SmartPros Legal and Ethics welcome you to today's webcast, "System Implementations—It's More Than the Technology—Improve Adoption through People and Process."

[The instructions provided here were intended for attendees of the live webcast when it was originally broadcast.]

Our presentation today will be moderated by David Munn, General Counsel for Pramata Corporation. And now, I'll turn it over to David.

DAVID MUNN: Thank you Marni, and welcome, everyone, to the Association of Corporate Counsel Law Department Management Committee webcast. As Marni said, my name is David Munn, and I will be the moderator for today's presentation. In addition to being general counsel for Pramata Corporation, I also serve as chair of the webcast subcommittee of the Law Department Management Committee of ACC. And I am really looking forward to today's presentation.

Our panelists will be talking about how to successfully manage a technology project. And project management skills for lawyers is one of the things the Law Department Management Committee is focusing on, so this topic is very timely.

Also, from a personal standpoint, my company, Pramata, is a technology and process company. We talk with a lot of customers and potential customers who have implemented even some name-brand technology solutions and who have either abandoned them or just don't feel they're getting real value out of them. Given the amount of money and effort that goes into any kind of system implementation, the last thing you want is a system that becomes what we refer to as "shelfware." So, today's discussion should provide some great insights into how you can use good project management practices to prevent that from happening to your projects.

Our first presenter today is Rich Seleznov. Rich is a managing director at Huron Consulting Group. Mr. Seleznov has more than 25 years of financial and management experience relating to improving the business performance of law departments and law firms through process improvements and the use of technology. He works with clients on technology strategies, business process improvement, benchmarking, and technology implementations. Other focus areas include reducing the cost of delivering legal services by optimizing internal resources, external spend, and discovery management.

Our second presenter is Alyssa Awe. Alyssa is director of business applications for Viacom. Ms. Awe has 18 years of experience in implementing software and gaining user acceptance, working for both software companies and in-house operations groups. Ms. Awe moved into the legal industry four years ago when she joined [the] Legal Business Applications Group at Viacom. Her areas of focus include cost reduction, business process improvement, and technology implementations in e-discovery, rights management, matter management, and e-billing. Ms. Awe most recently completed a successful matter management and e-billing system implementation

for the Viacom Law Department. This implementation has ushered in a new era of matter and spend management for 360-plus attorneys across multiple Viacom divisions and geographic locations.

And now, let me turn the presentation over to Mr. Seleznov.

RICH SELEZNOV: Thank you, David. As David described, we're going to go through and talk a little bit about technology projects, and some of the pitfalls, and some of the things that you can do to make sure that you don't fall into those pitfalls. It has often been said [that] technology is only really 10 percent of a successful system or project implementation. And in fact, I'd go as far to say [that] it is very rarely that the technology is the reason the project wasn't an overwhelming success.

So, what are the other parts and what can you do to make sure you don't fall into those traps? That's what we're going to focus on, particularly around project approach, teams, change management, and what are the things you need to do to assure the greatest adoption of the project? At the end of the day, what you want to make sure is that people are using whatever the tool is that you've just rolled out and that they're getting the benefits from it.

So, as background, let me ask Alyssa to describe Viacom and maybe a little bit about your project, the law department, and just to give everybody a sense of the size of the group.

ALYSSA AWE: OK, great. Thank you, Rich. I'm the director of business applications for Viacom Legal. Viacom is a global media company comprised of three major divisions: BET, MTV Networks, and Paramount. We have legal staff of about 600 around the world, and that encompasses a full range of technical proficiency.

Our most recent project was implementing a matter management and e-billing system, Team Connect, for the law department. We replaced an antiquated system that had very few attorney touch points. It did basic invoice approval, but basically it was a back office system. There were no attorneys using it for matter management. We had paper-based matter reporting and paper-based budgeting. So we've replaced it with a system that enables the attorneys to do electronic tracking and managing of matters, budgets, and invoices with a highly developed workflow and multiple integration points.

RICH SELEZNOV: OK, great! Thanks, Alyssa. So let's start to talk about—kind of set the stage. We're going to describe six major challenges that we often run into when doing technology projects. They're really universally applicable, but we'll be talking mainly in the context of a law department or legal environment.

I guess the main point, first, is: The system is not the software. You really need to stop and think about this whole thing holistically, and think about the software and also the people and the process and how they're going to work together. Something I've learned over the years is: It's not true [that] if you build it, they will come. I can tell you, that's not going to work. You really have to think about what are you trying to do and how does that impact the people and so forth.

A second point is recalcitrant users. That is that people tend to want to continue to do whatever they're doing. They'll want to continue to work the way they work, whether it's sticking sticky notes all over their computer monitor or whatever. That's what they're going to want to do; it's worked for them for years and they're perfectly happy doing it.

Lastly, workarounds. People will find ways to get around whatever you're trying to help them with. If they're not bought into whatever you're doing, however you're trying to help, they'll find ways to get around it.

Another area of challenge is this notion of "scope creep." And no matter how well defined you think you have a particular initiative, as you get into it, you'll start getting into conversations about "What about this? And what about that?" So, we'll get into change control, but [that's] a very important part of the project.

Another area is a focused, knowledgeable team. If you're trying to do these projects without a good understanding of the business needs, without understanding how the lawyers are working and how they interact with their business clients, it's going to be a very difficult way to get something useful into the environment.

Lastly, what are the challenges? Undefined objectives. If you have poor or no requirements, really not sure what the objective is—what you're trying to accomplish—you surely will accomplish that. It's the old saying, "If you don't know where you're going, you're going to end up getting there." So, have clear objectives.

With that, let's begin talking about some specific activities—things that you can do to help assure that you don't step in any of these landmines along the way. We'll begin by talking about pre-implementation planning. Even before you begin to even select something you're going to implement or get into deep implementation planning, there are certain activities that are very important. One of them is this idea of leadership buy-in, senior management buy-in. You'll probably hear us say it a couple of times. If it's a project that's being done as skunk works on the side because somebody has a keen interest in trying to do something, those projects very rarely succeed. You really need to get a broader buy-in, you need your senior management bought in on it, [and] you need your other organizations in your company involved, like IT, who are also partnering with you on these projects. That's the only way to get these things done because it requires so much.

ALYSSA AWE: I would say, Rich, as well, that ideally you're not really trying to gain buy-in by your leadership. What you're doing is you're implementing your leadership's vision. So they're the ones who are putting forth what their vision is and you are just implementing it, but that that vision helps them accomplish their strategic goals.

Additionally, if I could just touch on point number three as well, which is the business case and the ROIs. I know at Viacom if you can't articulate a good business case in an ROI, then you won't end up doing the project. So I think it's important to be able to have a strong business case and be able to talk about it.

RICH SELEZNOV: That's definitely true. In fact, most companies today—I'm sure people who are thinking about their own company—if you don't have a good reason why you're making some change, implementing something, or doing whatever, if it doesn't result in improved legal services, lower costs, greater business satisfaction, there's probably not a compelling reason to do it.

ALYSSA AWE: You might want to rethink that, then.

RICH SELEZNOV: You might want to rethink that, right. Other points around making sure you have a good coalition of stakeholders; you have all the people that you need to connect with, like your IT organization, your business support folks in Legal. There are just some key stakeholders that you need to have involved and buy in.

ALYSSA AWE: Right, and on that business side too, you want to make sure you have some key influencers on not just your stakeholder group, but also in your core working group, so that you have some people on the business side, because you're always going to have questions as you go through the implementation period, that you have committed individuals who are making this their top priority. And generally you'll find that those are people who, it's improving their business process by implementing the system. But they need to be influencers and they need to either be empowered to make decisions or they need to be able to get decisions made quickly.

The one last point on this slide is the business objectives—that you want to make sure that you are very clear about your focus for the new system. A new system can accomplish many things, but you want to make sure that you understand what your business priorities are, because as you go through the implementation period, you might find that you get caught up in trying to make one feature or another work, and if you're spending an inordinate amount of calendar time and resource time trying to get something to work that's not a high priority in terms of business objectives, you need to get sort of unstuck from that and move on.

RICH SELEZNOV: An example of that is: You'll always have one person who thinks they have a particular need that no one else ever thought of and [you need to be] able to have those conversations about really how important is that particular feature or that particular function, and really how are they going to use it, and what's the consequences if you don't do it now.

ALYSSA AWE: Sure and that's not a conversation that the IT group is going to have in isolation. That's something that you're going to talk about with your stakeholders. Is this something that we want to spend more time on or do we need to push on?

RICH SELEZNOV: Exactly. Now let's talk about some of the activities that are important as it relates to the execution of the project. So, once you're underway, there are certain things that are just very, very important about how the project proceeds. One is the structured project management. Project management is one of those things like good hygiene—everybody believes in it. Nobody will tell you it's not a good idea, but it's the first thing to go when you're under stress. I don't know if that analogy works.

The idea is here that you really do need somebody on the team really focused on the project management aspects, maintaining the work plan, maintaining the resource list, maintaining a list of the issues and the mediation approach to those issues. There are going to be questions that need to go up to the steering committee. They may be questions of policy or procedure. All of that really needs a very structured approach. It's not going to happen by itself and so a key activity here, often not paid as much attention to as needed, is this whole idea about project management.

ALYSSA AWE: That's right and you do have to do comprehensive planning in advance. To that point, we have three things that we wanted to talk about: scope management plan, communication plan, and a training plan.

For scope management, I'm sure if you've ever done a technology project before, you're familiar with scope creep. It's going to happen, and for people who have not done a technology project before, that means that once you start building your system, people will come in and say, "Oh this is great; can we also get it to do this?" or "I see the way this works. Can we do it a different way instead?" But a lot of planning goes into these activities, and once you set your requirements—and hopefully you have full requirements and comprehensive requirements—you do a lot of planning around those. So, it's important to try to not change what your scope is while you're in the middle of the implementation period. Which is not to say that that's not going to happen at all. The important thing is that you have a plan to deal with changes as they come up.

So, two things that that might encompass. One is that you have a change list. So as suggestions come up, it's not that you're in a conversation, someone mentions something and then they expect that it's going to be added to the system. You really want to have a formal change list that is shared with the different groups—the stakeholders and the core working group—where people can all see what the change requests are that are coming in, and then a process that you actually follow very consistently, where you take those changes to a particular group.

Now again, this is all ideally, one would do this. For example, you present the change request list to your sponsor committee once every two weeks or once a month, and if they agree that these changes are in line with the business objective and critical enough, then you make those changes and you assess what changes need to be done to the project in terms of resources or scheduling to accommodate them. Again, having a scope management plan does not mean that you're always going to have to say no and that you're never going to have changes. It just means that you are dealing with your change requests in a consistent and structured manner.

RICH SELEZNOV: And that everybody understands that it might mean a delayed go-live. It might mean incremental costs. That structured approach gives everyone an opportunity to weigh in on: Are they prepared to accept those things?

ALYSSA AWE: Right. And you would want everyone to agree in advance about what that structuring process is going to be.

OK, communication plan?

RICH SELEZNOV: Is a communication plan important?

ALYSSA AWE: Yes, it is.

RICH SELEZNOV: Tell us.

ALYSSA AWE: Actually, we have a great example of a communication plan—a template—on this next slide here. I'm just going to move to that for a minute. As you can see, if you look through this template, there are a variety of different communications that you can have, to a variety of user groups, with different key messages and going at different times, different methods of delivery. So it's really important to lay this out in advance, because as you get closer to go-live, you're going to have a lot of things competing for your attention. Sometimes communications can go down to the bottom of the priority list, and they really shouldn't. It's very important in terms of user adoption and even just for people—helping them manage their business process in the face of change—to be able to communicate with them.

Number one, it's important to have a communication plan. Two, you want to draft this in advance—all of the communications in advance—as much as possible. You're certainly going to have changes, but you might have communications that will have to go to several stakeholders for review and comments before you can actually send it to your target audience, so anything you can do in advance is going to be helpful to you. I would say, if you do this plan right, you're going to have quite a few communications, and I think that you would want to create a calendar of events, really—pre-go-live, at go live, and post-go-live—where you can really mark down when these things are going to be sent. You also include in there your training plan—when different groups will be trained and where—and share that with your stakeholders, so that everybody understands when these things are going to happen. They'll be able to even help evangelize as they discuss the system with their different groups, and they'll have the knowledge to share with them.

RICH SELEZNOV: An important point that I'd highlight on this. Notice that in your communication plan, you're trying to characterize some of the aspects of that population. I've seen communication plans that were quite elaborate that actually broke it down to individuals to identify, really, who are the proponents of the project as opposed to the opponents of the project, and have different communications geared towards the skeptical versus the ones that are really enthused. So, we've even tried to put them on a scale.

It's like back in the days when I used to do government relations, and you'd have the people that were always with you and they'll be with you, and then you'd have the people that will always be opposed to you, and then you'd have the people in the middle that you really have to spend time with. And that's what you are trying to do. You may never win the skeptics over, but you can take the people in the middle and make them part of a successful project.

There was a question. Someone asked a question about: Did you have, Alyssa, on your project, did you have many changes? When you were talking about change management; did you have to deal with many requests for changes or attempts at scope creep?

ALYSSA AWE: Yes. Yes, we did. It's always going to happen in any technical implementation, but we did, and for a variety of reasons and from a variety of sources. But it's surprising actually regardless of the number of conversations that you'll have, even on the IT side or your workgroup thing, [where you say,] "We're really hoping to not change scope." You'll even have people from your own team, in the spirit of "Let's do this right and let's build it in the best way we can possibly build it," make suggestions for change. Again, it's great, and you want to capture everything that comes up during that period, because they are wonderful suggestions. And some of them are critical to go-live and you absolutely do need to make that change before you go live. And that could either be for technical reasons or for user adoption reasons. But [there are] other ones that you might decide as a group, when you through this change management or this scope management process, that you all agree that "This is a really great thing that came up, but it's not worth changing what we're doing right now. We don't want to slow things down or gum up the works. We will go ahead and put this on our list, and once we go live, when we do our first set of enhancements two weeks after we go live, then we will include this in that first batch of enhancements." So, you definitely always want to capture everything that comes up.

RICH SELEZNOV: Right and then you may just break it out of the future phases. Now, how much time did you spend in planning for the project? Was that a big effort?

ALYSSA AWE: It was. It was. I would say that we did some of the planning before the project began at all, before any technical—obviously you do your requirements gathering and all of that. Some things you could take care of while technical development was going on. For example, the training plan and the communications plan—those two things we focused on after the technical development started. But the more time you spend planning, the less time you're going to have spend trying to fix issues later on. It's really the most critical part.

RICH SELEZNOV: Right. Good, OK. On the communication plan, was there any sense of a level of frequency? Can you do too much communication?

ALYSSA AWE: Yes, there's definitely a balance. I think you can do too much communication. That's something, when you review this communication plan with your stakeholders, they'll have a great sense of what their people will need—what they will need and what they will bear, so those two things.

In terms of the general user population, we sent probably three or four e-mails before go-live. And then once we went—at go-live, the day after go-live, one per week was the target to try to just keep people posted in terms of "Here are some things that we've noticed that people have reported back to us. We wanted to just make you aware of them. If you have any questions, don't forget, here's the e-mail you should use. If you'd like to schedule some training, here's the link to do that." So, all of that information. The great thing about having a calendar is you can see where some of these things might overlap, so you can have the general user communication and then if someone is going to training, one week before the training you'd have an e-mail. One day before the training, you'd have the e-mail. You could see, gosh, on Tuesday, the 21st, this one particular individual might get 10 e-mails from us, based on their situation, so it's good to lay it all out visually.

RICH SELEZNOV: Great, OK. Next, then, let's talk about the secrets to early adoption. One secret—and it shouldn't really be a secret at all—is this notion about improving business processes being so important. A lot of times, I think a major pitfall is: People begin to think of the project as a technology installation: “We're going to install some software.” And they miss the opportunity to step back and not just automate all the inefficiencies that have gone on for years, but really to think about: “How can this tool help us change the way we do our work, improve our processes, automate things that are done manually, and really take advantage of all of the investment we are making in doing this project in the first place?”

ALYSSA AWE: Like a business process management project that uses technology.

RICH SELEZNOV: Exactly. Most law departments may have projects like this, or maybe they'll do a project every several years, every five years, sometimes every 10 years, and to not use that as an opportunity to rethink your processes is just a missed chance of really making the practice of law much better than it is. So, that's clearly a secret to early adoption, because if you could improve those processes, people might be much more interested in using that system because their lives are made easier.

ALYSSA AWE: To your point, Rich, there is definitely, as you've said in the past, interacting with individual users, say, the recalcitrant users, who might—their thought is, “All I am doing is sitting here feeding the beast with all of this data, and what's in it for me?” As you go through with them their business process and how the system can align with that and improve upon that, you will see this “aha” moment where they understand, “Oh, I see the benefit now,” and “Oh gosh, look at these reports! I never had these before.” Then it becomes something of value to them. But if you're not improving the business process or improving their view into the data, then—

RICH SELEZNOV: They just think you're giving them one more thing to do before they go home at night, and that's not good for anybody. What about training?

ALYSSA AWE: Training, obviously, is critical. You don't want to have a system that nobody knows how to use. And while certainly the goal is always to build an intuitive system that doesn't require much training, you will always have, in addition to the how do you do something, the when and the why do you want to do something, so it's business process, as well as technology. But keep in mind, as you plan for your training, that people respond to a variety of different learning modalities. So you want to have your formal training. You could split that up. I know it's difficult for attorneys especially to carve out a large chunk of time in a day, so maybe you do some initial basic training and then you follow that up with advanced training sessions, and people can pick and choose. Like, “Oh I use this feature all the time; I want to go to that training,” or “I never use that; I don't need to worry about that particular session.”

You can also have a CBT, which is great; so online, on-demand training, which is wonderful, especially if you have certain users that are constantly traveling and they are just unable to make a session. That's a great way to say, “Oh, well view the CBT and then call me with questions after that.” FAQs, comprehensive user guides and business process manuals, and then, I have to say, one of the most effective things that we've done here is during go-live and after go-live,

having the personal visits; going to visit as many users as possible. You can't always get to everyone, but when you can, visiting with someone personally and being able to understand how they use the system, what their business context is, making sure they're using the system appropriately, and that they are getting a benefit out of it.

RICH SELEZNOV: So, of all of that training, what do you think is the most effective?

ALYSSA AWE: I think the in-person visits. But you can't only do that—and frankly, I'm jumping ahead a little bit here, but right at go-live, that's when you're going to have the formal training. And the CBT will be available and all of these other things will be available. So the formal training, yes, I think is the most important thing to do right at the beginning. And then, over time, you're going to have these personal visits where you interact and you put a face on the project; let them know that they aren't alone. If they ever have a question, we are here, and let me show you, based on what you're doing, the best way to use the system.

RICH SELEZNOV: Another point here is around continuous support from business administrators. Most law departments have someone there that is in somewhat of an administrative role. When you put in some form of technology, like a matter management system or any kind of financial spend system, there really is the need for somebody to take ownership of that. We've seen situations where there is no one at the ready for that role, where it might be someone who is not up to this new type of role of that professional business manager, which has become quite the trend in most corporate law departments today. There's really now a professional there. It might be an individual who formerly practiced law or it might be a finance type of guy or somebody with some other discipline. It might be somebody with a technology discipline, but somebody who has the role there to be the business manager. And that person needs to be there to provide support to the system and also to be an owner of the system, because once IT is finished and they hand it over, they're not going to be there to run the system for you. They're not there to run your reports. They're not there to tell you what the data means.

ALYSSA AWE: Yes, that's such a critical role, and I feel like at Viacom we're very fortunate in that we have two extremely capable people on the business side, for both matter management and e-billing, who are there to do the function. What I would say in terms of an implementation team is that you should be ready to help these people however you can, because if you're implementing a system for 10 or 20 users, it may be that one individual is enough. But if it's for hundreds of users, this person is just going to be overwhelmed. So find the things that you can do to help this person—the questions that you will be able to answer, any way that they can sort of write up, "Here's our business process for this and this, and these are the questions I'm getting," and make sure that you can do everything that you can to help them, because they will be very busy.

RICH SELEZNOV: OK. Lastly, we have executive support just because it's there. You can't have too much executive support.

ALYSSA AWE: It must be there. Certainly if we're ever doing a project just from the IT side, you're not going to have such successful user adoption. It's all about the executive support.

RICH SELEZNOV: Now let's talk about post-implementation support. Here's your opportunity now to step back and do a little postmortem and analyze the project, the implementation, and what still needs to be done for improvement. The first thing there is to identify the opportunities for cost savings. Are you going to be able to achieve all of the benefits that you claimed when you were doing the business case in the first place? So, in the beginning you said, "We need to do this project and spend this money because we're going to do one, two, and three." The question is: Do you have the data to analyze, to say, "Yes, we are achieving those benefits and we're doing what we planned to do" in terms of whether it's cost management or whatever that is.

ALYSSA AWE: That's very critical, because you want to make sure that you can actually provide your sponsors with the data. If you're saying, "We'll save a million dollars this year," you want to make sure that you're able to measure that data and come back to them and report right after go-live, a month after go-live, two months after go-live, you want to, as often as possible, be able to provide your sponsors with this data. They've been your evangelists for this project and it's important that they're able to tell the good story, assuming that you have one.

RICH SELEZNOV: And if you don't, make one up.

ALYSSA AWE: Yes, to say that it was a good idea that we did this project and here's why. But just make sure that you empower them with the data.

RICH SELEZNOV: Exactly. So, sometimes different ways that can be done, to monitor that data, is: You might have—it's important to establish—maybe it's a baseline—on the costs that you're incurring with outside counsel. You have certain measures or metrics that you're using, whether it be rates or whether they're not complying with outside counsel guidelines. Or there may be some things that you'll be able to measure, have a baseline before the project, and then six months down the road, you try to do a comparison and see, "Now we have compliance with our agreed-upon rates; we have compliance with our outside counsel guidelines." So there are things that have happened that allow you to actually measure that you've achieved your goals.

ALYSSA AWE: I would just say, in terms of continuous process improvement and analyzing the data and trends, it's important, first of all, just for resources, that you make sure that your team is dedicated to the project for at least three to six months post go-live, because you can't declare a victory the day after go live. You will have opportunities to continue to make enhancements to the system based on the feedback you're getting about the business process and how the system is aligning with that.

You might find that you had very clear requirements going into the implementation, but once you deliver the system to the users, they come back and say, "Oh, actually, everything's great, but this one thing is very confusing for us because we're using it in this one particular way." Somehow there was a misunderstanding about how something needed to be built, and maybe you have to change that to make sure it aligns with their business process. So, I would make sure your staff is available. Continue to capture your feedback; all of the feedback you get you want to keep in a list. After about six months, people are going to start adapting, even if it's a flawed

business process or a flawed system, and you'll lose that opportunity to capture their feedback, so make sure you capture it all.

My other suggestion would be: Provide enhancements to the system on a regular basis. If you can do monthly sprints where you have 10 or 12 or 20 enhancements and deliver them periodically, but you're not saying, "OK we'll have that next year when we do our next version of the system." But if you can do it closer to go-live in regular periods, I think that's helpful.

RICH SELEZNOV: A couple of questions, Alyssa. One is addressing ROI maybe when outside counsel is not part of the project, and I do have an example of that. There was a recent project related to intellectual property and we were able to show a return on investment because the technology that we were introducing was providing an improved way of understanding the portfolio of IP and was allowing the company to do a couple of things. One was: It created a lot of operational efficiencies, where paralegals that were doing a lot of duplicate and triplicate docketing were going to be able to step back and not do that anymore in favor of doing higher valued work—coordinating with IT organization, working with the inventors. As well as there was an opportunity there to possibly drop some patents that were being maintained that were not really contributing to the future revenue streams for the company. I think whether it's a matter of management project or e-billing or intellectual property or document management, if you really begin to look into it deeply, you will find the case for return on investment and getting the benefits out of those projects.

ALYSSA AWE: We have another question actually that came in, if that's all right to do now.

RICH SELEZNOV: Yes, OK.

ALYSSA AWE: So, this question is: The discussion is focused on internally managed projects. How do things change when there is a vendor intimately involved in the project? In fact, actually, [for] the project that I'm speaking of, we had Huron as our implementation partner, so I would say that they were deeply embedded with our team. It's interesting, actually, that you thought that it was just an in-house-managed project.

In terms of how it would change, I feel like—certainly a lot of benefits. One is that you're getting their expertise in terms of the market and the industry and what other people are doing. You might say, "Obviously, we've never implemented this system before. How are other people doing this particular thing? If we want to accomplish this business objective, what is the best way to do it?" They might say, "Here's the way you do it in this particular system, but also have you thought about this other business objective? There are other things you can accomplish here." I think that's really a bit of difference. You have that breadth of experience that you might not have internally.

RICH SELEZNOV: I think what's interesting is the way you're talking about the project is: I think that if you're using a consulting organization or someone to help do the implementation, I think what worked here is that we were part of one team. We, as outside consultants, weren't out there doing something to them or doing something in a vacuum. We were actually working

shoulder to shoulder, side by side, to the extent that some people didn't even necessarily know that we weren't Viacom. We were just working together to make the project happen.

OK, and then maybe [we'll] shift gears a little bit and maybe try to sum up in terms of: A lot of what we're been talking about is really change management. What that means is kind of setting the stage, so the pre-project stuff of establishing a sense of urgency, forming a powerful coalition of stakeholders, getting your business case defined, building a willingness to spend the money to do something—all very, very important in those early stages.

Secondly, deciding what to do. So, setting the stage, getting people interested; we're going to do something. That's really kind of a tipping point there, right? You've got to do something. And then, deciding what to do. So, now you know that you've got to do something. The question is: What are the business drivers? What are we going to do? How are we going to do this consistently for success in terms of structure that fits our culture? Do we get a consultant? Do we do this ourselves? Do we use the vendor? There are a lot of questions deciding what to do.

And then, Alyssa, how about making it happen?

ALYSSA AWE: OK, a lot of the plans we've already talked about. To sum it up, make sure you have your communication plan, your scope management plan, and your training plan, so that you think of these things well in advance and you're able to communicate out to your stakeholders how these things are going to happen when you go live. Communicating, training, let's see—and then once you go live, certainly making sure that you're capturing all of the feedback, having a process to turn around and come back on a regular period, whether it's month or bimonthly, to release new enhancements into the system and make sure that they understand that you are—

RICH SELEZNOV: And doing that in a structured way. So, sometimes what you find is a little bit of change overload, if you're making too much change too quickly, and you need to space those improvements out sometimes and give people a chance to assimilate what you have given them. And just making it stick, just making sure that you've got a process in place, you've got people to manage the system, you've got people to institutionalize the processes, you've got reports that are being generated on a regular basis, you've got people beginning to get into the system. One of the criteria for success here is: Does your attorney community actually sit down and maybe it's not the first thing they open, but they get into whatever that application is that you just delivered to them; that they're using it.

ALYSSA AWE: Right, and don't declare a victory the day after go-live. Make sure that you're still focused on the project for several months after go-live.

RICH SELEZNOV: So, Alyssa, two questions. One is: Any suggestions on dealing with conflicts between objectives? So, for example, you have people that want to expand the project to take in maybe unique needs or their particular needs, but it's not in sync with the overall project objectives. How do you reconcile that? You might have some very vocal people that want something that's not generally useful.

ALYSSA AWE: Right. Well, when in doubt, follow the process. Again, that would just be your change management, your scope management plan. So if you say, “When changes come in, we’re going to document them and we’re going to bring them to the sponsor committee and that’s how we’ll deal with them,” then you don’t need to worry about what it is that comes in. It could very well be a very valid competing business objective and you should bring that to the sponsor committee. It’s not something that the project team should be making a decision on and then saying, “We’re going to completely change course and go in another direction.” It’s definitely something for your sponsors.

RICH SELEZNOV: Sometimes somebody’s got to make the hard decision and deliver the tough news, right, if they’re not going to get what they want?

ALYSSA AWE: Yes, that is true.

RICH SELEZNOV: Another question is: How do you deal with the workarounds? How do you detect it? How do you deal with it? I know that was something we were thinking about, like around the document management side. How do you keep your users? An example is: We’re delivering a document management system along with this matter management, with the objective that we wanted all content to be in the system and associated with matters. We just didn’t want loose documents.

ALYSSA AWE: I would say that that is really where your planning comes in. If in advance you had already planned, and you’ve discussed what the value is of doing this particular thing, then you’ll be fine. Then you’ll be able to have the conversation with your users and say, “I know you want to do it this way because that’s the way you’ve been doing it or it seems like this is the quicker way to do it right now, but let me explain to you why we’ve decided to do it this other way and then you can see the value in it.” If you haven’t already determined that and figured out what the value is, then you might have a pretty tough conversation and a difficult time convincing someone to do it the way that you’ve asked them to do it, so be sure that you have that value.

RICH SELEZNOV: Did you have to make decisions as to whether you were going to force compliance or force use of the system or a certain feature of the system?

ALYSSA AWE: Yes, we did, and there again you have competing interests. One, as you said, document management, and we wanted everyone to manage, as much as possible, their documents via our matter management system, for a variety of reasons. There are real benefits in doing it that way and real value. It was a different process for the user and it was—I don’t want to say it was a little bit more difficult. It was different and it took some getting used to. So that was just many, many conversations explaining what the benefit was in doing it this other way. And that was a top-down, as well, from legal management saying, “This is the way we’re doing it.”

RICH SELEZNOV: So you used the carrot instead of the stick?

ALYSSA AWE: A little bit of both, I think.

RICH SELEZNOV: A little bit of both, OK.

ALYSSA AWE: Again, you really want to make sure that you've done that analysis and you understand what the benefit is, so you can clearly articulate it.

RICH SELEZNOV: OK. We have a couple of questions, and I also want to invite the audience to submit any questions through the chat window. We do have a couple more minutes. While we're waiting for some more questions, I see that one of the questions was about requirements gathering. How much time does that take? It sounds like a very critical part of the project. I think it is. Is that something you spent enough time on, or any suggestions about that?

ALYSSA AWE: I have many thoughts about requirements gathering. One thing I would say is: Make sure that your requirements gathering period occurs as close to the beginning of your implementation period as possible, meaning don't have your requirements-gathering session from three years ago—a huge document. They're like, "Well, we did this the last decade and we're ready to implement it now," because your business practice will have likely changed, so you don't want to have a big time gap there.

The other thing I would say, and I'm sure people are very familiar with this, but obviously you want your requirements to be as comprehensive as possible, like almost to the point where it's exhaustive. Because if they're not, these questions will have to be answered at one point or another. They're either answered in advance when you do your requirements gathering, and then you're able to plan for everything appropriately in terms of resources and your schedule and all of that. If you don't have those questions in advance and you get them during the implementation period because you had poor or incomplete requirements, then you're really going to have to make a lot of changes to your plan in the middle of the implementation period. That's what you don't want to do.

RICH SELEZNOV: Throughout the presentation, we kept on mentioning executive support, senior level support. Where did senior level support come for you in your project?

ALYSSA AWE: As I said early on, at Viacom it's not an IT project that occurred. This was a legal project and our business sponsor was legal management—the GC and the DGC. It was their vision, so this was something that was critical to accomplishing their strategicals and their business objectives, and we implemented it for them. So, we didn't have to go through a period of time to get executive buy-in or business buy-in. It was their vision from the beginning that we were implementing.

RICH SELEZNOV: So, it's not typical for a general counsel to have a vision about technology. Where did that vision come from? Is it from networking with other companies? Is it seeing what is going on, or is it realizing that there's just a big need for improvement?

ALYSSA AWE: That's certainly a better question for our legal management, but I'll try to answer it as best I can. I think part of it, I'm sure, is keeping an eye on industry best practices. But potentially, part of it came from pain points in existing business process and issues with data transparency. Maybe too many phone calls on the weekends to various attorneys saying, "Where

are you, and what's the budget for this, and where are we with the spend, or what's the update?" If you understand that a matter management system or an e-billing system will give you this sort of transparency and help you track and manage things in a much richer way, then maybe it becomes part of your vision.

RICH SELEZNOV: We have some more questions.

ALYSSA AWE: We have two audience questions waiting.

RICH SELEZNOV: David, I'm just checking to see. Do you see any other questions?

DAVID MUNN: No, I don't see any others. I think we can wrap it up. Alyssa should have them.

ALYSSA AWE: OK, here we go. The question is: Looking back on the project you just completed, what would you have done differently to make it even more successful?

RICH SELEZNOV: Good question.

ALYSSA AWE: That's a great question. It's always important at the end of a project to sit down, and there are always many opportunities for improvement. I would say that I would have—what I was telling you about the scope management and change management—I would have been more rigorous and consistent in that from the very beginning.

My other suggestion to you, which was: Make sure you don't have that gap between requirements gathering and implementation. Maybe you all guessed that I had that gap. Not a huge one, but enough that really looking back, I wish I had just taken an extra month or two to sit down with those requirements and review them thoroughly with the business again because of that gap.

RICH SELEZNOV: In all honesty, maybe you had a little false start, or it was just a long gap?

ALYSSA AWE: It was just a long gap. Not super long, but it was enough that they should have been probably revisited.

RICH SELEZNOV: Refreshed?

ALYSSA AWE: Yes, so that's my biggest lesson learned.

RICH SELEZNOV: OK. Well, I think we're reaching the end of our time, David.

ALYSSA AWE: Oh, sorry, one last question that has a very quick answer: What do you use as your matter management system? We're using Team Connect.

RICH SELEZNOV: Mitratech is the company name. Team Connect is the product, and it's a robust kind of system which really gives you a lot of flexibility to do a lot of things, which is good if you have good project management, so you don't get out of control.

ALYSSA AWE: Yes, we're very pleased with it.

RICH SELEZNOV: OK, David, we'll turn it back over to you.

DAVID MUNN: OK, great. Thank you very much. That was a great program. This concludes today's webcast. I'd like to thank Rich and Alyssa for their time and the excellent presentation. It's hard to believe they packed that much information into an hour.

I also want to thank Huron Consulting Group for sponsoring our webcast and also our committee. They're a great sponsor. Thanks also to the audience for attending our webcast. If you have any questions relating to today's topic, you can feel free to send an e-mail to Mr. Seleznov. The e-mail is rseleznov@huronconsultinggroup.com. Please don't forget to complete the evaluation at the end of the webcast.

Finally, if you're not a member of the Law Department Managing Committee, I invite you to join our committee. In the current economic environment, this committee's work is especially relevant. We have our committee conference call the second Wednesday of every month at 1 p.m. Eastern. You can check the committee home page on the ACC site for additional upcoming meetings and webcasts.

Thanks everyone for joining us today. You may now log off.

MARNI CENTOR: On behalf of the Association of Corporate Counsel and SmartPros Legal & Ethics, thank you everyone again for listening to today's program and have a good day.