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# Peer to Peer: Global Practices/Local Support

**MARCH 2012**

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Don’t be fooled by the theme of this issue of the magazine — the content we’re providing is valuable to any professional whose eyes gaze upon it, not just those who work among international offices. You’ll need to understand and appreciate cultural differences when ascending the staircase in the lobby or when boarding the transcontinental flight. Without question, our world gets smaller each day. And for those who work in organizations that provide training and support for offices that span our shrinking globe, you’ll find your peers offering very sage advice inside.

As we launch our 2012 publication calendar, I’m delighted that we could marry the concepts of global expansion and local support. It rather sounds like a description of ILTA: We’ve got a growing international membership, and our strength derives from peer connections and peer support (that “local” touch).

As you start your journey through these pages, please note our new graphical look! It’s been three years since we undertook a complete redesign of the magazine, and we’re simply giving the same great content a little makeover. We have moved the very popular “Ask the Expert” column to sit between our “Member Resources” and “Inside ILTA” sections. We hope you enjoy the fresh look to our always-fresh content.

I look forward to seeing you just around the corner of our little world very soon!

Randi Mayes
Executive Director
Until recently, globalization was a trend largely confined to big companies. Today, however, we’ve entered a new era where even small firms, recognizing the growth opportunities, are proactively broadening their global reach. My own company, which is less than two years old, operates in three countries — albeit with a shoestring staff.

Globalization takes a number of forms, some of them very complex. But in the legal industry, the model is fairly simple: establish networks of offices in numerous cities and unite the global and local within the services you offer your clients. Not surprisingly, setting up offices as far apart as New York and Tokyo and London and Hong Kong has both strategic advantages and tactical challenges.

Among the very real strategic advantages is the ability to work on a matter around the clock. To effectively collaborate on a global level, however, requires an environment that is both standards-based and flexible. This is a tricky balance to maintain, but advances in IT, coupled with Web technologies, make it possible.

An effective mechanism for global collaboration will include two elements at a minimum:

- A set of standards flexible enough to accommodate a wide variety of matters, yet sufficiently formalized to enable lawyers to look at a matter, understand its structure, locate data, and hand it off to another lawyer (without calling anyone).

- An adequate degree of data centralization that provides global access without sacrificing the firm’s standards for confidentiality and data privacy.

Flexible Yet Formal Standards

For most lawyers, their desktop is their office, and a significant amount of information — including documents, spreadsheets, presentations and email messages — clutters their systems. Most law firms organize this information in a workspace to make it more broadly available as electronic files. This is an important first step for both managing risk and facilitating collaboration.

For each matter, firms typically have at least one and possibly several workspaces. These workspaces house “virtual” case files that can contain tabs, document folders and search folders. Where the system breaks down, in a way that is especially detrimental to global collaboration, is in the traditional approach to workspace design.

Traditional workspace design is front-loaded, which requires the practice group to decide on the “perfect” structure. This process takes too long, requires multiple meetings and produces suboptimal results. The fundamental reason this approach doesn’t work is that users often do not understand what they need until they begin managing an electronic file.
Let’s look at the three common models for workspace design. All three approaches are characterized by many empty folders and/or general chaos.

- A minimalist approach, which creates one folder for documents and one for email messages, and lets users create subfolders

- The generic practice-area approach, which creates lots of folders to cover different circumstances using fixed structures

- Crafting folders according to the type of matter, which — while more precise than the practice-area approach — also requires the creation of lots of folders using fixed structures

None of these models works well in a collaborative environment. A labor and employment practice, for example, typically provides a variety of services, ranging from discrimination litigation, union negotiations, employment contracts and employee handbooks. A minimalist approach (one folder for email messages, one for documents) means that no matter is organized in the same way. Typically, each user builds his own folder structures under each root folder, such as Sally’s documents and Joe’s documents, for example. This might serve some goals of risk management, but it is a useless model for collaboration.

The generic practice-area approach produces whole sets of folders that are unnecessary to the matter, forcing users to navigate through many empty folders, which creates confusion in a collaborative environment. In addition, if end users are allowed to create subfolders, the tendency is for people to create their own world that no one else understands.

Crafting folders according to the type of matter requires too many different workspace templates and also creates confusion, the death knell for collaboration. In this scenario, the determination of the workspace design is made at matter opening. However, because lawyers often do not have a good understanding of all the work the matter encompasses, they are forced to guess the matter type. If they are wrong, the whole structure will need to be reworked, which creates a burden for both IT and the user population.

The other challenge with traditional models for workspace design is that none of them deal with cross-practice matters. For example, any matter involving a merger or acquisition will not only involve the corporate group but, depending on its complexity, could also involve many other practice areas, including tax, labor and employment, real estate, finance, intellectual property and even litigation. The ability to allow each group to have their own folder structure for their part of the process is essential for collaboration.

**Put the Responsible Lawyer in Charge**

A concept I like to call “on-demand foldering” allows law firms to minimize the upfront business process and rapidly make adjustments as lawyers begin to map out their structures. This approach starts at matter opening with a simple, common core — working drafts, correspondence and matter administration — that can be added onto as standards, practices and adoption evolve. This approach is ideal for global collaboration for several reasons:

- It puts the responsible lawyer in charge of the matter.
- It ensures that group standards of the practice are observed.
- It improves adoption of the electronic file with an easily understood structure that can be quickly rolled out.

**Control Who and What**

On-demand foldering also provides two dimensions of control:

- The ability to control the “who” (i.e., who can add/delete/edit folders)
- The ability to control the “what” (i.e., flexible naming standards by practice area)

The first dimension of control, the “who,” gives specific people control over folder operations — typically the responsible lawyer, the lawyer’s assistant or a designee. This approach has a number of advantages, not the least of which is making the responsible lawyer actually responsible. In other words, on-demand foldering gives the matter a file steward who knows the matter well — and knows how it should be organized against practice-group standards — better than anyone else. Preventing other users from creating folders stems the chaos that foldering typically creates.
The second dimension of control, the “what,” gives firms the flexibility to create fixed naming conventions with tags, such as “witness” with prefixes (John Smith Witness) or suffixes (Witness John Smith). Fixed naming conventions with tags allow firms to standardize naming conventions, while giving lawyers the flexibility to structure the foldering in a way that can be easily understood across offices. A single witness folder, for example, will suffice when a matter has only two witnesses. However, in large, complex matters, most lawyers would like the ability to create a separate folder for each witness. Fixed naming conventions with tags provide the consistency required for collaboration and the flexibility to provide additional levels of categorization.

This approach has been put to the test, and it works. I’m familiar with a large global firm that uses this approach very successfully to facilitate collaboration across their offices in the Americas, Europe and Asia.

Centralize the Data
With the exception of “supermatters” like giant mergers and acquisitions (such as Kraft’s acquisition of Cadbury), I also suggest that law firms create one centralized workspace for each matter to eliminate confusion about where all the matter information lives. WAN technology supports this concept, and it is crucial for global collaboration.

Make Data Secure, Easily
Our license to practice law requires us to maintain and protect our clients’ files. As an increasing number of data breaches surface, we’ve seen a renewed focus on security. However, working around the clock, globally and collaboratively, requires a deviation from the traditional centralized security model. For example, a lawyer in New York who wants to hand off portions of a matter to the Hong Kong office at 8:00 p.m. isn’t served well if he has to track down who can give the Hong Kong lawyers access to the secure folders in the matter.

A new approach to security uses a model I call “matter team management,” and it makes security both easy and friendly without sacrificing the firm’s standards. Matter team management puts the responsible lawyer, or designee, in charge of who has access to the matter. In this model, the responsible lawyer — without IT support — can add and delete members to the matter team and limit access to specific folders or provide full access to the entire matter. The document management system grants or denies access to documents and folders according to their actions.

Better Collaboration, More Sleep
Effective global collaboration strategies will require us to rethink how we work together and how we use the technology that supports that work. It will also require some very specific changes in how we manage our legal processes. Concepts like on-demand foldering, data centralization and matter team management are first steps in the right direction — steps that are sure to get everyone on board. And, just think, no more calls at midnight.

Keith Lipman, Esq., President of Prosperoware LLC, is a well-regarded expert in the areas of information management and e-discovery, and he has been involved in information management for over 19 years. Prior to his work with Prosperoware, Keith served in numerous capacities, including paralegal, lawyer, IT director in a law firm and technology consultant to law firms. He is a frequent speaker and author on the topics of e-discovery and the management of email, documents and records. Keith can be reached at keith@prosperoware.com.
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*We think out of the bowl.*
If you research global e-discovery, you’ll find volumes of useful articles explaining privacy laws, safe harbor, and language identification and translation strategies. These are all important issues to factor in when planning for a global-scale e-discovery project. But how do you build and maintain a practice group within your firm that can support global e-discovery projects as well as local e-discovery projects?

First there is the challenge of managing a multitude of complex projects, each of which requires a herculean effort to keep on track, on budget and on time, while also ensuring you are adhering to “repeatable and defensible processes.” In order to support the practice on a global scale you’ll also need to consider local privacy laws, cultural differences and jurisdictional requirements. Additionally you’ll need to factor in and support the unique needs of each local office, while maintaining a global outlook.

Given all of these challenges, it’s easy for a global e-discovery practice to spiral out of control as cases and projects are dealt with on an ad hoc basis, where each individual is more concerned with getting the job at hand done than in creating a global practice management group that communicates and works together as one unit. While that may work for a firm in the short term, any organization that wants to compete on an international playing field also needs to be able to perform and think as a global unit.

Build Your Base
In order to successfully manage e-discovery, you must build a solid foundation — an internal system of best practices and processes that:

- Are repeatable
- Can be adhered to in every case
- Apply to all offices, matters and jurisdictions

The only way to keep the thousands of moving parts running smoothly is to build a strong process management system. On top of that, you must use solid project management techniques to routinely evaluate whether you are hitting your targets — tracking and logging every process along the way.
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If you do not have any processes in place, it might seem overwhelming, but just start somewhere and refine, refine, refine. A good tool to utilize is the Electronic Discovery Reference Model (EDRM). For each of the steps in the e-discovery process, draft procedures that detail the best practices to be followed. For example, in processing:

- What software will you use for which data types?
- What data sizes should be processed in-house versus outsourced?
- Can you standardize deduplication and processing settings so that data are processed uniformly across all cases?

Think big — these process management steps should be clearly defined to direct people down the right path and broad enough to apply to a wide variety of cases and offices.

Forget About “Normal”

The second step is to maintain flexibility. Although keeping one foot strongly in process management means you should always be looking for ways to automate and regulate practices, you must also look for exceptions to the rule. Your process management system will always be in flux as you come across a different type of data or a new language, or you find that what works in one office doesn’t work in another.

In supporting each local office, you must be sensitive and responsive to their unique requirements and workflow while keeping your eye on the ball (i.e., your overarching global strategy). It’s a tough balancing act that requires a strong working relationship and compromise from all involved. But that is the beauty of the model; the processes should always be improving and changing in order to meet the different demands and requirements of your practice group. There will never be a day when you have completely finalized your processes, no moment when you can safely declare that you’ve covered every possibility.

Share the Wealth

The final step is to harness the power that comes from handling a multitude of different cases and operating in a variety of jurisdictions — this is one of a law firm’s greatest assets. But organizational intelligence, the collection of knowledge within a firm, can only be harnessed if a knowledge network is established. As a practice group, you can operate as one piece of the knowledge puzzle by capturing and sharing the knowledge gained in each case across all jurisdictions. In order to share knowledge, first you must capture it. But what does “capture” mean?

Knowledge is amorphous, and e-discovery is built upon such a wide variety of cases that there would be no way to codify each piece of useful information from every matter your practice group manages. Depending upon the culture and structure of your law firm, there are many different ways to capture and share knowledge. Knowledge management might have many connotations, but it comes down to sharing what you know. Departmental meetings, case folders, project logs, wikis and blogs are all useful conduits for sharing the knowledge your practice group holds. But these conduits are only as useful as what you put into them.

Decide upon a knowledge management plan for your e-discovery practice group and actively encourage all members to contribute and utilize the network. You’ll find it not only benefits the groups as a whole, but individual team members will find their jobs easier having access to what they know AND what their team members have learned.

The Reward of a Valuable Practice Group

It can be tough to find the right balance between creating e-discovery processes so rigid that they won’t be useful or applicable to all offices and having a system so elastic that there is no continuity. Once you’ve created a solid foundation, maintain your flexibility to make sure you’re supporting the many personalities, cultures and workflows of your firm’s local offices, and the varying circumstances you’ll encounter. As your practice accumulates knowledge, encourage everyone to actively participate in sharing what they’ve learned. If you can put these practices into play in your everyday management of a global e-discovery group, you’ll be rewarded with a valuable practice group that is an asset to the firm locally and globally.

Natalie Spano is the Manager of E-Discovery & Practice Technology at Fried Frank LLP. With close to 10 years of experience in litigation and e-discovery, Natalie manages e-discovery projects across the firm’s global offices. She can be reached at natalie.spano@friedfrank.com.
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In today’s global and Internet-driven market, the “think globally, act locally” mantra becomes even more relevant as people across the globe expect the same level of service, support and cultural respect, regardless of whether they reside in Phoenix, Singapore, Brussels or São Paulo.

As many U.S. firms open global offices or merge with firms operating internationally, there are ways in which you can meet and exceed expectations with a “glocal” approach (i.e., combining the idea of globalization with that of local considerations).

Develop Cultural Knowledge
Being sensitive to the needs of international offices, their respective cultures and ways of doing business helps create an environment that:

- Unifies people across offices and continents
- Increases efficiency and productivity
- Enhances the relationship among an organization’s people

This healthy environment intrinsically advances enhanced service to clients and customers. The more staff members are “local,” both physically and culturally, the more unified the organization becomes. Any attorney or staff member who has actually lived overseas for a period of time will have more empathy and appreciate what it means to work in a remote office. Some training and cultural exposure to your firm’s different locations will go a long way in increasing the level of service provided to those offices.

Cater Helpdesk Support
The level of helpdesk support required for a remote office can depend on expectations, the size of the office and the office’s history, such as whether the office was created from within or as the result of a merger.

As Lance Waagner, President and CEO of the international technology support company Intelliteach, points out, “There is nothing technically preventing a firm from providing support from the headquarters, but support from a local person who ‘understands them’ increases the confidence levels of remote office staff.”

Utilize Technology That Fits
The same reasoning applies to the various types of technology used. Some cultures are used to communicating through email messages to resolve a problem, but this approach is not as interactive as
phone or chat. Chat is timelier than an email exchange, yet it is not readily used in certain regions or in the legal market; however it’s highly used in corporate settings. A phone call is the best interactive medium, but — when their native language is different from those at headquarters — some prefer to communicate using a different method.

Another aspect of technology to consider when you have remote offices and are providing global support is the use of automated troubleshooting features and solutions. Software is getting better at facilitating self-help or self-healing, and many corporate environments have already begun utilizing automated solutions. Although many lawyers still rely on IT staff to support them, automated troubleshooting features and solutions might be the future of solving minor technology glitches. It all comes down to cultural preference and resources.

**Balance Self-Sufficiency and Control**

Over the past five to 10 years, the Internet has truly flattened the globe. People from India to Santiago can now download applications and immediately begin using the software in minutes. It’s hard to exercise control in this type of environment when employees can easily download apps without requiring any IT person at all. They can be anywhere in the world and still access and work on their documents. Finding the proper balance between local groups of self-sufficient users and global control of application distribution and management is a challenge for IT teams and vendors alike.

These considerations really come into play when innovation is stifled by global policies or local requirements. This can cause a reduction in the use of advanced technologies in remote offices.

**Wear Your “Glocal” Hat**

As you explore the ideas of global vs. local in supporting remote offices, remember that all users expect the same level of service, support and cultural respect. By wearing your glocal hat, you will exceed lawyer and staff expectations, and the rewards can be great for the firm as a global entity in extending the firm’s local expertise around the world. 😊

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**Survey Says...**

Below are a few responses taken from ILTA’s 2011 Technology Survey. The complete analysis and results can be found online at iltanet.org under the Publications tab | White Papers and Surveys.

**What remote access software do you use?**

(multiple responses allowed)

**Firms with 350-699 Attorneys:**

- 37% Microsoft Remote Desktop
- 31% VNC
- 24% Microsoft SCCM/SMS
- 14% GoToMyPC

**Firms with 700+ Attorneys:**

- 28% Microsoft Remote Desktop
- 28% Microsoft SCCM/SMS
- 25% Citrix
- 15% LogMeIn

**What software do you use for helpdesk trouble-ticket management?**

(multiple responses allowed)

**Firms with 350-699 Attorneys:**

- 16% Intelliteach IQTrack
- 14% Track-It
- 10% FrontRange HEAT

**Firms with 700+ Attorneys:**

- 15% FrontRange HEAT
- 13% Remedy
- 13% Service Desk

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Leonard Johnson is the Vice President of Marketing at NetDocuments. He has been in the technology field since 1982, including over 18 years in document management technology and 12 years in international business. Leonard can be reached at leonard@netdocuments.com.
What top three concerns do you point out to clients with international offices when they’re considering rollouts, user adoption, training and support?

End-User Adoption, Centralization and WANs, Continual Improvement

name..........................Erik Schmidt
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At OpenText, we pride ourselves on working closely with our clients as trusted advisors who help solve their key business process and content management needs. Having been in this business for 20 years, we have accumulated a lot of knowledge and experience. Thus, whenever we hear of a client who is planning an international expansion or rollout, there are three key areas on which we advise them to focus:

End-User Adoption: With international users, it becomes even more important than ever to create a meaningful, tailored content management experience for end users. People of different cultures and languages have different needs and expectations around collaboration and managing content. Taking a one-size-
A fits-all approach is not very effective across diverse business groups inside the United States, and in cross-cultural situations it can be a formula for a disaster! We encourage our clients to really do their business analysis and build out the right set of business-centric views for each region or international work group.

Centralization and WANs: With many of our large international law firm clients having in excess of 15 international offices, a lot of time and money goes into network infrastructure and system architecture. As such, this is one of the first areas that we recommend our clients look at for cost savings. Key to this process is understanding the roles that centralization, consolidation and system scalability play in realizing cost savings.

- Centralization helps reduce hardware and operational costs by pulling systems onto blade servers in regional data centers.
- Consolidation enables firms to save on license fees, administration efforts and gain increased user productivity.
- System scalability directly impacts how much financial benefit you will experience from both centralization and consolidation.

Thus, we strongly encourage our customers to coincide international rollouts, upgrades and deployments with centralization and consolidation projects. We also advise clients to pay close attention to network latency across the WAN, to take full advantage of modern IP acceleration technologies for speedier performance and to pre-position content-caching technologies where needed.

Continual Improvement: With all of the complexities and moving pieces, it is very tempting to declare a “mission accomplished” and move on to your next battle. However, our experience has been that it is critical to periodically revisit each deployment site to ensure that things have worked out as planned. Also, in today’s rapidly changing business environment, what made sense and worked six months or a year ago may now be out-of-date or — even worse — a business impediment. Putting in place a formal system to ensure you are continually revisiting and improving your international deployments and key business processes is vital for long-term sustainable success.

Expectations, Support, Disenfranchisement

Our shrinking globe is providing opportunities for many firms to explore inbound and outbound international practices as rich growth areas. Victims of their own success, lawyers demand the same level of technology and service whether in Kabul or Kuala Lumpur. However, these foreign offices present particular challenges for the firm’s IT staff, especially when it comes to rollouts and enhancements. While the technical issues are not insignificant, there are also management aspects to consider when supporting and upgrading technologies in far-flung locations.

Expectations: Lawyers and staff expect IT services in foreign offices to be nearly identical to what is available domestically. This is especially true of those who travel frequently. It may not be realistic to assume that things will be “the same as at the home office” unless the foreign office has a sufficiently large presence to warrant the necessary infrastructure (e.g., regional data center, onsite servers). Thin-client solutions can help, although laptop users, some of the most frequent travelers to these offices, may not find them to be very satisfactory.

Support: Smaller foreign offices might not warrant full- or even part-time IT support; however, it is time-consuming, costly and not always feasible for the home-based IT staff to travel to locations around the world, especially on short notice. Yet frequently the kinds of service providers that we have come to expect in even the smallest domestic locations are not available in certain countries (no Geek Squad!).

Disenfranchisement: Both domestic and foreign offices can suffer from “outpost” syndrome: We’re not the “mother ship,” and no one truly understands or cares about our needs. Complicate this with cultural differences — different workdays, holidays, schedules and customs — and, as hard as the staff in domestic offices try, it is very difficult to make those in “outposts” feel that their needs are being considered. Especially with rollouts; many of the tools, customizations and parameters will be designed for the bulk of the firm and may not adequately consider the needs of foreign offices. For a large firm, this makes economic sense but leads to an increased sense of “they just don’t get it.”
We’ve Got Connections!

ILTA’s Connected Community is the doorway to a wealth of information. In addition to our very popular e-groups (for ILTA members only), the forum provides snapshots of recent publications, events and job postings. You’ll see our bloggers active on the space, and you can utilize any number of social networking tools to get you connected to your ILTA peers! The Connected Communities are going mobile soon – watch for announcements!

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Language, Language, Language

name...................................................... Sue Pasfield
company .................................................. Capensys
website ................................................ www.capensys.com

We offer the following advice to firms with international support needs:

• Have Classroom Trainers Who Speak the Language: Delivering training in the local language encourages optimal user reaction to a new system. Ideally, the trainer would be a native speaker. If a trainer only has limited fluency in the target language, he/she can deliver the training in English and understand any questions when asked in the local language. This makes it easier for the trainees to ask questions and relaxes the class. If in doubt, arrange for an informal interview with key staff from the local office to see if the level of language skills provided by the trainer will be acceptable.

• Provide E-Learning and Quick References in the Target Language: Provide any e-learning and quick reference guides in the target language (at least for your main offices). The translation should be done by someone who is a native speaker. It should be someone who knows IT and has experience working with law firms. You may have an inhouse translation team that is great at translating points of law, but they might not have the right vocabulary for translating IT training.

  When choosing a voice to do audio recordings, check with the native speakers to ensure the accent is acceptable and that it is not irritating to the local ears. People can be sensitive about accents.

• Plan Your Design To Accommodate Language Translation Differences: When designing or purchasing an e-learning module, make sure that you have enough space to accommodate the material when translated. For example, German can run 25 percent longer than English. E-learning modules where the training instructions are presented in vertical panels works very well, as these allow for easy expansion of text.

So what is an IT department supposed to do? Visit. Listen. Don’t assume. And don’t take a cookie-cutter approach unless it is absolutely required and you know it will work. The rollout plans and desktop upgrades may be absolutely perfect for domestic offices but not for the foreign ones. All those forms and macros might not be needed in the foreign office, yet they require a level of support and customization that is not readily available. Think in terms of a pool of remote users who all happen to work in one place. Peel back everything that is unnecessary and provide what is needed in the simplest, most self-sufficient way possible.
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From Local to Global: Taking On a New Role

by Jon Castle of SNR Denton

In September 2010, Sonnenschein Nath & Rosenthal combined with Denton Wilde & Sapte to form SNR Denton. As part of the globalization of teams, I took on a new global role for the organization in July 2011. My title changed from Lead Infrastructure Engineer to Lead Architecture & Engineer, Global Networks. Adapting to this global role has required additional skills and understanding to be effective, and I have learned some key lessons along the way.

Communication Is Key
When the Information Services (IS) Department is spread over several continents, effective communication can be challenging. It is important that all team members feel they are an essential component to the success of the business — no matter the location.

Communication of day-to-day activities frequently occurs through unscheduled desk visits and hallway conversations, so it is important to have regularly scheduled meetings with team members located throughout all office locations. The meeting should have a tone of inclusion at all times; avoid using terms like “they” and “them,” and opt for terms like “us” and “our.”

Meetings conducted over the phone are okay, but videoconferencing your meeting is always better if the budget and technology are in place. Face-to-face meetings are ideal to make sure that messages don’t get lost or misinterpreted because of not being able to see facial expressions.

Understand the “Why”
Every information technology organization has followed an evolution in technology and processes to get where they are today. The end result of the technology designs and processes may seem strange from an outsider’s perspective given the context of one’s own experience. However, as you’re shifting the focus of your team from one that ran independently to one that will function under a global umbrella, you should take the time to learn “why” each team has reached their current state of how to do things.

Remember to keep an open mind, and don’t judge too quickly that which might seem broken. A quick conclusion that something is “bad” or a method “doesn’t make sense” might alienate peers. Often the strangeness of the design or process will be minimized when the path that was taken to get to the current result is understood.

When I evaluate a network, I often find myself puzzled about the design decisions that were made. It’s not until I start asking “why” that things make sense, and eventually the “aha” moment happens. By taking the time to listen and learn, you might find that another team’s methodology makes sense for the global standard, or the teams might create a new way of doing things together. No matter which way you move forward, you’ll be a stronger, more knowledgeable team.

There is a quote I like that states, “Networking philosophy opinions are like belly buttons; we all have them, we all like our own, but other people’s look funny.” (Author unknown)

Be Aware of Time
Working across multiple time zones has its challenges. I frequently use the website timeanddate.com to convert between different zones to make sure I’m aware of what time it is for the other members on my team.

The day can get stretched with early-morning meetings and late-afternoon appointments as staff in different areas of the world strive to collaborate. This is an unfortunate side effect of being global, but this also creates opportunities to provide improved support by having a representative available at any hour of the day.
I have also come to realize that not all countries work on the same days. For example, some countries in the Middle East have a Saturday-through-Thursday work week. Holidays and vacation times can be vastly different by country as well.

Dealing with the differences in times and days is a prime area in which communication is key for your team to retain its effectiveness.

**ISO Certification**

International Organization for Standardization (ISO) is a particular point of difference between U.S. and U.K. offices. Whereas ISO certification is available to law firms in the U.S., it doesn’t often drive new business intake. This is different in the U.K., as ISO certification is sometimes a requirement for a law firm to take on business there.

When you’re expanding your role from one that was U.S.-based to one that includes the U.K., make sure you get up-to-speed on the requirements of ISO certification. Certification is time-consuming and requires a lot of documentation. The key is to document the technology and processes you currently have; do not change the technology and processes to match the documentation. ISO certification is about actually doing what you claim to be doing. Annual audits are also a part of the ISO certification process.

**Shipping Overseas**

Something as simple as shipping equipment can be much tougher to get right when shipping internationally. Packages may get delayed in customs, or they might not be able to be shipped at all. There are some countries where devices with encryption cannot be imported, and network equipment often has encryption on it.

Another consideration is Value Added Tax (VAT), which is added to U.K. shipping costs based on the value of the equipment. Paperwork to support the equipment value must be provided for anything over $2,500. This VAT can be recovered by the recipient. There is paperwork that must filed prior to shipment in the U.K. to help ensure that the VAT is recovered.

Having a shipper that clearly understands various international rules can alleviate some headaches.

**With Change Comes Rewards**

As much as I’ve had to adapt to the new global role that I’ve taken on, it’s been an educational and fulfilling experience that has made me more aware of non-U.S. considerations. I’m enjoying the relationships I’ve built, and I feel better prepared for additional challenges that are bound to occur. I look forward to continued personal and professional growth alongside the growth of my firm.

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Jon Castle is the Lead Architecture & Engineer of Global Networks at SNR Denton, where he is responsible for the design and operation of the firm’s global network. Jon has 22 years of experience in computer networking in a wide variety of industries and is a Cisco Certified Internetwork Expert (CCIE #2562). Jon is a member of ITIAs Communications Technologies Peer Group Steering Committee. He can be reached at jon.castle@snrdenton.com.
A Global Approach Creates Consistent Results

by Lee Morrow of Skadden, Arps, Slate, Meagher & Flom, LLP

One of the biggest training challenges for larger firms is how to deliver training that is consistent across multiple offices. About five years ago, our firm came to the realization that while the trainers in each of our offices — domestic and international — were highly skilled, each one approached the training of desktop applications differently. Each trainer created his own syllabuses and handouts.

Normally this wouldn’t be an issue. After all, Word is Word, right? But, we’re a large firm with many offices. Our attorneys not only share documents within their primary office, they frequently travel to and work in other offices. It became obvious that word processors and secretaries in New York, for instance, had to be able to open a document originally created in London and pick up seamlessly with the next round of edits.

After too much back-and-forth — “I can’t believe they formatted it this way” and “Why did you strip and reformat the entire document?” — we decided it was time to launch the Global Training Initiative (GTI).

Preparing for Global Training

The goal of the GTI was to have agreed-upon best practices for the training and usage of all desktop applications. We wanted all trainers, regardless of office or location, to use the same syllabus, handouts, in-class demonstration documents, exercises and post-class quizzes.

We created a “trainers only” page on our firm’s intranet so that every trainer could easily download what they needed. This made it easy for us to update materials and to get those revised versions to our trainers within minutes.

We worked with in-house programmers to create a global training calendar that would allow attorneys, legal assistants and support staff to see the classes being offered in each office. They could enroll themselves or their direct supervisor could do so. Not only did this give us a daily snapshot of what each office was doing in terms of training, but it also ensured that the classes always had the same title, syllabus and handouts. There would be no more need for trainers to ask, “What do you teach in Excel 101?”

The Biggest Challenge

The biggest challenge in making such an initiative work was not in making sure staff mastered the applications. We had many word processors and secretaries who knew the Office applications inside and out. The challenge we faced was buy-in from our global staff of trainers. A trainer who says, “I’ve taught Word for 20 years” is going to need some persuasion to throw out an old syllabus covered in years of penciled-in notes and approach teaching Word in a different way.

The first thing we did was to make sure each application was approached from the point of view of the attorneys. We wanted training to change its focus from how attorneys use Word to what Word can do to meet the needs of attorneys.

If the structured finance practice area needed to have two tables of contents in their prospectuses, we needed to make sure our word processors and secretaries knew how to perform that function. We also needed to ensure that the tables of contents were inserted in the best way and always in the same way. Then anyone who subsequently worked in the document, regardless of office location, could simply make their edits without wasting time trying to figure out the best way to insert a TOC.

Even our most veteran trainers responded positively to this approach since trainers are often the first to be sent to an unhappy attorney to “figure out what’s going on” with a document.

Our trainers have come to value all the material being created for the GTI team; not having to create their own materials gives
them more time to actually train. The ability to visit the intranet, download a syllabus and handouts, and help someone within minutes is an invaluable benefit.

Expanding Our Offerings
Supporting the initiative has meant creating dozens of syllabuses and hundreds of handouts, and making sure that everything is continually updated and available on the intranet. Our approach to training is also informed by the idea that people learn differently, so our materials have been developed and shared in various ways.

Materials for New Hires: We created a single syllabus and manual for all new hires. “The Essentials: Technology Orientation,” what we call “TETO,” is now used for all new hires, ensuring they get the same training no matter what office they are joining. As the years pass and incoming hires get the same training as the group before, we are firmly cementing the best practices we want the entire firm to follow.

Videos and Webinars: We can now post in-house video and on-demand recorded webinar training modules to the intranet, and post video answers to all the application exercises. For example, a word processor can work on an exercise and then watch a trainer go through the same exercise showing the best approach to that challenge.

Covering New Technologies: We have expanded training programs to include Acrobat, ScanSoft, LexisNexis InterAction, the new telephones and voicemail systems, and new printers and copy machines. We have been able to produce new training materials as new technologies are introduced, and we want the training group to be included in everything that comes into the firm.

Sharing Information with Support Teams: We have also realized that our hard-earned expertise needs to get out of the classroom. We have worked with our colleagues at the call center to ensure that everyone answering a help-related call responds with the same best-practice instructions that we give in the classroom. We give local support on a global basis; all support is now “local” in the sense that the answer to a question is the same whether you’re talking with the call center, a trainer, a secretary or a word processor.

The Result Is Consistency
A major contribution to the “one firm” approach of our GTI is to have all documentation follow the same format. One of our trainers developed a two-column format, and our graphics group contributed a training logo so that we could “brand” all our materials. Our training coordinator developed a style sheet, so we all use the same terms for the same actions (e.g., Press, Click, Select and so forth).

We now have a strong foundation on which to build the training for any new software or hardware that is introduced. Our Global Training Initiative has become “the way it is.” No one looks back fondly on the days before GTI. Everyone relies on the GTI to be there when they need it, with the most current information and best practices.

Lee Morrow is the Manager of Global Training at Skadden, Arps, Slate, Meagher & Flom LLP. He can be reached at lee.morrow@skadden.com.
In any large organization, managing IT-related issues in local offices is a daunting challenge, especially when new technologies are introduced every day. When you are one of the 25 largest legal service providers in the world with more than 60 offices in 43 countries and over 2,500 end users, the challenge is even greater. So how does a sophisticated global IS team overcome this challenge? The answer for our firm has been to implement “PC (People Care) Squads” — a client service initiative designed to facilitate technology problem resolution and user feedback through floor walks by our local technical support specialists.

Answering the Call
It all started when we advised our local technical support specialist in the East Coast region to conduct floor walks to improve communication with end users — find out what they really thought about the firm’s technology and the IS department as a whole. The IS team did not have a clear understanding of perceptions and issues on the east coast because most team members were based in a different location.

It was because of this exercise that we were able to find out that end users were continually experiencing weak wireless cellular signals. The technical support specialist took the information and passed it on to IS management during their bimonthly meeting. This prompted management to review the services provided by our wireless carrier, bringing us to a final solution of adding wireless carriers to our environment. Throughout this process, the technical support specialist continued to walk the floors to keep end users informed, making the first PC Squad a great success.

An Expanding Crew
We realized the impact of our PC Squads when we addressed concerns presented in one of our Southwest offices. This office typically reported myriad issues, and they felt that our central IS team was disconnected from their everyday challenges. Once we deployed PC Squads and created teams to follow up on critical issues, it showed users in that office that the firmwide IS team was there to support them.

This Southwest office has turned around from being weary of the IS department to seeing the value we can bring and seeking involvement in new IS initiatives. Their feedback helped us improve IS service not only in their office but in all offices, as we took our lessons learned to fine-tune processes.

After the achievements of these initial PC Squads, we decided to expand them to each of our U.S. offices. The IS staff in each office was extremely excited and took ownership of implementing this solution from the very beginning. They knew their input would help IS management see what challenges were being encountered in their offices on a daily basis.

A Block in the Road
As enthusiastic as IS management and local technical support specialists were about the PC Squad initiative, it was tough to explain the concept to our end users. To an end user, it seemed that IS may have been encroaching on their workspace or questioning the manner in which they worked. Some users even felt uncomfortable speaking about technology issues, and they didn’t find the value in this new level of support.

With the help of the local directors of administration, we were able to successfully pass on the message of the importance of PC Squads to our end-user community. We quickly put words into action by showing users that, by listening to their needs and requirements and following up with solutions, service was vastly improved. PC Squads proved that we’re a trusted resource in providing great service to them and the firm’s clients.
Once PC Squads were accepted by our end-user community, we published a schedule for local technical support specialists to walk the floors once every two weeks. They collect information when speaking with end users and send it directly to our CIO and IS directors. The IS leadership team reviews the information and utilizes it to find solutions and improve processes that affect our end users in “real time” — before issues are escalated.

Rallying the Troops
Since our combination with Denton Wilde Sapte, SNR Denton has transformed into a truly global firm with offices from Hong Kong to Los Angeles. With this global presence, we asked ourselves, “How do we implement PC Squads globally?” We found success by focusing on two things.

- **A Dedication to Client Services:** Our global IS team is dedicated to client services 24/7 — 365. We have a global IS client services team that consists of a global director, global manager, global service desk manager and regional technical support coordinators, all of whom think globally and act locally in the day-to-day operations of the department.

- **A Clear Plan:** We created a blueprint to follow that’s included in our “IS Client Services and Responsiveness Plan.” This helps the team focus on the big picture of standardizing processes to improve client services while enabling local support to address the challenges that users experience. We’re making sure we never lose focus on what’s important.

Victory on the Field
PC Squads have helped us think globally and act locally, providing a ground-level view of persistent technology or process issues that can be reviewed by IS leadership for service improvement. This proactive method of seeking out the technology challenges faced by our users has allowed us to maintain successful and strong relationships with them.

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Nikhil Shah is the Global IS Client Service Manager at SNR Denton, a global client-focused international legal practice that is located in 43 countries with over 60 offices. With over 10 years of experience, he has worked in various industries, including trading, financial, marketing and legal. Nikhil is certified in ITIL v3 Foundation and is responsible for managing a team of technical support analysts around the globe. He can be reached at nikhil.shah@snrdenton.com

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Cultural Awareness and Sensitivity in Today’s Global Environment

by Charlotte L. Washington

As law firms open international offices and merge with firms that have a global presence, interacting with multinational clients and managing multicultural legal workforces is more and more prevalent. To effectively lead a global workforce, it is increasingly important to not only become more culturally aware, but to also develop cultural sensitivity.

Connecting Culture and Relationships
Culture encompasses the attitudes, actions, traditions, language and behavior shared by members of various groups. While these groups might be delineated in a variety of ways, two of the most common are by organization or geographic locale. As firms move toward a more global presence, failure to be aware of and sensitive to such cultural differences will be a disaster in the making. Cultural awareness is not an innate trait, nor can it be guided by a random acceptance of perceived stereotypical behavior commonly used as a basis for communication or managerial methods. To begin to understand how culture shapes an organization, which will therefore impact not only management of law firms but also client relationships, we must understand that culture is multidimensional.
Many firms headquartered in the United States are opening offices or merging with firms in China, Europe, Latin America and the Middle East, along with many other parts of the world, which brings the opportunity to serve clients from varying cultures. To foster positive relationships, it is important to develop cultural awareness and sensitivity. Conversely, it would be a devastating mistake to manage offices in other countries just like you would those within your own country. Many of us have firsthand experience in the differences encountered with East and West Coast U.S. offices, such as the laid-back California attitude and more casual attire, versus the more conservative dress and assertive style of our East Coast counterparts. It stands to reason that there will be variation of an even greater magnitude when blending offices and people around the world.

First, Compare Cultural Forms

There have been many research studies on cultural differences that can help shed some light on this intriguing subject. As a word of caution, research studies can only offer a glimpse into the very deep concept of cultural dimension, and should merely be used directionally; they should not be taken as the authoritative guide to understanding the culture of a society as a whole.

Notably, most research studies look at a limited group within a culture, which is not representative of an entire country, organization or even a single office. Just as there are many layers to an onion, there are many layers to cultural diversity. With this understanding, the most widely recognized study of cultural differences was conducted by Geert Hofstede, a renowned comparative intercultural researcher who, over the course of several years, compiled data on employees from large, multinational companies — such as IBM — in over 70 countries. From this research, a paradigm was created known as “Hofstede’s Five Cultural Dimensions.”

The three dimensions highlighted here are more pertinent to cross-cultural business settings:

- **Individualism vs. Collectivism**: Culture in the United States has traits of a particularly individualistic society with a focus on a high degree of personal achievement. Countries such as China, on the other hand, tend to be more collectivist, where members of the culture identify themselves with a group or organization. One might ask an American what he does for a living, and the answer tends to be his specific occupation, such as “an attorney,” whereas a lawyer in China might answer, “I work for ABC firm.” Being aware of this difference can help explain why a person from a collectivist culture might find being paid a compliment about their individual accomplishment embarrassing. Rather than draw attention to personal achievements, it might be more acceptable to compliment the team.

- **Masculinity vs. Femininity**: Instead of the common perception of masculinity and femininity, this represents the tendency of a culture with a higher masculine dimension to value assertiveness, achievement and competition, such as in Japan. Countries such as Denmark and Sweden, which exhibit more feminine dimensions, lean towards caring for others and cooperation. Being aware that these differences can affect negotiation styles can be helpful, so that you won’t be taken by surprise.

- **Power Distance**: Relating to the acceptance of a hierarchical order in a culture, those whose culture exhibits high power distance will more readily recognize that power is distributed unequally. Middle Eastern cultures tend to accept that everyone has a place and generally will not seek to equalize such power. Others, such as in the United States, exhibit lower power distance, which can explain the belief that everyone is created equal. Understanding this cultural dimension can help to explain certain cultural behaviors, such as freely accepting orders or decisions from a superior, even when they create inequalities.

Sharpen Your Sensitivity

While comparing cultural dimensions can shed some light on the behaviors associated with a culture, particularly when analyzed against those of your own country, again, it is important to understand that these are generalizations describing only the tendencies of members of the group. The key is to hone your cultural awareness and sensitivity skills.

When faced with the task of expanding into the global arena, it is beneficial to perform your own research. Simply talking with people from the country can provide amazing insight into some of the differences between the culture you are most familiar with and your new experience with another culture. Schedule some time to chat with attorneys, administrators and staff so that you can gain a more holistic perception of how the culture of the country, firm or office differs from yours.

Ask questions to gain a clear understanding about how these differences might affect your management or communication style. Here are a few suggestions:

- **Ask about the concept of time.** Do people tend to work in a linear fashion, completing one task before embarking on another; or do they tend to multitask?

- **Inquire about their purpose of work.** Is work performed to support their lifestyle? Is work merely a means to an end, or is it more for personal reward and achievement?

- **Question the nature of work relationships.** Are work relationships group-oriented or individual? Do those relationships carry on outside of the workplace?
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• **Observe the general communication style.** Is there high-context communication such that both verbal and nonverbal cues convey meaning (requiring a read-between-the-lines approach), or is communication low-context and straightforward, generally conveying the entire meaning, without hidden messages?

**When in Doubt, Ask for Help**

These are just a few of the areas that differ greatly across cultures, and the answers to these questions can assist you in understanding global business environments and expanding your cultural awareness. Be sensitive to the differences you might encounter, and seek guidance from your colleagues and friends who are from countries other than your own.

Avoid attempting to mirror what you see — your behavior could be seen as disingenuous or mocking. Freely admit when you need help understanding a new culture; generally you will be treated with tolerance and rewarded with insight into how the culture operates.

By understanding that culture is distinctive and dynamic, yet persists through time by being passed on from generation to generation, one can become more adept at interaction across global borders. Cross-cultural awareness and sensitivity will go far in improving working and client relationships as your firm expands into the global marketplace.

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Charlotte Washington is the Manager of Technology Services for Sheppard Mullin. She has led and participated in software upgrades and implementation projects for nearly 100 law firms and corporations. Charlotte serves as the Communications Liaison for ILTA’s User Support Peer Group and is a featured speaker at ILTA conferences and regional events. She can be reached at cwashington@sheppardmullin.com.

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A GLOBAL SUPPORT MODEL: FACT OR FICTION?

Insight from Mayer Brown’s Global Support Gurus
For most firms, the idea of making support work globally is both appealing and intimidating. The promise of leveraged resources, 24/7 support (without overtime!) and streamlined processes for all offices is an ideal worth striving for. That said, everything global is still local, which means figuring out how to weave cultures, expectations, languages and processes into a coherent whole is easier said than done.

Support experts from one of the world’s largest global law firms, Mayer Brown, have gathered to share their experience and wisdom. Their roles span customer service, administration, training, communications, the service desk and more. Let’s see how they have approached the challenge of global support and made it successful at Mayer Brown.

**What Does Global Really Mean?**

**Nina Gratrick:** In an ideal world, global means that the entire firm has agreed on a way in which to deliver services and support to its clients, regardless of location, language or culture. Law firms are often challenged with delivering a truly global support model due to the high demand and historical culture of providing personalized service for clients and internal customers/users.

This presents a huge challenge for us as an IT department that implemented a global organizational structure a few years ago; while we want to be able to leverage our departmental resources across the globe, our internal customers still prefer to deal with local representatives. If we can show the business that we can deliver personalized service regardless of location, then we have accomplished a truly global service model.

**Angelos Kokkinos:** The word “global” has a vast array of meanings, which largely depend on each person’s experience, whom you are addressing and the context of the discussion.

In my opinion, there exists a spectrum. At one end of the scale, it could simply be a phrase designed to create a feeling of reliability and confidence. I have worked with many suppliers over the years who consider themselves global, but when you start to dig deeper you discover they are nothing of the sort. Has anyone tried to put together a truly global contract for mobile phones? Further, the word “global” could be stretched to assert that the business

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**Angelos Kokkinos** is the Assistant Director of Global Planning and Administration and the Assistant Director of EMEA Customer Services at Mayer Brown LLP. He has over 20 years of legal IT experience, 17 years of which have been in various management positions. Angelos has been part of Mayer Brown’s global IT leadership team for the last eight years and serves on the firm’s Technology Committee. He can be reached at akokkinos@mayerbrown.com.
Peer to Peer

can service clients well with multijurisdictional and geographical requirements.

At the other end of the scale is a business model that operates as a single global entity that has instituted collaboration and communication mechanisms that allow it to operate on a totally “joined-up” basis, offering consistent worldwide services to its clients. One could go further by stating that businesses like these have indeed developed a suite of products and services tailored for global corporations.

I suspect that like most global law firms, we are sitting somewhere between these two extremes.

**Summarize your global customer support structure.**

Michele Gossmeyer: We have an Assistant Director (AD) of Customer Services in each region (Americas, EMEA and Asia) who oversees the service desk, training and communications functions for the offices in their region.

As part of the service desk, each region has a centralized call center that handles the majority of the first-line support calls (either via phone or remote assistance software). Calls that require onsite attention are escalated to the desktop support team located in the user’s office (the majority of our offices have at least one onsite resource).

Calls that need to be escalated for further troubleshooting and/or additional technical assistance are then assigned to the appropriate technical support teams (e.g., desktop applications, financial systems, etc.).

Lea Angelin-Linker: ‘Going global’ is an accelerating trend, and a global support model is possible if consistent governing policies and procedures exist within the IT organization.

Management should consider either a matrix or mixed support structure to cater to regional differences. A global office should be flexible enough to support varying responsibilities; business, service and product differences; and people management within...
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that region. A cohesive group of senior managers and stakeholders should use globally agreed-upon methodology to design the overall products and services, make budgetary decisions and undertake project management.

At the same time, retaining autonomy in areas such as support and service is important. To ensure a truly cohesive support model, senior IT managers must build and maintain teams and invest in training and growth.

**Kristin Gorman:** I believe a global training model is possible if all parties agree to follow a consistent organizational structure and the same policies/procedures, while at the same time having the flexibility to allow for business-critical regional differences.

**WHAT TIPS CAN YOU SHARE ON EFFECTIVELY COMMUNICATING WITH GLOBAL USER COMMUNITIES?**

**Nina:** I don’t believe that one size fits all. To be most effective, we have to consider the audience, the topic, the urgency, the impact on users and any action required by users.

Where possible, having the communication distributed “personally” by a local or business resource is more effective. We are also trying to develop a more branded style for our communications so that our community can more readily identify the type of message they are receiving.

**Kristin:** Nina is spot on. I would add that you need to strive to understand the culture of the region and office as well. This helps with crafting a more effective message.

**Michelle:** Having someone in a lead role to oversee global communications helps with decisions and the coordination of global versus regional messages. However, having a lead communication contact (with responsibility and decision-making authority) in each region is also key to helping review, vet and confirm both applicability of the messages and any region-specific adjustments that need to be made.

Cultural considerations come into play not only internationally, but sometimes from office-to-office. We try to develop consistent communications globally whenever possible, but also consider the best delivery method (email message, voicemail, PIN messaging, intranet, hard copy, etc.) for the content and the culture.

**WHAT ARE THE MAIN CHALLENGES IN TRYING TO DELIVER GLOBAL SUPPORT ACROSS YOUR THREE REGIONS?**

**Jeff Linnert:** Providing global support is broken down into two main components: technical support and customer service.

We have a technical support challenge of supporting two desktop configurations (full and thin client, as a result of one of our mergers). This currently works best for each of those environments, but presents challenges for the support teams retaining knowledge and awareness of the differences (setup and policies). The support teams also need to be well-versed in all applications, even the region-specific ones. This could present challenges in timely delivery of service when a service desk is addressing region-specific issues or applications for a region other than their own.

Providing quality customer service is just as important as resolving the technical issues. There are various native languages within our offices around the world, which can be a challenge when providing telephone support. This can also impact response times if the user needs hands-on local support and the support team member is juggling multiple requests.

**Nina:** As Jeff mentioned, the support of localized or bespoke applications can be problematic.

Another challenge is consistency. With all large teams, ensuring that everyone is on the same page when it comes to delivering service, updating tickets, responding to users/customers in a timely fashion, etc. can be difficult — more so when you are working across regions. Our support structure has some variations (e.g., some offices with large teams across all disciplines and others with remote support teams or no onsite support). Making sure every user gets the same service, response and priority ranking can be challenging.
Angelos: Business engagements, although obvious, are still very challenging. In an economic environment where there is pressure to sustain revenues and profitability, engaging the business in nonbillable work can present timeline challenges.

Change management might also seem obvious, but this also needs strong participation from the business and, for the same reasons cited above, can be challenging.

Language differences can also present challenges. We have determined that while English is generally the most globally accepted form of communication, there are instances where it is more effective to work with support staff who can speak the local language.

Finally, there can be various learning curves when figuring out cultural differences. As an example, the words "buy-in" can translate into different levels of compliance across cultures.

If you could go back and redo your global support/training model, what would you change?

Kristin: Ideally, I would have at least one local training resource in each region (Americas, EMEA and Asia). Without that, it makes it difficult to get an accurate understanding of the culture of the region and office.

I would also recommend the same departmental and reporting structures across all regions to ensure cohesiveness. A team reporting into one department in one region and into another department in a different region presents greater challenges for signoff on process and structure changes.

Finally, I would recommend a structure in which training departments in each region work more closely together on curriculum development initiatives. This provides the advantage of creating a global curriculum while incorporating region-specific differences.

Nina: I would start with a centralized, global 24/7 service desk to process all tickets at all times. Standard policies, processes, procedures, training and working practices provide a solid foundation to ensure that service is consistent and of the best quality. Supporting this, I would have regional first-response/second-line teams and a strong incident management team to manage the service.

Angelos: It really depends on the overarching objectives and drivers of the business. If the business has a particular focus on IT efficiency, a single, global 24/7 service desk can be achieved fairly quickly. However, if user satisfaction and service delivery are primary drivers, providing an element of local or distributed support might be more desirable — though coordinating resources and processes in various offices might increase the implementation time.
As a management team, how do you ensure that you are all on the same page?

**Jeff:** Communication is key to the success of any support department/organization. Regularly scheduled meetings with a set agenda are needed to ensure everyone is communicating. However, there are risks in having too many meetings, so it is imperative that you spend time understanding who needs to attend, the frequency with which they occur and the agenda. Don’t have a meeting just to have a meeting.

**Angelos:** To state the obvious, a good communication plan and change management process are important in ensuring everybody is informed and in agreement. In addition, regular meetings with published minutes of all the key decisions and actions seem to work pretty well.

**Michele:** Our goal is to regularly focus on the overlap and synergies between each of our support functions. For example, the service desk sharing frequent call topics with the training and communications teams helps us develop workshops and targeted communications, so we can effectively provide our users with valuable tools to enhance their workflow. In turn, when a training session helps identify topics with which attendees are struggling, they can share that with the service desk and communications teams during support briefings, and help prepare newsletter or intranet tips to share with users.

**How do you quantify the value (ROI) of moving to a global support model?**

**Nina:** The value is easy to identify. Having a well-connected group of support analysts all trained in the same way, using the same processes and working to the same service levels and expectations is priceless. The return on investment in real terms is harder to quantify. But as the service matures, individual downtime should be reduced; thus, reducing the impact of each incident, especially at critical times when users are offsite or traveling. In an industry where time really is money, a global support model that can cater to all types of requests and incidents both effectively and efficiently will save time.

**Angelos:** There are very strong arguments for reducing costs by deploying a global support model — most of which are derived from global economies of scale. Here are some of the ways in which we have seen cost savings:

- **Follow-the-Sun Service Desk:** If your firm is strategically situated with offices in the Americas, EMEA and Asia, 24-hour support can be provided across core business hours with minimal need for overtime during out-of-hours shifts. With hub offices in Chicago, London and Hong Kong, we can cover a large portion of the working day without the need to pay overtime or allowances for nonsocial hours (although the latter is becoming rare).

- **Employment of Automatic Call Distribution (ACD) Technology:** This allows us to benefit from overflow capabilities during peak/busy periods and reduce the amount of staff required to operate various shifts within certain regions.

- **Utilization and Sharing of Global Skills and Expensive Subject-Matter Expertise:** While we still consider outsourcing where it makes sense, we are generally in a position to keep certain skill sets inhouse and best utilized across a number of global projects and other initiatives.

**What is an example of a global support process that has worked really well? What hasn’t worked as well, and how did/will you adjust to resolve the problem?**

**Jeff:** Rolling out a global incident management system and process went very well. The success was the buy-in from all IT members throughout all the regions. Some of the offices were not logging...
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Lea: In my previous role as the service delivery manager at a magic circle firm, we successfully deployed a PBX system to all five regions in Asia with no interruption to the business. The project was managed in the London head office with local project assistants managing regional deployments. Our success was due to global involvement, training and open communication.

A project that faced major challenges was the implementation of our accounting system. It was managed by global project managers very early in the stages of a merger and — due to cultural differences in processes and policies — the project proved challenging to all involved. We suffered from communication problems, differences in business requirements and conversions from locally built systems to a global system. These combined factors presented greater implementation challenges and more risks. We conducted a lessons learned assessment after the project and used the results to adjust our project processes.

Michele: We've had success related to our formal communication process for notifying users of both scheduled and unscheduled outages. We require all IT staff to attend a presentation that covers these processes twice a year to ensure that all levels know how to raise awareness of, respond to and resolve user-impacting outages. This helps us report key information to our users quickly and allows us to provide workarounds to minimize interruption to both user workflow and service delivery to firm clients.

Our success is jeopardized when things are pushed through too quickly or not viewed from a larger perspective; this adds risk to our delivery effectiveness. A few months back, we had one team working on communicating a message around one topic, and we inadvertently communicated information that was contrary to best practices on our other systems and in other offices. We didn't fully vet the messages and confused our users. We've since adjusted our review process to help reduce this risk in the future.

What advice can you give to firms that are about to enter into global support models as a result of a merger/acquisition?

Angelos: It is important to engage the business and ensure that any standard support model deployed actually meets business requirements. Obtaining agreement very early on with regard to the following areas should be considered:

- Global language (both spoken and deployed to PCs)
- A single core computer build that includes agreement on the core applications to be deployed
- Training and education of support staff across all the core applications
- A communication plan that has a consistent format or brand for global communications
- Core hours of support available within each office/region
- Centralized versus follow-the-sun support, taking into account both cost efficiencies and service/support delivery requirements

Lea: Review skill sets within. Utilize acquired skill sets to get a better understanding of the local needs and requirements. Centralization is not always the answer; there will be aspects of service that require local attention but global guidance.

Michele: Full disclosure of gaps and flaws is very helpful — we are often reluctant to share our pain points or weaknesses with others, particularly in a merger situation where we want to put our best foot forward early on. However, the quicker you are able to comfortably share gaps, challenges and risks, the sooner you can work together as a team to plan and implement effective solutions.
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THAT’S COSTRECOVERYPLUS
From Boston to Beijing: Effective Global Project Portfolio Management

by Kelly Harbour of Bingham McCutchen LLP
The expression, “It’s five o’clock somewhere,” takes on new meaning for IT staff supporting a firm with a global footprint. It may be five o’clock in the morning in one office, five o’clock in the evening in another and some time in between in other offices. As a result, the process of selecting, prioritizing, implementing and managing new technology projects becomes more complex.

With these complexities, however, come significant opportunities to improve project portfolio management processes. Structure and flexibility are the most important keys to success. It may sound like an oxymoron, since people often think increased structure leads to decreased flexibility; but when done well, the opposite is true. Sound portfolio management processes allow firms to adapt resources to address changing priorities without people feeling as though they are constantly changing course.

Align and Prioritize
The first rule of project portfolio management, whether for a firm with one office or dozens of offices, is that any project that does not explicitly support at least one of the firm’s business objectives or mitigate some type of risk for the firm, should not move forward. Ideally, the firm will have documented objectives for the coming year. If not, these should be determined as part of the annual budget process. All IT projects should be aligned with those business objectives.

Projects that will have the greatest impact on the firm’s business objectives, naturally, should have top priority. Everyone on each project team, no matter their role in the firm, should understand how the project aligns with the firm’s objectives. Teams that understand how they are contributing to the success of the firm will be less likely to resist change if their projects are put on hold, or if they are asked to participate in another project.

A High-Level View
To be able to quickly react to business needs, an up-to-date, clear, high-level view into the project portfolio should be established via project portfolio management software or something considerably less formal, such as a spreadsheet. Each project’s priority and progress toward completion should be clearly identified and reviewed with senior management at a frequency that makes sense for the firm. Generally, the larger the size of the firm, the more active projects in process and the more frequent the reviews should be. Somewhere between monthly and quarterly is probably right.

Throughout the year, new projects will emerge and projects will change in priority as economic and political factors affecting the firm and its clients dictate. For example, a data security law enacted in Europe might affect records in a firm’s CRM system on a server in the United States, which could require redirection of resources, particularly if there are deadlines for compliance. On a larger scale, a firm expansion, particularly into a new geographic region, may require a significant shift of resources away from previously identified, high-priority projects. A well-managed, transparent project portfolio can absorb changes of any scope because everyone who is part of the process, from the project teams to senior management around the world, understands where resources need to be allocated.

Structured But Flexible
Managing individual projects across international offices can be just as complex and challenging as selecting and prioritizing the portfolio. Again, structure and flexibility are critical throughout the process, and frequent communication across a variety of channels is required. For team meetings, it is generally preferable to meet on a recurring day and time so the team gets into a rhythm. When project teams are distributed around the globe, particularly in time zones with little or no workday overlap, it might make sense to rotate the meeting time to be convenient for teams in each geographic region.

This becomes even more important when working with teams from the East Coast, West Coast, Europe and Asia. Finding a time of day when everyone is working is impossible. Finding a time of day when everyone is awake is more feasible, so alternating meeting times may be an appropriate compromise.

Centralized or Scattered
Deploying firmwide systems in offices around the world will always raise performance concerns for those farthest from the heart of the data center. For systems with a centralized database, application acceleration across the WAN may be required; or it may be preferable to implement small data centers in various regions of the world. This is especially important to support a product like Microsoft Exchange, for example, since instant delivery of email messages is of paramount importance to both internal and external clients.

In both cases, with an initial foray abroad, there will be additional hardware costs, vendor reviews and project planning for implementing a software product. The project team will need to conduct basic feature testing, and later in the process, take on more complex tasks when performance testing is added to the mix.

Coordinate Change Management
When it comes to deployment, setting a change management schedule is not quite as difficult as scheduling a project team meeting with stakeholders around the world, but it is certainly a challenge to coordinate in order to avoid disruption during working hours. As such, a “big bang” deployment where everyone gets an installation at the same time is unrealistic. It’s better to choose a standard time when changes will occur, say at 1:00 a.m. local time, wherever “local” is for the affected office. Environment
changes such as software deployment or server patching would then always occur at that time, unless extenuating circumstances dictated otherwise.

This standard also simplifies the process for everyone in IT, since they always know what time they can make changes and when to expect that changes might be made by others. A scheduled meeting to review upcoming environment changes also makes sense to account for shifting priorities or emergency maintenance, in addition to coordinating planned project-based changes. It also helps to make a shared “change” calendar available for all offices to visit and contribute their events during their traditional business hours.

Crafty Communication

Despite the added complexity and challenges of managing a global project portfolio, there is a significant opportunity to learn about other cultures and business decorum in other countries. Guidelines for communication between both the project team and the audience should be given significant time and attention. It can be helpful to provide some education on cultural awareness and communication etiquette in advance for teams scheduled to meet with stakeholders in other countries.

When writing an email message to someone in Japan, for example, it is best to begin the message with a polite greeting to the recipient apart from the business reason for the exchange. Adjusting vernacular is also appropriate (e.g., referring to “fee earners” in the United Kingdom as “attorneys” or “lawyers,” as there is a meaningful distinction between the two, unlike in the United States). Written messages to those in the U.K. should also use British spelling conventions.

Having representatives from all offices on project teams, either as part of a focus group or on the core team, will be invaluable in crafting a communication plan.

To Standardize or Not

Offices in different countries sometimes adopt and utilize technology differently. Gains can be made firmwide from the following type of study:

While working on a process improvement initiative and relaunch of our CRM system, our project team discovered that our London office had a significantly higher adoption rate than most of our stateside offices. The technology was implemented exactly the same way overseas as it was in our Boston office, so the discrepancy in adoption rates came down to a difference in process.

The London office is smaller than several of our offices in the U.S., so the feedback on the system and processes between the local marketers and secretaries was more fluid, and process improvements were implemented more quickly as a result. To address gaps in knowledge of the system and differences in how secretaries were using it, the London office completed refresher training for all secretaries and distributed quick reference cards to sit on each secretary’s desk, relating the steps to achieve the most commonly executed tasks. These two steps improved adoption and streamlined operations and did not result in an increased cost to the firm — just the use of resources.

Interviews with stakeholders in the U.S. offices revealed that taking these same simple steps would help increase adoption of our CRM system, so we modeled much of our relaunch program after the success that had been achieved in London.

On the other hand, in preparing for an implementation, it might not make sense to standardize some processes across all offices around the world due to different legal requirements. For example, if implementing email activity tracking, it might not be possible to apply the same tracking methods to email messages sent on behalf of those in an office in Germany, where data protection laws are quite strict. Firms may have to investigate what additional action is required to ensure compliance with applicable laws.

Reflect on Your Success

After projects have been successfully implemented, hold a retrospective meeting where team members weigh in on what worked well and what didn’t. This gives project teams an opportunity to determine what could be improved for future projects. Lessons learned that are broadly applicable can also be shared as a reference through a SharePoint site, shared document or intranet page.

Of course, for every project closed, another project is right behind it waiting for resources. A global project portfolio that is flexible and driven by business value will ensure that project teams continually deliver the right technology to the right people at the right time — in whatever time zone they work.

Kelly Harbour is the IT Project Manager at Bingham McCutchen LLP. Leading the business analyst team, Kelly works with the firm’s management and legal professionals to direct the global technology project portfolio. With nearly a decade of experience in driving forward 200+ IT projects, her success lies in applying business analysis, project management and process improvement principles to strategically align technology with business objectives. Recent collaborative projects include CRM process improvement and business intelligence dashboards. She can be reached at kelly.harbour@bingham.com.
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ABOUT THE AWARDS

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Nominees may be self-nominated or nominated by ILTA members and vendors using the nomination form from the awards website (http://awards.iltanet.org). All sections of the nomination form must be completed.

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Find more information online at http://awards.iltanet.org.
So your firm has a new international office and/or you are new to a position that now includes supporting international offices. Congratulations! You envision yourself traveling to exotic places, meeting exciting people and having a great life-enriching experience ... or not. However you view the opportunity, it will be exciting and challenging at the same time.

For over 15 years, I provided IT management and support in nine countries (10 if you count California since it can be a different world in itself) with two top U.S.-based firms, and it truly was a wonderful experience. It always brings me satisfaction to solve an issue, fix a problem, make the computer do as I wish and get that thank you and smile from a user. As a good friend of mine would jokingly say, “Another life saved.” I have learned various tips and tricks through my adventures; there are certainly some technical and nontechnical challenges you can expect when supporting a globalized desktop ... plenty of opportunities to “save lives.”
No Such Thing as Standard
When it comes to management and technical challenges, the problems you face in your local office will also exist in the global desktop; products fail, software gets corrupted and users load unapproved software for work or personal use. Just as you face challenges in your domestic offices with different practice groups having varying business needs (e.g., different applications, printing needs, access to sites, etc.), global offices bring additional needs, such as foreign languages and fonts, documents in two languages, foreign language spell checkers and keyboards with different character sets — to name a few.

The bottom line on the technical side is that there will be no such thing as a "standard" configuration across all of your international offices. They may all use MS Word, but it will be configured differently to meet each office's unique needs. When you are supporting global desktops, your job will be to design and support one that is as consistent as possible across all offices, but uniquely designed and implemented to fit the needs of each global office and user.

From the Expected to the Unexplainable
The biggest technical challenge I faced in my 15 or so years of providing international support was bandwidth/latency to connect global offices. If you have "cheap" (it’s all relative) high-bandwidth WANs connecting your offices, great! Add a WAN optimization product such as Riverbed to offset the latency factors, and your WAN performance/challenges will be greatly reduced.

However, if your global office is in Dubai, for example, and you have to use the Internet to connect that office because the cost of MPLS or a single T1 to London is in excess of $40,000 a month, your challenges increase greatly. You would have to deal with latency of 150-200ms on good days and possibly reach the range of 500ms or more on a bad day. A worst-case scenario occurs when a ship anchor drags across the fiber cable in the Mediterranean Sea, cutting the cable to Europe and bouncing your data from Dubai to Hong Kong before reaching London. Suddenly a system you designed to work at an acceptable level at 150ms runs like cold maple syrup at 500+ms. Lawyers don’t like that!

The moral here is that you have to design the WAN/LAN and server systems to account for real-world latency and WAN failures. Believe me, it will happen.

When you travel to a foreign country to set up a connection, unanticipated problems always seem to pop up right as you thought everything was set and you were finally going to do a little sightseeing.

And then there are the odd problems that can’t be explained. One office I supported in London had problems that just did not make any sense. We often joked that the office must have been haunted. Sometimes I started to believe the jokes were real!

Unexpected and unexplainable aside, here is a list of some of the more common technical challenges you will face:

- WAN links might be undependable or too expensive.
- Backup WAN circuits might be undependable or too expensive.
- You might experience Internet latency and packet loss issues.
- Your “standard” equipment might not be available in a foreign country, and you might not be allowed to ship the equipment to that country.
- Software/patch management might be more difficult.
- When multiple languages are required, there might be display problems with fonts/special characters (UNICODE can help).
- Multiple characters/languages in applications might not be supported.
- VDI/Citrix still requires unique setups for each office.
- You might need to install required specialized apps.
- VoIP can reduce costs significantly, but you can’t apply QoS to the Internet link.
- Equipment disposal laws vary greatly from country to country.
- Data security could be a concern.
- Determining which disaster recovery vendors to use in a foreign country could be difficult (ask your ILTA peers for references).
- Determining which business continuity vendors to use in a foreign country might cause issues (ask your ILTA peers for references). Keep in mind natural disasters and emergencies like earthquakes, tsunamis and rolling blackouts.
- Finding the right offsite storage vendor might take some investigation (ask your ILTA peers for references).

TIP: Get your sightseeing done before you start the work when abroad, or the only “sites” you’ll see will be during the commute between the airport, your hotel and the office.
Images can get out of control quickly when there is no local technician on site to enforce the standard.

Vendors and local administrative staff will have to respond to a lawyer’s demands during time crunches. Protocol can be difficult to implement.

There’s More Where That Came From
You also have to deal with internal, political, geographical and cultural challenges. I’ve outlined some ideas below; do these apply to your firm? Can you think of other challenges in these areas that your firm might face?

Internal Firm Challenges

- Internal management might not understand the challenges required to support a global organization.

Time zone differences could have your IT support staff asleep when the international office is working.

Your country/culture vs. international culture/perspective might vary.

Political challenges might exist.

Internet censorship in China is a consideration.

VoIP is illegal in some countries (e.g., no Skype from Dubai).

Government monopoly of telecommunications vendors might exist (i.e., you pay what they say). There are no negotiations — you get a “take it or leave it” attitude from telecom providers.

Social unrest might exist (e.g., in the Middle East).

Encryption restrictions might exist in some countries.
Geographical Challenges

- High telecommunication costs might exist (e.g., $40,000 a month for a point-to-point T1 or MPLS circuit from Dubai to London).
- High data-roaming costs might be an issue.
- The ability to obtain products in a timely fashion might be difficult.
- Products might not be available in a specific country.
- Parts can get stuck in customs for weeks or months.
- Buying parts locally from a gray market may be your only source for a part on-the-fly.
- Department of Defense (DOD) restrictions exist on product exports.

Cultural Challenges

- Work week differences might exist (e.g., weekends in the Middle East are Friday and Saturday).
- Holiday differences exist.
- Language differences exist.
- In some cultures, the locals don’t want to tell you “no,” so they say “yes” for things they will not do.

TIP: Brush up on local customs before you travel to a foreign country.
Recommended Book: “Kiss, Bow, or Shake Hands: How to Do Business in More Than Sixty Countries”

And Don’t Forget About...

Just when you thought the list of considerations was complete, here are a few more things to keep in mind.

Local Support in an International Office

- **Selecting a Local Vendor:** The local office administrator or lawyers may have leads. Your local office manager will be a great resource for everything.
- **Use Your Connections:** Don’t forget about your ILTA peers — network with those who have offices in the same city or country. You’ll also want to network with your regular vendors to get leads for possible local vendors.
- **Security:** It might be difficult to trust the local vendor.
- **Vendor Support:** Coordinating vendor support can be problematic.

Government Regulations

- Plan longer lead times for projects because government offices may work slowly.
- Be aware of privacy laws (i.e., what data have to be maintained locally, and what can be housed outside the country).
• Make sure you know local building occupancy codes. I experienced delays when an entire office’s electrical system had to be rewired in Dubai because of a contractor’s mistake on the code.

• Do your research on any software/hardware issues (for example, BlackBerry BES servers and encryption restrictions have recently been an issue in the UAE).

• There might be security restrictions enforced by the DOD.

The Personal Side of International Travel and Support

• **Jet Lag:** Flying to a new part of the world where the day/time is off from your normal sleep cycle will require some time to adjust.

• **Exhaustion:** At some point, you’ll probably experience that 16-hour nonstop flight that departs at 3:00 a.m. And yes, you’ll need to go straight into the office to work for eight to 12 hours.

• **Wasted Time in Airports:** There will be unplanned layovers, flight delays and canceled flights.

• **Compromise for Conference Calls:** Some calls will need to take place at 6:00 a.m. or 11:00 p.m. so you match up with the work hours of the international office.

• **Taxi Confusion:** Communicating your desired destination to a foreign driver can be an adventure.

  **Tip:** Have the address written down in the native language, and give that to the driver.

• **Traffic Gridlock:** You think it’s bad where you live?!

• **Pubs and Other Local Venues:** One of the fringe benefits!

Miscellaneous

• In some countries, they take your passport while you are there. Make a copy and keep it with you at all times.

• Some countries might make you uncomfortable, where you really do feel foreign.

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Global desktop support creates new challenges and rewards, but being aware of the path that lies ahead can arm you with the knowledge to succeed. In the end, people are basically the same everywhere; they want to get their jobs done with a minimal amount of problems with their computers. Your job is to make that a reality for the people in your global offices. Your hard work, along with your people, management and technical skills, will get the job done, and you will solve the world’s problems … well, at least the global desktop problem in your office. Another life saved!

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David Svoboda is the Chief Information Officer at Strasburger & Price LLP. He has more than 25 years of management experience in the legal industry, starting out with legal vertical vendors then working as an IT manager and associate director at Baker Botts LLP. David has extensive experience managing IT, KM and practice support in law offices across multiple U.S. cities and in Europe, the Middle East and Asia. He can be reached at david.svoboda@strasburger.com.
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EASING THE GROWING PAINS OF INTEGRATING NEW OFFICES

by David Wood of Berwin Leighton Paisner LLP

When a law firm is pursuing expansion and sets up new international offices, the IT department plays a key role in providing some comfort to any “growing pains.” There are systems integration, training and support considerations to keep in mind when aligning a new office with the rest of your global presence. Examining the challenges and following best practices can help make the transition a smooth one for everyone at the firm.

ESTABLISH A PLAN FOR ACTION
When Berwin Leighton Paisner LLP (BLP) commits to opening a new office — with a budget and some rough timescales in place — IT will consider the following as it starts project planning:
• **The method of expansion.** Is it the result of organic growth, the forming of an alliance or M&A activity? Each method creates a different mix of users, from moving existing users needing little or no training to bringing in completely new users requiring full training and education. Also, the method can affect factors such as requirements for systems integration and consolidation, as well as contract review.

• **Existence of an office in this particular country.** There will be challenges to doing business in a new country, including potential language issues, working with new suppliers and applying regulatory and compliance requirements and information security. These matters cannot be ignored and will influence the project throughout.

• **The mix and number of staff working in the new office.** Are existing internal staff transferring to the new office, is there a mix of existing and new staff, or will it be a whole new set of staff? The mix will have a significant impact on the support and training aspects of the project, and any new joiners might have data transfer needs.

• **The office accommodation.** Are the new premises temporary or permanent, serviced or not, when will access be given, and what is the term of the lease?

• **How the office will operate.** What are the hardware and infrastructure requirements to enable and support the users, and how do these compare to what, if anything, might be available in the proposed office premises?

• **Connections in place.** What telecoms are needed to get the new office connected to the rest of the firm, what should be done when, and when is the best time to put in a full link to the firm?

• **Required support.** What type of support will we need to provide — and how much for how long — to do everything necessary to get the users in, up and working on the systems?

The first three elements described above relate to the firm’s international strategy and help IT gauge the complexity of the project. The next three elements are more practical and formulaic, although they could still present some challenges. However, the main focus for the IT department relates to the final element — getting the users onto the systems and working effectively. This is a true acid test for IT. With this in mind, efforts tend to concentrate on training and supporting users, and integrating services to align with the rest of the business.

**ON THE GROUND WITH NEW PEOPLE IN A NEW PLACE**

The comments and suggestions that follow are based on a scenario that resembles the parameters BLP was working within when opening new offices for the first time in Germany in Q4 of 2011. The project involved setting up new greenfield offices in temporary, short-term, nonserviced office space in a new country. It included a raft of new staff from other legal practices joining the firm at different times to provide legal services in both German and English to new and existing clients. The areas of integrating services, training and support are considered below under the high-level phases of the project: before, during and after the new office opens.

**ILTA Volunteer Positions**

It is no accident that ILTA makes mention of the term “volunteer” in so many different places. The spirit of volunteerism runs deep and wide within the association; in fact, ILTA was created by a group of volunteers, is led by volunteers, and still holds as its singular mission addressing the specific educational needs of its members through the voices of volunteer leadership. ILTA fosters, relies on and celebrates volunteers for their real-world experience and their value as a resource for colleagues.

Volunteerism takes on many forms and ranges from something as simple as sharing an idea in one of the community forums (the e-groups) to officer-level commitment of running one of the organization’s core programming delivery teams. The opportunities ILTA provides can deliver great benefits to both the individual volunteers as well as to their firms/organizations.

We continually seek committed, energetic individuals who have a passion for learning and peer-networking. To read more about the qualifications for service and the responsibilities of each position click here.
### Integrating Services

Note that this element can bring a real mix of challenges and opportunities, and the range of topics covered across the project phases reflects this. In practice, the global versus local arguments will need to be balanced, and integration initiatives, in general, will affect both training and support.

- Identify the IT project manager and start the engagement with the firmwide project team responsible for getting the new office up and running.

- Fully understand the connectivity options of the office premises; for example, which telecom companies already have a presence in the building, and what is the quality of the 3G signal if data cards are required as a temporary measure?

- Consider the timescales between temporary and permanent office space. Due to lead times for telecom installs, it might make sense to put the full private network connection into the permanent office space only.

- Find out about any information security, data protection and regulatory requirements in relation to the new country, as there might be a need for important configuration changes to be made to core business systems.

- Use the questionnaire or process in place for new lawyer or partner intake with the joiners in the new office to help understand who is joining, what their expectations are, and if they plan to bring any electronic information with them.

- For authorized data transfers, consider and recommend approaches for weeding and formatting the information to be exported, secure data transfer, data import and providing access to the appropriate new users.

- In terms of potential language issues, there might be different alphabets and/or characters which can then impact software requirements and hardware needs such as alternative keyboard layouts for PCs and smartphones.

### Training

- Have the IT trainers speak to the IT project manager responsible for the coordination of IT efforts in opening the new office. This helps the IT trainers understand how many new joiners there will be, when they will join, what the staff mix is (lawyers, secretaries and business services staff) and with which systems the users have experience.

- If possible, have the IT project manager and IT trainers engage one of the new partners to sponsor the upcoming induction training. Their buy-in and backing now will go a long way in protecting the early training sessions from the many disruptions going on during the initial office opening.

- Give the IT training team time to prepare their training. The training involved in opening up a new international office is very different from normal induction training. They will need to review existing training materials and plans and align these to any different practices required in the new office. There could also be new software applications to understand.

- Some prelearning can be useful, for example, to introduce basic points about the firm and its systems. While it is unlikely the new joiners will have much time to look at prelearning materials, it makes a positive impression on the new joiners by indicating there is help available throughout the transition.
Recognize that establishing support for new offices is a two-way process: The new users are encouraged to adopt the proper processes for seeking support, and the IT support teams will work hard to deliver solutions. Also, as the IT support teams look to gain the trust and confidence of the new users, they might also have to adapt to different processes stemming from new requirements, learn about new software applications and understand local practices.

- Have the IT project manager and IT trainers brief the IT support teams, such as the helpdesk and the desktop systems team, to share their growing knowledge of the users, their IT skills and experiences and the proposed training plan.

- Update relevant service desk tools to include the new office and any new software applications it might introduce. This means the management reports coming out of the system can add value from the start.

- Consider the practicalities of how the existing IT helpdesk can support these new users. Is there enough support during the core office hours of the new office, or are the time zones an issue? Do they need their own IT support team, or can they be serviced by one or more of the other offices?

- If new IT support will be added on the ground in the new office, they will need to be brought up to speed quickly and be made to feel part of both the new office team and the wider IT team.

- Ensure there are enough licenses for applications for the new joiners and double-check the software can be used in the new location; some contracts might have named sites only. Further, there could be contracts for new software applications or services with local suppliers to be translated, negotiated and executed, and this more cumbersome process might take up valuable time.

- Prepare and release any templates required for the new office such as electronic letterheads, invoices and perhaps email disclaimer wording. Again, working in different languages can make this a time-consuming process.
Recognize the integration of a new office is an evolving process, so actively manage a flexible project plan. Accept there will be surprises. Develop relationships between IT members and staff at multiple levels throughout the new office to help minimize the element of surprise and to promote clear communications to help tackle them when they do arise.

Deal with ongoing data transfers as efficiently and effectively as possible, and keep the owners of the electronic information up to speed with progress on the import and the accessibility of the information. If a lot of information has come across, get the owner to prioritize the order in which it should be imported.

Actively manage the telecom options and their lead times. These dates tend to have many dependencies linked to them. Given the international element of the project, ensure the account manager at the service provider has established and is maintaining contact with their counterpart in the new office location.

Communicate with the IT training and IT support teams as new integrations are implemented and existing solutions enhanced.

As the new office gets going, it will be looking to build up its reputation and resources. In particular there could be ongoing recruitment, and this growth should be built into equipment lists and plans in general.

For BLP at present, just-in-time blended learning has the biggest impact on new joiners. Leverage the backing and new-joiner enthusiasm to engage early on in their roles, and encourage active teamwork.

Flexibility in timing and approach is critical. Effectively a new start-up office creates a high level of disruption for all involved. In a true test of their professionalism, the IT trainers have to balance their approaches and resources with the training environment, training demands business needs of this new office.

Recognize there will be a need to provide ad hoc training on demand, and there could be more new joiners in the early days and weeks as the new office is established. This will put additional pressure on the IT training team and the project team as a whole, but it is a good sign the new office is trying to get to a steady state sooner rather than later.
INTEGRATING SERVICES

- Have the IT project team conduct a full review and include input from IT training and IT support teams. The results will help complete the transition for new users and might identify opportunities to improve the process for opening the next new international office.

- Add this new office and integrations into the scope of ongoing or upcoming firmwide projects.

- Remember that during the new office setup, one goal will be to help quickly establish and maintain a sense of business as usual. Be sensitive to this when it comes to making improvements in the future, and try to keep further disruption to a minimum.

- Define the business continuity and disaster recovery plans for the new office, and add these to the firm’s overarching plans.

TRAINING

- It is likely the IT trainers will have done such a great job training the users, the users will not want them to leave. Ensure there are clear and consistent communications to all parties to enable a suitable handover of support from the IT trainers to the IT helpdesk.

- The IT training induction program for the new joiners probably will have been minimized, condensed and rushed. Therefore, at an appropriate time, the IT trainers should conduct a review of what they were able to deliver and the new joiners should also be given the opportunity to identify further training needs. Any knowledge gaps (perhaps backed up by service desk reports) and missed opportunities should then be addressed.

SUPPORT

- Consider how supporting this new office is impacting the IT support teams’ ability to support other users throughout the business.

- Conduct a supplier and contract review within a reasonable time after opening the new office, as some of the contracts put in place at the height of the office setup might no longer be required.
FACTORYING IN THE GLOBAL PICTURE

While the above points regarding integration, training and support concentrate on the new office, there are many things for the IT department as a whole to remember at the firm level. The examples below look to put the new office setup into perspective alongside the day-to-day operations of the firm as a whole:

- When preparing to open a new office in a different country, the breadth and depth of resources across the firm that get involved means the bonds between all the parts of the business — for example, legal teams and business services such as HR, IT, marketing and finance will be stretched and squeezed to accommodate this new request.

- The announcement of a new office, especially at short notice, can be highly disruptive to other IT projects and initiatives that are underway or have been scheduled.

- The challenges and excitement of opening up an office in new territory means that many individuals can be drawn to the project. While these projects provide a valuable opportunity to develop new and existing skills in various members of IT, care has to be taken to avoid oversubscription to the detriment of other work streams or project success.

- Language can be an issue, and IT is not the only business services department that has to tackle it. For new BLP offices that communicate with clients and third parties in a language other than English, the firm needs to think about enabling and empowering other support departments too. For example, the document production unit might be asked to assist in creating or editing documents in other languages, or to proofread or translate such documents. As a result, they need to be forewarned of any such possible language requirements so they can build up or recruit resources with a suitable skill set.

THE ULTIMATE GOAL: HAPPY USERS ADDING VALUE TO THE FIRM

Opening a new international office is a common but complex project for law firms. While the above comments and suggestions
are derived largely from common sense, BLP’s experience confirms the more that can be done and the more thoroughly it is done, the greater the project’s success. Planning such projects with good practices in mind means elements can be reused. With further new international offices on BLP’s growth agenda, we will look to benefit from this hard and rewarding work.

David Wood is Head of Business Projects at BLP and has over fifteen years’ experience in legal IT. He is a qualified solicitor and in 2009 earned an Executive MBA with a focus on the impact of international growth on how an organization functions. He is actively involved in a number of key projects and change initiatives and uses his mix of skills, knowledge and experience to help IT support the business and its objectives. David can be reached at david.wood@blplaw.com.

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OUTSOURCED

An expat struggles with the challenges of cultural differences and learns to love the similarities
I make it a point not to read anyone else’s review of a movie before watching it or writing about it, to avoid absorbing others’ opinions. Such was the case for the 2006 comedy, OUTSOURCED. Still, I have to admit that I approached it with a bit of trepidation, fearing from the sound of its title — and the fact that it had been turned into a TV sitcom that was cancelled in less than a full season — that it might be one of those comedies so popular today that features forgettable dialogue, less-than-stellar acting and poking fun at somebody’s expense.

But boy, was I wrong! OUTSOURCED, it turns out, is a sweet, credible (well, mostly) romantic comedy that introduces us to characters we can all identify with — workers caught up in the globalization of the world economy who must stretch and grow to survive. And the film deftly manages to do so without depicting any culture in an unfair light. Adapting to the work ways in other countries is something many of us are dealing with these days in person, online and on the phone.

The film opens with unhappy news for Todd Anderson (Josh Hamilton), the 32-year-old manager of a Seattle customer call center. With total lack of sentiment, his bottom line-focused boss, Dave (Matt Smith), informs him that the entire Order Fulfillment Department is about to be outsourced to India, where labor is much cheaper than in the U.S., and that Todd’s own job will end as soon as he trains his replacement in India and halves the time of each telephone sales transaction. Grudgingly, Todd travels abroad and is immediately slammed with total culture shock (his name is pronounced “Toad” by everyone he meets). He finds himself confused by everything from how to board a rapidly moving train to hiring a taxi and learning, in a very amusing scene, why eating with the right hand is proper and eating with the left is horrifying to Indians.

Housed in a new building that looks like a military bunker, the Indian call center is staffed by willing novices whom Todd endeavors to train to work and sound like Americans. Todd makes little progress until one star on the staff, the beautiful and brainy Asha (Ayesha Dharker), convinces him that he will succeed in his mission not by trying to turn his Indian employees into Americans, but by learning about Indian culture and letting them be themselves. He takes her advice (starting with actually asking his staff what would make them happier workers), and, in the process, he falls in love not only with India and its people, but with Asha as well.

Sales go up, call transaction times goes down, teamwork overcomes the inevitable obstacles, and all is well. And then, in quick succession, Todd learns that Asha is engaged to another man in accordance with Indian tradition, Todd’s boss (remember Dave, who outsourced to India because labor was so cheap) pays a surprise visit to the bunker to see how things are going and informs Todd that the company has now decided to outsource order fulfillment to China because labor is even cheaper there.

Will Todd take the manager’s job in China for additional pay and perks? Will Asha trade her ritualized planned marriage for true love? What’s the fate of the man Todd was training to be his replacement in India, not to mention his entire Indian staff? And will Todd ever get used to spicy Indian food? You’ll have to rent OUTSOURCED yourself to find out, and I highly recommend you do so. Because in it you’ll find many useful lessons about today’s cross-cultural world, not least of which is that surviving and thriving in new cultures, whether on the job or off, isn’t just about learning and adapting to the differences; it’s about discovering and appreciating the similarities.

**OUTSOURCED TRIVIA**
(Courtesy of IMDb and other sources)

- Among the knickknacks on Dave’s bookshelf at Western Novelty is a figure of J.P. Patches, a popular children’s entertainer in the Seattle area during the ’60s and ’70s.

- When Todd first arrives at the airport in India and is making his way through the group holding signs looking for people, the name on one sign is Gwen Bialic (co-producer of this and other popular movies).

- The note that Asha passes to Todd is a page torn from “The Kama Sutra.” The caption reads, “Any posture is unsatisfactory if kissing is impossible.”

- When Todd is being driven to the train station in the rickshaw, his position and the position of his luggage keep switching from one side to the other, depending on the location of the camera.

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Andy Spiegel is a creative director for a business software company based in Austin, Texas, and he’s a freelance writer. An ardent movie watcher, he maintains a blog called “Austinlad’s Private Screening Room,” which spotlights movie reviews of films from the ’30s to today. He can be reached at austinlad@austin.rr.com.
Cultural diversity is a major phenomenon of our time. Whether we travel or not, whether we do business across national borders or not, we live globally now. In our workplaces, in our shopping malls and entertainment centers, in our social circles and in our neighborhoods, we are more than likely to encounter people of many cultures and backgrounds. In all settings, it pays to understand how best to get along; but in our professional lives, the stakes are much higher. If cross-cultural challenges of all kinds find us unprepared, we face unexpected difficulties in conducting our business to a successful conclusion. And we may be at a complete loss as to what went wrong or how to fix it.

Marshall McLuhan’s prediction of a global village has come true with respect to worldwide electronic communications; yet in some respects we are still as far apart as ever. Now, however, the person whose culture we don’t understand may be our colleague or client instead of a stranger halfway around the world.

Facing the Challenges of Diversity
How do we prepare to deal with the many possible kinds of confusion that can arise between people of drastically different backgrounds — or better, avert them in the first place? David C. Thomas and Kerr Inkson say the answer is to raise our cultural intelligence. They call it CQ. In “Cultural Intelligence: Living and Working Globally” (Berrett-Koehler Publishers, 2009), they define the components of CQ and then show how to develop and practice it in a wide variety of situations, both abroad and right at home.

This is not a book that presents exhaustive lists of do’s and don’ts, country by country; for that there’s a resources section in the back. If we’re heading into an interaction with members of a particular society, of course it’s a good idea to know their culture’s traits, conventions and expected courtesies, and learn which hand gestures never to make. That’s the kind of homework we’ll want to do in advance. This book is more basic and more general; the authors position it as a starting place to gain cultural awareness that will stand by us in any situation.

Attempting to grow our cultural intelligence exhibits a sometimes vexing paradox: to increase our CQ, we must have cross-cultural experiences, but to succeed in those experiences and benefit from them, we need to have CQ.

Elements of CQ
The solution is to view the process as an iterative one. CQ has three aspects: gaining knowledge, practicing mindfulness and developing skills. We improve our ability to handle ourselves in unfamiliar situations by “a cycle [of] repetition in which each new challenge builds upon previous ones.

“The twenty-first century world is increasingly global, and the ability to deal with others who are culturally different has become a daily necessity.”

— Thomas and Inkson, “Cultural Intelligence”
And the place to begin is right where we are, with knowledge of what’s closest to home. The indispensable foundation, say Thomas and Inkson, is recognition of the features of our own culture. What assumptions and expectations are so ingrained in us that we don’t even notice them, thinking instead that this is just the way things ought to be? Those are going to get us in trouble when we have to deal with people who bring a different set of assumptions and expectations with them.

“Of all measures of cultural variation,” say the authors, “individualism and collectivism are the most useful and powerful.” This dimension affects how members of the group see themselves and how they relate to others, which in turn influence group process and especially decision making. A member of a collectivist society, for example, is likely to be a far less aggressive and competitive negotiator than an individualist — and may also have ways of saying “no” that sound like “yes” to less subtly attuned ears.

### A Cultural Map

Other cultural values that play a critical part in human interactions include assertiveness, egalitarianism and uncertainty avoidance. Countries and societies can be mapped on such dimensions; the authors present the results of several important studies and include diagrams that compare cultures on key variables. Seeing where we fall in relation to others is an important step in heightening our cultural awareness. As we move toward mastery of the elements of CQ, we learn to:

- Stop thinking that others should be like us
- Turn off cultural cruise control that causes us to behave in automatic ways even in novel situations
- Pick up on cues in each situation that point the way toward more effective interchanges

What sorts of interchanges those might be span the gamut from flying without setting off security alarms with the use of offhand foreign slang to making ethical decisions in a multinational corporate setting. In four chapters, Thomas and Inkson apply the previously defined principles of CQ to the areas of decision making, communicating and negotiating, leadership, and working with multicultural groups. The virtual team, an increasingly common work group model thanks to communications technologies, comes in for special mention, with some suggestions for how to overcome the difficulties of working with a team dispersed over wide distances.

For all team structures, the authors urge attention to group process as well as to group tasks and explain how to meet these management challenges.

### Changing Our Perspective

Problems in communication underlie a significant proportion of perceived difficulties in business, as elsewhere. Those problems are compounded when the parties involved do not share the same codes and conventions, and the results can be both painful and costly. Culture is the primary source of those codes and conventions.

Using plentiful case examples drawn from a global sampling of cultures with markedly different traits, the authors take pains to show us both sides — or all sides — of each potential or actual misunderstanding. Imagining ourselves in the place of those whose values are less familiar to us is a great first step toward attaining cultural intelligence. As the authors remind us, “cultural intelligence is not developed through mere exposure to other cultures but requires conscious effort.”

For the steps that come second, third and fourth, the concepts in “Cultural Intelligence” point the way.
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This is the time of year when we Chicagoans anticipate warm summer days on the lake and post-season baseball on both sides of town. We hope that many of our ILTA colleagues from other cities will visit to help us enjoy the former and ease our pain through the likely letdown of the latter. As the flowers begin to emerge, here too are updates on ILTA’s emerging ventures:

Knowledge Exchange: We continue to collaborate with other organizations to exchange knowledge and extend member benefits. We have introductory meetings in the works in the professional development arena, and we continue to work with our law school contacts to provide insight on technology curriculum targets for law students in exchange for legal training overviews and better insights on the most effective ways to deliver technology support to lawyers.

Law Firm 101: We are putting the finishing touches on our Law Firm 101 initiative, a program that provides educational opportunities for our members to better understand the legal operations of firms and their clients/law departments. If you have expertise and interest in educating your peers on legal operations, please know we’ll be looking to form our “faculty” over the coming months.

March Officer Meetings: The volunteer leaders of the organization and ILTA staff meet in person each March to collaborate and develop educational and networking opportunities for ILTA members. We welcome your ideas, input and willingness to participate to keep raising the bar on ILTA offerings. Feel free to contact any of us identified in this section of the magazine.

We look forward to both enhancing and benefiting from your knowledge — ILTA is what it is because of the many contributions from you, its members!

May spring bring pleasant weather to your part of the world!

Michele Gossmeyer
mgossmeyer@mayerbrown.com
ILTA President
Subject: Remote Training?

Does anyone have a good solution for training to a remote location? We are looking for the ability to have the trainer give the lesson and see the student's desktop for four or more students at a time.

Larry Davick
Business Analyst
Manatt, Phelps & Phillips, LLP

We conduct 90 percent of our new-hire training remotely. From our training rooms (one to 10 computers), we access the user’s computer using a remote access software, such as VNC, Microsoft Communicator, etc. The trainer has the option of using a webcam to see the user and vice versa. This is a very inexpensive way to conduct remote training.

If we have more than three remote access points, the trainer can use an external conference calling service for the audio instead of our VoIP phones. We have conducted up to six remote sessions at one time.

Jill Dietz
Solutions Specialist
Dinsmore & Shohl LLP
We have seven trainers and 36 offices, so I feel your pain! We primarily use WebEx to conduct remote training. If it is one-on-one, the trainer will have the student be the “presenter.”

We are currently reworking our new-hire training so that each student will have a lesson plan with links to online resources, making the actual interaction time with the trainer more effective. We may also look into a brief recorded introductory session for use when a trainer is not available due to other commitments or time zone/work week differences.

Apryle Kohut
Applications Training and Support Manager
Moore & Van Allen, PLLC
(Post made while at K&L Gates LLP)
Member Announcements

From www.iltanet.org, the Members tab provides links to Peer Groups and Regional Groups. View current leaders at any time from those locations.

We welcome the following new steering committee members:

Financial Management Peer Group Steering Committee:
Toby Brown from Vinson & Elkins LLP
Scott Wirtz from Loeb & Loeb LLP

We welcome the following individuals who are new city representatives:

Brad Drewett of Miller & Martin PLLC in Nashville, TN

Carl Peterson of Workman Nydegger in Salt Lake City, UT
(Litigation Support City Representative; replacing Jane Smart)

Brynn Wiswall of Baker, Donelson, Bearman, Caldwell & Berkowitz in Memphis, TN

Dean Leung has been promoted to Chief Information Officer of Holland & Knight in Tampa, FL

Congratulations to Dean Leung of Holland & Knight, Vice President of ILTA’s Communications Technologies Peer Group, and Brie Stampe of Traveling Coaches. They were married on November 11, 2011 in Kauai, Hawaii with some of their ILTA “family” by their side. Dean and Brie are a true ILTA couple and have been together since meeting at ILTA’s annual conference. We are so happy we helped them find each other!

Have you changed jobs, been promoted, presented at an IT event or been recognized for your work? Please send your news to editor@iltanet.org.

One of ILTA’s most valued resources is our pool of volunteer authors. We are grateful to them for sharing the information and experience they’ve acquired.

Writers Wanted

iltanet.org/write
Welcome New Members

We welcome the following firms and legal departments that have joined ILTA since the last edition of Peer to Peer:

Administrative Office of the U.S. Courts ....................................................... Washington, D.C.
Bayer Corporation ....................................................................................... Pittsburgh, PA
Bendet Fidell, Attorneys at Law, A Law Corporation ........................................ Honolulu, HI
Brown & Jennings, PLC .............................................................................. Roanoke, VA
Campbell Soup Company ........................................................................... Camden, NJ
Campbell’s Attorneys at Law ....................................................................... Georgetown, Grand Cayman
Curry & Friend PLC ..................................................................................... New Orleans, LA
DelCotto Law Group PLLC .......................................................................... Lexington, KY
Duggins Wren Mann & Romero, LLP .......................................................... Austin, TX
Fedex Ground Package System, Inc ............................................................. Moon Twp, PA
Johnson & Condon, P.A. ............................................................................. Minneapolis, MN
McAlloon & Friedman, P.C. ........................................................................ New York, NY
Offit Kurman .............................................................................................. Maple Lawn, MD
Pettit Kohn Ingrassia & Lutz PC .................................................................... San Diego, CA
Ralcorp Holdings, Inc ................................................................................... St. Louis, MO
Reeg Lawyers, LLC ..................................................................................... St. Louis, MO
Sherrard Kuzz LLP ...................................................................................... Toronto, ON
Sullivan, Morgan & Chronic L.L.C ................................................................. Kansas City, MO
The Great-West Life Assurance Company ................................................ Winnipeg, MB
Vermont Law School ................................................................................... South Royalton, VT
Wolfe & Wyman LLP ................................................................................... Irvine, CA

ILTA’s Core Values

Maximize the value of technology in support of the legal profession
Provide quality, independent, unbiased and accurate information to our members about technology and the practice of law
Provide quality educational opportunities
Act as a vehicle for meaningful peer networking
Respect our colleagues
Commit to the highest standard of professionalism
Maintain a financially sound organization that provides full value for the members’ investments
Maintain vendor independence
Develop strategic relationships with vendors that underscore member advocacy
Provide opportunities to celebrate volunteers and maximize their value to foster a trusted resource community
Recognize that ILTA is a volunteer-governed organization managed by a professional staff
On the Move

Kroll Ontrack announced that Dean Hager has been appointed President and CEO of the company by Altegrity, Inc., its parent company. Additionally, acting Kroll Ontrack President Joel Vogel will assume the role of Senior Vice President of Legal Technologies, and current Senior Executive Greg Olson will serve as Senior Vice President of Data Recovery and Software. www.krollontrack.com

Jim Hammond has been appointed Vice President of Global Marketing of Aderant. www.aderant.com

Lesly Kenney has joined Savvy Training & Consulting as the Director of New Business Development. www.savvytraining.com

Daniel Lim has been appointed Vice President and Deputy General Counsel, and Alex Andrianopoulos has been named Vice President of Marketing of Guidance Software, Inc. www.guidancesoftware.com

Michael Pennington has been promoted to Director of North American Sales at Litéra. www.litera.com

Dan Sharratt has been promoted to Vice President of Operations at nQueue Billback. www.nQBillback.com

Shishir Shetty has joined Wilson Legal Solutions as its Senior Director of 3E Client Services. www.wilsonlegalsol.com

Lisa Windahl joined Traveling Coaches as the Travel and Special Projects Coordinator, Cindy McCoy joined the company as a Project Manager, and Kate Soja is their new Marketing Coordinator. www.travelingcoaches.com

Rick Wyman has joined Huron Consulting Group as a Managing Director in its Huron Legal practice. www.huronconsultinggroup.com

AlphaLit announced its strategic alliance with Content Analyst Company. The combination of Content Analyst’s advanced analytics engine, CAAT, for exploring and evaluating unstructured documents, email messages and other text records with AlphaLit’s longstanding litigation support expertise provides clients with tremendous advantages for success. www.contentanalyst.com and www.alphalit.com

Epiq Systems, Inc. announced the acquisition of De Novo Legal LLC, a U.S. e-discovery provider with particular prominence in managed review services. With this transaction, Epiq further strengthens its leading global e-discovery franchise, providing corporate legal departments and law firms with full-service capabilities to manage electronic information for discovery, investigations, regulatory issues, compliance and related legal matters. www.epiqsystems.com

Kate Billera of Epiq Systems authored an article in December’s Peer to Peer magazine. We apologize that her last name was misspelled.

Congratulations!

Erik B. Goltzer, Chief Information Officer at ILTA member firm Miller Johnson, has been named a “2012 Premier 100 IT Leader” by Computerworld magazine.
Tikit Carpe Diem
21st Century Time Capture

Tikit’s Carpe Diem and Carpe Diem Mobile solutions provide a fast, flexible and simplified approach to time tracking, for both large and small law firms.

“Carpe Diem Mobile is about greater efficiency and making life better for staff.”

Jan Durant
Director of IT
Lewis Silkin LLP

“Carpe Diem offered much improved and intuitive ‘at time of event’ time data capture capabilities and management tools, in a modern technology platform easily integrated with other firm software applications.”

Patrick Tisdale
Chief Information Officer
Orrick, Herrington & Sutcliffe LLP

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www.tikit.com

Professional IT for law firms and accountancy practices
Product Announcements

**BEC Legal Systems** announced the availability of LegalBar 4.7. LegalBar is a Microsoft Word add-in solution that addresses the document production and formatting needs of law firms. It encourages the use of Firm Styles, Templates and Clause Libraries. LegalBar 4.7 provides a new, improved Template Organizer with enhancements to Document Cleanup and Numbering. In addition, LegalBar now integrates with CoreRelate (SQL) to generate and save Author preferences. www.beclegal.com

**BigHand** launched its most innovative and powerful new version, BigHand 4.2. The new features and enhancements have been developed in consultation with clients through a series of user group meetings, in order to reduce end-user training time, increase accuracy and improve the usability of speech recognition for law firms. BigHand 4.2 is a significant step forward in making speech recognition accessible to all types of lawyers and an even more viable productivity technology for law firms. www.bighand.com

**Biscom** announced that it has launched an iPad app for its secure file transfer software. The Biscom iPad app allows for the same secure and auditable delivery of documents provided by Biscom for the enterprise, but with additional features for mobile use. www.biscom.com/legal

**C2C** has upgraded its full suite of products for simplifying email and PST file management. Email data and PST container files pose a significant risk to organizations involved in litigation or compliance matters. C2C’s solutions reduce the risk involved with preserving email data for legal holds and simplify the collection of that data, even without first migrating it into an email archive. www.c2c.com

**Capensys Intelligent Learning**, which has training teams both in Europe and the U.S., announced their international offering comprising multilingual e-learning, quick reference guides, marketing material and trainers capable of delivering training in foreign languages. E-learning, assessments and training scripts/user guides are available for Office 2010, FileSite, NetDocuments, Workshare, Acrobat, and many more. They also offer consultancy services around foreign language training strategies and implementation. www.capensys.com

**Hot Neuron LLC** announced the release of version 3.0 of its Clustify software, featuring the ability to analyze documents stored in virtually any database and export cluster information back into the database as additional columns that can be used by many review platforms and e-discovery tools. Clustify groups related documents into labeled clusters, providing an overview of the document set and allowing the user to review and categorize related documents together for greater efficiency and consistency. www.cluster-text.com

**IPRO Tech, Inc.** announced the release of IPRO Allegro 3.0. This latest release of the early case assessment tool features the ability to auto-load into the IPRO Eclipse review system, a full tagging panel, email thread view, hierarchy view, duplicate file view, native file launch over the Web and archive file password handling. www.iprotech.com

**Lateral Data, LP** announced the launch of Viewpoint Assisted Review as a module in its Viewpoint all-in-one e-Discovery platform. Viewpoint Assisted Review delivers full predictive tagging functionality, allowing for automated review, prioritization of review and machine-assisted quality control of attorney review. Viewpoint Assisted Review is included with every Viewpoint Enterprise Subscription. www.lateraldata.com

**LawLoop.com** announced the launch of its pioneering legal software system that consolidates the software needs of a legal practice in one secure seamless system. By using the cloud and its unique “loop” architecture, LawLoop.com fully and securely integrates front and back-office software at a fraction of the cost of traditional systems without the hassle and inefficiency of going back and forth between several competing legal software products. www.lawloop.com

**MEETandCONFERENCE.COM** announced that it has integrated a new budget projector module into its existing software. This new budget projector module allows users of the MEETandCONFERENCE.COM system to estimate the costs of their e-discovery requirements as they proceed through the meet and confer process. This new functionality adds an extremely valuable component to the process because it allows the parties to assess the proportionality of their projected e-discovery costs with the value of the damages sought. www.meetandconfer.com

**Nexidia** and **First Advantage Litigation Consulting (First Advantage)** announced they have partnered to offer First Advantage clients efficient review and analysis of electronic audio and video files. First Advantage has installed Nexidia’s Forensic Search software in its global data centers and is integrating Nexidia’s patented phonetic search technology into its
Web-based review platform, Global RPM. First Advantage customers will be able to review audio and video content from within Global RPM. [www.nexidia.com/legal](http://www.nexidia.com/legal) and [www.fadvlit.com](http://www.fadvlit.com)

Nextpoint, Inc. introduced a major set of enhancements for customizable document coding and review across its e-discovery and trial presentation platforms. These new enhancements make advanced redaction, custom coding and customizable document views available in a secure, cloud-based document review platform. With the new functionality, users have the ability to create customized stamps and codes to accurately identify documents, making the process of producing large volumes of digital evidence for litigation even easier and more efficient. [www.nextpoint.com](http://www.nextpoint.com)

Omega Legal Systems announced a new integration with Bellefield Systems’ iTimeKeep iPad and iPhone applications. Using iTimeKeep, Omega customers can now enter time directly from their iPad or iPhone via wireless connection and their entries automatically synchronize and register in Omega Legal’s financial management system in real time. Also, when new clients, matters, tasks and activity codes are added to Omega Legal, iTimeKeep immediately renders them visible on the iPad or iPhone. [www.omegalegal.com](http://www.omegalegal.com) and [www.bellefield.com](http://www.bellefield.com)

RenewData announced the launch of DART (Defensible Auditable Review Tagger). Used exclusively with Kura’s popular review platform Relativity, DART, offered at no additional charge to clients using RenewData to host their Relativity reviews, helps attorneys expedite the analysis of data to allow for quicker and more informed legal and business decisions. [www.renewdata.com](http://www.renewdata.com)

Rocket Matter announced the 2.0 release of their flagship software, including the addition of major features document assembly and custom fields. Document assembly allows users to merge their client and matter data, already stored in Rocket Matter with templated legal forms, creating instantanous new legal documents. Since Rocket Matter tracks time and generates invoices, a billable entry can be automatically created as well. [www.rocketmatter.com](http://www.rocketmatter.com)

TCDI announced the introduction of CV5 for smarter document review and production. CV5 was designed to provide efficiency and productivity enhancements for review teams, while also maximizing performance and responsiveness over the Internet. It contains important enhancements with advanced technology and automation that will streamline work processes, improve productivity and significantly reduce the cost involved in legal document review and production. [www.tcdi.com](http://www.tcdi.com)

ZyLAB released the first in its series of new ZyLAB Cloud Collectors to capture email from Microsoft Exchange Online, part of Office 365, and all email messaging applications that support Exchange ActiveSync Protocol, Post Office Protocol (POP3) and Internet Message Access Protocol (IMAP), such as Gmail, Hotmail, AOL, Verizon and Comcast, among others. The supported data types span messages, nested messages, attachments, calendar items and tasks, and contacts that are stored within the webmail account. [www.zylab.com](http://www.zylab.com)

Congratulations 2011 LTN Innovation Award Winners:

**Champion of Technology**  
U.S. District Court Magistrate Judge  
Andrew Peck

**IT Director of the Year**  
Craig Bingham of Bass, Berry & Sims

**Large Law Firm**  
Mallesons Stephen Jaques

**Small Law Firm**  
Ward and Smith

**Corporate Law Department**  
John Deere

**Pro Bono**  
Minnesota Legal Services Coalition

Additional information on the awards and winners is available in the February 2012 issue of Law Technology News and on the magazine’s website at [www.lawtechnologynews.com](http://www.lawtechnologynews.com).
### Event Calendar

#### March 2012

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>March 5</td>
<td>Negotiating Major IT Contracts</td>
<td>ARK Group</td>
<td><a href="http://www.arkgroupaustralia.com.au">www.arkgroupaustralia.com.au</a></td>
</tr>
<tr>
<td>March 6-7</td>
<td>Legal IT Business Show 2012</td>
<td>Informa</td>
<td><a href="http://www.legalitshow.com">www.legalitshow.com</a></td>
</tr>
<tr>
<td>March 6-7</td>
<td>Knowledge Management for the Legal Profession</td>
<td>ARK Group</td>
<td><a href="http://www.arkgroupaustralia.com.au">www.arkgroupaustralia.com.au</a></td>
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#### April 2012

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<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
<th>Website</th>
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<tbody>
<tr>
<td>April 2</td>
<td>Legal IT 6.0</td>
<td>Montreal</td>
<td><a href="http://legalit.ca">http://legalit.ca</a></td>
</tr>
<tr>
<td>April 2-4</td>
<td>ACEDS Annual Conference</td>
<td>Hollywood, FL</td>
<td><a href="http://www.aceds.org">www.aceds.org</a></td>
</tr>
<tr>
<td>April 15-18</td>
<td>Adrant Global User Conference “Momentum”</td>
<td>Las Vegas</td>
<td><a href="http://www.adrant.com">www.adrant.com</a></td>
</tr>
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#### May 2012

<table>
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<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
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<tr>
<td>May 6-10</td>
<td>Interop</td>
<td>Las Vegas</td>
<td><a href="http://www.interop.com">www.interop.com</a></td>
</tr>
<tr>
<td>May 8-9</td>
<td>INSIGHT 2012</td>
<td>London</td>
<td><a href="http://insight.iltanet.org">http://insight.iltanet.org</a></td>
</tr>
<tr>
<td>May 8-10</td>
<td>AccessData Users’ Conference</td>
<td>Las Vegas</td>
<td><a href="http://www.accessdata.com/aduc">www.accessdata.com/aduc</a></td>
</tr>
<tr>
<td>May 21-24</td>
<td>EMC World 2012</td>
<td>Las Vegas</td>
<td><a href="http://www.emcworld.com">www.emcworld.com</a></td>
</tr>
<tr>
<td>May 21-24</td>
<td>CEIC 2012</td>
<td>Summerlin, NV</td>
<td><a href="http://www.ceicconference.com">www.ceicconference.com</a></td>
</tr>
<tr>
<td>May 22-23</td>
<td>LegalTech West Coast</td>
<td>Los Angeles</td>
<td><a href="http://www.legaltechshow.com">www.legaltechshow.com</a></td>
</tr>
</tbody>
</table>

#### June 2012

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
<th>Website</th>
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<tbody>
<tr>
<td>June 12-14</td>
<td>Elite User Conference</td>
<td>Las Vegas</td>
<td><a href="http://www.elite.com">www.elite.com</a></td>
</tr>
<tr>
<td>June 26-28</td>
<td>ELITE User Conference</td>
<td>Las Vegas</td>
<td><a href="http://www.elite.com">www.elite.com</a></td>
</tr>
</tbody>
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Dates and locations are subject to change. This event calendar is compiled for ILTA members from the InsideLegal Legal Technology Master Events Calendar. The calendar can be viewed in its entirety at www.InsideLegal.com.
ILTA Vice Presidents

Peer Group Vice Presidents

ILTA's peer groups are communities of professionals who share common interests. Each group has an e-group (online discussion forum), and many work with ILTA's staff in developing seminars, webinars and publications.

Dean Leung of Holland & Knight
Communications Technologies

Tim Hooks of Taft Stettinius & Hollister LLP
Desktop and Application Services

Mark Manoukian of Kegler, Brown, Hill & Ritter
Emerging Technologies

Pat Morris of Torys
Enterprise Content Management

David Smith of Ford & Harrison LLP
Financial Management

Chris Boyd of Wilson Sonsini Goodrich & Rosati, PC
Knowledge Management

Tom Morrissey of Purdue Pharma L.P.
Law Department

Joanne Lane of Metlife
Litigation and Practice Support

Kate Cain of Winston & Strawn LLP
Professional Services

Charlene Wacenske of Morrison & Foerster LLP
Risk and Records Management

Carlos Rodriguez of Nexsen Pruet, LLC
Server Operations and Security

Michelle Spencer of Bracewell & Giuliani LLP
User Support Services

Regional Vice Presidents

Janet Day of Berwin Leighton Paisner LLP
Europe

Sandy Mikita of Eckert Seamans Cherin & Mellott, LLC
Middle Atlantic

Angela Dowd of Burns & Levinson, LLP
North Atlantic

Donna Halac of Vedder Price P.C.
North Central

Dave Clark of Jones Waldo Holbrook & McDonough
North Pacific

David Michel of Burr & Forman LLP
South Atlantic

Kirk Scruggs of Bracewell & Giuliani LLP
South Central

Kathryn McCarthy of Miller Starr Regalia
South Pacific

Conference Vice Presidents

Kathy Lentini of Brown Rudnick Berlack Israels, LLP

Rachelle Rennagel of Patterson Belknap Webb & Tyler LLP
Support Perspectives from Around the Globe

La’Tresha Gregory is the Global IT Service Desk Manager for Kirkland & Ellis, LLP, and she is based in their Chicago office. With over 20 years of experience in the legal industry, La’Tresha develops and executes training modules for the service desk and local technology support teams, coordinates all activities related to problem management, implements client satisfaction initiatives and operational improvement programs, and serves as the technical representative for various firmwide project initiatives. She can be reached at lgregory@kirkland.com.

Heather Webster is the Head of Global IT Support and Relationship Management for Allen & Overy LLP, based in their London office. She has over 12 years of technology experience, during which she has gained expertise in the provision of services and support to the global legal community and their clients. Heather is currently leading the transition of U.K.-based technology and support services to an offshore shared-service center. She can be reached at heather.webster@allenovery.com.

Lee Jones is the Technology Training and Melbourne User Support Manager at Mallesons Stephen Jaques, and he works in their Melbourne office. Lee worked in London before moving to Australia. He has over 15 years of experience in the legal industry, starting as a technical trainer. Lee enjoys rolling out new products and developing the skills of end users, and finds providing assistance and solutions to users through the user support team very rewarding. He can be reached at lee.jones@mallesons.com.

LISTEN TO THE RECORDED INTERVIEWS ONLINE: www.iltanet.org/podcasts
We’re seeing more firms expand their presence across international borders, but that doesn’t necessarily mean that there will be local IT support staff in each office location. This presents both a challenge and an opportunity for innovation for those in a position to provide training and support to their firm’s broad range of office locations and cultures. Several ILTA members from around the globe recently sat down at a virtual roundtable to discuss their firms’ approaches to providing support. Each person’s interview can be heard in its entirety on the accompanying podcasts.

**How many offices does your firm support, and which regions do they cover?**

**Heather:** Approximately 70 percent of the organization is in Central and Western Europe, with 39 offices in 27 countries. We recently opened new offices in Australia, Africa, Indonesia and Qatar. We also have a network of relationship lawyers in other countries, giving us a truly global reach.

**Lee:** Mallesons currently has nine offices — five in Australia (Sydney, Melbourne, Brisbane, Perth, Canberra), three in Asia (Hong Kong, Beijing, Shanghai) and one office in Europe (London).

**La’Tresha:** We have 10 offices — six in the U.S., one in London, one in Germany and two in Asia (Hong Kong and Shanghai)

**What are the biggest challenges in providing local support and training to your global range of offices?**

**Lee:** Our biggest challenge is the time differences. There is a three-hour time difference between the Eastern Australian cities and Perth and Hong Kong, a 10-hour difference between London and Sydney, and seven hours between Hong Kong and London. However, that can have its advantages in that we are able to use those differences to provide great support coverage within the firm.

**La’Tresha:** I find it difficult to find, develop and retain the IT support professional that’s a good fit for the type of dynamic environment that we currently work in.

And once a strong team has been built, it’s often logistically difficult to arrange training on new technologies. In our environment, there are approximately 330 applications/services that we’re tasked with supporting. With such a wide range of applications, maintaining current processes and support documentation can be difficult.

**Heather:** Our number one challenge is trying to keep changes such as system downtimes and application changes minimal and outside of normal working hours.

In IT training, it is important to understand that everyone is different and will have different requirements, so we try to offer opportunities that meet all needs. In doing so, we have identified three major challenges:

- **Coverage/Availability:** Some of our trainers have dual roles and occasionally experience conflicts with business responsibilities.

- **Attendance:** Fee earners are under constant pressure to meet deadlines; getting them into a training room engaged and ready to learn is trying. We have found attendance is more of an issue in the larger offices, but meals — and especially chocolates — are always good enticements.

- **Timing:** It can be difficult to find the appropriate time to provide training for lawyers, practicing attorneys (PAs) and support staff. This occasionally means the trainers have to work different hours.

We have two big challenges in our IT support department:

- **Communication:** We need to ensure that our analysts are kept up to date with planned changes to technology, both from an operational and project perspective. We do this via knowledgebase articles, weekly calls in a cascade method and drop-in sessions.

- **Managing Workloads:** We try to provide support remotely wherever we can, and we utilize agreed-upon policies and office/regional/global contractual arrangements to help take
The pressure off local staff. In a number of regions we have moved to a centralized service desk model so that the local support can concentrate on deskside duties and provide induction training when a trainer is not readily available.

Did your training programs grow organically in various localities, or is there an overarching global strategy that governs your curriculum?

La’Tresha: We have an overarching global strategy for our training curriculum. I work very closely with the other IT managers, as well as with subject-matter experts, to help prepare my team to support any new products and services during both the pilot and production phases of any rollout. Concurrently, I work very closely with our training department, and we meet regularly with our different project leads to develop a training program that’s tailored for support.

Heather: We also have an overarching program of training that supports the global strategy. This includes a standard desktop image and working practices so that training can be standardized for all staff. It’s usually role-based, although the requirement of training between roles is blurring; fee earners and PAs now tend to follow the same processes.

Additional technology training is provided for specialist departments. The key principle is that we educate people on how to complete role-based tasks, such as managing data related to a transactional matter.

Lee: We have a firmwide approach to training as well. Our induction program and the technology used is the same in all of our offices. This makes it very easy for staff to move between offices and helps ease business collaboration within the firm. Some of our courses are also offered across locations, so we will have people attending remotely from different offices.

Which tools does your firm use to provide support and training on a global level?

Heather: For IT support, we use a global service desk tool. It’s ITIL-based, so it provides access to our incident knowledgebase, CMDB, change control and other process areas. To assist our users remotely, we use GoToAssist, which allows our service desks to provide support on home PCs as well as office devices.

From a training perspective, we use PeopleSoft Training Module to record and manage requirements and attendance.
globe. We provide a facility to self-enroll in courses, which allows our staff to view a catalogue of training courses so they can choose the time and availability that suits them.

We also use:

- E-Learning products to provide desktop training to individuals. We record video, screen captures and PowerPoint slides with narrative using products such as Captivate.

- Webcast technology and Live Meeting conferencing services to provide remote training and record the sessions for others to use.

- The firm’s intranet to post the current course catalogue, course documentation, e-modules and a complete history of all our IT tips.

- Email messages to globally distribute weekly IT training tips on key topics.

**Lee:** We primarily use Microsoft Remote Assistance to connect to users’ PCs and provide help. We also use this to create an online meeting for short training sessions across centers. This has proved to be popular, as personnel don’t even need to leave their desks for training.

We use HP Service Desk across the user support and training teams to record help calls. This helps us track issues from all support centers.

**La’Tresha:** We have a very robust document management system called WorkSite. We also use a Workshare product to organize our support documentation. Because of the large quantity of applications and services we support, we organize all of our support documentation in the DMS and with SharePoint.

We also use SharePoint as a knowledgebase, so all support teams can upload any tips or tricks they’ve learned and see what other teams are doing across the other offices.

We use WebEx for meetings and training collaboration, and we utilize Altiris, pcAnywhere and GoToAssist to remotely connect to users’ machines and to provide training among ourselves.

Our ticketing system is HEAT, which we use to escalate any issues.

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- **Stay in touch** with the office no matter where you are.

- **Receive automatic contact** information as they change in source systems and refresh distribution lists as employees join or leave the company.

- **Resume communications** and exchange critical information with other users during network outages.

- **Increase productivity** of your field workers and employees who are frequently away from the office.

- **Browse contacts** even when there is no network connection.

- **Seamlessly integrates** with Exchange Server and BlackBerry Enterprise Server (BES).

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Consider secondments; they increase experience, knowledge and skill sets.
Do you encounter any common cultural misconceptions?

Lee: None come to mind, happily. I daresay we must be doing something right!

La’Tresha: Wow — that’s great! The one thing I’ve noticed is a misconception that because our “home” office is the Chicago office, everything has to be dictated through Chicago, and that’s really not the case. We realize that, depending on the practice area and the location, our attorneys and users may have unique needs. After all, what someone needs in the U.K. may not be what someone needs in Chicago. So we try to be very sensitive to that and tailor both our training and support to each local office.

Heather: That’s interesting, La’Tresha. At Allen & Overy, we strive to eradicate IT jargon and local sayings, but these do sometimes slip through the net and cause some confusion. We use document-checking services to reduce this error level and also have a governance process in place that ensures group approval is given for each training course and IT tip before it’s distributed.

Are there any skills or training that you recommend for staff who will be providing global support and/or training?

La’Tresha: Right now our attorneys’ biggest issue is remote access — being able to access documents, programs and whatever else they need wherever they are in the world. I recommend training on products like Citrix and VPN, as well as Apple products — anything that can make the attorney more portable. And generally, I think it’s important that IT professionals are informed about emerging technologies and industry trends.

Heather: We offer “train the trainer” instruction for all who may be providing support and training locally. We feel that trainers, whatever their specialty, can always improve their presentation skills.

It’s also good to keep in mind that even though people may speak a language well, it might not be their native language. We recommend having conference call and meeting etiquette guidelines in place.
I’d also recommend the following:

- Provide a cultural awareness program, and consider making attendance mandatory.
- Deliver training and guidance on working in and managing virtual teams.
- Be aware of stereotyping nationalities. Do not allow outdated views to affect how you work and communicate with your colleagues.
- Consider secondments; they increase experience, knowledge and skill sets.

Lee: We encourage the user support and training teams to get to know the practice by spending part of their week on the legal floors, only steps away from the people who can help them best. We also hold regular team meetings to enable staff to know what is going on in each support center. Staff is encouraged to visit other centers where possible to get to know their colleagues there. We also encourage user support and training staff to work on projects across centers to help build relationships within the team.

How do you measure successful support and training?

Heather: In IT training, we monitor our levels of incidents logged with the service desks. This information is analyzed monthly to understand the latest technology issues and usage. This provides some of the material required for our IT training tips. In addition, attendees evaluate individual training sessions.

As for IT support, we have daily, quarterly and annual customer surveys, as well as quantitative feedback gained from walking the floors and attending team meetings. We review the number of incidents logged and fixed the first time the call has been made to the service desk.

Lee: We have key performance indicators set for both user support and training. Similar to what Heather mentioned, we ask for feedback after training courses, and we provide a survey for helpdesk users. This information is fed back regularly to the team. We also track the calls being made to the helpdesk to see where there is room for improvement.

La’Tresha: Some of the internal factors used to measure success for our support team are through metrics, such as how long it takes for an issue to be resolved and whether or not a caller is calling back for a repeat issue.

Just like my colleagues, we measure our success through user satisfaction. We do surveys for a percentage of all desk support provided, and we carefully study that feedback. We continually ask our attorneys and administrators whether we are providing the kind of support they need; and if we’re not, what we could do to improve support. My motto is: “If our users are happy, then I’m happy.” 😊
There is nothing quite like the sheer power of an ILTA conference. It electrifies the spirit and supercharges the mind. With ILTA 2012, our admittedly funky theme has its roots in electronics, and it has enough of the ILTA brand to allow for creativity. It’s different things to different people, and it’s all about alternatives, collaboration and delivery of content. It’s about connections and decisiveness; it’s about colleagues, curriculum, co-creation, commitment and the power of the collective.

The theme informs the development of content and provides a focus for the volunteer committee as they go about the work of delivering the premier educational event in legal technology.

FIND MORE INFORMATION AND REGISTER ONLINE AT http://conference.iltanet.org
WHY ATTEND?

ANNUAL CONFERENCE TO DC
(America’s Capital/Amazing City)
Our high-energy theme is woven into the entire conference experience. ILTA 2012 is a low-cost, high-value event for your organization and for you personally.

AMAZING CONTENT TO DEVELOP COLLABORATIVELY
Session content is entirely peer-developed. Our expert speakers come from within ILTA ranks and from other industries. There are varied session formats to address all learning types: peoples’ choice, hands-on, keynotes, traditional “lecture-style” presentations, roundtables/panels, workshops and more! There are varied levels of interaction and audience participation — hear from subject-matter experts and interact with them. Collaboration and social media opportunities are offered pre-conference and while onsite.

ANOTHER CHANCE TO DISCOVER CONNECTIONS
The myriad networking opportunities provide numerous forums to discuss topics of interest with your peers and to develop professional contacts. You get access to top level legal industry vendors all in one place.

ADVANCED CURRICULUM TO DELIVER COLLECTIVELY
We are offering an advanced curriculum for our C-level members.

OUR VENUE
Our conference venue this year is the Gaylord National Resort and Conference Center, near Washington, D.C. Its bountiful amenities include a waterfront promenade and Gaylord National Pier, with access to water taxis to Georgetown and Old Town Alexandria. Take a quick tour of the beautiful property and meeting space online at www.gaylordnational.com.

Member attendees will be provided with a link to reserve rooms at the Gaylord National when they register for conference.
Enjoy two full days of educational and networking opportunities covering all aspects of SharePoint for legal. Whether you use SharePoint as a database, for your records management, as your DMS or workflow engine, for your intranet or extranets, this Symposium has something for you!

**Why Attend?**
ILTA’s SharePoint Symposium planning committee is developing the educational program based on topics and trends identified by their peers. With peer-provided educational sessions that cover strategic and operational SharePoint topics, there is something for every legal IT professional who strategizes around or works with SharePoint.

**Session Formats**
Sessions will be presented in different formats to meet a wide variety of learning styles. From lectures by experts to crowd-sourced and attendee-driven sessions, there will be something for everyone.

**Faculty**
ILTA members and vendors make up the SharePoint Symposium faculty, with the majority being ILTA members telling their stories.

**Networking**
The majority of ILTA’s SharePoint Symposium attendees rate networking as a key benefit received from the event. We offer a number of settings in which to connect and network.

REGISTER AND GET MORE INFORMATION AT HTTP://SHAREPOINT.ILTANET.ORG
Venue
The venue for the event is the Westin Lombard Yorktown Center, located just 30 minutes west of Chicago and steps from the Yorktown Shopping Center. There are many shops, restaurants and evening activities nearby, and the hotel is easily accessible from all major expressways, as well as O’Hare International and Midway airports. The room rate for attendees of ILTA’s SharePoint Symposium is $149 plus tax. Information about reserving a room is available at http://sharepoint.iltanet.org.

Cost
There is NO FEE for ILTA members to attend ILTA’s SharePoint Symposium. Registration for the event is open at http://sharepoint.iltanet.org

Keynotes
Our day-one keynote is Richard Harbridge, Senior SharePoint Evangelist at Allin Consulting. Richard is an internationally recognized expert in Microsoft SharePoint and is a technology and business evangelist with deep expertise in information architecture, enterprise content management and technology strategy. His keynote is titled “Future-Proofing Your SharePoint Strategy.” He will discuss how having an effective SharePoint strategy is essential for getting the full value out of your platform investment, how to create an effective strategy, and where you start. Richard will outline real-world best practices in the legal industry that will ensure your SharePoint implementation sees long-term success.

Our day-two keynote will be from Microsoft, covering Microsoft’s SharePoint plans and how they connect to the legal industry.

Exhibitor and Consultants
In addition to the structured educational experience, you’ll be able to explore an exhibition area featuring approximately 30 key SharePoint vendors. We’ll also provide abundant opportunities for socializing.

ILTA’s Career Center is your best resource for making online employment connections in the legal market. The feature-rich site offers several opportunities for connecting law firms and corporate legal departments with top talent, along with quick and easy job posting and online job activity reports.

It provides job-seekers free and confidential résumé posting, automated weekly email notification of new job listings, online application for positions and the ability to save jobs for later review. Employers can post and edit their job listings at will, select features to highlight key positions, receive email notification of applicants and search résumés.

Visit the Career Center at iltanet.org under the Services tab.
The Premier Education and Networking Event For Legal Technology Professionals In Europe

BEYOND THE TRADITIONAL...LAW FIRM IT

Today’s legal practice looks nothing like it did a generation ago — it’s getting bigger through mergers, globalisation and multiple office deals; it’s layered with more risks from “always-connected” technologies and more regulatory requirements. The successful law firm and law department need to look at IT in new ways, challenge the norms and focus on different approaches to traditional IT projects and project management.

TARGET AUDIENCE

Heads of IT, Operational Support Managers, Litigation and Practice Support Managers

PEER-FOCUSED PRODUCTS IN THE EXPOSITION HALL

INSIGHT 2012 will provide an exposition hall featuring key legal IT vendors. This is the perfect opportunity to explore multiple technology solutions under one roof and make important contacts within the vendor community.
PEER-DEVELOPED CONTENT

An ILTA educational event is unique due to its peer-powered content. INSIGHT 2012 is planned from the ground up by knowledgeable peers; the content is delivered by experts from the ranks of legal IT professionals. This year's co-chairs are:

- Janet Day, Director: Technology and Infrastructure Services at Berwin Leighton Paisner (London)
- Gareth Ash, CIO at Allen & Overy LLP (London)

ILTA members from across the world were asked to form the advisory group for the INSIGHT 2012 conference. The group comprises experienced and enthusiastic ILTA members. They are developing the educational programme based on topics and trends identified by their peers.

- Peter Attwood, Chief Technology Officer at Simmons & Simmons (London)
- Jan Durant, Director of IT at Lewis Silkin LLP (London)
- Marcel Henri, Global IT Director at Salans LLP (Paris)
- Peter Lesser, Director of Global Technology at Skadden, Arps, Slate, Meagher & Flom, LLP (New York)
- Vince Neicho, Litigation Support Manager at Allen & Overy LLP (London)
- Simon Niven, Head of Strategy and Architecture at Freshfields Bruckhaus Deringer LLP (London)
- Andy Rudall, BIS Operations & Programme Manager at Wragge & Co LLP (Birmingham)
- Joy Rush, Director of Enterprise Multimedia Services at Sidley Austin LLP (Chicago)
- Santiago Gómez Sancha, Director of Information Systems at Uria Menéndez (Madrid)

DAY 1 – BEYOND THE TRADITIONAL EFFICIENCIES

Efficiency and Strategy: The Commoditisation of Technology | U.K. Legal Services Act | Law Firms Taking Over General Counsel Functions

Information Management: Moving to SharePoint as a DMS | Structured vs. Unstructured Information Management | The Future of Intranets


DAY 2 – INNOVATION

Innovation and Strategy: To Innovate or Not To Innovate | A Tale of Two Social Networks | Great (Business Model) Expectations

Emerging Technologies: Security and the Next Generation of Firewalls | Implications of Emerging Technologies | Mobile Devices – Apps for Everything


KEYNOTES

Two extraordinary keynoters set the stage for two full days of educational content:

- Day One – Security Chief for Olympics 2012 – Janet Williams, Deputy Assistant Commissioner
- Day Two – Economics Expert – Vicky Pryce, member of the Secretary of State for Business Panel on monitoring the economy

REGISTER ONLINE AT INSIGHT.ILTANET.ORG
(there’s no charge for ILTA Members)
Play It Again!

Are you interested in accessing additional resources related to the themes in this edition of Peer to Peer? There is a wealth of peer-powered knowledge collected on the ILTA website for your listening and viewing pleasure, including conference materials and recordings, podcasts, webinars, articles and more. Take some time to explore the website for information in your areas of interest. Here is an example of some of the great things you’ll find at www.iltanet.org:

Articles

- Winning the Rollout War – Implementing a Long-Term Rollout Strategy (Peer to Peer, December 2010)
- Why American Training Techniques Don’t Translate (Peer to Peer, August 2008)

Session Recordings from the 2011 Annual Conference

- Helpdesk Software: Service Desk Management or Glorified Database?
- Helpdesks: In-house and Outsourced Options
- Challenges in Developing User Documentation

Manager’s Knowledgebase

- Understanding Firm Culture and Politics
- Preparing for Major Events, Such As Mergers and Acquisitions

Webinars

Global E-Billing and the LEDES Oversight Committee

by Jane A. Bennitt of Global Legal Ebilling, LLC

**The international focus of the LEDES**

Oversight Committee is the first descriptor in our mission statement:

The LEDES (Legal Electronic Data Exchange Standard) Oversight Committee ("LOC") is an international, voluntary, not-for-profit organization comprised of legal industry representatives. Among its objectives is the creation and maintenance of open standards and formats to be used by the legal industry for the electronic exchange of information between computer systems while relying on minimal manual intervention. The organization will undertake measures to ensure that any standards developed meet the wider industry’s changing needs, and will promote the usage, understanding and best practices related to such standards in a vendor and/or system-neutral fashion.

While concerned with the exchange of other types of information between law firms and their clients, the LEDES Oversight Committee is best known for our legal e-billing standards.

**Worldwide Billing Differences**

There are differences between legal billing within the U.S. and elsewhere in the world. Most notably:

<table>
<thead>
<tr>
<th>Legal Billing in the U.S.</th>
<th>Legal Billing Outside U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal services taxed in only a handful of states</td>
<td>Legal services almost universally taxed; depending on the country, there could be multiple taxes applied to invoice line items</td>
</tr>
<tr>
<td>Paid via ACH or check</td>
<td>Paid via wire transfer</td>
</tr>
<tr>
<td>Typically litigation matters</td>
<td>Typically transactional matters</td>
</tr>
<tr>
<td>Typically hourly billing</td>
<td>Typically non-hourly billing</td>
</tr>
<tr>
<td>Tenth-of-an-hour increments are standard</td>
<td>Time may be recorded in minutes</td>
</tr>
</tbody>
</table>

Similarly, there are differences in legal e-billing within the U.S. and elsewhere in the world.

Most notably, outside the U.S. legal e-billing is considered to be a subset of e-invoicing, an entire discipline unto itself, which supports global e-commerce. Ever purchase something online?
The new norm: BYOD
Addressing the consumerization of IT

Zone Mobile
Give lawyers device-independent access to content on their desktops

It’s an IT headache of unique proportions: a constantly connected and constantly working staff that increasingly uses their own consumer devices to get work done. Now you’re getting pressure to open the network to these devices. You understand the positives—increased productivity and lower costs in the long run—but can you solve the security issue? Short answer: yes.

Now you can make it okay to bring your own device (BYOD) to work. Zone Mobile gives lawyers a secure, easy-to-use solution for device-independent access to content on their desktops. They simply touch a single icon to seamlessly navigate email, content repositories, and file shares from any home computer, laptop, or tablet—working in the familiar email management environment they have at the office.

And you can relax about security: sensitive data is protected by a unique hybrid security model that combines the scalability and flexibility of web-based models with the fine control of centralized IT security models. World class.
That’s e-commerce. Add in the additional complexity of cross-border transactions and there you will find legal e-billing.

There may be rules or requirements that must be followed in the areas of data privacy, data protection, data storage, data archiving, data accessibility, electronic invoicing, digital signatures, data composition and required elements. These rules or requirements can be imposed by regional, jurisdictional (country), regulatory, local and advisory bodies. Tax authorities often are the source of many requirements, and in this regard a noncompliant process could result in not only a penalty assessed against the client but, in some cases, could result in a penalty to the law firm. With this in mind, the LEDES Oversight Committee has given special consideration to global e-billing requirements.

Formats to Support Global E-Billing
While the electronic invoice file structures used most often in the U.S. (LEDES 98B and LEDES 2000) provide insight into the line items involved in the transaction, invoice totals are for the most part reconstructed from the information provided by the receiving system and checked against the values provided. Outside the U.S., an electronic invoice typically is required to include more information on the financial nature of the transaction between parties. Moreover, since alternate fee structures are more common, there is a greater need to detail how these structures impact invoice line items and the overall financial transaction. The end result is a more difficult math statement and a more complex file structure.

The LEDES Oversight Committee has two actively supported formats for use with global e-billing:

- LEDES 98BI is an extended version of the LEDES 98B format, adding an additional 28 fields to the original ASCII pipe-delimited format.

- XML 2.1 is actually a third-generation format. The first-generation LEDES 2000 format, ratified in late 2000, included seven segments and a total of 125 data elements; it was originally designed for use in the U.S. The second-generation file, LEDES XML E-Billing 2.0, was ratified in 2006 and contained 15 segments and a total of 153 data elements: it was specifically designed to support global e-billing. Once in use, we learned that there were some issues to be (re)considered, there were things about XML 2.0 that were not well understood and there was a need to accommodate required elements with greater dexterity as legal e-billing spread from country to country. The result was the third-generation LEDES XML E-Billing 2.1, ratified in 2008, which contains 16 segments and a total of 191 data elements.

That’s not to say other formats will not work in global e-billing. They do — as long as an electronic rendering of the invoice (PDF or Word file) is also provided by the law firm and the electronic rendering is the document of record for tax authorities. LEDES 98B or LEDES 2000, however, may not provide all of the information needed by the client’s accounts payable system and, for this reason, is used less commonly in global e-billing.

The organization is also helping to facilitate the spread of legal e-billing around the world. A few years ago, we added a feature to our websites, ledes.org and UTBMS.com, that allows visitors to contact the board. As a result, we have received questions from all over the world — not only from law firms but also local time and billing programs that are developing the ability to create LEDES invoice formats. Global: It’s what we do.
IT’S TIME
eBILLING WORKED FOR
EVERYONE.

eBILLINGHUB®

Ebilling has always worked for clients, but how about law firms? It does when you send your ebills through “the Hub.” We keep track of all ebilling vendor formats and client standards, ensuring 100% bill submission, reducing write-downs by 60%, and speeding payment by 11 days. All from one website, with one password. It’s so popular with firms, we processed over one million invoices last year. So … isn’t it time you left the hassle for the Hub?

See the proof at ebillinghub.com.
A Genesis Story: Developing a Global-Friendly Proposal Generator

by Umair Ahmed, Sunny Bane and Philip DeMario of DLA Piper

Following the 2005 merger of three regional firms to form the global firm DLA Piper, we’ve remained focused on combining our systems and cultures. During this process, a challenge for the marketing department presented itself: How to provide access to thousands of pieces of collateral from offices all over the world, and make it easy to put those together into proposal documents that conform to style and branding guidelines, follow regional legal requirements, and utilize only the most current, accurate information.

Could we develop a system that allowed marketing staff in California to put together a pitch for a company with operations in China without having to wait for responses from personnel in Shanghai? How could we be sure that an energy-focused proposal sent out from Houston conveyed the same information, look and feel as one from Dubai?

An initial attempt to use off-the-shelf proposal generation software was unsuccessful for several reasons, including difficulty in managing such a large inventory of documents, challenges with training users across different skill levels and cultures, and issues with slow performance. In our rush to adopt a solution to “stop the bleeding,” we had failed to do our homework before making a purchase, and the result was a system that didn’t adequately meet our needs and which few people used. Rogue users abounded!
In the Beginning...

In 2008, we wrote out our requirements for a truly global, functional system. We took all the issues from our initial deployment into account, surveyed the marketing staff, and carefully listed out the business needs in detail. After looking at existing systems, we decided to build an in-house system from the ground up, and work began in early 2009.

The first big issue was how to manage such a large inventory. We needed a handful of people with overall administrator rights, but ownership of the documents needed to reside at the local level. People with larger practice group, industry or regional responsibilities would also need to be able to easily review and update collateral. And we wanted everyone in marketing to be able to grab a single document 24/7 without having to go through a full proposal generation process. The solution was to use our DMS and store everything as Word documents in a separate library. This also addressed language issues.

The second issue was how to get all those documents to use the same styles and branding rules when combined into one document. Templates were developed and code was written to override the settings from the original files. A Web interface was built so users could very intuitively choose basic settings up front, such as U.S. Letter or A4 paper, vertical or horizontal format. Having all the original documents created locally in different formats — and sometimes different versions — caused a lot of issues. We couldn’t rely on everyone to be consistent in how they applied styles, set margins or even which fonts they used. And, of course, we were dealing with two different paper sizes. In addition to the Web interface and templates, special code needed to be written that could force the documents to adopt a global standard.

Once the system applied all of these settings, users could navigate the Web interface to select collateral either through a keyword search or navigating a folder tree. Lawyer bios and resumes were fed from a website where they were already housed and made available in the Web interface through a name-based search. A summary screen gave users final feedback on the choices they had made, allowing them to reorder the chosen collateral items, and then all of the pieces were stitched together into a final document.

The third big challenge was delivering the final document. One key issue we identified from our earlier system was performance. For several of our more remote offices, it could take several minutes to generate. So in our new system, an option was included to have the proposal delivered as an attachment to an email message once it was completed.

There Was Darkness

The proposal generator launched in the fall of 2009, and initial reactions were very positive. However, like any system, the “if only it could” requests started right away. We offered different color options (or “colour” options for those in the U.K. — another culture
We had to deal with) for the cover page, but the interior page headers and graphics all stayed blue. The next question that naturally came up was whether we could change those to match the cover page.

In the current system, we force a three-inch left margin, providing space for pull quotes and graphics. These could be saved in the original document and worked great for formal RFP responses. For less formal pitches, however, this created a real estate problem: Could we offer a “no sidebar” option? It must strip out the graphics and pull quotes, of course. Oh, and please make that option available only in certain countries.

DLA Piper had also entered into a relationship with a firm in Brazil that needed a proposal generator solution, but for risk management reasons could not commingle their content with ours. Could we give them access to the software but silo their templates and collateral?

In many instances, biographies need to be added to a pitch after it has already been generated. Could we add an option for “bios/CVs only” so they could generate those separately and then drop into their existing document?

Lastly, performance during the generation process continued to be an issue. Could we do anything to improve the time required to locate and select content?

In the middle of this, portions of the firm began the switch to Windows 7 and Office 2010. Testing needed to be done to verify that the templates, styles and coding would hold up for those users who were upgraded, while still working for everyone else on Windows XP and Office 2003.

The People Said, Let There Be Light

Work by the development and desktop teams began in November 2010 and was completed in March 2011. Because this is a global system, there were many parties involved. Although we had been very thorough in our initial research in 2009, and believed all upgrade requirements had been carefully documented, in hindsight we should have spent more time surveying users to verify that the list of modifications was complete, accurately reflecting the key issues.

We had a lot of “surprise” requests come up during the process that caused scope creep and delays to our timeline. Because we were competing for resources with the Windows 7/Office 2010 upgrade, these slips in the timeline were further magnified.

The different cultures and number of local “adaptations” also caused communication problems. When the proposal generator was initially launched, everyone was just happy to have a solution. Now, over a year later, we didn’t properly appreciate how ingrained it had become in the day-to-day processes of the marketing staff and failed to solicit input before marching forward with the change requests already received.

Very late in the upgrade process, we discovered that a majority of our users were swapping the “Title” and “Company Name” positions on the cover page. This was a fairly simple change that was almost overlooked because no one had complained — and we didn’t ask. We had communicated with the “core team,” but overlooked our local user base.

And It Was Good

Despite these setbacks, all of the modifications were successfully made, and usage of the system in 2011 was up significantly over 2010. Key to this was building a platform from the outset that could easily accommodate future changes, which gave us the ability to quickly address so many different global and local requests.
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