



## **Innovative Thinking Workshop**

Enough! No more academic navel gazing about innovation! Part 2 of our Innovation Series is an interactive workshop focused on “practical innovation” – HOW organizations develop and vet ideas, and then move from idea to execution. Rather than focus on a formal or formulaic process, participants will share, challenge, and build on different approaches to innovation. This is a rare opportunity to compare notes with your peers to see what might work at your own firm. You’ll work in small groups through a series of questions, scenarios, and outcomes. Together, we will see what common themes emerge in practical innovation.

We had eight tables participating in the workshop on Tuesday, August 20, 2019. There were four worksheets (available to download) with questions that each table discussed and recorded their ideas. All input from the workshop participants was compiled into this document.

The responses are in no particular order, except for ideas selected as favorites appearing first.

## 1. Organization

### Organizational Structure for Innovation

	Structured	Unstructured
1. How would you describe your organization's approach to innovation?	23	27
	YES	NO
2. Does your organization have dedicated "innovation staff"?	29	22
Does that include lawyers?	21	20
	YES	NO
3. Does your organization have a formal budget for innovation?	19	32
	YES	NO
4. Is there a defined decision process to pursue innovation projects at your organization?	19	31
	Individual	Committee
4a. If yes, who at your organization owns the decision rights - an individual or committee?	5	19

## Lessons Learned About Innovation

Factors that help innovation projects succeed (✓ = selected as a favorite)

- ✓ Project manager or coordinator
- ✓ Lawyer involvement (champion)
- ✓ Permission to fail
- ✓ Client pressure
- ✓ attorney buy-in
- ✓ support from key sponsor (partners) / champion
- ✓ culture of "open to change" or continuous improvement
- sponsor ( partner, shareholder, client)
- Requirements (clear at project initiation)
- Expertise required
- Disrupter
- Deadlines
- Management buy-in
- Acceptance
- Client-driven
- Awareness - visibility - coordination of efforts
- Defined outcome/goal
- Money
- Sponsors/business buy-in (especially partner/shareholder/client)
- risk mitigation
- having a good business justification
- Attorney champions
- Mindset (attitude)
- hot technology (feed off the buzz)
- easy implementation
- well-defined need or opportunity
- moves the needle
- unity
- staff to implement
- budget
- attorney engagement
- dedicated resources
- simple scope and implementation
- budget
- budget for failure
- quick wins or fail fast
- budget (money where your mouth is)
- right people with right skills
- culture/mindset
- partner champion (key partner)
- ability to convince/influence/sell
- partner with client
- financial incentive (partners)
- client incentive
- open to feedback (negative and positive)
- budget - resources, people, money
- sense of ownership
- Management buy-in
- no limitations on ideas
- budget
- dedicated staff
- culture - acceptance of failure / open to change / committed to innovation
- vendor support
- client engagement

## 2. Lessons Learned

### Factors that work against innovation project success (✓ = selected as a favorite)

- ✓ scope creep
- ✓ lack of communication
- ✓ resistance to change
- ✓ scope creep
- ✓ lack of ownership
- changing priorities
- resource availability
- willingness to change
- lack of diverse ideas
- lack of clear direction
- lack of regular check-ins
- no management buy-in
- complacency / lack of desire to change
- incorrect parties to project
- time management issues, prioritization
- shiny new toy syndrome
- failure to market properly
- lack of dedicated IT resources
- security compliance - too many stop gaps
- culture doesn't encourage failure
- competing interests pull adoption down - can't get adoption through whole organization
- lack of process/procedures
- budget
- status quo
- silos
- unrealistic expectations
- lack of time/resources
- articulate needs
- attorney resistance
- unforeseen results
- budget issues
- lack of buy-in from attorneys or other staff
- lack of budget
- lack of ROI - efficiency or revenue generation
- lack of budget
- culture resistant to change
- failure not accepted
- lack of vision
- attorney commitment
- not delivering
- too many cooks in the kitchen
- trying to be perfect or complete
- lack of budget
- ROI expectation (immediate)
- lack of priority
- lack of scalability

## 2. Lessons Learned

### **Top lessons learned:**

- effective communication is critical
- vet project participants to confirm willingness to change
- don't boil the ocean
- setting accurate expectations
- reign in the skeptics
- innovation challenge with \$\$ incentive
- design thinking labs
- innovation committee with structure in practices
- change is messy - train on change management
- understand what is needed, not what is wanted
- need attorney buy-in
- need budget
- participation of stakeholders throughout the firm
- sell, sell, sell (from idea to adoption)
- it's about the people and the process
- requirements - ask questions & repeat...
- dedication and persistence
- people - process - \$\$
- how to be able to communicate value in all languages
- culture of innovation
- resources - time, \$\$
- inclusion and benefit to clients

### **Best overall tip:**

- change is messy
- try to keep it simple and promote your success (ROI)
- mindset of change!
- culture of innovation

## Innovation Project Selection

What is the process to GENERATE innovation ideas (✓ = selected as a favorite)

- ✓ journey mapping
- ✓ start from lawyer questions/pain points
- ✓ consultant help to identify pain points - client-facing gets higher priority
- ✓ client demands
- ✓ client need or demand
- ✓ retreat / committee dedicated time
- user surveys to identify challenges
- virtual suggestion box
- process disaggregation
- evaluate competition
- workshop with attorney teams
- conversations with clients
- create environment for creativity
- investigating with firm members - partners, shareholders
- marketing - internal facebook + vote + share
- problems --> innovation
- partners & staff meeting/retreat
- pain points - loud complaints
- unprofitable client engagements
- challenge teams to bring "one new idea"
- partner/associate targeted discussion / prioritized list
- all levels of firm engagement
- lawyer interest
- firm pain points
- ILTACON
- employee interviews
- brainstorming sessions with those involved in the process
- meetings with practice groups
- awareness of things bubbling up - organic in nature
- listening to /proposing "what if" scenarios
- focus groups
- interviews
- unsolicited ideas
- service now / suggestion box / portal
- dedicate people to solicit / instigators
- hackathon

### 3. Project Selection

#### What are approaches to evaluate and select projects? (✓ = selected as a favorite)

- ✓ supports the strategic plan
- ✓ business case - executive director & chiefs
- ✓ need & value (ROI)
- ✓ impact on ? - clients, productivity, marketing/BD
- ✓ scalable / make impact /depth
- project prioritization process / cost-benefit
- client satisfaction - net promoter scoring
- client needs assessment
- which is the most painful
- which is likely to have biggest benefit
- directive from above
- client driven
- weighting against firm strategy
- business case - shareholder buy-in
- someone impartial wants it --> it gets selected
- identify opportunities & easy wins
- vetting criteria -- multi-phase vetting
- "yes, and..." / no is not forever
- separate function/ombudsman idea - direct connection to decision maker
- alignment with roadmap
- external influences
- directives for innovation structure
- idea management tool - submit ideas, evaluation score (points for revenue generation, cost, governance, scalable),
- innovation steering committee
- no process
- resources available (low code/no code)
- low hanging fruit
- popularity among influencers
- ROI
- squeaky wheel
- committee

### 3. Project Selection

**What are some success metrics for innovation projects (how do you evaluate success)? (✓ = selected as a favorite)**

- ✓ adoption
- ✓ adoption
- ✓ client satisfaction - rise in billable hours or AFA
- ✓ QT & QA assessments (e.g. leverage, quotes from benefactors)
- on time and on budget
- user impact
- addressable market
- growth in revenue
- ROI
- user adoption
- winning new business
- surveys
- did you meet what you set out to do?
- adoption
- revenue/ROI
- client satisfaction
- buzz --> positive
- adoption
- trouble tickets - reporting & evaluation
- request for training - sign ups report
- did we win the legal work?
- usage of tools
- productization / scalable
- revenue generation
- new revenue stream
- voluntary feedback
- What is value of outputs = save on overhead, save on productivity, drive revenue
- know how it will be measured
- adoption / usage
- solves business case
- \$\$ / cost saved / ROI
- less friction

**Best overall tip for project selection?**

- have a process for ideas and selection/prioritization
- weight against firm strategy
- start from lawyer pain points / inquiries
- good use case examples: helps sell business case
- flexibility vs. rigidity
- freedom to generate how ideas develop ... support system
- little changes can make a big difference - not just the shiny objects
- the one that returns the most value for the firm and/or its clients
- which ties directly to firm strategic plan?
- scalability / fit / adoption
- differentiator / competitive advantage

## **Innovation Project Execution**

### **Who PLANS the project? A person or a team? Who do they consult?**

BA documents requirements

PM execution strategy and dev plan

PMO/Project manager with sponsor/stakeholders

practice and client solutions team with practice groups or client

KM or BD resource with stakeholders

team - consult 2-3 attorney partner/sponsors plus any other stakeholders

solo planning, but stakeholders

PM, steering committee (larger scale)

affected departments/teams

exec or high level people

culture

scale determines a lot, so does maturity of effort

it depends on the project size and approach

based on who owns the project: IT project? Process improvement?

could be practice group, IT, etc.

innovation team

PM

owner of the project (with PM's, IT and others)

small project - one person; large project - team/committee

consult stakeholders, other Innovation Team members

inform IT, PMO, other departmental stakeholders as needed for some projects

#### 4. Project Execution

##### **Who EXECUTES the project (to the point of launch or pilot)? (tech, process, other work)**

product owner  
project team  
tech developers  
marketing  
pricing  
"the people"  
same group that planned it  
end users/benefactors  
it depends on the project  
depends on the type of project (process vs. tech)  
PM  
PM or project team (affected departments)  
vendor  
champion practice  
the same as the planner  
KM - innovation team (with IT)  
third parties (outsource)  
owner of the project (with PM's, IT and others)  
PM or process engineer  
LPM team for control purpose  
innovation team itself, or IT depending on the project  
the practices implement innovations that are not necessarily "projects"

#### 4. Project Execution

##### **Who plans the adoption strategy? Different from who executes on adoption?**

product manager - own products, manage dev, marketing, adoption  
ideally, training/learning & development (change manager)  
leadership or project sponsor  
project manager or project leader  
project stakeholders  
group plans strategy  
depends on the project  
disconnect between planner & execution  
sometimes noone; an afterthought  
vendor does it sometimes  
dedicated adoption role (innovation manager)  
PMs  
practice groups  
business analysts & training  
owners of app/system/etc.  
innovation team  
it depends, but this is more a decision of the project team  
KM - innovation team  
PMs  
product owners  
owner of the project (with PM's, IT and others)  
marketing  
primary stakeholder  
sometimes noone  
sometimes marketing  
sometimes training/IT

## 4. Project Execution

### Any examples of successful adoption strategies? (✓ = selected as a favorite)

- ✓ champions
- ✓ gamification
- ✓ communication, communication, communication
- ✓ gamification
- training and awareness
- timely support
- clear communications about product assistance
- project champion involvement
- iterative delivery
- demonstrate the ROI
- gamification
- regular demos
- dedicated internal communication
- shut off the old system
- Help Desk
- getting word out as many ways & target audiences
- involve people in design
- communicate early and often
- put out a good, working product
- use a pilot group
- identify early adopters
- firm mandate that highlights benefits to the firm
- be part of workflow (client or lawyer)
- piloting - hands on exposure
- empathy and understanding of personal experiences
- what's in it for you
- bounties/prizes/awards
- exclusivity - encourage adoption by making people feel special

### Best overall tip(s) for project execution?

- sustained focus and momentum
- find a champion and keep them involved
- no one size fits all for project implementation - deliver maximum value (iterative approach)
- consistent and persistent communication
- planning
- lessons learned
- communication & socialization
- planning
- project selection
- keep stakeholders engaged
- keep communication going
- right person to execute depending on type of project (PM sometimes, or project owner)
- right skills / right people / right technology
- change management
- champion(s)