Building a Predictable Process Management System

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Shortlink:
https://goo.gl/sddLrL

Introduction

GOAL: Increase firm profitability, reduce client dissatisfaction
WHY: Benefits of Identifying and Documenting Processes

- Increases agility and efficiency
- Consistency in execution
- Enhances ability to identify issues with processes
- Empowers team members
- Improves morale
- Streamlines training

HOW to Start: Gather Information

<table>
<thead>
<tr>
<th>Task</th>
<th>Revenue Generating</th>
<th>Not Revenue Generating</th>
<th>Love</th>
<th>Hate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answering calls</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Scheduling meetings</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Checking email</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Attending a mixer</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Reviewing a contract</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Calendaring processes</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Drafting a notice</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
WHO(M) to Involve

* Ensures all information is captured
* Empowers staff
* Increases empathy toward staff from attorneys
* Increases harmony and improves morale

WHO(M) to Involve

GATHER
DATA

ASSOCIATES/PARTNERS
CLIENTS

BLOG, THINK TASKS, JOURNALS

ACCOUNTANTS, BOOKKEEPERS, PROGRAMMERS

COMMUNITY MEMBERS/COLLEAGUES

STAFF
WHAT to do with the information

• Identify any:
  • Crossover
  • Duplication
  • Disharmony
  • Disparate approaches
• Problem or opportunity? (discuss)
  • Explore reasoning
  • Team members are heard
  • Everyone rows in the same direction

Outcomes Measurement

• Look before AND after you leap
• Implement fully or use a pilot program?
  Consider:
  • Size of operation; how disruptive
  • How tech-savvy are your team members?
  • Are you willing to set the example?
WHAT to do with the information
Outcomes Measurement

• Test success
  • Surveys - internal and external
  • Performance metrics
  • Encourage feedback and look for patterns
  • Revisit initial goals

WHERE to keep the information

• Centralized, easily accessible
• Enable team members to comment as they encounter snags
• Keep other media channels in mind
• Create process manuals

WHEN to engage in the exercise

• First one is the toughest
• Quarterly or semi-annually
• YOU play the most important part in keeping TECHSHOW exciting. Please complete the Speaker evaluation before you leave.

• Reserve the dates!

TECHSHOW 2019: February 27 – March 2, 2019