ILTA's Strategic Plan

for

January 2024 through December 2026

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EXECUTIVE SUMMARY

Since our inception in 1980, ILTA has delivered career-enhancing content, connections, and leadership opportunities to technologists working in support of the legal profession.

Through the strategic planning effort, our job has been to look at ILTA's past, generate hypotheses regarding the next three years, set strategic goals for that period, develop a strategic plan ("the Plan") to guide the association from January 2024 through December 2026, and define, report on, and be accountable for measuring success.

WHO WE ARE

Our Mission – the unique purpose of the organization – is clear.

ILTA is the trusted resource community for legal technologists, providing education and peer connections.

With more than 1050 member entities, 150 business partners, and 20,000 individual participants in 26 countries, representing hundreds of job functions, ILTA is a much larger, more diverse, and more complex entity than the 12-member organization of 1980.

WHAT WE WILL DO IN FULFILLMENT OF OUR MISSION

The Plan defines the strategic three-year goals through which ILTA intends to carry forward its Mission, the strategies we will employ, the outcomes we expect to achieve by the end of the Plan, and how we will measure our success.

Our strategic goals are simple:

Create, curate, and deliver individually tailored, timely, and actionable educational content, and promote a dynamic range of opportunities for peer connections.

ILTA also has an ongoing goal to enhance ILTA's organizational capacity to deliver on its Mission.

Providing a personalized experience for each stakeholder means developing a deep understanding of what stakeholders require, being agile enough to evolve that understanding quickly and pivot accordingly, and having sufficient resources in the form of money, volunteers, and employees to deliver.

HOW WE WILL ACHIEVE OUR MISSION

Our key strategies to achieve the goals will be as follows:

➢ *Leverage Technology to Find Personalized Content and Connections.* Through Project Find-it, ILTA participants will be able to find content across repositories and types using a variety of search criteria. The Enhanced Sponsor Directory and planned improvements to participant profiles will aid in finding appropriate connections.

➢ *Establish Feedback Loops and Methods for Innovating, Iterating, and Prioritizing.* New and continuing Advisory Committees for, among others, Young Professionals, Corporate Members, members from outside the United States, and Business Partners, an updated Community Survey, and improved tracking and oversight for in-progress initiatives will all contribute to this.

➢ *Employ Data Driven Decision-Making, Management, Reporting, and Accountability.* Our Decision Scorecard process, utilized by both staff and volunteers, is at the core of this strategy.

➢ *Strengthen ILTA's Business Processes.* Building on recent strides in financial reporting, implementing succession planning, and enhancing other standard operating procedures will be essential to this.

HOW WE WILL KNOW WE HAVE BEEN SUCCESSFUL

At the end of the Plan, we will know we have been successful if we have delivered on these priority outcomes:

➢ *Findability Improvements.* Finding content and connections on www.iltanet.org will be much easier.

➢ *Content and Communication Improvements.* Providing more just-in-time content on emerging issues, leveraging a wider array of thought leaders, and personalizing the communication experience will push more and better content to our community members.

➢ *Enhanced Peer Connections.* Whether peers wish to connect by location or roles, entity type, or areas of interest, finding and connecting with peers will be easier.

➢ *Structured Listening, Evaluating, Prioritizing, and Responding.* ILTA participants have more good ideas than the organization has resources to implement. We want to hear from all participant groups, then assign the organization's limited resources to the best ideas using a structured decision-making process that aligns with our priorities. Business Partners, participants from outside of the US, Corporate participants, Young Professionals, and participants from law firms of all sizes all can benefit from this approach. In this way, the best new ideas become reality and ideas that do not pan out as intended are discontinued.

Our efforts will ensure that the organization remains financially sound – thriving, not just surviving – and has sufficient human resources – both volunteer and employee – as well as the skills to deliver on its Mission for another 40 years.

ILTA'S STRATEGIC PLAN FOR JANUARY 2024 THROUGH DECEMBER 2026

INTRODUCTION

Since 1980, ILTA has provided a range of opportunities for legal technology professionals to support their organizations and advance their careers through education, networking, and volunteerism.

ILTA's strong reputation for peer sharing, industry-specific content and connections, and volunteer experiences that build career skills is well-deserved, inspiring dedicated members, volunteers, and employees, as well as devoted sponsors.

Perhaps never in its history has the organization undergone more change than during the period covered by the last strategic plan.

As we write this plan, the world is emerging from a three-year global pandemic that changed for the foreseeable future – if not forever – where and how many of us work. Knowledge workers, such as lawyers, learned that they could be productive even when not in an office setting – and technology was critical to enabling that productivity.

As we enter the new strategic plan, we must recognize that technology is more important than ever to the practice of law and that the rapid pace of change observed during the pandemic seems to be here to stay.

However, we equally must remember that – whatever form our services take – we need to continue to deliver the career-enhancing content, connections, and leadership opportunities that have been ILTA's hallmark since its inception.

SETTING THE STAGE FOR THE PLAN

To develop the Plan, we needed to assess and document our current state, as well as develop hypotheses about our future state, we undertook several key efforts to create the context for this plan, as follows: Future State Analysis, Stakeholder Feedback, and Association Research.

Today

Before moving into an exploration of our findings, we must comment on the world in which we are creating this plan.

The ILTA – and indeed the world – of 2023 is not what we anticipated when we put forth the last strategic plan.

Some trends we anticipated in 2020 have come to pass. For example, consolidation of both business partners and law firms has continued. In fact, the largest law firm merger in history (up to that point) took place during the pandemic.

However, the most important unanticipated aspect of today's world is that we are still emerging from the pandemic. It is fair to say that in 2020 we did not believe the pandemic would endure for more than three years.

Several areas are notable in this regard. First, remote work remains prevalent. This impacts how people make connections and where and how they consume content. Second, the ILTA staff is recovering from the cuts experienced in 2020. The focus during the pandemic was in delivering as many services as possible as well as possible with a smaller staff. Although we are in the process of restoring ILTA to appropriate staffing levels, we need to make operational and mindset changes from the pandemic way of working. Finally, ILTA has emerged from the pandemic much stronger financially than we anticipated in the first two years of the last plan. This is prompting us to focus on making our money work for us and on formalizing decision support methodologies, especially around the allocation of resources given competing priorities.

Future State Analysis

The first area of research we undertook in preparation for the Plan was a Future State Analysis. To develop a plan that will carry us through 2026, it is important to have a sense of how our 2026 operating environment will look. We put together a team of knowledge advisors, Board members, and senior staff to guide this effort.

Below please find a summary of the key findings of the Future State Analysis. Elsewhere in the document (See Appendix A – ILTA Future State Analysis), please find more information about the Future State Analysis effort, including methodology and participants.

It is important to note that the Future State Analysis was undertaken prior to the November 2022 release of ChatGPT 3.5. This release marked the beginning of the current heightened level of interest in Generative Artificial Intelligence ("GAI") and Large Language Models ("LLM") among lawyers and legal technologists.

Consequently, we have added general comments about the impact of GAI/LLM in the analysis areas. These comments were not part of the team's original discussions and hypotheses. They appear in italics at the end of some sections below.

What the World Will Look Like in 2026

In terms of the world economy, three factors are of the greatest concern to ILTA. These are inflation, the talent market, and demand for legal services. Inflation affects both what we pay for and what we can charge. While we need to contend with inflation, members and business partners expect ILTA pricing to stabilize. ILTA has many long-term hotel contracts, a situation which provides some protection against inflation by capping year-over-year price increases in specific areas such as food and beverage. For the talent market, non-profits are competing for the same talent as for-profits, at a different pay scale. ILTA will need to continue to find ways to attract and retain quality staff. However, the talent market issues also affect both the

number and skill sets of available volunteers. The demand for legal services is the bread-and-butter issue for our member entities. It drives the budget available for dues and conferences and for purchasing products and services from ILTA business partners. It also affects the ability of volunteers to contribute their time.

The changing demographics of the workforce, which virtually all analysts predict will be much younger in 2026 than today, as well as more racially and ethnically diverse, present challenges in engaging younger and more diverse volunteers.

What the Practice of Law will Look Like in 2026

Through the Future State Analysis, we have identified four key areas of the future state of legal technology and the practice of law. These areas are as follows:

➢ Roles and Jobs

➢ The Hybrid Workplace

➢ The Role of Technology

➢ The Legal Services Delivery Landscape

Our predictions about those four areas provide the context for what ILTA will look like in 2026.

Some key findings from the Future State Analysis which have influenced the Plan are as follows:

Roles and Jobs

To the extent that roles and jobs will become more directly related to the revenue and efficiency of the business, rather than a focus on legal practices and knowledge centers, ILTA will need to respond. We have already seen that some of the traditional roles on which ILTA was founded are going away or changing fundamentally, e.g., Network Engineers. Similarly, new roles are arising, e.g., Teams Administrators, and other roles are being re-cast, e.g., Records to Information Governance.

People in new roles need guidance about what those roles entail, what products/services they need, and how they interact with others in more traditional roles. Participants with changing roles need similar guidance and resources.

Most, if not all, of our member entities outsource to some degree. In the case of small law firms, IT is often outsourced in its entirety. Outsourcing by itself changes jobs and roles within those organizations, as some participants who had been "doers" now become "managers" of core functions. This trend also raises the issue of how we engage the outsourced providers in ILTA.

Finally, organizations are examining what roles and tasks can be or are best handled by lawyers. Lawyers will likely need more grounding in technology basics than career legal technologists.

GAI and LLM tools and processes will create new roles within member entities and change the scope and importance of other jobs, particularly in information governance and data science. For example, one law firm recently created the position of Chief Artificial Intelligence Officer.

The Hybrid Workplace

Most organizations will continue to have a hybrid or remote workforce now and at least through 2026. Effective and easy-to-use technology will be crucial for the success of these organizations.

The hybrid workplace has implications both for what ILTA participants do and where they do it and impacts content, connections, and networking. ILTA needs to help member organizations provide support for hybrid functions and to provide services that can be consumed in the hybrid workplace.

ILTA can support its community by working on facilitating both in person and virtual experiences to preserve community culture and promote meaningful personal connections.

The Role of Technology

The role of technology in the practice of law will only increase over time.

Specific areas where we expect to see more use of technology are as follows:

> ➢ Client/customer-facing collaboration technology to promote stickiness in the relationship
>
> ➢ "Run the business" technology to streamline operations and make certain functions less labor intensive
>
> ➢ Easy-to-use productivity applications, as executive assistant positions go away
>
> ➢ Artificial Intelligence (AI)-enabled drafting tools

At the same time, technology competence is far from universal, and rules for technology competence lack specificity.

With technology becoming increasingly important, and with fewer resources available to lawyers to assist with the use of technology, training is changing fundamentally. The advances in user interface means there is less to learn, and people want "just-in-time" learning.

AI is a huge wild card in this area, as the market is still determining where such tools fit into the practice of law. The regulatory climate surrounding AI is also geographically fractured and volatile.

GAI and LLM have the potential to disrupt the practice of law significantly, and potential disruption is being discussed widely in the global legal technology community. In this context, the key issue may be the proper mix of technology and human intervention more than the role of technology.

Legal Services Delivery Landscape

By 2026, the legal market will likely have as many law firms as today. However, their nature, composition, and client base will shift substantially. Small firms, specialized boutiques, large, and mega-firms will share the space, but the mid-tier law firms may start to morph into new models.

We have also seen a trend toward corporate law departments bringing more work in-house, as well as expanding and professionalizing the legal operations function.

The part the Big Four will play remains an area to watch, as ILTA determines where those organizations fit in the ecosystem.

With respect to the providers of technology solutions and services, we will continue to experience the waves which lead to services being bundled and vendors combining followed by unbundling. Unbundling typically is triggered by a smaller player identifying a gap in the bundling and filling that gap with a better product or service at the same or lower price.

Over the next five years, we anticipate continued consolidation with some legal tech vendors exiting, big players becoming even bigger, and an upsurge of excellent legal tech start-ups. One trend that is clear is the important role private equity, venture capital, and angel investors are playing in the legal technology market.

GAI and LLM are creating new avenues of discussion among law firms and corporate law departments, as clients issue guidance on how such tools and technologies may be used by their outside counsel and using what data. Corporate clients are, in many cases, clearly expecting their outside counsel to manage costs and fees using automation. However, they also expect transparency about how their data is being used in the training of such tools.

Stakeholder Feedback

Using a combination of facilitated focus groups (both in-person and virtual) and individual interviews, we conducted stakeholder research over a 10-month period beginning in August 2022. Below please find key points from each major segment of stakeholder feedback.

General

Most of this feedback came from focus groups conducted at ILTACON 2022. Nearly 30 individuals participated in these groups, and the feedback was remarkably consistent within and among the groups.

Key points from these focus groups were as follows:

➢ **Technology.** ILTA's technology remains a major pain point. This applies both to finding content and finding connections.

➢ **Communication.** Participants are happy to receive "push" notifications, but they want the content to apply to them. There is too much email from ILTA that is not appropriately

targeted. Similarly, calls for volunteers are general and do not relate to the areas of interest people indicated in their profiles.

➢ **Belonging.** Volunteers need more appreciation and more communication about their roles. New member onboarding is highly desirable, and new participants need more of a "charm offensive" to keep them engaged.

➢ **Content.** Content delivery, including platform, methodology, and length, must keep up with the current technology and the learning preferences of younger members.

Europe

Most of this feedback came from individual interviews conducted around ILTACON Europe in 2022.

In many cases, the feedback mirrored that of the focus groups at ILTACON. However, there were some unique points that were raised in these interviews:

➢ **US Centric.** Despite efforts and strides in recent years, ILTA remains US Centric. Examples include the times that programming is delivered live, the lack of in-person networking opportunities outside the US, and even the ability to pay in currency other than US Dollars.

➢ **"Stops and Starts."** It is difficult to define ILTA outside North America. Efforts in other markets have stopped and started.

➢ **No Response on Online Communities.** This was reported by several participants posting in the geography-specific e-groups.

➢ **Role-Based Content and Connections.** In the UK, the Special Interest Groups (SIGs) have been successful in terms of both content and connections.

Young Professionals

We conducted four virtual focus groups for this segment. Please note that both members and business partners participated in these focus groups, and they were not separated.

Again, many of the points raised in the general focus groups were also key themes with young professionals, especially with respect to ILTA's technology. Key points from these focus groups were as follows:

➢ **Bite-Sized Information.** Participants wanted more nuggets. However, they also want the option of taking a deeper dive. A layered approach to content would be helpful.

➢ **Variety of Learning Opportunities.** Live, interactive, and experiential learning was clearly a strong preference within this group.

➢ **The Volunteer Experience.** Young professionals are interested in volunteering, but they have specific asks: a sense of purpose (how do my volunteer effort matter?); a desire to be tapped on the shoulder or personally invited to volunteer; and a greater number of micro-volunteering options.

➢ **Ongoing Engagement.** Now that they have been asked, ILTA's young professionals want to continue to have a voice and engage in the future of the organization. They need an easy way for that to happen.

Business Partners

This feedback came from a combination of focus groups at ILTACON, meetings with the Partner Advisory Council, and individual business partner interviews.

Key points from these conversations were as follows:

➢ **Second-Class Citizens.** Participants deeply appreciate ILTA, but there is still some sense of being second class citizens. The feeling of being second-class citizens is less strong than it was three years ago, but it is still present.

➢ **ILTA's Critical Place in the Ecosystem.** The business partners regard ILTA's role as uniquely valuable. Some attribute the growth and success of their businesses to ILTA.

➢ **Content Could Be Stronger.** Some business partners believe that ILTA's content could be stronger and more cutting edge and that the delivery of that content could take place in more engaging ways.   They welcome the opportunity to partner with ILTA to address these challenges.

➢ **Leverage Business Partners.** Business partners want to be seen as thought leaders, and ILTA needs thought leadership in content. There need to be more partnering opportunities.

➢ **Return to Local Meetings.** There is a strong desire to deliver more local meetings and events where people meet in person. The business partner community will support such efforts.

➢ **Opportunities and Guardrails.** The business partners appreciate the opportunities volunteering affords them. However, they caution for the need for guardrails against favoritism.

Corporate Members

We conducted two focus groups comprised of current and former corporate members. Not surprisingly, their view of the organization differs significantly from that of the other groups, although they also called out technology as a concern.

Key points from these focus groups were as follows:

➢ **Not a Priority.** Corporate members feel as though ILTA does not care enough about them despite their interest and involvement. They are frustrated with their past efforts to engage with ILTA's leadership. They, like the young professionals, want an ongoing voice.

➢ **Inflection Point.** Corporate members think there are synergies and connections that merit ILTA paying more attention to them now, and they are happy to give ILTA "another chance" to address their needs.

➤ **Onboarding and Ongoing Engagement.** Corporate members want to feel welcomed and encouraged to volunteer, speak, etc. They would like a corporate buddy system.

It is worth noting that this perspective represents those who took the time to participate in the focus group discussions and is not necessarily reflective of all current and former corporate members.

ILTA Professional Staff

We spoke with the professional staff in two general meetings and one optional session.

The major theme surfaced by the staff is the tension between delivering quality programming and innovating. The staff members are tasked with delivering an incredible number and range of services, and this is often more than a full-time job. They also recognized, however, the need to continue to innovate our products and services to remain relevant and valuable. Staff members further recognize the need to prioritize opportunities given resource and staffing constraints, and they are open to using the decision scorecard to do so. They will need support and guidance as this new approach unfolds.

Implications of Findings

Based on the aggregated findings of the stakeholder interviews, ILTA needs to prioritize three broad areas:

➤ Technology, with an emphasis on "findability"

➤ Structured Listening and Responding, with ongoing advisory and focus groups of targeted stakeholders

➤ Enhanced Local Experience

None of the above can be separated from the theme of personalization, which underlies many of the comments from the stakeholder research.

Association Research

As we prepared to develop the Plan, we also conducted research with various associations, some in the legal sector and some from outside legal.

Attached as Appendix B – ILTA Association Interviews Summary, please find the questions used in the association research, as well as a detailed report on the research.

Key points from the association research are as follows:

➤ **Volunteer Demographics.** All associations are struggling with an aging membership and/or volunteer populations. Engaging younger generations is a priority.

➤ **Revenue Diversification.** Dues and sponsorships, as well as revenue from in-person events, are major sources of revenue across the associations. Each organization indicated they are

seeking new sources of revenue or ways to boost existing ones. Each organization also indicated that this is tremendously challenging.

➢ **Personalization.** This was a theme in many of the interviews. Personalization is key to increasing member satisfaction and generating more revenue from existing sources. Similarly, while all organizations recognize the value of personalization, they also noted that it is hard to deliver a personalized experience for their members.

THE STRATEGIC PLAN

ILTA's new three-year strategic plan builds on the themes and efforts of the past three years but in the context of a world that may have been unthinkable three years ago.

The main aspect of what we are carrying through from the last plan is a commitment to our core deliverables and essential value proposition: Content, Connections, and Community.

Definitions

As we discuss the plan, several terms will be used, as follows:

Mission. The unique purpose of the organization.

Goals. The Goals capture the broad aspirations through which ILTA hopes to carry forward its mission. ILTA's goals for the coming three years are in the areas of Content, Connections, and Capacity.

Strategies. This is how ILTA plans to accomplish the Goals.

Outcomes. The Outcomes happen when we properly implement the Strategies. The Outcomes represent how successful implementation of the Goals looks "in the real world."

ILTA's Foundational Elements

Central to any organization's success is a common understanding of what we do today, the principles that govern our efforts, what we aspire to do tomorrow, and for whom we act.

See Appendix C: ILTA 2020 – 2023 Foundational Elements for the 2020 – 2023 versions of the foundational elements.

For this plan period, we have simplified our language.

Mission Statement

A well-crafted mission statement is a brief description of the purpose of the organization, rather than a detailed list of an organization's products and services. The Mission Statement provides clarity internally and externally on the organization's unique role. In short, the Mission Statement shows why the organization matters.

The Mission Statement also guides choices about organizational priorities.

ILTA's Mission Statement for the 2024 - 2026 period is:

> *ILTA is the trusted resource community for legal technologists, providing education and peer connections.*

Core Values

Sometimes referred to as guiding principles, the core values define right and wrong in how we operate and conduct ourselves and provide a snapshot of "what good looks like."

ILTA's Core Values for the 2024 - 2026 period are as follows:

> *Nurture skills and talents to promote professional development and success*
>
> *Embrace and encourage volunteerism*
>
> *Respond with agility to our rapidly changing environment*
>
> *Strive to be environmentally responsible*
>
> *Foster diversity, equity, and inclusion throughout the ILTA community*

Value Proposition

ILTA plays a critical and unique leadership role in the legal ecosystem with member entities, individual participants, and business partners.

ILTA's fundamental value proposition delivers a return on investment of money (dues, sponsorships, and registrations) and volunteer time for all stakeholders by providing:

> *Content. Connections. Community. Competence.*

Although specific stakeholders find individual value in their ILTA participation, the broader legal ecosystem benefits when ILTA facilitates community conversation and provides leadership on emerging and critical topics.

Today, ILTA differentiates itself in the marketplace in its peer network, membership base, longevity and industry reputation, consistently great content, and entity-based membership.

Stakeholders

It is important to remember in designing specific programs and initiatives that ILTA serves a trilogy of stakeholders who expect a return on their investment of money, talent, and time.

Member Entities	*Invest dues and volunteer time*
Individual Participants	*Invest thought leadership and volunteer time*
Business Partners	*Invest thought leadership, sponsorships, and volunteer time*

In the past, we spent considerable time trying to prioritize our offerings and initiatives based on entity type. Our focus tended to be on what was different between and among stakeholders, rather than what was the same.

We have learned, however, that entity type is often less important in designing ILTA's products and services than role within a given organization, especially with respect to member entities.

Similarly, geography is often most important in terms of times zones, e.g., when programming is offered, rather than topics, e.g., what programming is offered.

Overall, our research has made it clear to us that ILTA participants want to connect via a variety of affinity groups. These groups might represent any of the following: entity, e.g., small law firms, corporate law departments; geographical location, e.g., UK, Europe, Central America; role, e.g., Litigation Support, Innovation, training; and/or personal demographic, e.g., age, sexual orientation, racial/ethnic background.

Finally, although we have made progress in this area, we continue to work to manage the tension that can exist between members (buyers) and business partners (providers). Both buyers and providers must benefit from the value proposition for ILTA to thrive.

Themes for this Strategic Plan

Across the stakeholder research referenced earlier in this document, three central themes emerged, as follows:

> *ILTA needs to stop being "everything to everybody" and instead prioritize*
>
> *In that context, we need to be able to create an organization that is agile and good enough at pivoting to accommodate the changing landscape and still achieve our mission*
>
> *Although it is critical to deliver "better" (more efficiently, more timely, more targeted) on our core offerings, we cannot stop innovating or we risk becoming irrelevant, i.e., we cannot be "better" without innovating*

We will explore key outcomes around each of these themes later in this document.

Goals for this Strategic Plan

The following three key goals will guide ILTA's efforts over the coming three years.

> *Create, curate, and deliver individually tailored, timely, and actionable educational **content***
>
> *Promote a dynamic range of opportunities for peer **connections***
>
> *Enhance ILTA's organizational **capacity** to implement this strategic plan*

For each of these goals, we have defined high level outcomes that will assist us in keeping on track over the course of the plan.

Personalization

Personalization is an issue that came up in every facet of our research from focus groups to individual interviews to discussions with other associations. Some other associations have gone as far as identifying it as a core value or calling it out as a specific strategy.

Personalization will be critical if ILTA is to address its content and connections goals effectively. Each ILTA participant desires content and connections tailored to their unique and personal situation. It is implied with adjectives such as "individually tailored" and "dynamic" that we use to describe our goals.

Ensuring we have and maintain the data and processes to ensure appropriate personalization will be a common thread through many of our capacity objectives.

Strategies to Achieve Success

In 2026, when we look back on the prior three years, we will know we have been successful if we have made progress in the areas listed below. As we move through 2023 and into 2024, the staff will work with ILTA's volunteers and Board to identify individual initiatives and operational goals that together will achieve the desired outcomes.

In reviewing the strategies, it is important to understand that – unless stated otherwise – these apply to the entire ILTA community, whether member entities, individual participants, business partners, staff, or other interested parties in the legal ecosystem.

Below please find specific strategies related to the goals around Content, Connections, and Capacity.

However, across the three goals, four strategies emerge as common:

➢ **Leverage Technology to Find Personalized Content and Connections.** ILTA has an ambitious technology agenda for the next three years, and we need to demonstrate visible progress by the end of year 1.

➢ **Establish Feedback Loops and Methods for Innovating, Iterating, and Prioritizing.** We need to listen to stakeholders, track suggestions, and act on the best (or sometimes the easiest) ideas.

➢ **Employ Data-Driven Decision-Making, Management, Reporting, and Accountability.** Apply the current (or a revised version) of the Decision Scorecard throughout staff and volunteer groups to enable better decisions. Identify the key areas that determine ILTA's success, define KPIs to measure the key areas, implement KPIs dashboard(s), and ensure the data is sufficient and of appropriate quality.

➢ **Strengthen ILTA's Business Processes.** Ensure that we have complete policies and procedures. Establish and maintain a cadence of review. End each year with an operating surplus and add to long-term investments.

As we identify specific initiatives in support of the strategies listed below, we must be respectful of the many sources of expertise, provide guardrails around perceived conflicts of interest, and be clear in roles and responsibilities for prioritization of content to be created, actual creation of content, and content curation.

Create and Curate Content

We will employ certain strategies and prioritize initiatives around content, as follows.

Technology Strategy

Fix the technology so that relevant and timely content can be easily found. This is, without doubt, the most cited issue in our stakeholder discussions. We kicked off a critical initiative – Project Find-It – in this area in early 2023, but it is imperative that we carry it through expeditiously.

Content Options Strategy

Offer flexible, innovative, and responsive options for how ILTA's content is consumed that recognize that different participants have different learning preferences. During our stakeholder research, we asked specific questions around how people wish to consume information, as well as what other information sources are "go-to" for legal technology. We must be prepared to experiment with – and market – new approaches.

Content Creation Strategy

Prioritize content creation in areas where a real gap or urgency exists. In some cases, we create new content because existing content is so difficult to find that re-use is impracticable. Success with Project Find-It means we can focus content creation efforts on emerging technologies, new roles and responsibilities, and key changes in existing areas of interest.

Leverage Thought Leadership

Leverage the thought leadership of business partners and other experts – in addition to members and participants – in content creation and curation. These individuals bring a breadth of experience and depth of knowledge to ILTA, and they are also peers.

ILTA as a Leader

Grow ILTA's influence as a thought leader and content source on emerging issues. ILTA has a humble culture. However, ILTA is seen as a leader in the legal ecosystem, and we need to embrace that role. No important conversation about legal technology should take place without ILTA at the table.

Dynamic Range of Opportunities for Connections

We will employ certain strategies and prioritize initiatives around connections, as follows:

Community Building Strategy

Offer flexible in-person and virtual options for nurturing relationships and building peer communities based on shared interests and/or geography.

Lead and Frame the Conversation Strategy

Lead and frame key conversations on critical topics.

Technology Strategy

Fix the technology so that participants can easily find relevant and timely opportunities to connect.

Organizational Capacity

It is easy to think of organizational capacity in terms of revenue and expense only. However, capacity issues are much bigger than budget alone.

Human Capital Strategy

Ensure that the organization has the appropriate number of people – both volunteers and paid professionals – in the proper roles to support its mission and operations and that the people

have the proper skills to deliver. Ensure that the professional staffing model is financially sustainable and that volunteer roles are varied, well-defined, and realistic.

Operational Excellence Strategy

Optimize operations to promote quality, to make ILTA easier to do business with, and to free up staff for more value-added work.

Financial Strategy

Ensure that the organization remains financially viable and healthy without relying on large annual increases in dues and/or sponsorships.

Member/Business Partner Relationship Strategy

Continue to evolve the member/business partner relationship in ways that are respectful, mutually beneficial, and enhance the organization's deliverables. Work closely with the Business Partner Committee on this important effort.

Governance Strategy

Improve the completeness, timeliness, usefulness, and transparency of decision support resources available to the Board, senior volunteers, and staff leadership team.

Wrapping up the Last Plan

As we embark on the new strategic plan, it is important to note that we still have unfinished business from the 2020-2023 plan.

Below are the major efforts we undertook as part of the previous plan that will be completed during the new plan period:

➢ **Implementation of the Updated Volunteer Structure.** This process is functionally complete and in place. We are now focusing on fine-tuning the operations aspects; we fully expect the work to be completed by the end of 2024.

➢ **Maturation of the Affiliate Program.** Partnering for success with other organizations – both non-profit and for-profit – that support our community provides a wide array of mutual benefits.

Overarching Outcomes

By the end of the plan period, we will deliver outcomes that track with stakeholder feedback and enhance the viability and vibrancy of the organization.

The "big picture" of success has four major components:

➢ Findability Improvements
➢ Content and Communications Improvements
➢ Enhanced Local Experience
➢ Structured Listening, Evaluating, Prioritizing, and Responding

We have also established key outcomes for each year of the Plan. More detailed strategies and related outcomes will be developed for each year of the Plan by the staff, and these will be shared, tracked, and reported to the ILTA community.

Year One Outcomes

By the end of year one of the new plan, we will employ the strategies to achieve the following outcomes:

Findability Improvements

Phase 1 of Project Find-it will be completed with respect to the past two years of content. ILTA participants will see a marked improvement in their ability to find both content and connections using ILTA's technology. We will make progress on personalization.

For an ILTA participant, finding ILTA content and connections on iltanet.org will be easier, more intuitive, timelier, and less frustrating.

Content Improvements

There will be a significant body of "just-in-time" programming created that is valued by ILTA stakeholders. Emerging and urgent needs will be addressed in this programming.

Thought leadership from a variety of stakeholders will have been leveraged to create valued content for ILTA stakeholders.

Structured Listening and Responding

ILTA will establish or maintain ongoing advisory groups for young professionals and corporate members, at a minimum. Through the new volunteer structure, improved decision support, and more focused governance efforts, we will show greater accountability for tracking and responding to feedback from ILTA participants.

Additionally, ILTA will establish volunteer governance over Project Find-it, implementing a formal feedback loop.

For an ILTA participant, we can ensure that individual concerns and ideas are evaluated, tracked, responded to, and, if prioritized through the decision support process, implemented.

More broadly, ILTA participants will feel genuinely heard and valued. They will further feel that ILTA provides them with genuine value tailored to their needs.

Enhanced Local Experience

Technology can carry us only so far with respect to connections.

Our members and business partners want more of an in-person experience.

An ILTA participant will be presented with a flexible range of in-person options, based on geography, role, interests, and/or entity type.

Year Two Outcomes

By the end of year two of the new plan, we will employ the strategies to achieve the following outcomes:

Findability Improvements

Phase 2 of Project Find-it will be completed, and ILTA participants will see an improvement in the ability to search ILTA's archives.

ILTA participants will see a marked improvement in personalization.

Content Improvements

ILTA will begin offering more options for consuming content, including new formats.

Individual participants can consume content in accordance with their personal preferences and learning styles.

Structured Listening and Responding

ILTA will track how well findability, content and connections improvements resonate with participants and iterative accordingly.

ILTA will conduct a community survey, analyze the results, and prepare an action plan for year three.

Connecting with Peers

An ILTA participant will be presented with new, more flexible options for making and maintaining virtual connections with others.

Year Three Outcomes

By the end of year three of the Plan, we will employ the strategies to achieve the following outcomes:

Personalization of Push Content as well as Pull

With Project Find-it fully implemented, we can focus on tailored communication, presenting ILTA participants with personalized content and notifications.

Overall

By the end of year three, detailed strategies and related outcomes will have been developed by the staff for each year of the Plan and will have been shared, tracked, and reported to the ILTA community. ILTA will have a well-established feedback loop on all outcomes, assessed success on all outcomes, and iterated based on feedback.

MANAGING RISK

There are three major categories of risk to the success of any strategic plan. These are as follows:

➢ Strategic Risk – Key stakeholders and audiences fail to respond as predicted

➢ Operational Risk – The organization does not execute as effectively as predicted

➢ Environmental Risk – Changes in the larger operating environment

Strategic Risk

ILTA 's culture is steeped in a rich history with associated traditions, particularly among long-time participants. The most significant strategic risk is around the gradual change in culture from "a club to a business" that ILTA has been undergoing for the past five to ten years.

Mitigation strategies are including a range of ILTA participants in our processes via structured listening and responding, being transparent in communications, and embracing the ability to pivot that we demonstrated during the pandemic and continuing to apply that, even outside of a crisis.

Operational Risk

Staff capacity, especially in the wake of the 2020 staffing cuts and associated reorganization, is an operational risk to the organization. In addition, the failure to mature and codify our processes and procedures is a significant operational risk.

Mitigating overall staff risks requires a deep understanding of the skills required for each staff role, a focus on quality versus quantity, and deciding carefully among competing priorities. Documenting processes is also a current priority.

Succession planning, including organizational runbooks and other process documentation, is the key to mitigating the most serious staff risks.

Strong adherence to decision support processes and protocols can also assist in this area, as it ensures that our limited resources are devoted to the most important and impactful efforts.

Environmental Risk

ILTA – for good or ill – remains heavily dependent on in-person events, notably ILTACON, for its "disposable income." An uncertain economy, where business travel is one of the first expenses to be cut, presents the greatest risk.

Reserves will help ILTA to have a cushion in the event of an unforeseen environmental risk.

ILTA will continue to explore new revenue streams. However, the likelihood of developing and implementing a new revenue stream in the near term that will deliver the same level of revenue as in-person events is unrealistic.

DECISION SUPPORT

Critical to our ability to be effective in achieving the outcomes described above, as well as in managing risk, is to establish and adhere to a decision framework that helps us manage resources and "keep our eyes on the prize." We have identified three efforts for improving decision support: prioritization of efforts; identification of critical success factors; and accountability.

Prioritization

We must prioritize our efforts within a decision-making framework that ensures that every initiative we undertake meets one or more of the following criteria.

➢ Aligns with ILTA's mission

➢ Serves core legal technologists well

➢ Enhances ILTA's value proposition

➢ Delivers a return on investment, including good will

➢ Acknowledges ILTA's leadership role

➢ Personalizes the ILTA experience

Our initial versions of the Decision Scorecard (full version and "vetting" version) are attached as Appendix D.

The ILTA staff Leadership Team will review all submitted Scorecards on a monthly basis and make recommendations to the Senior Leadership Team.

We will adopt a similar structure (still to be defined) with the volunteers.

Critical Success Factors

For each project and initiative, we will define critical success factors. This will assist both staff and volunteers in moving such efforts forward and the senior staff and Board in monitoring progress.

We are also adding Critical Success Factors to the framing criteria for Board discussions.

Accountability

Accountability comes in the form of regular monitoring with meaningful data and reporting.

MEASURING SUCCESS AND REPORTING ON PROGRESS

Above we referenced success and accountability.

ILTA has recently created a new staff position focused on governance and reporting. As we implement and mature processes in this area, participants will see greater transparency in terms of ILTA initiatives.

We will report on key efforts in the Quarterly Update Webinars, and we are planning a microsite on iltanet.org to report on our progress against the Plan.

CONCLUSION

Good strategy begins with good listening.

However, good listening without action is not enough.

And action without accountability is not responsible.

As we deliver on the Plan, we pledge to turn what we hear into what we do, to measure what we do, and to quantify how we improve.

In three years, we expect to have moved forward on all of our strategies, and we will be prepared to listen again to learn how to build on our success.

APPENDIX A: ILTA FUTURE STATE ANALYSIS

(Double-click on the title below to open the Appendix)

ILTA Future State Analysis

Originally prepared Aug 2022, updated December 2022

APPENDIX B: ILTA ASSOCIATION INTERVIEWS SUMMARY

(Double-click on the title below to open the Appendix)

ILTA 2023 Strategic Plan Association Interviews

Conducted December 2022 through January 2023

(Double-click on the title below to open the Appendix)

ILTA's 2020 - 2023 Foundational Elements

APPENDIX D: DECISION SCORECARD

(FULL VERSION: Double-click on the picture below to open the document)

ILTA Decision Scorecard (last updated as of 1 June 2023)

Title of Proposal/Idea

Status of Proposal/Idea
☐ New Idea   ☐ Updated Idea   ☐ Change in Product/Service   ☐ Elimination of Product/Service

Summary of Proposal/Idea
How Compelling is the Proposal? ☐ Very Compelling ☐ Somewhat Compelling ☐ Not Compelling
Comments:

Alignment and Impact of Proposal/Idea
Aligned with Mission?   ☐ Very Aligned   ☐ Somewhat Aligned   ☐ Not Aligned
Supports Strategic Plan?   ☐ Content   ☐ Connections   ☐ Leadership
Impact on Member Value?   ☐ Positive   ☐ Neutral   ☐ Negative
Impact on Business Partner Value?   ☐ Positive   ☐ Neutral   ☐ Negative
Greatest Potential Positive Impact? (check all that apply) ☐ Small Law Firm   ☐ Mid-Sized Law Firms   ☐ Large Law Firms   ☐ Corporate/Government/Schools ☐ Small Business Partner   ☐ Large Business Partner   ☐ Mid-Sized Business Partners
Greatest Potential Negative Impact? (check all that apply) ☐ Small Law Firm   ☐ Mid-Sized Law Firms   ☐ Large Law Firms   ☐ Corporate/Government/Schools ☐ Small Business Partner   ☐ Large Business Partner   ☐ Mid-Sized Business Partners

(VETTING VERSION: Double-click on the picture below to open the document)

ILTA Decision Scorecard (last updated as of 1 June 2023)

Title of Proposal/Idea

Status of Proposal/Idea
☐ New Idea   ☐ Updated Idea   ☐ Change in Product/Service   ☐ Elimination of Product/Service

Summary of Proposal/Idea
Comments:

Impact of Proposal/Idea
Impact on Member Value?   ☐ Positive   ☐ Neutral   ☐ Negative
Impact on Business Partner Value?   ☐ Positive   ☐ Neutral   ☐ Negative
Areas of Support for Strategic Plan: ☐ Content   ☐ Connections   ☐ Capacity
Is there Revenue Potential?   ☐ Yes   ☐ No   ☐ Not Sure
Does this Proposal Present Challenges to Tradition?   ☐ Yes   ☐ No   ☐ Not Sure
Does this Proposal Impact Volunteer Culture?   ☐ Yes   ☐ No   ☐ Not Sure