Agenda

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Introduction

- ILTA launched a strategic planning effort at ILTACON 2019
- I was hired to conduct impartial third party stakeholder research to inform the planning
- **204 stakeholders participated - 131 members, 35 business partners, 38 staff**
  - 12 member focus groups including a total of 109 members- ILTACON, ILTACON Europe, PPC, LegalTech NY (corporate members), Dallas, San Francisco, law school members (virtual), Canadian (virtual)
  - 22 member interviews
  - 4 business partner focus groups including a total of 19 business partners at ILTACON and ILTACON Europe
  - 16 business partner interviews
  - 3 staff focus groups including a total of 29 staff, 9 individual staff interviews
- Stakeholders were encouraged to be candid; all conversations were conducted in confidence
- Findings reflect an aggregate of perspectives
Strengths and Weaknesses
ILTA’s Strengths

- Peer to peer connection and networking (Consistently mentioned as the strength that is valued the most)
  - “I’m able to know what the top folks are doing across the globe and can reach out to any one of 100 CIOs.”
  - “I found my job through ILTACON - the networking is almost a form of job security.”

- Content
  - “educational rigor and excellent content in diverse formats that doesn’t exist elsewhere.”
  - “Brainstorm solutions and not just hear product pitches or fairytale endings”
  - ILTACON, technology survey, Peer to Peer, webinars, etc.

- Credibility
  - “ILTA is the top organization - they provide true value”
  - Leadership and reach in the legal ecosystem
  - Vendor neutral - “almost everything else is vendor driven”
  - Lengthy track record of success
Strengths

- **Culture**
  - Passion
  - Willingness to share - “sense of community”

- **Conversation**
  - Access to and opportunity to participate in community dialogue
  - convening across different perspectives
  - “ILTA is unusual in the way it brings different parts of the community together, vendors, IT, KM folks- it is a non-adversarial forum where everyone can get together”

- **Firm Membership**
  - “everyone can benefit in my firm.”
Strengths

- **Personal/Professional Growth**
  - Opportunity for members to grow - many don’t get leadership and professional development training in their law firms
  - “I’m chomping to get more management roles at my firm, I cut my teeth at ILTA, and have learned in real time.”

- **Leadership/Staff**
  - “Joy is a breath of fresh air”
  - “I was disillusioned but now I’m being drawn back in - ILTA is being run like a real organization, they are doing it right.”
ILTA’s Weaknesses

Tailoring ILTA to my needs....

- **Breadth, depth and focus**
  - “ILTA needs to focus, let’s just do some things well, it will mean hard choices, some things will get left out, but what remains will be quality.”
  - “Willingness to try things can make us scattered.”
  - “Diversity of the membership is a blessing and a curse.”

- **Content**
  - Hard to locate content on the website - too easy to find content other places and give up on ILTA
  - Need to get beyond high level introductory content
  - “Offerings are outdated, what is the ROI?”
Weaknesses

- Remaining Current
  - “Strategies are becoming dated, haven’t changed in 15 years.”
  - “Move at the pace of collaboration - slows us down a bit.”
  - “We are lacking data to be strategic.”
  - “Not doing a good job with younger generations.”
  - “ILTA preaches change and innovation, yet has trouble figuring out how to make change and innovation a part of the system, there needs to be a method in which experiments can get escalated into the system.”
ILTA’s Weaknesses (cont’d.)

- **Including All**
  - “Too cliquey.”
  - “There are amazing voices around the world that could be better heard.”
  - Be more inclusive with materials - other languages, visually impaired etc.
  - “ILTA is a firm wide investment - I would like to see more people from my firm use it.”
  - “Business partners get treated like the red headed step child but have a lot of content expertise to offer.”

- **Leadership challenges before Joy’s hire**
ILTA’s Weaknesses

- **Conference**
  - “ILTA’s greatest strength and its greatest weakness. Too dependent on it...is it anachronistic?”
  - “Hard for small firms to see the value - need to demonstrate year round value beyond ILTACON.”

- **Regional presence**
  - ILTA’s regional presence ebbs and flows
  - Smaller gatherings have value - ILTACON can be overwhelming
  - What is the right balance of vendor generated vs vendor neutral local content?

- **Passion**- can be a negative, care so deeply, can be resistant to change

- **Peer to peer culture** may be diminishing
  - Flip side of growth
Weaknesses

- **Too US-centric** - “American organization with members from other countries”
  - Not deliberate, but many examples large and small where ILTA doesn’t think globally
    - Content teams don’t reflect international perspective
    - Schedules for webinars and volunteer meetings
    - American accents in materials
    - Prices in dollars
  - This was pointed out by virtually every non American, not once pointed out by American members

- **Volunteerism doesn’t translate** well outside North America
  - “ILTA is so frigging American, but that is arguably one of its strongest assets, the Americans are more prone to help each other and volunteer.”
Specific Stakeholder Perspectives
International Perspective

- Has felt more energized in the past year
- “It’s been great to have a staff person in the same time zone. She has made herself high profile, she’s out talking to people.”
- “If you mean the “I,” put something behind it.”
- Europe and the UK are NOT monolithic, there are significant cultural differences between the UK and Europe and within Europe
- “Calling out international separately isn’t always right - should be integrated on much of the content but acknowledge and address the reality of cultural differences.”
Corporate Perspective

- Frustration about ILTA’s lack of attention to corporate issues in the past
- CLOC and ACC filled a void that ILTA didn’t seem interested in addressing
- ILTA doesn’t bring much value to corporate folks
  - “Not getting the ROI from ILTA.”
- “Will have to be something specific to bring people back that’s not already out there. And don’t charge too much.”
  - “Look at collaborations.”
Law School Perspective

- Law schools fit with ILTA’s overall purpose
  - “Generation of law students coming into the workforce... there is significant value in their early engagement... technology can impact their work and how law firms operate.”
  - “Technology is not just a service, it is an integral part of how law is practiced.”
  - “Law school program will pay dividends in the future.”
Recognize and appreciate that ILTA is the place to go to connect with current and potential customers

Feel like “second class citizens” - some say this is getting better

Want more access and trust
  - “We have a lot to offer.”
  - “Moving in the right direction- breaking down walls”
  - “Trust our money, trust us as well”
  - “They tend to punish us all because of a few bad apples. We know the rules and respect them. Enforce the rules with those who don’t.”

ILTA has a unique thought leadership role to play
  - Many vendors are interested in partnering with ILTA to do this
Staff Perspective

- Value ILTA’s accomplishments, history, culture and co-workers
- Change is needed as the organization looks ahead
  - “We have to respect the past without being held back by it”
  - “We have rebuilt after a rocky period, but there is still more to be done.”
- Need to solidify the foundation and be more business like as ILTA looks to the future
  - Technology - website and search capabilities
  - “Be more data driven.”
  - Enhance processes and systems
  - Clarification of roles and responsibilities vis a vis volunteers
Stakeholder Engagement

- Need to think about new ways to engage that are forward thinking
  - “We need to better define the personas of the members. We can’t do one size fits all. We need paths for our members...they are constantly firefighted, we need segmentation.”
- Create clearer learning and participation pathways for different audiences
  - Changing generational preferences
    - “Younger generation needs an end game, a clearer connection to a career payoff”
  - “Need entry level volunteer opportunities.”
  - Consider creating more “micro volunteering” opportunities
    - “I’m too busy keeping up with my job. I can only do a more limited amount. Be more realistic with what you are looking for.”
- Mentoring
  - Suggested frequently, particularly as a means to engage younger volunteers
A range of competitors, virtually all of whom occupy a smaller niche than ILTA. CLOC mentioned more frequently than any other entity.

ILTA’s advantages:
- Peer network
- Membership base, longevity and established brand name
- Great content, consistently produced
- Firm level membership - significant benefit

ILTA’s disadvantages:
- “Horrible search capabilities”
- Cost is a negative for some stakeholders (corporate, law schools, small firms)
- “Let’s form collaborative relationships instead of competing. Let business partners participate more.”
- “Make ILTA faithful to its core, a technology-centric organization.”
COVID-19

A few stakeholder conversations happened post COVID-19.

- “ILTA’s value is centered around the social connection, that’s why the COVID-19 situation is hard”
- “Need to pivot - don’t want ILTA to fail - need to find ways to keep folks engaged, add value to the business partners”
- “What does the transition phase look like - new normal, won’t just flip a switch, more remote work environments, more external collaboration, smaller real estate footprint.”
- “Rather than generic advice in light of COVID-19, target it to smaller communities of practice.”
Implications of Findings

- Clarify and communicate priorities
- Create systems and structures that enable participants to tailor their ILTA experience to their unique needs
- Promote innovation
- Provide year round value
- Operate more like a business while at the same time being nimble and responsive
- Rethink structures to support priorities
Questions?