



ILTA STRATEGIC PLANNING

Stakeholder Research Findings

May 2020

Prepared by Hedda Rublin

Agenda

- ▶ Introduction
- ▶ Strengths
- ▶ Weaknesses
- ▶ Specific Stakeholder Perspectives
 - ▶ International
 - ▶ Corporate
 - ▶ Law Schools
 - ▶ Business Partners
 - ▶ Staff
- ▶ Stakeholder Engagement
- ▶ Competition
- ▶ COVID-19
- ▶ Implications of Findings

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 cliquy.”
 - ▶ “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.”

Business Partner Perspective

- ▶ 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 fire hosed, 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

Competition

- ▶ 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?