

2013 LMA Marketing Technology Conference/West Best Practices - Experience Management Implementation

"All things are created twice; first mentally; then physically. The key to creativity is to begin with the end in mind, with a vision and a blue print of the desired result." — Stephen Covey

Assess Business Needs

1. What problems are you solving?

- a. Gather information from various stakeholders.
- b. Research trends and consider anticipated changes.
- c. "If we solve for nothing else, we must solve for _____."
- d. Define the project team and involve early in the process.

2. Who will use the system?

- a. Global thinking vs. reality
- b. Consider a phased approach

3. Project management

- a. Success = Project Manager who lives and breathes this project daily.
- b. The Project Manager manages budgets, deadlines, requirements, and people.
- c. Ideally, the Project Manager has no other responsibilities.

4. Engage leadership

- a. Difficult to sell upstream; engage leadership at the outset.
- b. Be clear. "This initiative will help us to _____."
- c. Find a partner champion.
- d. Be willing to wait.

Planning

1. Who will build it?

- a. Involve IT and other pertinent teams at the outset.
- b. Gather vendor data and call references.
- c. What is the IT norm in your firm? What will the culture support?
- d. Budget considerations and competing projects

2. How will it work?

- a. Begin with the end in mind. Design based on desired goals.
- b. Define reporting capabilities.
- c. User interface - definition and mock-ups are helpful.
- d. Do you need a mobile version?
- e. Technical considerations - support, hosting, user experience



3. How will staff support it?

- a. Data management is a full time job.
- b. Develop processes for gathering data, data entry, quality control.
- c. Define the roles of IT, Marketing, Business Development, Knowledge Management, and others.
- d. Avoid overlapping data and data sources. Hard to keep multiple systems current.
- e. Job descriptions and roles/responsibilities - clearly defined

4. How will we use what we already have?

- a. Assess current systems, processes. What works? What doesn't? Involve those stakeholders. Avoid us vs. them approach.
- b. Define what is available. How does it align (or not) with desired goals for the project? Are any of the current data structures/systems changing in the firm?
- c. What will the firm's culture support?
- d. Avoid GIGO - "garbage in, garbage out." Data consistency and format are critical.

1. Review of early development

- a. The Project Manager and key team members must stay in the development game. Avoid surprises.
- b. Get screenshots of application in early stages to ensure project on track.
- c. Watch budget and scope creep.
- d. Embrace compromise.

2. Continual review

- a. The Project Manager - manages budget, deadlines, vendor and internal communications.
- b. Status reports are helpful and necessary for the team.
- c. System architect and developers are your new best friends.
- d. Constant and consistent communications will drive success.
- e. "The devil's in the details."

3. Keep the ball rolling

- a. After initial development, interest can wane. Must keep team in the game.
- b. Provide updates to leadership and stakeholders. Use milestones and metrics.
- c. Consider an internal campaign to maintain interest.



4. Pre-launch readiness

- a. Communicate, communicate, communicate.
- b. Plan for the pre-launch, (Alpha, Beta) and define the roles and responsibilities of the team.
- c. Develop scripts for internal testing.
- d. "Keep your wits about you." - Nothing works perfectly during testing.
- e. Clear communication with development team is important.
- f. Expect issues. What can you live with?
- g. Define processes for working in the new world with experience management.

1. Roll out to marketing/business development team

- a. Create training and testing materials.
- b. Create a group of power users for initial testing - gather feedback.
- c. Provide feedback to development team. Use a standard form/process.
- d. Create "naysayer" testing team. Gather feedback and provide to development.
- e. Prioritize and document changes, fixes, and re-test before first user group.
- f. Document everything. Again, document everything.

2. Roll out to first user group.

- a. Provide scripts for testing system and gather feedback through process.
- b. Bottom line - can we live with it now?
- c. Revise documents and retest.
- d. Plan for launch should be finalized and ready to go.

3. Production launch

- a. Chill champagne and get ready to celebrate!
- b. Develop user support documents. Helpdesk should be ready.
- c. Launch new systems over weekend or holiday for easy backout if needed.
- d. Define go/no go requirements.
- e. Don't panic.

4. Promote

- a. Communications to the firm - practice groups, leadership, staff.
- b. Road shows and demos at practice/industry group meetings.
- c. Share success stories - be open to feedback.
- d. Keep at it. This is a marathon.



1. Solicit feedback

- a. Meet with the team and Project Manager. What worked? What didn't?
- b. Summarize feedback and prioritize system changes, updates.
- c. Develop plan to manage updates.
- d. Record success stories and challenges.

2. Continue communication

- a. Share wins globally.
- b. Acknowledge the team involved and support from the leadership.
- c. Communicate new features, updates and user tips to the user group.

3. Improvements

- a. Continue meetings with team to discuss enhancements/improvements.
- b. What's new in technology? What new problems are we solving?

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