

Digital Transformation of the Legal Industry Webinar Series

# SLW Digital Transformation Case Study: Recruiting, On-Boarding, Training, Firm Communications

# 8-Episode Webinar Series

**Episode 01** – What is Digital Transformation for Law Practices?  
**Thursday, February 11<sup>th</sup>, 2021, at 12:00 PM CT**

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**Episode 02** – SLW Digital Transformation Case Study: Overview of SLW systems, tools, data lake, processes, teams and personnel.  
**Thursday, March 11<sup>th</sup>, 2021, at 12:00 PM CT**

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**Episode 03** – SLW Digital Transformation Case Study: Application Preparation – Disclosure intake and docketing, application drafting tools, production management  
**Thursday, April 13<sup>th</sup>, 2021, at 12:00 PM CT**

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**Episode 04** – SLW Digital Transformation Case Study: Prosecution I – Receiving & Reporting PTO Correspondence – docketing, data/document storage, work packets, drafting and filing papers and responses; reporting to clients  
**Thursday, May 13<sup>th</sup>, 2021, at 12:00 PM CT**

**Episode 05** – SLW Digital Transformation Case Study: Prosecution II – Claim tracking, reference analysis tools and reports, prosecution landscape tools and reports, IDS management  
**Thursday, June 10<sup>th</sup>, 2021, at 12:00 PM CT**

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**Episode 06** – SLW Digital Transformation Case Study: Due Diligence, Freedom to Operate Studies, Landscape Studies, Portfolio Curation, Portfolio Analytics, Landscape Analytics, Examiner and Attorney Analytics  
**Thursday, July 8<sup>th</sup>, 2021, at 12:00 PM CT**

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**Episode 07** -- SLW Digital Transformation Case Study: Billing, Invoicing, Client Budgeting and Cost Projection  
**Thursday, August 12<sup>th</sup>, 2021, at 12:00 PM CT**

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**Episode 08** -- SLW Digital Transformation Case Study: Recruiting, On-Boarding, Training, Firm Communications  
**Thursday, September 9<sup>th</sup>, 2021, at 12:00 PM CT**

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## Before We Get Started...



### Recording

A link to the recording and slides will be emailed to all registrants.



### Questions

Type in the question box and we will answer in real time or during the Q&A.



### Social

Follow us on LinkedIn or go to SLW Institute on slwip.com to see upcoming and on demand webinars.

# Today's Presenters...



**Steve Lundberg**  
Principal & Chief  
Innovation Officer  
Schwegman  
Lundberg &  
Woessner



**Susan Crosson**  
Human Resources  
Manager  
Schwegman  
Lundberg &  
Woessner



**Tom Ernster**  
Director of  
Information  
Technologies  
Schwegman  
Lundberg &  
Woessner



**Pamela Huff**  
Trademark  
Principal  
Schwegman  
Lundberg &  
Woessner



**Scott Otto**  
Application Support  
Specialist  
Schwegman  
Lundberg &  
Woessner



**Garth Vivier**  
Principal  
Schwegman  
Lundberg &  
Woessner



# Recruiting





# Recruiting & Digital Transformation

- Explosive growth following development of web-based/cloud-based systems
- Importance of recruiting
- Cost of bad hiring decisions
- Geographically dispersed applicants and interviewers
- Digital tools essential



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# Recruiting & Digital Transformation

- Keeping track of applicants and source of referral
- Background information on applicant
- Video conferencing
- New channels to advertise job openings
- AI



# Human Resources

Software, Training & Remote Work







# Human Resources Software

- ADP Workforce Now as SLW's HR, Benefits, Time & Attendance tool
- Updates made in HR flow to payroll and benefit providers
- Employees can self-serve:
  - Update address
  - Direct Deposit
  - Tax Withholdings
  - View paystubs & benefits
  - Make changes during open enrollment
  - Enter time off
  - Enter weekly hours on their timecard

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# HR Training

- Kantola Training for HR Training
- Offers a library of courses that can be accessed and assigned to employees
- Employees watch video, take test and record course is completed
- Courses include sexual harassment, social media, diversity and inclusion



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## Remote Events

- Remote events still occur, will continue with COVID-19
- Yearly Staff Appreciation, Employee Recognition events, all done virtually
- Employees still reap benefits at our company picnic and holiday party gifts
- Weekly town halls with company updates provided by various management members




# Onboarding





# Onboarding for the Virtual Firm

- Remote Training and Follow Ups
- Cloud-based Solutions
  - FoundationIP
    - Fileroom/Docket/Billing Entry
    - Client Onboarding
  - MS Teams
    - Quick Chat/Phone/Screen share
    - Client Centric Teams
      - Jump in and catch up
  - MILO / Intranet
    - Firmwide Information
    - Training
    - Forms / Workflows



# Future and the Virtual Firm

Kaizen is a Japanese term meaning "change for the better" or "continuous improvement."

- Hybrid/Remote: The New Normal?
  - Better Online Resources
    - Training – On Demand
    - Better Communication(s)
    - Better Workflows
- Presence and OOO are not enough
  - Centralized Employee Info Area
    - On Site vs Remote Schedule
    - Best Way to Contact / Alternative Contacts
- Seamless Experience





# Attorney Practice Infrastructure & Support





# Attorney Practice Transformation

- A paperless environment is critical to digital transformation
- A paper bound practice inhibits coordination and workflow
- Operating on a cloud-based system allows for improved coordination and immediate access to information and data
- FoundationIP ("FIP") revolutionizes work processes





# Attorney Practice Transformation

- FIP
  - Docketing system
  - Time entry and management
  - Document and email filing and management
- Immediate access to information
- Access by anyone at any time
  - Increased efficiency when working with others
  - Multiple people working on file at same time
  - Location of others is non-issue

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# Attorney Practice Transformation – Present Day Advantages

- Increased flexibility, particularly as to work location
- Allows for immediate remote work options
- Recruiting
  - Ability to recruit from anywhere
  - Ability to offer work environment flexibility

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# Attorney Practice Transformation – Present Day Advantages

- Mentoring
  - Critical to be able to offer continuous and uninterrupted mentoring
  - Significant recruiting advantage



# Attorney Training Tools





# Attorney Information Technology Training

- Goal: Make training personalized, succinct and useful without overwhelming
- Introduce content, then show how to dig deeper

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# Attorney IT Training

## Best Practices

- Using Teams, Zoom or Webex
- SharePoint Online: A simple, well organized, central repository is crucial
- Use client-centered repositories
- Use Yammer, a wiki or blogging tools to keep information fresh and dynamic
- Use features or content available in existing tools and services
- Understand your regulatory, insurance or business requirements
- Use Learning Management Systems
- Consider how you will alert people or publish urgent notifications
- Personalize, encourage, and promote





Thank you for your interest.

# Questions?





These materials are for general informational purposes only. They are not intended to be legal advice, and should not be taken as legal advice. They do not establish an attorney-client relationship.