



Explainer for Microsoft's Trusted Advisor Program (Sept 20, 2018)

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Our Strategic Partner Program is built on the premise we can deliver more value to our shared customer, Microsoft, if we work together to develop deeper engagement. One path to creating more value is improving the quality, speed, and cost of our legal services delivery. At this year's CELA Global Summit we said we will weave continuous improvement and innovation of service delivery into the fabric of our relationship.

We are holding ourselves and you, our partners, accountable because we must improve and evolve to serve our client. We are a team. Our team cannot provide exceptional counsel to a business that is accelerating by relying on existing, conventional approaches. They do not keep up. They do not scale. They do not deliver the value we seek.

Clients frequently ask you to innovate, get more efficient, and become data driven. We hire the best firms to do our work because you are experts. We must partner with you to define the specific improvements that will deliver value to us based upon your expertise. We want to help you succeed in delivering a set of specific outcomes that address our value asks. We want you to focus on making a few changes that improve our work in an explainable way that our legal professionals can understand, value, and appreciate.

Our innovation focused Trusted Advisor Forum is the start of the continuous improvement cycle with you, our Trusted Advisors. We intend to find a sustainable cadence to collaborate on developing improvement plans and measure our progress against those plans. We will discuss strategic plans, target operating models, and digital transformation as our collaboration process matures. We are starting with simple, discrete, concrete projects that you believe have impact and that you can measure. The ask:

1. tell us about one thing you have done in the last year to get better; and
2. tell us about one thing you will try to do next year to get better.

You will offer a hypothesis about how each of these creates more value for Microsoft, ideally with measurable indicators. For more background, you can read Casey on these concepts ([shorter](#), [longer](#)).

Decoding the Innovation Stories We Seek

"an innovation that demonstrably improves legal service delivery to Microsoft"

Innovation. The Forum is focused on innovation. Innovation, not invention. We use "innovation" broadly to mean a change in how you deliver legal services to Microsoft. The

projects reflected in the canvasses are the mechanisms by which you introduce and incorporate the innovation.

Innovation need not involve technology. Changes to business models are critical innovations. If our AFA relationship incents you to create a new non-partner career track—to ensure dedicated, highly trained resources with low attrition focused on Microsoft work—that constitutes innovation for purposes of the Forum. The project would be how you structure, socialize, implement, and measure the success of your staffing innovation.

This is not to discount technology. We are undergoing our own digital transformation and will share our plans with you at the Forum. We expect many of your innovations will have a technological component. The technology, however, needs to be connected to changes in behavior and the attendant value delivered to Microsoft. Explaining a major IT investment and failing to explain how this will make the work you do for us more valuable is not adequate.

Demonstrably Improve. We were tempted to use “measurably.” Not every improvement lends itself to clear quantification of impact. You, for example, might choose to solve for overreliance on email as a means of both communication and document management. Your innovation might be migrating lawyers to a workflow tool. Many aspects of this innovation are measurable—e.g., number of matters, messages, and documents in the tool—and should be included in your metrics. Yet while the benefits may be clear (demonstrable), the actual impact might be hard to quantify (measurable).

To offer another example, you might have developed a clause bank for the purposes of speed and consistency in contract drafting. Simply stating the existence of the clause bank would fall short of our expectations. Providing the data—number of clauses, usage statistics, update frequency—and pointing to concrete instances of the clauses being used in service of Microsoft would be closer. That is, you can demonstrate improvement even if you are challenged to precisely measure time savings with only anecdotes and logic to support the claim of superior quality.

Legal Service Delivery. You have superb lawyers. Legal acumen is why we hired you. It remains the foundation of our relationship. As one of our primary providers, you’ve helped Microsoft deliver success last year and will do so again next year. Creativity in the application of legal knowledge is worth celebrating. But it is not the focus of this Forum.

The Forum is focused on innovation in legal service delivery—i.e., systems for leveraging expertise through process and technology. The Forum is an opportunity to explore ways to improve quality, consistency, speed, transparency, sustainability, cost-effectiveness, predictability, scalability, et cetera.

Winning a motion for summary judgment due to a novel legal argument is praiseworthy but not a topic for the Forum. Changes in your approach to summary judgment based on judge-level predictive analytics you have deployed would be.

To Microsoft. Your innovations need not be specific to Microsoft. But your innovations must demonstrably benefit Microsoft. This is not a marketing pitch about how the firm is/can be innovative. The Forum will be a discussion of specific innovations with an express nexus to legal service delivery to Microsoft.

For example, a new legal project management program may or may not be an appropriate topic for the Forum. While LPM is patently an initiative related to legal service delivery, the mere existence of the program has no self-evident benefits for Microsoft. You would need to, for example, identify areas where project managers have been assigned to Microsoft matters and then explain, preferably with numbers, how that assignment benefited Microsoft. Though you need not have created the program specifically for Microsoft. Nor do the benefits need to be confined to Microsoft.

Presenting Your Innovations to Our Partner Community

You will be presenting to the entire Forum. This includes your fellow Trusted Advisors. You may see other firms as competitors. We see you all as part of an integrated partner ecosystem.

Microsoft frequently collaborates with its 'competitors'. Consider our multi-billion-dollar commitment to the open source community or our partnerships with Apple, Amazon, Google, et alia. We expect our partner firms to find ways to collaborate and complement each other's strengths. This will be an opportunity to demonstrate your commitment to one of our values.

You did not become a Trusted Advisor because of the innovations you will present. You became and remain a Trusted Advisor because you are the type of organization that will innovate. Likewise, other clients are unlikely to retain you because of a single innovation. Your continued participation in the Trusted Advisor program should be a more salient differentiator—social proof and a strong signal of commitment to continuous improvement. Indeed, we will be inviting some large law departments to observe the Forum.

Ultimately, the value is in the execution, not the ideas. Ideas are cheap. Hence the Forum's focus on demonstrable improvements.

Failure Is Not Trying and Success Is Learning

Failure is permissible if we learn something. On your already introduced innovation, you can cherry pick a success story. We do not expect the forward-looking project to be so pedestrian

as for success to be guaranteed. We want you to be bold. We are prepared to accept failure. We cannot accept not trying. We are updating our culture to embrace a growth mindset that stresses a learn-it-all instead of a know-it-all approach. We expect to see this reflected by our Trusted Advisors.

There are edifying effects to getting it wrong. We look forward to you sharing lessons learned no matter the outcome of your attempts to improve.

We are Figuring It Out Too

The Forum is an experiment. The current thinking is we will reconvene in a year to report back and publicly commit to a new round of innovations. But we will see how this goes.

Our commitment to continuous improvement is not an experiment. These types of projects will become part of our annual feedback cycle and will be on the agenda for my site visits. In addition, I recommend you start, if you haven't already, situating these projects in a larger strategic plan with a target operating model and a digital transformation roadmap. You do not have to share your entire vision at the Forum. I will ask about it when I come onsite.