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HOW TO BUILD A VIRTUOUS CYCLE FOR IT TECHNICAL SUPPORT

IT TECHNICAL SUPPORT BEST PRACTICES FROM SCHULTE ROTH & ZABEL LLP, AN AWARD WINNING TOP 100 LAW FIRM
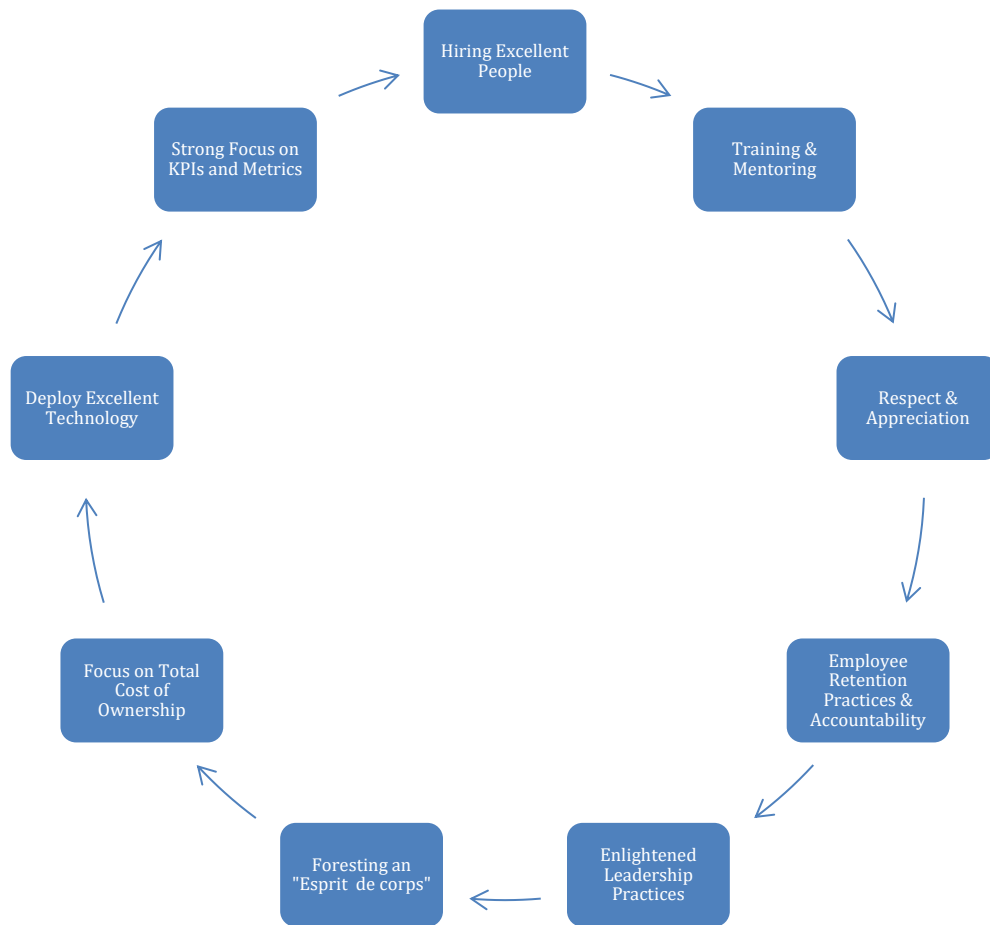
Part 1

This is Part I of a two part White Paper on how Schulte Roth & Zabel LLP, a top 100 law firm, built a virtuous cycle for IT technical support. Part I discusses leadership practices and a unique firm culture that supports building a self-perpetuating virtuous cycle. Part II discusses the importance of metrics and KPIs, and how it can help an organization measure success and reward teams and individuals. Both of these qualitative and quantitative leadership practices are necessary to build an award winning IT help desk in a demanding and rapidly changing top 100 law firm environment.

Summary of White Paper

This White Paper is based upon interviews with a number of IT Department employees at the law firm of Schulte Roth & Zabel LLP (SRZ). The leader of the IT Help Desk is Danny Morse, Technology Support Manager.

The internal IT Help Desk at SRZ has consistently won awards year after year. From 2006 through 2010, SRZ was ranked the #1 Law Firm Help Desk in New York City. In summary, there is no one single insight or differentiator that can explain their extraordinary success. There are many important leadership practices that contribute to success: hiring and developing/mentoring outstanding people, "enlightened" management practices, deploying excellent technology, and fostering a healthy and fun "*esprit de corps*" in the IT department. You could say that their "secret" is a firm culture and senior leadership that supports an environment of respect, trust, individuality, out-of-box thinking and an ethos of exceptional customer service.

HOW TO BUILD A VIRTUOUS CYCLE FOR IT TECHNICAL SUPPORT

Hiring Excellent People

Training & Mentoring

Strong Focus on KPIs and Metrics

Respect & Appreciation

Deploy Excellent Technology

Employee Retention Practices & Accountability

Focus on Total Cost of Ownership

Foresting an "Esprit de corps"

Enlightened Leadership Practices

Introduction

This white paper discusses some important IT Help Desk Best Practices employed at the law firm of SRZ. The firm is among the top 100 law firms in the world. The firm was awarded #1 Law Firm Help Desk in the USA in 2009 and 2008 from an independent survey entitled, "AmLaw Mid-Level Associate Technology Survey", the technology supplement to The American Lawyer. From 2006 through 2010, SRZ was ranked the #1 Law Firm Help Desk in New York City.

Over the last decade, as SRZ has grown in size, so has the complexity of its IT environment. As with many large law firms, the expectations of SRZ attorneys have increased while rapidly changing technologies continue to be deployed.

An Outstanding Customer Service Team Starts with the DNA of IT Leaders

Just as SRZ attorneys work to service the firm's clients with the utmost dedication, professionalism and creativity, the firm's business departments have the same mindset with respect to supporting their attorneys. This philosophy is part of the firm culture that emanates from senior leaders.

The outstanding customer service ethos of the SRZ community is lived and practiced daily and starts with the senior leadership team of Gary B. Fiebert, Executive Director, and Will McDonald, Director of IT. They are both long time contributors at SRZ. These leaders set the customer service oriented tone to the organization.

In a top 100 law firm excellent technology is a critical piece of delivering outstanding legal services to demanding clients with high expectations. Senior leaders and partners at SRZ know that technology is complex and ever changing, and that technology support is absolutely critical. They budget new technology purchases, mindful that they must be properly supported.

Although not unique to SRZ, this operating philosophy puts SRZ in a minority of law firms. SRZ focuses on analyzing the Total Cost of Ownership (TCO) of technology purchases. They well understand that, in order for the firm to realize a positive Return on Investment (ROI) on new technology investments (i.e. an increase in attorney productivity that more than offsets the TCO of the purchase), the firm must train attorneys and support personnel, maintain the technology with appropriate upgrades, and offer efficient and outstanding technical support.

Recruiting

It is quite difficult to get an offer of employment from the IT help desk department at SRZ. The firm has a number of proprietary technical screening assessments that they perform in order to objectively and thoroughly evaluate technical and service capabilities of prospective employees. SRZ carefully performs screening interviews and role playing to measure personality traits and "fit" with its demanding environment, in an effort to identify outstanding talent. They have established very high standards on the IT help desk. Staff have often adjusted schedules to provide technology support while recruiting for the best talent possible. An important insight is never to settle with just an "average" candidate. Exceptional talent is the foundation and the starting point of building an award winning virtuous cycle for IT technical support.

Although SRZ hires exceptional talent, new employees quickly learn that they have to prove their value to the organization. Regardless of their length of service, all employees are treated with dignity and respect at all times. This is just part of the DNA and culture of the firm. However, new employees have to prove their professional competency. They are very closely monitored when they begin working on the IT help desk. More seasoned employees are always ready to mentor newer talent. There is a strong "e*sprit de corps*" in the IT department and somewhat of a competitive game of who can be most productive in terms of answering the most phone calls and earning the highest customer satisfaction ratings.

The IT help desk agents providing Level 1 support have access to individual and group metrics and KPIs. This has fostered a healthy form of competitiveness. This competitiveness has helped "raise the bar" in that it perpetuates higher standards of productivity and effectiveness. Since metrics and KPIs are available to all, there is no place to hide and objective data "wins the day." Supervisors and senior analysts can lead, coach and mentor Level 1 agents with just the facts and the raw data. This has a strong motivating effect when people know their performance will be based upon objectivity.

Each part of the virtuous cycle, if practiced consistently, will help to self-perpetuate the cycle. Exceptional talent will attract others that are exceptional. SRZ finds that former colleagues of current employees are drawn to the winning SRZ team. Since SRZ has developed an outstanding reputation by consistently winning awards, excellent talent continues to be attracted to the firm.

Focus On Trust & Employee Development

SRZ spends significant effort on training, mentoring and ongoing employee development as necessary. This is among IT management's top priorities and is a continuous challenge.

Establishing trust with employees sounds like a rudimentary leadership practice, but it is not often well practiced in large law firms. Formal organizational reporting lines are part of SRZ, but IT staff can exercise their right to use the "open door" policy that senior leaders espouse. There is an open door policy for everyone in Support – no exceptions.

When projects are delegated to staff, there is also a lot of authority and trust provided as well. However, these members are still expected to communicate issues to the project team, and to participate in centralized decision-making when appropriate. Staff who know the details of a project are in the best position to present challenges to the team, and their insight and knowledge are very much respected.

The focus on team work rather than a "star system" is another important part of SRZ culture. The leadership team celebrates the IT team's achievements with a lot of gusto and enthusiasm. In

turn, this fosters more team work. People are rewarded and recognized for contributions to team work. Highly talented employees are encouraged, mentored and celebrated, but with less fanfare.

Stable, Happy Workforce

SRZ has an unusually low IT help desk employee turnover rate. The firm attributes this to a number of factors. The firm seeks to find the best talent possible. The "e*sprit de corps*" in the IT department is an environment of appreciation and respect and a philosophy of teamwork that all play important roles in creating happy employees. When employees are happy and generally enjoy their work, they stay committed to a firm.

SRZ enjoys a stable IT help desk workforce in a traditionally high turnover area. This reduces that TCO of providing technical support. This savings can be "plowed" back into the firm. Again, this virtuous cycle is self-perpetuating. As it turns out, treating people very well is also great for business!

As previously discussed, SRZ recruits and hires the absolute best talent they can find. The firm knows that it has to make investments in people. As part of this philosophy, employee mentoring and development are very important. Part of the IT department culture at SRZ is an "improvement complex." Employees learn to accept that there is always something that they can improve, whether it is technology or interpersonal skills. IT help desk

employees are always asked and encouraged to build new skills and capabilities. Constructive feedback is provided in the best interest of individuals, as well as the team.

Showing Respect & Appreciation

Respect for the individual is extremely important at SRZ. With all legal help desks, it is very difficult to provide attorneys with technical support, as they are always facing deadlines and pressure. Attorneys depend on technology to increase their productivity – they do not have time to stay on the phone speaking with the help desk. They need efficient and accurate assistance as well as superior customer service. When attorneys receive this level of support, they are more than happy to share their appreciation with those who assisted them. It is not enough for the help desk to hear appreciation from IT leadership. Appreciation is acknowledged by the firm's attorneys through customer service surveys. That is somewhat unusual in a large law firm. Again, this is just part of the DNA of the firm. Attorneys expect exceptional service, and most often they get it. Attorneys are surveyed on each and every call about the level of service they received. The survey response rate is approximately 35% which indicates that attorneys are willing to take a minute or two to contribute to the feedback loop. Surveying attorneys after each and every call allows corrective or remedial action to take place in near real-time while events are fresh in everyone's mind.

CASE STUDY: SRZ AND GIVA

SRZ has been using Giva's cloud-based call tracking system for their Internal IT help desk for over a decade. Giva asked SRZ why they have been a customer for so long. This is what Danny Morse, Technology Support Manager said:

"There are several reasons why SRZ has been a Giva customer since 2001. We like their cloud-based products and the fact that we don't need to dedicate anybody to maintain and support our call tracking system. Their products are extremely easy and intuitive to use, whether opening service requests, using dashboards or analyzing reports.

We have been able to reduce support costs and increase customer satisfaction using Giva. The company has provided us with outstanding customer service and support. We like how they are passionate about customer service just like we are passionate about providing the absolute best customer service and support to our attorneys and staff.

We have a partnership kind of relationship with Giva that we wished we had with all of our technology vendors. Giva asks us for feedback and input before and after new product releases. They are continuously building a better product. They have worked closely with us over the past decade in order to customize our system "just the way we want it." Like us, they share the philosophy that "good enough" is never good enough. We always get more than we expect from Giva. It's an excellent cloud-based product supported by a top level company."

ABOUT GIVA

Founded in 1999, Giva was among the first to provide a suite of help desk and customer service/call center applications architected for the cloud.

Now, with hundreds of customer driven releases, the Giva Service Management™ Suite delivers an intuitive, easy-to-use design that can be deployed in just days and requires only one hour of training. Giva's robust, fast and painless reporting/analytics/KPIs quickly measure team productivity, responsiveness and customer satisfaction resulting in faster and higher quality decision-making. Customization and configuration are all point and click with no programming or consultants required to deliver a substantially lower total cost of ownership.

Giva is a private company headquartered in Santa Clara, California serving delighted customers worldwide.

deploy in days, train in 1 hour

robust, fast & painless reporting for higher quality decision-making

highly customizable without programming or consultants

the **Giva**difference