

OVERVIEW

The *Service Delivery Review: Process and Technology* is a flexible vendor management program designed to augment an ongoing or completed convergence initiative. The SDR combines a customized questionnaire with quantifiable measurements and an onsite review to produce a scorecard and recommendations in areas the client selects (e.g., project management, billing hygiene, staffing, training, knowledge management).

With people and pricing in place, **process** offers clients and law firms the most levers to work collaboratively in driving **continuous improvement**. The SDR creates the opportunity for an on-going **structured dialogue** about increasing performance in areas of emphasis. The SDR is as much about carrots as it is about sticks. The optimal outcome is a **deeper relationship** in which clients get better quality at lower cost while firms increase realizations and profits.

- Clients
 - Gain a more comprehensive understanding of how legal services are delivered
 - Generate empirically-aided opportunities to communicate with firms about priorities
 - Improve quality and reduce costs in a cooperative, systematic manner
- Firms
 - Differentiate themselves from competitors and strengthen relationships with clients
 - Get credit and realize a return on investments in process and technology
 - Address the presumption of inefficiency that leads to internal and external writedowns

Dive directly into the **mechanics** [here](#). An annotated **exemplar questionnaire** is [here](#). **Sample reports** are [here](#). An introduction to **Basic Technology Benchmarking**, which addresses common office technology like Word and Excel, can be found [here](#).

Philosophy

[Strategic sourcing](#) is an approach to supply-chain management premised on the inherent value in long-term, mutually-beneficial relationships. The hard and soft costs incurred in switching suppliers afford advantages to incumbency. Exemption from reasonable scrutiny, however, is not among them. Rather, strategic sourcing calls for a rigorous but collaborative approach to continuous improvement across the entire value stream.

What is Strategic Sourcing?

Definition: A systematic and fact-based approach for optimizing an organization's supply base and improving the overall value proposition.

What it is	What it is NOT
Focused on the Total Cost of Ownership (TCO) incorporating customer needs, organizational goals, and market conditions	Focused ONLY on cost
Getting the best product/service at the best value	Getting the cheapest product/service
Driven by a rigorous and collaborative approach	Ad-hoc activities involving only purchasing
Addresses all levers for savings	Focused on "beating up suppliers"
Decisions based on fact based analysis and market intelligence	Decisions based on opinion, unjustified preference, or complacency
A continuous process	A one-time project or decision

Legal acumen is mission critical. The operating assumption is that the organization already hires superb lawyers both internally and externally. But the provision of legal services is not solely a matter of abstract legal insight. While the insight is primary source of value, execution matters, especially for consistency and cost. Much of the labor (and waste and error) comes in translating abstract insights into concrete deliverables such as contracts, closing documents, filings, etc. Expanding the focus from individual aptitude to the mechanisms by which legal services are delivered substantially increases the levers available to drive continuous improvement.

The primary purpose is not to punish incumbent law firms for operational inefficiency but to build [deep supplier relationships](#) that move continually towards operational excellence. This starts with committing to coprosperity and learning about how the suppliers works.

The model for deep supplier relationships is the Japanese automakers in comparison to their American Big 3 counterparts a decade ago. When the competition from the Japanese intensified, the Big 3 studied the Japanese cost structure. They found that the supply base was a major source of Japanese cost advantage. The Big 3 tried to close the gap by leaning on their suppliers for cost reductions. The Big 3 achieved cost reductions. Just not enough. They also had to deal with inferior quality parts and decimated, antagonized suppliers, many of whom eventually went bankrupt.

The Japanese automakers responded to the competitive pressure by setting cost reduction targets of their own. They achieved cost reductions. At the same time, quality improved, and the Japanese

automakers deepened their relationship with an engaged, profitable supply base. Their suppliers, including American companies, were able to fulfill the twin mandates of cost reduction and quality improvement because the Japanese automakers helped them do so. The Japanese automakers dispatched teams of consultants to map supplier value streams, identify high-impact process improvements, and implement improvement plans in a sustainable manner. The Japanese automakers were just as hard on their suppliers, if not harder, than their American counterparts. But they approached their suppliers in the spirit of active engagement rather than antagonism.



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The American legal market has grown more antagonistic since the Great Recession. As reflected in [plummeting realization rates](#), inside counsel already 'know' their outside counsel are inefficient. But these are imprecise impressions of poor service delivery, not a concrete identification of remediable problems. Law firms therefore have limited opportunity to demonstrate value and alleviate client concerns. Clients do not reward process improvement with higher realizations or additional work. With no return on investment in innovation, stagnation reigns and client discontent deepens.

Transparency benefits both sides. A client that understands the mechanics of service delivery can set clear expectations for improvement. Rather than a vague, unilateral mandate, these expectations should serve as a foundation for a [structured dialogue](#) about priorities, timelines, milestones, and measurable results. The interaction should run both directions, with the law firms also identifying the ways in which the client can help facilitate the delivery of superior legal service.

There is no finish line. Individual projects will run their course. There will always be more levers to press. Progress, not perfection, is the objective. Progress includes the alignment of interests between client and firm through structured dialogue and continuous, mutual improvement.

Mechanics

Step 1: the (external or internal) consultant conducts interviews with the client to customize the questionnaire and scorecard, including category selection and weighting. In addition to the managing attorney, interviewees should include operational and administrative personnel. An annotated, exemplar questionnaire is appended [here](#).

Step 2: the consultant works with the firms to complete the questionnaire, responding to inquiries about the questions themselves, as well as the form and content of the answers.

Step 3: the consultant conducts follow-on interviews with law firm personnel. These interviews include not only the relationship partner and other timekeepers, but also their support staff and nontraditional stakeholders such as the information services, knowledge services, project management, and pricing professionals. The interviews will be driven by responses to the questionnaire as well as an onsite review protocol customized to the client. An exemplar onsite review protocol is [here](#).

Step 4: the consultant presents preliminary findings and recommendations to each law firm for comment and feedback. Exemplar findings are [here](#).

Step 5: the consultant finalizes the findings/recommendations for each relationship and provides them to both the client and the law firms. The consultant provides the client with a comparative report and a consolidated response document, which contains all the firms' responses, as well as the consultant's notes from the onsite review. An exemplar comparison is [here](#).

Step 6: the client and the law firm meet to discuss the findings and recommendations. The consultant participates at the beginning of the meeting to set stage and at the end of the meeting to document commitments, deliverables, timelines, etc.

Step 7: repeat (annually or biannually) with an ever-evolving questionnaire that uses previous findings/commitments as a baseline and is modified to accommodate changed circumstances and new priorities.

Other Considerations

How many law firms? The process works with just one firm. That said, relative rankings tend to be more informative than evaluation against an abstract standard. Multiple firms answering substantially similar questionnaires also introduces economies of scale. If, however, the process is to be used with more than five firms, the recommendation is to create rational subgroups for suitable comparisons and administrative ease.

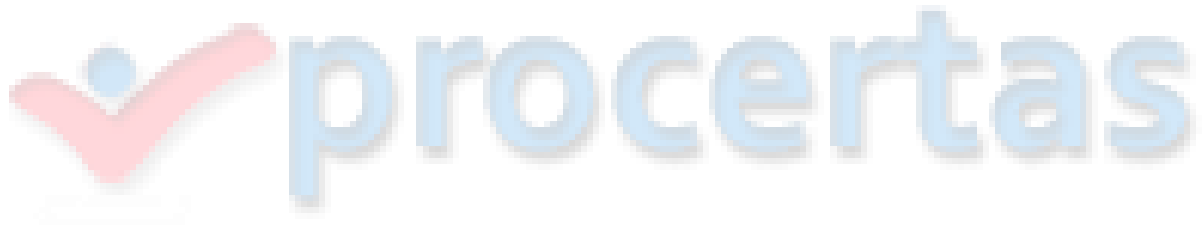
Which law firms? The law firm relationships with sufficient incentives on both sides. The relationship has to be valuable enough to the firm for them to invest in process improvement. And the relationship has to be valuable enough to the client to invest time in understanding the firm's delivery mechanism and communicating clear expectations about process improvement.

For firms that don't quite meet the threshold but are still substantial partners, the recommendation is for the client to make a conditional commitment to act in concert with clients in a similar circumstance. That is, the client commits to be one of the X number of clients that will request responses to a more generalized questionnaire. It is up to the consultant to find the critical mass of other clients with a similar level of interest.

There is also merit in a scaled-back SDR for firms with less strategically vital relationships. General questionnaires with limited follow-up and no onsite meeting can be used for evaluative purposes as part of a broader vendor management initiative.

Who pays? The firms probably should. This is marketing in the purest sense (to know and understand the customer). The results are also portable. The firms can use positive findings as selling points with other clients.

The marketing angle is particularly apt if multiple clients are asking after the same information (e.g., the conditional commitment scenario). If there is only one client asking, there is more of discussion to be had about the client covering some, if not all, of the consulting costs.



Sample Findings

Firm #1



Findings: the firm regularly invests in basic hardware, software, and platforms (e.g., they have a new document management system). They've also spent the last several years focusing on enhancing their project management capabilities. With their PM program maturing, they are turning their attention to knowledge management, having just hired a new Chief Knowledge Officer. At the moment, their knowledge management practices are virtually nonexistent. The same is true of their use of data and analytics. Their billing hygiene is problematic, and their combination of support staff and associate training needs to improve.

Weight			
15%	Billing Hygiene	2	The firm has a good written policy on timely recording of activity. But the policy is not enforced. The overall velocity of time entry is poor, which suggests subpar record keeping, cost accounting, etc.
14%	Process/PM	4	The firm has invested heavily in project management, including hiring several full-time, certified project managers and mapping every major process involved in handling the client's matters. There are, however, a few holdouts at the top of the partnership ranks who do not think they need PM involved in even their largest matters. The program is excellent. But the adoption is not where it needs to be among the partners serving the client, especially given the client's strong emphasis on project management.
10%	E-Signatures	2	Most lawyers still print, sign, and scan. The few lawyers that use e-signatures do so by crudely inserting image files onto documents. There is little-to-no use of the built-in digital signature functionality of Word and Acrobat, let alone a more robust digital signature management program like EchoSign or DocuSign.
10%	Document Assembly	3	Document assembly is not that broadly used within the firm. But the commercial litigation group that directly serves the client has a good macro-aided process for generating pleading/submission templates for new matters and is working with their PM department on a more automated way to complete discovery responses.
10%	Data/Analytics	1	The firm simply does not look at the data it has. And the data it has is limited because there has been no investment in analytic tools. There is no pricing director or other member of senior management who tracks key metrics in any meaningful or systematic way.
8%	Training	2	There is extensive screening and training of staff. There are also mandatory training sessions for all major rollouts (e.g., the new document management system). But the competence level of new and existing associates is mediocre. And while training is available, it is not mandatory. Nor does it have a competence based component. This SDR (and the associated Legal Technology Assessment) was the first time the firm has seriously considered the technical competence level of its junior attorneys.
8%	Staffing	3	New associates do not get secretaries and complain about the hours that word processors are available. But the centralized workflow coordination of the word processors is fairly good and overall lawyer-to-staff ratio is comparable to, if not slightly better than, competitor firms.
8%	Knowledge Mgmt.	2	The firm has no systemic knowledge management program to speak of. Its previously licensed some software and has made its document management system searchable. But there has been no real emphasis on generating content or keeping it current. That said, the firm recently hired a new Chief of Knowledge Management and intends to focus on KM now that its project management initiative has matured.
8%	Hardware/Software	4	The firm has new equipment and makes it easy for attorneys to acquire additional productivity-enhancing software. Additional hardware is another story. Despite an expressed desire, associates and staff have a hard time getting a second full monitor.
7%	Mobility	5	The firm provides laptops, smartphones, tablets, a well-functioning VPN, and mobile hotspots. The document management system has just been refreshed with an emphasis on mobile. Interview subjects were very happy with their capacity to work remotely.

Recommendations: given the mutual, but independent, emphasis on project management, the firm and the client should open up a dialogue between their respective project managers. There are a number of ways to harmonize the workflow and share KPI's. In addition, the client should have direct discussions with some of its main relationship partners to reinforce the value the client places on proper project management.

Given the client's concern and the firm's poor performance, the primary project for the coming year should likely be getting timekeepers to maintain prompt, accurate records. A secondary goal might be basic training on, and the increased usage of, electronic signatures. Another, related possibility is enhancing the staffing ratio and/or attorney training to better handle some of the more laborious aspects of the work.

The client should maintain interest in what traction the new Chief Knowledge Officer may get and how that traction translates into improved service delivery. There is always more to do with respect to document assembly but the already-initiated automation of discovery responses should go a long way on that front. Finally, the firm will eventually need to address its use of data and analytics to improve projections and outcomes. But the firm is a few years away, and it is not a top client priority.

Sample Comparison



Weight

15%	Billing Hygiene	2	3	2	5	2
14%	Process/PM	4	3	4	2	2
10%	E-Signatures	2	2	5	4	2
10%	Document Assembly	3	4	4	3	3
10%	Data/Analytics	1	2	2	4	3
8%	Training	2	3	4	2	1
8%	Staffing	3	3	3	3	4
8%	Knowledge Mgmt.	2	3	3	2	1
8%	Hardware/Software	4	5	3	5	3
7%	Mobility	5	4	2	4	2

Annotated Questionnaire

Basic User Hardware/Software

Reasoning: this section is aimed at establishing a very simple baseline for whether the law firm invests in technology. There will be no granular distinctions about which new computer or smartphone is best. The object is simply to ensure that timekeepers are not stuck on obsolete hardware or software that makes it hard for them to do their job.

Rubric: on the one end will be the laggards with timekeepers running old programs on old computers. On the other end will be firms who provide modern software on modern hardware with a productivity-enhancing workstation configuration.

1. What is the most common hardware configuration for users across the firm? What options do users have?

Example: they can select between a Dell Desktop OptiPlex 3020 or HPZbook 15 G2 laptop, and between the iPhone 5S and a Galaxy 5 for their smartphone

2. What is the most common operating system and default software packages? What options do users have?

Example: Windows 7, Office 2010, and Acrobat X. They can upgrade to Acrobat X Pro upon request. In addition, there is a process in place for individual upgrades. The IT department permitted 183 of the 224 partner-approved requests last year. The granted requests included Microsoft Project, Visio, and WordRake.

3. What is the most common monitor configuration (number and size) across the firm? What options do users have?

Example: laptop with a 15.6" screen connected to 23" monitor. A second 23" monitor is available upon request.

Document Management/Mobility

Reasoning: this section is aimed at flexibility and freedom from frustration. Again, there will be no granular distinctions preferring one contemporary option over the other. The object is simply to ensure that timekeepers have easy access to their work no matter where they are.

Rubric: on the one end will be the laggards with lawyers running obsolete versions of standard software and no meaningful mobility options. On the other end will be firms who offer their timekeepers a seamless, mobile work environment.

4. What document management system (including version) does the firm utilize?

Example: Opentext Connectivity 14

5. What remote access options (including software versions) does the firm offer?

Example: Citrix XenClient 4.6

6. What hardware, software, and data connections does the firm provide to timekeepers to ensure they can work when mobile?

Example: every timekeeper has a VPN-enabled laptop and a mobile phone (iPhone 6 or Galaxy S6) with mobile hotspot capability enabled and unlimited data plans.

Staffing Ratio/Delegation

Reasoning: one convenient but unconvincing argument against the need to emphasize process and technology is that lawyers have plenty of staff to whom they delegate. Not only does argument this ignore the quality degradation that comes from the resulting inefficiency (communication breakdowns) but it also assumes that staffing ratios have remained constant. Yet, as many have publicly stated (see, [here](#), [here](#), [here](#), [here](#), [here](#), [here](#), and [here](#)), firms are aggressively substituting technology for staff.

Rubric: this will be relative. In part, surveyed firms will be compared against each other. But it will also be about how the firm approaches process and technology. A case can be made that well-trained lawyers utilizing good technology within a well-designed workflow require less staff support. Finally, the import of the numbers will be client and area specific. Sometimes, a client may expect little leverage—i.e., they want most of the work done at the partner level. There will be other instances where the client expects the partners to delegate as much work as possible to lower cost or no cost (to the client) personnel.

7. What are the firm's ratios of timekeepers (e.g., partners, associates, paralegals) to the non-timekeeping professionals to whom client work is delegated (e.g., secretaries, word processing, other support staff) excluding back office functions like accounting, marketing, IT, and professional development?

Example: the firm has 110 partners, 270 associates, 70 secretaries, 20 paralegals, 10 word processors, an 8-person office services staff, and 2 librarians. The ratio of timekeepers to non-timekeepers is 400:100, or 4:1.

8. Provide whatever statistics the firm has (e.g., from document management or time recording systems) on the allocation of work performed on client documents between timekeepers and non-timekeepers?

Example: our attorneys account for 80% of the keystrokes in Microsoft Word; 98% of the checkout time of the average document is attributable to timekeepers; the median document is never touched by a non-timekeeper.

9. Provide whatever statistics the firm has (e.g., from document management or time recording systems) on the allocation of work performed on client documents at various levels (e.g., partners, associates, paralegals)?

Example: associates account for 72% of the attorney keystrokes in Microsoft Word, partners account for 20%, paralegals account for 8%. Associates are responsible for 70% of the PDF uploaded to the DMS, paralegals account for 27%, partners account for 3%. Paralegals are responsible for 56% of the spreadsheets uploaded to the DMS, associates account for 32%, partners account for 12%.

Training

Reasoning: purchasing technology is one thing. Using it properly is another. The [digital native is a myth](#). And most enterprise-level technology is far from intuitive. Studies suggest that it takes a 10x investment in organizational capital—training and process redesign—to reap the full benefits of every dollar invested in new technology.* This section is aimed at determining whether the firm makes the complementary investment in training and whether their personnel know how to use the technology tools at their disposal.

Rubric: fortunately, the [Legal Technology Assessment](#) is a true, quantitative benchmark that enables apples-to-apples comparison. Beyond the numbers, there will be firms that do almost nothing regarding training and those with robust, mandatory programs.

10. Fill out the tables with respect to the firm's performance (COBOT level) on the identified modules of the Legal Technology Assessment.

	Word				
	Expert	Qualified	Novice	Beginner	Not Taken
Partners	1	2	2	5	100
Associates	5	25	100	75	65
Paralegals	2	5	7	6	0
Support Staff	8	21	31	20	0

* E. Brynjolfsson and L. M. Hitt, "Computing Productivity: Firm-level Evidence," Review of Economics and Statistics 8, no. 4 (2003): 793– 808.

	Excel				
	Expert	Qualified	Novice	Beginner	Not Taken
Partners	1	0	2	3	104
Associates	2	5	81	102	80
Paralegals	0	3	7	10	0
Support Staff	4	13	23	40	0

	PDF				
	Expert	Qualified	Novice	Beginner	Not Taken
Partners	1	1	3	5	100
Associates	4	19	83	99	65
Paralegals	2	3	8	7	0
Support Staff	9	18	23	20	0

11. What screening mechanisms does the firm use regarding basic fluency with common technology? Identify to whom the screening applies (associates, staff, both).

Example: we use a customized Word assessments from eSkill for secretaries and word processors.

12. Describe any other mandatory technology training or technology-based competence assessments the firm utilizes to ensure personnel have adequate skills?

Example: we have mandatory training with every new rollout. For example, we had one hour of compulsory training for our new document management system.

Electronic Signatures

Reasoning: electronic signatures are the lowest hanging fruit for going paperless. A substantial percentage of printing is attributable solely to the perceived need to affix an ink signature to a document, only for the document to be scanned back in electronic form. This is a waste of time and resources that degrades the quality of the document (worse appearance, larger file size, reduced searchability). Lawyers, more than anyone, should be expected to know that the law recognizes the validity of electronic signatures with only a few minor exceptions (e.g., codicils, notarized documents).[†]

Rubric: one end of the spectrum will be the firms that still print, sign, and scan everything. On the other end, firms will have comprehensive e-signature systems, including a complete audit trail, integrated directly into their standard workflow.

13. What electronic signature software or protocols (including number of licenses, where applicable) does the firm deploy?

Example: we have created a customized digital signature for each lawyer in Word and Adobe Acrobat. Also, each of our 68 admins have been given logon credentials to Adobe EchoSign and trained to circulate documents to clients and opposing parties for electronic signature.

14. Is it standard practice at the firm to use electronic signatures on letters, pleadings, etc.? That is, if the median partner sends a signed letter to opposing counsel is it more likely that they (a) have it printed out, sign it, scan it, and send it or (b) sign it and convert it to a PDF electronically.

Example: yes, it standard practice to electronically sign all documents. Our templates are set up with document tags for electronic signatures. Most of our partners can now accomplish the electronic execution of documents without secretarial assistance.

15. Provide whatever statistics the firm has on the utilization of electronic signatures by attorneys.

Example: an average of 414 documents are signed each month via the firm's DocuSign portal. There is also an average of 11 unique uploaders and 36 unique firm-based signatories each month.

[†] Flaherty, D. Casey, and Corey Lovato. "Digital Signatures and the Paperless Office." Journal of Internet Law 17.7 (2014): 3-12.

Document Assembly

Reasoning: document automation is a rationalized, systematic approach to cut-and-paste. Reinventing the wheel is bad but so is repurposing a poorly constructed wheel. Document automation starts with pristine templates that are iteratively improved. But the technology can go well beyond that with dynamic questionnaires (i.e., a decision tree where the questions change based on answers to previous questions) and automated workflows.

Rubric: some firms won't use document automation at all. Others will use it in a limited capacity. And some firms will have made a substantial investment in document automation, including the training necessary to integrate it tightly into their timekeeper's standard workflow.

16. What document automation tools (version and number of licenses) does the firm deploy?

Example: the firm has an enterprise license for HotDocs 10.

17. Describe the processes in which document automation is utilized.

Example: all the firm's NDA's and pleading templates for new matters are created using a custom document assembly macro.

18. Provide whatever statistics the firm has on the utilization of document automation.

Example: 31 unique users generate 213 documents per month through the firm's HotDoc's portal.

Process/Project Management

Reasoning: process is critical to ensure that (a) the right people (b) are doing the right things (c) the right way. Good process can enhance efficacy and efficiency. Bad process can be a major drag on productivity. The first question is whether the firm has processes. The second question is whether those processes are any good.

Rubric: some firms will consider process to be silly encumbrance on their autonomous professionals. Other firms will have bought into the Lean/Six Sigma/Agile/Project Management ethos of higher quality at lower cost in less time.

19. How many process maps has the firm created or updated within the last five years? How many checklists has the firm created or updated within the last five years? In what areas does the firm use process maps or checklists?

Example: The firm has 7 process maps for preparing patent filings. We also have a local rule checklists for filings in the 19 courts in which the firm has active matters.

20. Describe the firm's project management protocols and the integration of project management into the day-to-day work performed at the firm. Describe the firm's matter management and tracking practices from a project management perspective, including how calendars are created, maintained, and shared. Identify the software used for project management, matter tracking, calendaring, etc. as well as who is responsible for their use.

Example: Every matter budgeted for more than \$100,000 is assigned a PMI-certified project manager. The firm employs 12 full-time project managers who work directly with the relationship

partner to map out the matter at inception and then help the partner monitor the matter throughout its lifecycle. The PM's use a custom Onit software solution. In addition, the PM or, in smaller cases, the administrative assistant of the partner in charge is tasked with maintaining the litigation calendar in CompuLaw, as well as a team calendar in Outlook.

21. Describe the firm's quality assurance protocols for client documents. Indicate what software tools, if any, the firm utilizes for quality assurance.

Example: every timekeeper has WordRake and PerfectIt installed with Word. In addition, all of the firm's transactional associates and paralegals have a license for and training on EagleEye. Finally, we have 12 junior associates designated as copy editors and available to bring fresh eyes to work product before it goes out the door. The firm has provided these copy editors with both training and several document-specific proofreading checklists that go beyond our automated tools.

Knowledge Management

Reasoning: one [famous former general counsel](#) often remarks, "the only thing I hate more than answering the same question twice is *paying* to answer the same question twice." Knowledge management is not just about capturing asked-and-answered questions but structuring the answers (conclusions, model clauses, etc.) in a manner that is easily accessible and updateable when the questions are asked again.

Rubric: some firms will provide nothing or, at best, the ability to keyword search prior work product. Other will firms will give billable credit for adding content to a fully-indexed, organized wiki-like repository and hold personnel accountable when they do not make the repository the first (for research) and last stop (for contributions) on their matters.

22. Describe the firm's knowledge management solutions and protocols? How does the firm create lasting institutional value from work performed (beyond the enhanced experience of the individual lawyers doing the work)?

Example: the firm has a fully searchable document repository that enables lawyers to pull up previous work product. In addition, the corporate law department maintains a clause bank that contains 213 entries, is accessed an average of 8 times per day, and is updated an average of twice per month.

23. Does the firm award billable credit for contributions to the institutional knowledge base? How does the firm ensure that work product is translated into generally useful reference material?

Example: the firm does not provide billable credit for contributions to the knowledge management system and leaves it to the individual attorneys to determine what and how they will contribute to knowledge base of the firm.

24. Provide whatever statistics the firm has on the utilization (both generation and consumption) of its knowledge management tools.

Example: there are 42,516 documents in our knowledge management repository, which is searched an average of 19 times per month.

Data/Analytics

Reasoning: one useful definition of *information* is data organized in a manner that reduces uncertainty. Law firms have all sorts of data that, if organized properly, should help a client reduce uncertainty about costs and outcomes. Many firms, however, are data rich but information poor.

Rubric: one end of the spectrum will contain firms that see the value in capturing their data in order to turn it into actionable information. The other end includes those firms who think the intuition of their experienced attorneys does not need to be augmented by empirical analysis.

25. How much does a motion for summary judgment cost? How many MSJs has the law firm filed in the last two years? What has been the median cost to the client? How are the costs distributed (i.e., on a normal, bell-shaped curve vs. a power-law distribution etc.)? How granular can the firm break down the types of MSJ's (jurisdiction, topic, etc.)? Does the firm keep statistics on the outcomes?

Example: the firm filed approximately 850 motions for summary judgment in the last two years. But, without considerable labor, we cannot provide a median cost to client, let alone a distribution by cost or type. We also do not maintain records on outcomes.

26. Describe how the firm's uses of data and analytics in budgeting and cost projection. Provide whatever statistics are available in terms of the consistency with which the firm stays within matter budgets.

Example: the firm has a full-time pricing director who analyzes all of our matters and assists in putting together budgets and bidding on fixed-fee work. She has created a dashboard that tracks individual matters as well as aggregate budgeting information. The dashboard will be shared during the in-person review. The firm, however, does not have any statistics on performance against initial budget.

27. Describe the firm's use of data and analytics to inform substantive and strategic decisions within a matter.

Example: the firm uses reports from Lex Machina to help guide tactical decisions in IP litigation. Beyond that, however, the firm does not have any ability to mine data for making decisions at the matter or task level.

Billing Hygiene[‡]

Reasoning: Delayed recording of work degrades the accuracy and the usefulness of the entries. Moreover, there is evidence to suggest that the longer a timekeeper waits, [the more they inflate](#). Even in the flat fee context, inaccurate record keeping can affect cost accounting and, as a result, matter pricing.

Rubric: one end of the spectrum will be the firms where most everyone waits until the end of the month to reconstruct what they did. On the other end, there will be the firms that track their matters in real time and penalize late record keeping.

28. What is the firm's policy on how immediately timekeepers must enter their time? How is the policy enforced?

Example: Our policy requires timekeepers to enter their time daily. If they have not made an entry within a week, we send them a reminder email.

29. Based on the information contained in firm's timekeeping database, what is the average delay in time recording? That is, what is the average delta between the activity and the capturing of time related to that activity?

Example: the average delay between work being performed and time being recorded is 10.2 days.

30. Does the firm provide real-time access to timekeeping data internally (partners) or externally (clients)? How?

Example: our partners have access to a project-management dashboard that allows them to track matter progress in real time. But we do not provide access to clients.

[‡] The author offers a separate consulting service that goes beyond immediacy of entry. Algorithms are used to review invoices for block billing, vague entries, skills mismatch, duplicate entries, padding, etc.

Additional

Reasoning: the Review questions are comprehensive, but they will never be complete. Even as the questionnaire is tailored to specific situation and evolves over time, it will not cover every conceivable area that might be of value. It is only fair that firms have the opportunity to highlight their achievement and their aspirations. Moreover, for the exchange to be a true dialogue, the firms deserve an opportunity to point out areas where the client might improve.

Rubric: this section is not graded. But it affects the overall assessment, as well the recommendations.

31. Describe up to three projects that the firm has completed or refreshed in the last three years that have an appreciable positive impact on the process and technology aspects of delivering legal services but did not fit appropriately into responses to the previous questions.

Example: FirmSync is a secure Dropbox-like program that allows the firm to easily share and update large volumes of data and large quantities of files with our clients. It works much better than an extranet or FTP for sharing files with our clients.

Sekundment is a program by which the firm provides free secundment of junior associates to clients to help them solve policy, process, or technology related issues. The associates have all been through intensive technology and Lean Six Sigma training. They are sent to the client to tackle a discrete policy, process, or technology-related issue. We consider it part of their training to be ready to assist on the client's work.

The NeXt prize is a firmwide program that rewards process innovation. It has a heavy technological bent. 2% of the associate bonus pool is withheld to create prizes for personnel (staff is welcome to participate) who propose the best, most actionable process improvement. Last year's winners included automation of the employment litigation intake process and Outlook inbox rule that helped ensure that client emails would receive a response within 24 hours (even if only to acknowledge receipt of the email and promise a more complete response at a later date).

32. Describe up to three projects that the firm is currently undertaking or is about to initiate that will have an appreciable positive impact on the process and technology aspects of delivering legal services but did not fit appropriately into responses to the previous questions.

Example: the firm has brought in an outside vendor to complete a consolidation and refresh of all the firm's litigation templates. The project should be done in Q1.

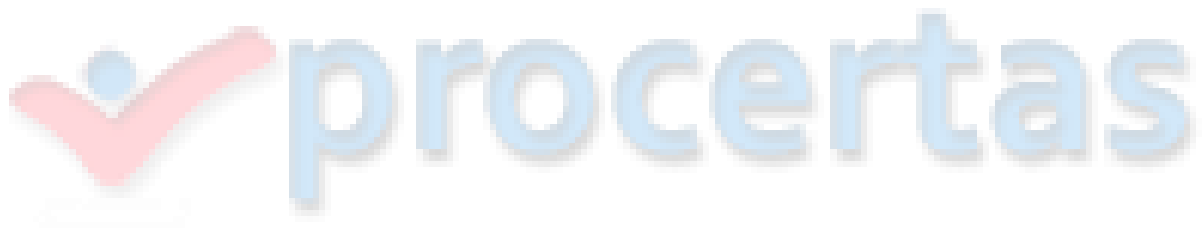
The firm is using Umbria to create matter and practice management dashboards that update in real time and are available to all our partners. The prototype will be complete in Q2. We anticipate rollout in Q1 of next year.

33. Identify areas in which process or technology upgrades on the part of the client could facilitate the firm's delivery of legal services.

Example: the client still has not upgraded from Office 2003. Not being able to send the client .docx and .xlsx files is an impediment to sharing work product.

The client also has to approve every individual timekeeper in its matter management system at the commencement of every matter. The system automatically rejects timekeepers whose bills predate

their approval in the system. But the client is often delayed in setting up matters in the system, let alone approving timekeepers. It can be weeks before a litigation-initiating pleading transmitted via email turns into a formal matter in the system. It can be several more weeks before timekeepers are approved. The client's rules are at odds with the client's own practices, demanding that games be played to get the work going in a timely matter.



Onsite Review Protocol

Reasoning: responses to the questions can only provide so much insight. An onsite review adds considerable perspective. How the sausage gets made may appear very different from the vantage point of (a) firm management, (b) delegators, and (c) delegates. For example, while a firm may claim to use electronic signatures, the fact that e-signatures are not utilized for something as routine as an engagement letter suggests otherwise. Having purchased project management software is not the same as integrating its use into a well-designed workflow. The onsite review facilitates a much deeper dive into the firm's process and technology. It also gives them the opportunity to show off.

Rubric: this section is not graded. But it affects the overall assessment, as well the recommendations.

The interview requests will be modified based on the firm's answer to the foregoing. But, initially, the interviewer will want to meet the individuals responsible for putting together those answers. The interviewer will also want to meet, at their workstation, with the individuals responsible for generating:

Engagement Letters	Motions/Exhibits	Matter-Specific Analytics
Pleadings	Settlement Agreements	Billing Analytics
Litigation Calendar	Case Files	
Discovery Requests/Responses	Matter Budget	
Deposition Questions/Exhibits	Checklists/Process Maps	
Legal Research/Memos	Knowledge Management	

There may be more than one individual involved in each process. Engagement letters, for example, may be a collaboration between a partner and her secretary. Or discovery responses may be a collaboration between an associate and word processing. The interviewer will meet with each party involved. Copies of related process maps and checklists are much appreciated.

[The above is just an example for general commercial litigation. It will be customized based on the specific type of work the firm performs for the client (e.g., patent, real estate, class actions, employment, transactional)]

Basic Technology Benchmarking

Read about the LTA in [The Washington Post](#) and the [ABA Journal](#). Understand the [positive case for technology training](#).

Watch an introductory video [here](#).

Basic Technology Benchmarking utilizes the [Legal Technology Assessment](#) to establish how fluent legal professionals are with basic technology, such as word processing and spreadsheets. The LTA is both a benchmarked assessment and a training platform. Benchmarked results can be used for marketing, professional development, team assembly, onboarding, rate negotiation, invoice review, provider differentiation, etc. Primarily, however, results should be used to ensure that legal professionals are getting the training they need. The LTA pairs competence-based assessments with synchronous, active learning in order to provide an effective, tailored training solution. The objective of the initial version of the LTA is its own obsolescence in the near term.

The Basics

The LTA is taken in a completely live environment on exemplar documents. The LTA is digitally-signed Word plug-in that can be downloaded and installed on the user's own computer or on a group computer provided by their organization (e.g., training laptop, computer lab).

The instructions are contained in a Word document with a control panel on the side. A screenshot is [here](#). As shown in the screenshot, the software automatically opens and closes exemplar document on which work is completed. On the first task, for example, the instructions to (i) turn off track changes and (ii) delete comments are presented in the instructions document while the software automatically opens another Word document in which to turn off track changes and delete comments.

Each user has a unique username (their email) and password that enables individual score tracking. At the completion of each module, the user is sent their score. An introduction to the individual score report is [here](#). The score sheet identifies specific deficiencies and enables the creation of individually tailored training curriculum. After training, the user can retake the LTA as many times as they want during the license period (usually one year).

There is also a **Training Edition** that pairs the assessment with synchronized learning. Instead of receiving a score at the end of the module, the user is informed at the completion of each task whether they performed the task correctly. As shown in the [screenshot](#), the control panel of the Training Edition has not only a Previous Task button, which allows the user to navigate backwards to retry the previous task, but also a Help button. The Help button is programmable. It can open up any training material designated by the organization. For organizations that lack internal or external training resources, [Hotshot](#) has created professional videos that walk the user through each task. The user can try, fail, return, learn, try, and succeed in a synchronous loop.

The Training Edition is not connected to any database. Performance is not recorded. Users can use the Training Edition for self-evaluation and preparation in a low-stakes setting. Embarrassment is not the objective. Getting legal professionals properly trained is the objective. Even recorded scores are not released without the express permission of the organization. Indeed, the bare fact that individuals in the organization have taken the LTA is not disclosed absent express permission. That said, law firms and their clients will take an interest in LTA scores. A walkthrough of benchmark reporting is [here](#).

The LTA is modular. Not only is the assessment broken into separate modules by software application, but the features assessed are customizable. A **list of features** for which assessments and training are currently available follows.

Word

- Accept/Turn-off changes and comments
- Cut & Paste
- Replace text
- Format text
- Footers
- Insert hyperlink
- Apply/Modify style
- Insert/Update cross-references
- Insert page break
- Insert non-breaking space
- Clean document properties
- Create comparison document

Excel

- Copy/Rename worksheet
- Insert column
- Format column width
- Format text
- Sort
- Filter
- Remove duplicates
- Divide
- Count
- Sum
- Average
- Prepare to print

PDF

- Convert Word & Excel documents to PDF
- Create single PDF from multiple files
- Recognize text (OCR)
- Extract page
- Highlight text
- Redact information
- Insert footer
- Create bookmark
- Create internal link
- Remove hidden Info
- Password protect

The LTA Advantage

By pairing competence-based assessments with synchronous learning the LTA augments traditional training in a number of ways.

- **Sorting mechanism.** Not everyone is a poor end user of common software. Some have training. Others are self-taught. In onboarding, the LTA can distinguish between previously trained and untrained users. On a go-forward basis, the LTA segments trainees by skill set, which includes letting skilled user test out of training they do not need.
- **Lose your illusion.** Most computer users don't know what they don't know. They are not intentionally avoiding the quality-enhancing, labor-saving features available in common software. They are simply not aware these features exist, let alone how to use them. They believe that the way they are operating is right (or close to right). They are wrong. But they don't know they are wrong. Consequently, they do not recognize the need for training. Simply mandating training will not change this preconception, and the users will be disengaged from the outset. The LTA can puncture their delusions of adequacy and help them realize there is a problem in need of correction.
- **Tailored training.** One of the easiest ways to lose a training audience is to start by teaching them things they already know. Yet, most training classes begin with the basics for good reason: some audience members are likely to be unfamiliar with the basics. Meanwhile, everyone else checks out. This shotgun approach to training reduces engagement. Not only does the LTA demonstrate that training is needed, but it also pinpoints what training is needed. The LTA identifies specific deficiencies and enables the creation of individually-tailored training programs. It even offers a way to deliver that training in the form of the Training Edition.
- **Active learning.** Answers can be memorized. Skills must be learned. When a child has a swim test, knowing they will have to traverse the length of the pool unassisted is of little assistance in accomplishing that feat. Rather than abstract knowledge, deliberate practice is necessary to pass the test. We help them across the pool as many times as is needed until they can do it their own. The Training Edition outfitted with a Help button (*teach me how to do this now*) allow trainees to try, fail, study, try again, and succeed in a synchronous loop. They can identify weaknesses and address those weaknesses in the same exercise until they are ready for the live exam.
- **Validation.** With traditional tech training, all we know is that the trainees sat in a room or watched a video for a prescribed amount of time. Whether they learned anything is a matter of speculation. Time is a poor proxy for learning. Competence-based assessments both establish a baseline and measure progress against that baseline.
- **Self-direction.** Different people learn different ways and will struggle to different degrees. Some thrive with a live teacher. Others are too embarrassed to ask questions. As long as sufficient training resources of varying modalities are made available, the validation component of LTA allows trainees to self-direct their remedial efforts and substantiate how effective those efforts were.

The Future

Our modest goal is to replace the virtually meaningless “proficient in Microsoft Office” with [COBOT Qualified](#) in specific software. We intend to expand our offerings both horizontally (other programs such as Outlook and PowerPoint) and vertically (different levels from Delegator to Expert). Our vision for the future involves getting the entire legal community to care about, and take an active role in, technology training.

- **Law schools.** Law schools are creating more and more classes that are directly related to technology (e-discovery). This is a good thing. But basic technology training does not require separate credits. Basic technology competence can be integrated directly into the core curriculum. In Civil Procedure, students learn how to prepare an e-filing (PDF). In Contracts, they learn how to format a contract (Word). In Corporations, they learn how to handle financial data (Excel). Etc. All of these modules can be provided outside of the classroom through a platform like ours without the instructor needing to alter anything other than their syllabus. Additional integration points include pre-enrollment learning, legal writing, and pre-clinic bootcamps.
- **State bars.** State bars can assist members in fulfilling their [evolving ethical duty of competence](#) by ensuring that CLE credit is available for technology skills acquisition—i.e., learning to properly use the tools of the profession. State bars could also move CLE into a more active-learning direction by offering CLE credit for demonstrations of competence instead of time. Currently, time is used as a proxy for learning. All we know that the learner sat in a room (or turned on a video) in which information was shared. We do not know whether they absorbed any of the information. They just as easily could have spent the time responding to client emails or playing Angry Birds. Credit seekers should at least have the option of a competence-based assessment that establishes their engagement with the material. Eventually, bars might also consider making demonstrations of competence mandatory for newly-minted lawyers.
- **Legal Employers.** Law departments, government agencies, law firms, alternative service providers, and nonprofits should encourage their legal professionals to expand their competencies to include the use of basic technology. The level of training required will vary based on the type of work the individual performs. Legal employers should make basic tech competence part of their onboarding, training, and professional development protocols. They, however, should not bear all the burden. As discussed above, law schools should produce properly trained personnel, and state bars should support remedial efforts by offering CLE credit.
- **Corporate Clients.** Corporate clients should take a keener interest in how legal services are delivered. Just as corporate clients are unlikely to use a lawyer who are unable to communicate via email, corporate clients should have limited tolerance for a poor use of basic office technology. Corporate clients should use validation and benchmarking methods like the LTA to have a structured dialogue with their outside providers about priorities and the proper delivery of legal services.

LTA Instruction Sample

Task #1



A target Word document entitled *Investor Rights Agreement—Revised* has been opened for you. Please check the task bar.

Complete the following tasks in *Investor Rights Agreement—Revised*.

1. Turn off track changes
2. Accept all the changes in the document.
3. Delete all comments.

Legal Tech Audit ... ▾ ×

Audit Controls

Stop

Submit And
Continue

Trainer Controls

Help

Previous Task

Training Media

- ☐ PDF
- ☒ Video
- ☐ Custom

Individual Score Reporting

Every time that an individual takes a module, they receive a score report. Below is an example score report for Assignment I (Word Processing).

Assignment #	Task #	Task Description	Performed Correctly	Target Time	Actual Time	Penalty Time	Assessed Time
I	1	Accept changes/Turn off track changes/Delete comments	Yes	1:00	0:52	15:00	0:52
	2	Replace text	Yes	1:00	3:20	15:00	3:20
	3	Non-breaking space	Yes	1:00	0:44	5:00	0:44
	4	Format section	Yes	3:00	0:38	15:00	0:38
	5	Insert/Update cross-references	Yes	3:00	2:19	25:00	2:19
	6	Insert hyperlink	No	1:00	1:25	5:00	5:00
	7	Format fourth level of numbering	Yes	2:00	0:35	10:00	0:35
	8	Format legend	Yes	2:00	1:09	5:00	1:09
	9	Cut and paste from separate document	Yes	1:30	1:17	10:00	1:17
	10	Page break	Yes	1:00	2:04	5:00	2:04
	11	Fix Footer	No	3:00	0:15	5:00	5:00
	12	Properties	Yes	1:30	1:47	10:00	1:47
	13	Comparison	Yes	3:00	1:47	10:00	1:47
Total for Assignment I			11/13	24:00	18:12	135:00	26:32

Performed Correctly. Whether or not the user completed the task correctly. In the example above, the person did not properly complete Task #6.

Target Time. Approximation of how long the task should take a qualified user. Target time is double an expert time rounded up with a minimum of one minute despite the fact that many of the tasks can be completed in a matter of seconds.

Actual Time. How long a task actually took the user.

Penalty Time. Approximation of how long the task would take a beginner. The penalty time is substituted for (not added to) the actual time when the task is performed incorrectly. The theory is that the individual (or their firm) will reach the right result eventually, it will just require more time.

Assessed Time. Equals the actual time if the task is performed correctly. Equals the penalty time if the task is not performed correctly. All assessed times that exceed the target times, even those where the individual performed the task correctly, are highlighted in red. This is a quick, visual cue to indicate where the user needs to improve. The individual score report is not only a record of how well the user performed, it is also a mechanism to create an individually-tailored learning plan.

The next page contains a sample score report for all three modules.

Full Report for Jane Doe (Fake Firm LLP)

Assignment #	Task #	Task Description	Performed Correctly	Target Time	Actual Time	Penalty Time	Assessed Time
I	1	Accept changes/Turn off track changes/Delete comments	Yes	1:00	0:52	15:00	0:52
	2	Replace text	Yes	1:00	3:20	15:00	3:20
	3	Non-breaking space	Yes	1:00	0:44	5:00	0:44
	4	Format section	Yes	3:00	0:38	15:00	0:38
	5	Insert/Update cross-references	Yes	3:00	2:19	25:00	2:19
	6	Insert hyperlink	No	1:00	1:25	5:00	5:00
	7	Format fourth level of numbering	Yes	2:00	0:35	10:00	0:35
	8	Format legend	Yes	2:00	1:09	5:00	1:09
	9	Cut and paste from separate document	Yes	1:30	1:17	10:00	1:17
	10	Page break	Yes	1:00	2:04	5:00	2:04
	11	Fix Footer	No	3:00	0:15	5:00	5:00
	12	Properties	Yes	1:30	1:47	10:00	1:47
	13	Comparison	Yes	3:00	1:47	10:00	1:47
Total for Assignment I			11/13	24:00	18:12	135:00	26:32

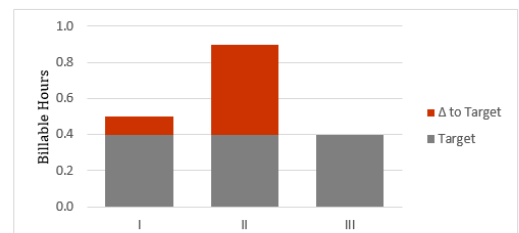
Assignment #	Task #	Task Description	Performed Correctly	Target Time	Actual Time	Penalty Time	Assessed Time
II	1	Copy & rename worksheet	Yes	1:30	0:37	5:00	0:37
	2	Format column text	Yes	1:30	1:19	5:00	1:19
	3	Insert column	Yes	1:00	0:24	5:00	0:24
	4	Remove duplicates	No	1:30	1:12	20:00	20:00
	5	Move data over from other worksheet	Yes	4:00	5:43	40:00	5:43
	6	Calculate dividends	Yes	1:00	1:39	15:00	1:39
	7	Format column width	Yes	2:00	1:17	5:00	1:17
	8	Insert dividend per share	Yes	2:00	2:03	10:00	2:03
	9	Count investors	Yes	2:00	3:00	10:00	3:00
	10	Sum shares	Yes	1:30	2:43	15:00	2:43
	11	Sum dividend	Yes	1:00	1:41	15:00	1:41
	12	Average dividend	Yes	1:00	0:45	15:00	0:45
	13	Compute damages	Yes	2:00	3:54	15:00	3:54
	14	Page Setup	Yes	2:00	5:27	10:00	5:27
	15	Sort	Yes	2:00	1:43	15:00	1:43
Total for Assignment II			14/15	24:00	31:44	200:00	52:15

Assignment #	Task #	Task Description	Performed Correctly	Target Time	Actual Time	Penalty Time	Assessed Time
III	1	Word to PDF	Yes	2:00	0:52	5:00	0:52
	2	Excel to PDF	Yes	2:00	3:20	5:00	3:20
	3	Recognize Text (OCR)	Yes	3:00	0:44	15:00	0:44
	4	Extract Page	Yes	2:00	0:38	10:00	0:38
	5	Highlight	Yes	1:00	2:19	5:00	2:19
	6	Redact	Yes	2:00	1:25	10:00	1:25
	7	Create PDF from multiple files	Yes	2:00	0:35	15:00	0:35
	8	Footer/Page No.	Yes	2:00	1:09	10:00	1:09
	9	Create Bookmark	Yes	1:00	1:17	10:00	1:17
	10	Create internal link	Yes	2:00	2:04	10:00	2:04
	11	Remove Links & Hidden Info, Keep Bookmarks	Yes	2:00	0:15	10:00	0:15
	12	Password protect	Yes	2:00	1:47	10:00	1:47
Total for Assignment III			12/12	23:00	16:25	115:00	16:25

In addition to the individual assignment reports, the assignments scores are translated into billable time and presented in summary format.

Summary Report for Jane Doe (Fake Firm LLP)

Assignment	Accuracy	Actual	Reported (w/Penalties)	Target	Δ to Target	Δ%
I	85%	0.4	0.5	0.4	0.1	25%
II	93%	0.6	0.9	0.4	0.5	125%
III	100%	0.3	0.3	0.4	-	-



Finally, each individual is given a COBOT designation for each module.

Jane Doe (Fake Firm LLP) - Certified Operator of Basic Office Technology (COBOT)	
Word Processing	Novice
Spreadsheets	Novice
PDFs	Qualified

COBOT: Certified Operator of Basic Office Technology. An individual who hits the target time is Qualified. Since the target times are deliberately generous, there is also Expert status at 50% of the target time. The cutoff for Novice is 3x the target time. Anything beyond 3x the target time represents Beginner level skills.

In concrete terms, an Expert will complete an individual module in 0.2, or less. To be designated Qualified, the user will need to achieve times of 0.4 per module. The cutoff for Novice is 1.2 *per module*, or 3.6 for the entire LTA. That is, the Novice may spend as long on a single module as the Qualified user spends on the entire LTA. Anything worse than Novice is a pure Beginner. The table of designations is below.

	Expert	Qualified	Novice	Beginner
Word Processing	≤ 0.2	≤ 0.4	≤ 1.2	>1.2
Spreadsheets	≤ 0.2	≤ 0.4	≤ 1.2	>1.2
PDFs	≤ 0.2	≤ 0.4	≤ 1.2	>1.2

Importantly, and as will be discussed in more detail in the [Benchmark Reporting](#) section, the individual scores can be weighted so that a user who does not spend time with a particular type of document (e.g., Excel spreadsheets) is not penalized for a poor performance on the related module. Indeed, since the weighting can be set at 0%, the user can skip module entirely without negative impact on the overall score reported.

Individual users may take the LTA as many times as they need to. The first attempt should not be about getting a Qualified score. Rather, the first attempt should be aimed at identifying knowledge gaps and creating an individualized training program. Subsequent attempts serve to validate the efficacy of that training. With respect to [Benchmark Reporting](#), we only release each user's most recent score and then only after we are given express permission to do so. Clients only see scores that are released and otherwise are not able to differentiate between firms that have used the LTA for self-assessment and firms that have not.

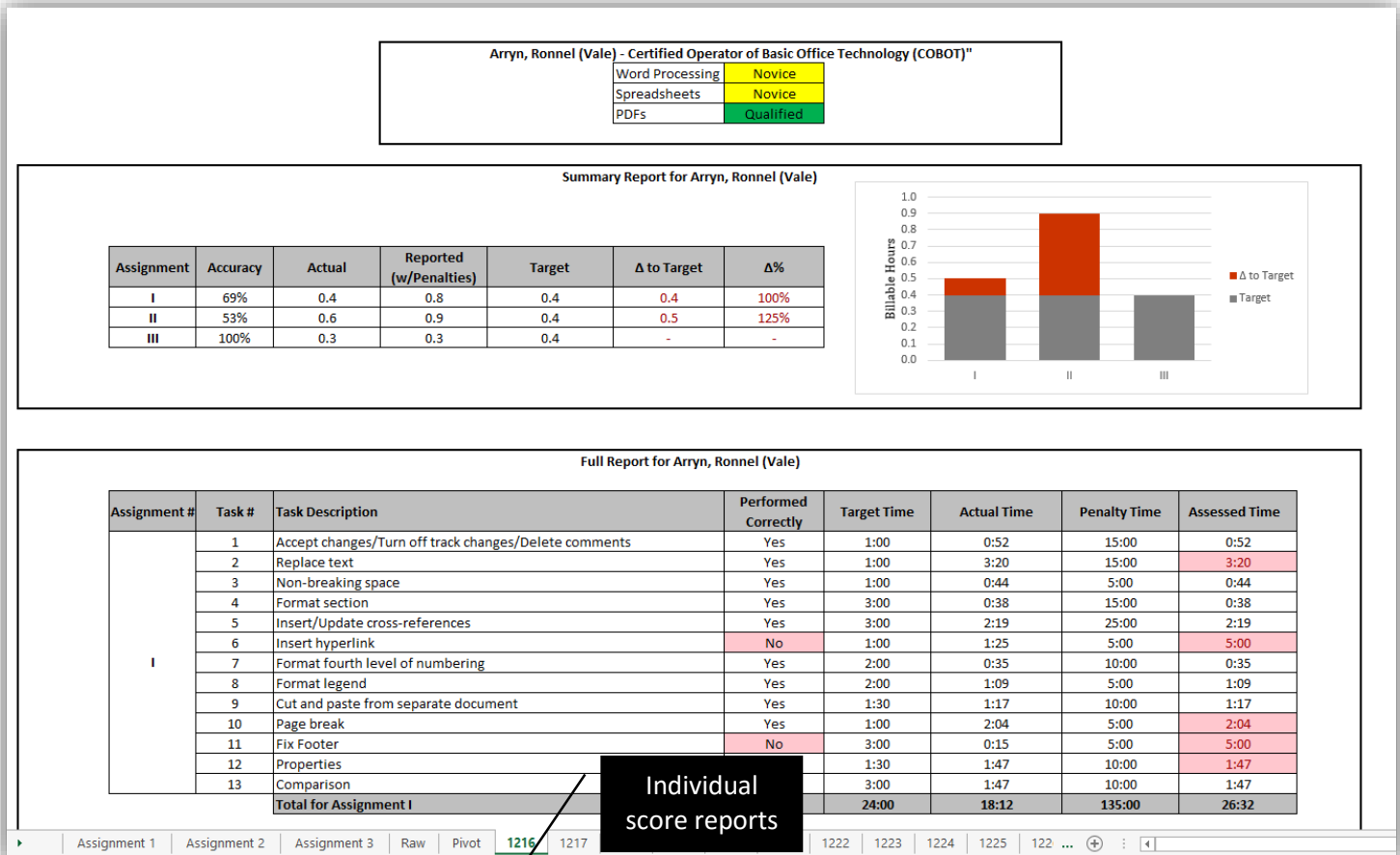
The biggest gains come from identifying and training Beginners. And there are a lot of efficiencies in turning a Novice into a Qualified user. It would be fantastic if everyone were Expert in all aspects of basic, ubiquitous software. But that goal might prove impractical. A more reasonable objective might be to have a few Experts in each area available so that they can handle the larger, software-intensive projects and be there to assist their colleagues on the smaller ones.

Individual score sheets will be aggregated for both [Group Score Reporting](#) and [Benchmark Reporting](#).

Group Score Reporting

Individual score reports will be aggregated in whatever manner and provided at whatever interval the organization selects. The goal is to keep the organization apprised of progress while also providing their training staff the detailed information they need to properly upskill the individuals subject to the LTA.

Group score reporting starts with bulk provision of the [individual score reports](#).



Individual scores are then aggregated into tables to provide a general overview of where the initiative stands.

	A	B	C	D	E	F	G	H
1	Name	ID	Accuracy	Actual	Reported (w/Penalties)	Target	Δ To Target	COBOT Status
2	Blackwood, Edmund	1218	100%	0.1	0.1	0.4	0.0	Expert
3	Celtigar, Ardrian	1223	100%	0.2	0.2	0.4	0.0	Expert
4	Gaunt, Gwayne	1227	100%	0.2	0.2	0.4	0.0	Expert
5	Votyris, Byan	1249	100%	0.2	0.2	0.4	0.0	Expert
6	Payne, Ilyn	1238	100%	0.3	0.3	0.4	0.0	Qualified
7	Flint, Byam	1226	100%	0.4	0.4	0.4	0.0	Qualified
8	Heddle, Willow	1230	100%	0.4	0.4	0.4	0.0	Qualified
9	Seaworth, Davos	1243	100%	0.4	0.4	0.4	0.0	Qualified
10	Crakehall, Sumner	1224	92%	0.3	0.4	0.4	0.0	Qualified
11	Greyjoy, Robin	1229	92%	0.2	0.4	0.4	0.0	Qualified
12	Ironmaker, Urek	1232	92%	0.3	0.4	0.4	0.0	Qualified
13	Manderly, Medrick	1235	92%	0.2	0.4	0.4	0.0	Qualified
14	Mallister, Denys	1234	92%	0.4	0.5	0.4	0.1	Novice
15	Merrell, Harry	1236	92%	0.3	0.5	0.4	0.1	Novice
16	Pyke, Cotter	1239	92%	0.4	0.5	0.4	0.1	Novice
17	Stout, Wynton	1246	92%	0.2	0.5	0.4	0.1	Novice
18	Paege, Robert	1237	92%	0.5	0.6	0.4	0.2	Novice
19	Royce, Albar	1241	92%	0.4	0.6	0.4	0.2	Novice
20	Stackspear, Selmond	1245	92%	0.5	0.6	0.4	0.2	Novice
21	Brax, Flement	1220	85%	0.3	0.7	0.4	0.3	Novice
22	Targaryen, Jaehaerys	1247	85%	0.6	0.7	0.4	0.3	Novice
23	Reed, Jyana	1240	85%	0.5	0.8	0.4	0.4	Novice
24	Arryn, Ronnel	1216	69%	0.3	0.8	0.4	0.4	Novice
25	Goodbrother, Gran	1228	92%	0.5	0.8	0.4	0.4	Novice
26	Foote, Philip	1217	77%	0.5	1.0	0.4	0.6	Novice
27	Jast, Antario	1233	77%	0.4	1.0	0.4	0.6	Novice
28	Botley, Quellon	1219	69%	0.4	1.2	0.4	0.8	Novice
29	Cargyll, Arryk	1221	69%	0.4	1.2	0.4	0.8	Novice
30	Spicer, Rolph	1244	62%	1.0	1.3	0.4	0.9	Beginner
31	Caron, Bryce	1222	69%	1.0	1.5	0.4	1.1	Beginner
32	Sand, Loreza	1242	69%	1.0	1.6	0.4	1.2	Beginner
33	Deddings, Darla	1225	54%	1.3	1.7	0.4	1.3	Beginner
34	Ironfoot, Urras	1231	54%	1.3	1.9	0.4	1.5	Beginner
35	Tyrell, Lia	1248	46%	1.3	2.1	0.4	1.7	Beginner
36								
37								
38								
39								
40								
Assignment 1		Assignment 2	Assignment 3	Raw	Pivot	1216	1217	1

In addition to the standard tables, the organization is provided raw data down to the individual task level.

	A	B	C	D	E	F	G	H				
1	Name	Assignment	Task	Performed Correctly	Target Time	Actual Time	Penalty Time	Assessed Time				
2	Arryn, Ronnel	I	1	Yes	1:00	0:52	15:00	0:52				
3	Arryn, Ronnel	I	2	Yes	1:00	3:20	15:00	3:20				
4	Arryn, Ronnel	I	3	Yes	1:00	0:44	5:00	0:44				
5	Arryn, Ronnel	I	4	Yes	3:00	0:38	15:00	0:38				
6	Arryn, Ronnel	I	5	Yes	3:00	2:19	25:00	2:19				
7	Arryn, Ronnel	I	6	Yes	1:00	1:25	5:00	1:25				
8	Arryn, Ronnel	I	7	Yes	2:00	0:35	10:00	0:35				
9	Arryn, Ronnel	I	8	No	2:00	1:09	5:00	5:00				
10	Arryn, Ronnel	I	9	Yes	1:30	1:17	10:00	1:17				
11	Arryn, Ronnel	I	10	Yes	1:00	2:04	5:00	2:04				
12	Arryn, Ronnel	I	11	Yes	3:00	0:15	5:00	0:15				
13	Arryn, Ronnel	I	12	Yes	1:30	1:47	10:00	1:47				
14	Arryn, Ronnel	I	13	Yes	3:00	1:47	10:00	1:47				
15	Arryn, Ronnel	II	1	Yes	1:30	0:37	5:00	0:37				
16	Arryn, Ronnel	II	2	Yes	1:30	1:19	5:00	1:19				
17	Arryn, Ronnel	II	3	No	1:00	0:24	5:00	5:00				
18	Arryn, Ronnel	II	4	Yes	1:30	1:12	20:00	1:12				
19	Arryn, Ronnel	II	5	Yes	4:00	5:43	40:00	5:43				
20	Arryn, Ronnel	II	6	Yes	1:00	1:39	15:00	1:39				
21	Arryn, Ronnel	II	7	Yes	2:00	1:17	5:00	1:17				
22	Arryn, Ronnel	II	8	Yes	2:00	2:03	10:00	2:03				
23	Arryn, Ronnel	II	9	Yes	2:00	3:00	10:00	3:00				
24	Arryn, Ronnel	II	10	Yes	1:30	2:43	15:00	2:43				
25	Arryn, Ronnel	II	11	No	1:00	1:41	15:00	15:00				
26	Arryn, Ronnel	II	12	Yes	1:00	0:45	15:00	0:45				
27	Arryn, Ronnel	II	13	Yes	2:00	3:54	15:00	3:54				
28	Arryn, Ronnel	II	14	Yes	2:00	5:27	10:00	5:27				
29	Arryn, Ronnel	II	15	Yes	2:00	1:43	15:00	1:43				
30	Arryn, Ronnel	III	1	Yes	2:00	0:52	5:00	0:52				
31	Arryn, Ronnel	III	2	Yes	2:00	3:20	5:00	3:20				
32	Arryn, Ronnel	III	3	No	3:00	0:44	15:00	15:00				
33	Arryn, Ronnel	III	4	Yes	2:00	0:38	10:00	0:38				
34	Arryn, Ronnel	III	5	Yes	1:00	2:19	5:00	2:19				
35	Arryn, Ronnel	III	6	Yes	2:00	1:25	10:00	1:25				
36	Arryn, Ronnel	III	7	Yes	2:00	0:35	15:00	0:35				
37	Arryn, Ronnel	III	8	Yes	2:00	1:09	10:00	1:09				
38	Arryn, Ronnel	III	9	Yes	1:00	1:17	10:00	1:17				
39	Arryn, Ronnel	III	10	Yes	2:00	2:04	10:00	2:04				
40	Arryn, Ronnel	III	11	Yes	2:00	0:15	10:00	0:15				
41	Arryn, Ronnel	III	12	No	2:00	1:47	10:00	10:00				
◀ ▶		Assignment 1	Assignment 2	Assignment 3	Raw	Pivot	1216	1217	1218	1219	1220	1221

The raw data can then be filtered in multiples. The organization may, for example, want to zero in on which specific tasks an individual does not perform correctly:

Name	Assignment	Task	Performed Correctly	Target Time	Actual Time	Penalty Time	Assessed Time
Arryn, Ronnel	I	8	No	2:00	1:09	5:00	5:00
Arryn, Ronnel	I	3	No	1:00	0:24	5:00	5:00
Arryn, Ronnel	I	11	No	1:00	1:41	15:00	15:00
Arryn, Ronnel	III	3	No	3:00	0:44	15:00	15:00
Arryn, Ronnel	III	12	No	2:00	1:47	10:00	10:00

Or the organization might want to identify all the individuals who are unable to perform a specific task:

Name	Assignment	Task	Performed Correctly	Target Time	Actual Time	Penalty Time	Assessed Time
Caron, Bryce	I	2	No	1:00	3:20	15:00	15:00
Ironmaker, Urek	I	2	No	1:00	3:20	15:00	15:00
Jast, Antario	I	2	No	1:00	3:20	15:00	15:00
Manderly, Medrick	I	2	No	1:00	3:20	15:00	15:00
Seaworth, Davos	I	2	No	1:00	3:20	15:00	15:00
Votyris, Byan	I	2	No	1:00	3:20	15:00	15:00

The raw data can also be used to create pivot tables that allow the organization to dissect the information in whatever manner they want. For example, before determining who struggled with which task, the organization may need to identify the tasks on which the most users struggled:

Assignment	Task #	# Performed Incorrectly
I	2	6
I	3	4
I	4	6
I	5	6
I	6	4
I	7	4
I	8	4
I	9	8
I	10	6
I	12	8
I	13	4
II	1	4
II	2	4
II	3	8
II	4	2
II	5	6
II	6	4
II	7	6
II	8	8
II	9	8
II	11	6
II	13	4
II	14	8
II	15	4
III	1	2
III	2	2
III	3	4
III	4	4
III	5	6
III	6	6
III	7	8
III	8	6
III	9	2
III	10	2
III	11	4
III	12	10

But these are just examples. The raw data can be manipulated any number of ways. And, again, the standard reports will be provided in whatever form and at whatever interval the organization requests.

Benchmark Reporting

In the following exemplars, all names have been changed to protect the innocent and guilty alike. To the extent any of the names are those of an actual legal professional, it simply an awesome coincidence that their name appears in *The Song of Fire and Ice* (a.k.a., *Game of Thrones*), from which all names are taken. The firm names are also fictitious—simply a jumble of firm names from the AmLaw 200—and have zero relationship to the firms actually represented.

When released to clients, scores are reported in composite form so that the clients are not only able to benchmark individuals versus the target time but also benchmark their firms against each other.

Raw Scores are provided on the individual level:

Name	Position	Firm	Overall			Word Processing			Spreadsheets			PDF		
			Time (Target = 1.0)	Waste %	COBOT Designation	Time (Target = 0.4)	Word Waste %	COBOT Designation	Time (Target = 0.4)	Excel Waste %	COBOT Designation	Time (Target = 0.4)	PDF Waste %	COBOT Designation
Ahlaq, Ghazdor	Associate	Procter, Reese, & Chadbourne	1.2	17%	Qualified	0.4	25%	Qualified	0.4	0%	Qualified	0.4	25%	Qualified
Allyrion, Delonne	Non-equity Partner	Benson Lewis	1.6	38%	Novice	0.5	40%	Novice	0.6	33%	Novice	0.5	40%	Novice
Allyrion, Ryon	Associate	Procter, Reese, & Chadbourne	1.0	0%	Qualified	0.3	0%	Qualified	0.4	0%	Qualified	0.3	0%	Qualified
Ambrose, Alyn	Associate	Manning, Case, & Stoel	2.1	52%	Novice	0.6	50%	Novice	0.8	50%	Novice	0.7	57%	Novice
Ambrose, Arthur	Associate	Mullin Dinsmore	0.6	0%	Expert	0.2	0%	Expert	0.2	0%	Expert	0.2	0%	Expert
Ambrose, Edmund	Associate	Cromwell, Belknap, & Gordon	4.0	75%	Beginner	1.1	73%	Novice	1.6	75%	Beginner	1.3	77%	Beginner
Ambrose, Marq	Associate	Cromwell, Belknap, & Gordon	1.6	38%	Novice	0.3	0%	Qualified	0.8	50%	Novice	0.5	40%	Novice
Antaryon, Ferrego	Associate	Hartson, Walker, & Davis	1.3	23%	Novice	0.6	50%	Novice	0.2	0%	Expert	0.5	40%	Novice
Arryn, Aemma	Associate	Cromwell, Belknap, & Gordon	0.9	0%	Qualified	0.3	0%	Qualified	0.2	0%	Expert	0.4	25%	Qualified

Name	Position	Firm	Overall		
			Time (Target = 1.0)	Waste %	COBOT Designation
Ahlaq, Ghazdor	Associate	Procter, Reese, & Chadbourne	1.2	17%	Qualified
Allyrion, Delonne	Non-equity Partner	Benson Lewis	1.6	38%	Novice
Allyrion, Ryon	Associate	Procter, Reese, & Chadbourne	1.0	0%	Qualified
Ambrose, Alyn	Associate	Manning, Case, & Stoel	2.1	52%	Novice
Ambrose, Arthur	Associate	Mullin Dinsmore	0.6	0%	Expert
Ambrose, Edmund	Associate	Cromwell, Belknap, & Gordon	4.0	75%	Beginner
Ambrose, Marq	Associate	Cromwell, Belknap, & Gordon	1.6	38%	Novice
Antaryon, Ferrego	Associate	Hartson, Walker, & Davis	1.3	23%	Novice
Arryn, Aemma	Associate	Cromwell, Belknap, & Gordon	0.9	0%	Qualified

Waste %: The percentage of overall time that is above the target. With a target of 1.2 hours, an individual who takes 1.4 hours has a Waste % of 14% because 0.2 hours of their 1.4 hours were avoidable waste (i.e., $0.2/1.4 = 14\%$). Likewise, a score of 1.6 hours is a Waste % of 25% (because 0.4 hours of the 1.6 hours was waste, or $.4/1.6 = 25\%$) and a score of 2.4 hours is a Waste % of 50% (because 1.2 hours of the 2.4 hours was waste, or $1.2/2.4 = 50\%$).

Name	Position	Firm	Overall			Word Processing			Spreadsheets			PDF		
			Time (Target = 1.0)	Waste %	COBOT Designation	Time (Target = 0.4)	Word Waste %	COBOT Designation	Time (Target = 0.4)	Excel Waste %	COBOT Designation	Time (Target = 0.4)	PDF Waste %	COBOT Designation
Ahlag, Ghazdor	Associate	Procter, Reese, & Chadbourne	1.2	17%	Qualified	0.4	25%	Qualified	0.4	0%	Qualified	0.4	25%	Qualified
Allyrion, Delonne	Non-equity Partner	Benson Lewis	1.6	38%	Novice	0.5	40%	Novice	0.6	33%	Novice	0.5	40%	Novice
Allyrion, Ryon	Associate	Procter, Reese, & Chadbourne	1.0	0%	Qualified	0.3	0%	Qualified	0.4	0%	Qualified	0.3	0%	Qualified
Ambrose, Alyn	Associate	Manning, Case, & Stoel	2.1	52%	Novice	0.6	50%	Novice	0.8	50%	Novice	0.7	57%	Novice
Ambrose, Arthur	Associate	Mullin Dinsmore	0.6	0%	Expert	0.2	0%	Expert	0.2	0%	Expert	0.2	0%	Expert
Ambrose, Edmund	Associate	Cromwell, Belknap, & Gordon	4.0	75%	Beginner	1.1	73%	Novice	1.6	75%	Beginner	1.3	77%	Beginner
Ambrose, Marg	Associate	Cromwell, Belknap, & Gordon	1.6	38%	Novice	0.3	0%	Qualified	0.8	50%	Novice	0.5	40%	Novice
Antayon, Ferrego	Associate	Hartson, Walker, & Davis	1.3	23%	Novice	0.6	50%	Novice	0.2	0%	Expert	0.5	40%	Novice
Arryn, Aemma	Associate	Cromwell, Belknap, & Gordon	0.9	0%	Qualified	0.3	0%	Qualified	0.2	0%	Expert	0.4	25%	Qualified

Word Processing		
Time (Target = 0.4)	Word Waste %	COBOT Designation
0.4	25%	Qualified
0.5	40%	Novice
0.3	0%	Qualified
0.6	50%	Novice
0.2	0%	Expert
1.1	73%	Novice
0.3	0%	Qualified
0.6	50%	Novice
0.3	0%	Qualified

COBOT: *Certified Operator of Basic Office Technology*. An individual who hits the target time is Qualified. Since the target times are deliberately generous, there is also Expert status at 50% of the target time. The cutoff for Novice is 3x the target time. Anything above 3x the target time represents Beginner level skills.

Of course, legal professionals do not spend all of their time on the type of tasks assessed on the LTA. Indeed, some legal professionals should be exempted entirely because they do not perform these types of tasks. For everyone else, clients can—with input from their firms—populate the results spreadsheet with **Assumptions** about how different timekeepers allocate their average day.

Assumptions				
	Non-equity partners	Associates	Paralegals	Contractors
Average Billable Rate	\$500	\$350	\$200	\$100
Percent of billable time spent on basic tasks in common software				
	Non-equity partners	Associates	Paralegals	Contractors
Word - Draft/Revise/QC Documents	10%	15%	20%	20%
PDF - Organize/File Documents	5%	10%	25%	20%
Excel - Organize/Analyze Data	1%	5%	20%	20%
Thus, in an 8-hour billable day, these basic tasks account for, on average	1.3	2.4	5.2	4.8

The default presumption is that equity partners are not doing this kind of work. The default assumptions are that paralegals spend a greater percentage of their time on these types of tasks than associates, who spend a greater percentage than service partners. But these are just general assumptions that can be modified at the individual level—i.e., changed for each individual user reported.

Identification			Totals						Word			
Name	Position	Firm	Billable Rate	Recommended Writedown	Recommended Rate	Time on basic tasks per 8 hrs. billed	Overall Waste % on basic tasks	Waste Estimate per 8 hrs billed	% of billable time on basic Word tasks	Time on basic Word tasks per 8 hrs billed	Word Waste %	Word Waste per 8 hrs billed
Ahlaq, Ghazdor	Associate	Procter, Reese, & Chadbourne	\$350	6%	\$328	2.4	21%	0.5	15%	1.2	25%	0.3
Allyrion, Delonne	Non-equity Partner	Benson Lewis	\$500	6%	\$468	1.3	39%	0.5	10%	0.8	40%	0.3
Allyrion, Ryon	Associate	Procter, Reese, & Chadbourne	\$350	0%	\$350	2.4	0%	0.0	15%	1.2	0%	0.0
Ambrose, Alyn	Associate	Manning, Case, & Stoel	\$350	16%	\$295	2.4	52%	1.3	15%	1.2	50%	0.6
Ambrose, Arthur	Associate	Mullin Dinsmore	\$350	0%	\$350	2.4	0%	0.0	15%	1.2	0%	0.0
Ambrose, Edmund	Associate	Cromwell, Belknap, & Gordon	\$350	22%	\$272	2.4	75%	1.8	15%	1.2	73%	0.9
Ambrose, Marq	Associate	Cromwell, Belknap, & Gordon	\$350	7%	\$327	2.4	22%	0.5	15%	1.2	0%	0.0
Antaryon, Ferrego	Associate	Hartson, Walker, & Davis	\$350	12%	\$310	2.4	38%	0.9	15%	1.2	50%	0.6
Arryn, Aemma	Associate	Cromwell, Belknap, & Gordon	\$350	3%	\$341	2.4	8%	0.2	15%	1.2	0%	0.0

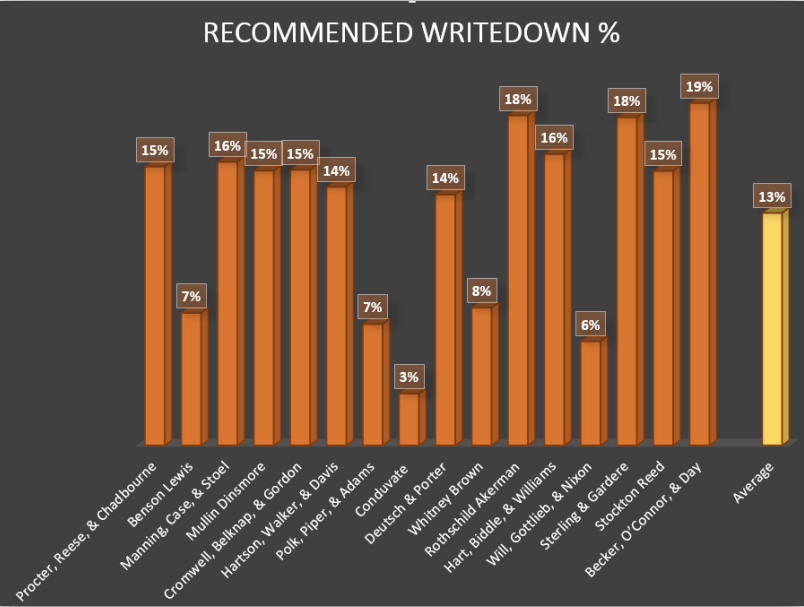
Identification			Word			
Name	Position	Firm	% of billable time on basic Word tasks	Time on basic Word tasks per 8 hrs billed	Word Waste %	Word Waste per 8 hrs billed
Ahlaq, Ghazdor	Associate	Procter, Reese, & Chadbourne	15%	1.2	25%	0.3
Allyrion, Delonne	Non-equity Partner	Benson Lewis	10%	0.8	40%	0.3
Allyrion, Ryon	Associate	Procter, Reese, & Chadbourne	15%	1.2	0%	0.0
Ambrose, Alyn	Associate	Manning, Case, & Stoel	15%	1.2	50%	0.6
Ambrose, Arthur	Associate	Mullin Dinsmore	15%	1.2	0%	0.0
Ambrose, Edmund	Associate	Cromwell, Belknap, & Gordon	15%	1.2	73%	0.9
Ambrose, Marq	Associate	Cromwell, Belknap, & Gordon	15%	1.2	0%	0.0
Antaryon, Ferrego	Associate	Hartson, Walker, & Davis	15%	1.2	50%	0.6
Arryn, Aemma	Associate	Cromwell, Belknap, & Gordon	15%	1.2	0%	0.0

[Law firms should have data](#) from their document management system to provide a rough picture of who spends their time doing what. Thus, for example, if a specific legal professional never uses Excel, their Excel percentage can be reduced to 0% and their performance on the Excel module (which they can skip without penalty) will have no impact on their **Recommended Writedown**. Recommended Writedown is a composite result that combines the user's raw score with the adjustable assumptions about how their time is spent.

Identification			Totals					
Name	Position	Firm	Billable Rate	Recommended Writedown	Recommended Rate	Time on basic tasks per 8 hrs. billed	Overall Waste % on basic tasks	Waste Estimate per 8 hrs billed
Ahlaq, Ghazdor	Associate	Procter, Reese, & Chadbourne	\$350	6%	\$328	2.4	21%	0.5
Allyrion, Delonne	Non-equity Partner	Benson Lewis	\$500	6%	\$468	1.3	39%	0.5
Allyrion, Ryon	Associate	Procter, Reese, & Chadbourne	\$350	0%	\$350	2.4	0%	0.0
Ambrose, Alyn	Associate	Manning, Case, & Stoel	\$350	16%	\$295	2.4	52%	1.3
Ambrose, Arthur	Associate	Mullin Dinsmore	\$350	0%	\$350	2.4	0%	0.0
Ambrose, Edmund	Associate	Cromwell, Belknap, & Gordon	\$350	22%	\$272	2.4	75%	1.8
Ambrose, Marq	Associate	Cromwell, Belknap, & Gordon	\$350	7%	\$327	2.4	22%	0.5
Antaryon, Ferrego	Associate	Hartson, Walker, & Davis	\$350	12%	\$310	2.4	38%	0.9
Arryn, Aemma	Associate	Cromwell, Belknap, & Gordon	\$350	3%	\$341	2.4	8%	0.2

The concept of Recommend Writedown may seem harsh at first glance. But the entire object of the LTA is to avoid these tough conversations entirely by creating incentives for proper training. The LTA is not intended to embarrass. But, unfortunately, the LTA results thus far suggest that the prospect of embarrassment is necessary to incite legal professionals to take technology training seriously. Since they have access to the Training Edition and can retake the LTA as many times as they like—we only report the most recent score—every legal professional subject to the LTA should have ample opportunity to achieve a qualifying score.

Individual scores are rolled up and benchmarked at the firm level in a variety of ways:



Firm	Participants	Decliners	Suggested Writeoff	Waste Estimate (per 8 hrs billed)	Avg. Billable Rate	True Rate	Recommended Rate	Avg. LTA Time
Procter, Reese, & Chadbourne	99	0	15%		\$355	\$408	\$302	2.7
Non-Equity Partner	6	0	7%	0.5	\$500	\$533	\$467	1.2
Associate	90	0	15%	1.2	\$350	\$404	\$296	1.9
Paralegal	3	0	34%	2.7	\$200	\$267	\$133	2.6
Benson Lewis	98	0	7%		\$353	\$378	\$328	1.4
Non-Equity Partner	7	0	5%	0.4	\$500	\$527	\$473	0.9
Associate	86	0	7%	0.6	\$350	\$374	\$326	0.8
Paralegal	5	0	17%	1.4	\$200	\$234	\$166	1.4
Manning, Case, & Stoel	180	0	16%		\$356	\$410	\$302	2.8
Non-Equity Partner	17	0	9%	0.7	\$500	\$544	\$456	1.7
Associate	153	0	16%	1.2	\$350	\$405	\$295	1.9
Paralegal	10	0	28%	2.3	\$200	\$257	\$143	2.1
Mullin Dinsmore	50	61	15%		\$353	\$405	\$301	2.6
Non-Equity Partner	3	9	11%	0.8	\$500	\$553	\$447	1.8
Associate	45	48	14%	1.1	\$350	\$400	\$300	1.7
Paralegal	2	4	43%	3.4	\$200	\$285	\$115	3.0

We only release the most recent score and only after the firm authorizes us to do so. If the firm gets a score request from a client, they can pass it on to us with express permission to release the scores identified. Alternatively, if we receive a score request from a client, we forward it to a designated person at the subject firm and then release only those scores, if any, that the firm authorizes. In fact, we do not even identify whether a firm or an individual has a score in the system unless we are expressly authorized to do so.

Thus, a client request may include two firms that will not release their scores for different reasons: one because they don't have scores; the other because they are not ready to release their scores. From the client perspective, the two firms will look exactly the same. We will simply indicate that the firms declined to release their scores without specifying whether or not they have scores in the system. We do not want a firm that is in the process of evaluating their internal competencies to be at a disadvantage vis-à-vis a firm that is not inclined to do so.

Obviously, clients can apply pressure to get firms to take the LTA and release their scores. In addition, our score reporting to clients provides a method to impute scores to Decliners—i.e., firms or individuals whose scores are not released.

Identification				Presumed Totals					
Name	Position	Firm	Score Status	Billable Rate	Recommended Writedown	Recommended Rate	Time on basic tasks per 8 hrs. billed	Overall Waste % on basic tasks	Waste Estimate per 8 hrs billed
Arias, Mikenna	Associate	Becker, O'Connor, & Day	Declined	\$350	23%	\$269	2.4	77%	1.8
Cox, Nissi	Associate	Becker, O'Connor, & Day	Declined	\$350	23%	\$269	2.4	77%	1.8
Donovan, Ming	Associate	Becker, O'Connor, & Day	Declined	\$350	23%	\$269	2.4	77%	1.8
Ford, Nuri	Non-equity Partner	Becker, O'Connor, & Day	Declined	\$500	13%	\$437	1.3	78%	1.0
Gentry, Berklie	Associate	Becker, O'Connor, & Day	Declined	\$350	23%	\$269	2.4	77%	1.8
Guzman, Jackelyn	Associate	Becker, O'Connor, & Day	Declined	\$350	23%	\$269	2.4	77%	1.8
Hayes, Elliot	Non-equity Partner	Becker, O'Connor, & Day	Declined	\$500	13%	\$437	1.3	78%	1.0
Hendrix, Rayanna	Associate	Becker, O'Connor, & Day	Declined	\$350	23%	\$269	2.4	77%	1.8

Decliners
Presume individual scores that are **25%** worse than firm average to fill out the data set and deter cherrypicking. If a firm does not release any scores, report-group average *plus* this percentage will be used.

For more information go to: www.procertas.com