

Open Legal
STANDARDS
INITIATIVE

Legal Process & Metrics Innovation Symposia

Join a Legal Industry Effort to Define Process
and Metrics Innovation and Standards

The Legal Industry, Process Improvement and Metrics

The Legal Process and Metrics Innovation Symposia is an industry-wide effort to drive rigorous dialogue and innovation in the areas of process improvement, metrics and benchmarking on par with efforts in other industries.

The OLSI Mission

The mission of the Open Legal Standards Initiative is to set the standard for quality and efficient legal services through the development of business process and metrics classification systems for the legal industry, benchmarking surveys and various industry events and publications.

Goals of the Legal Process and Metrics Innovation Symposia

The goals of the Legal Process and Metrics Innovation Symposia are to be an organizing force for legal industry dialogue and initiatives on process improvement and metrics and to get industry consensus on key components of such efforts. Initially, the Legal Process and Metrics Innovation Symposia will focus on evolving an industry standard list of processes and metrics, a consistent metrics collection and reporting methodology to allow for effective benchmarking, an effective implementation approach to drive organizational usage of process and metrics innovation, culminating with an industry performance metrics benchmarking survey.

In the future, inspired by the creativity of the participants in this Symposia, our goals include engaging the industry in dialogue on how to apply process improvement principles from quality initiatives such as Six Sigma or TQM to the knowledge and service worker sectors.

For more information or to
register contact:
John Ogden
Interim Executive Director
201-962-8062
symposia@openlegalstandards.org

www.openlegalstandards.org

Webcast program will be available through
both:
WestLegalEdcenter® &



CLE credit will be applied for in states allowing
Law Practice Management Credit.

Symposia also brought to you by the following OLSI Founding Partners:



Symposia Overview

Open Legal
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An Educational Forum and Dialogue on Innovation
and Setting Standards in the Legal Industry

Symposia Components

Four Symposia Tracks

This 4 track curriculum has been conceived and designed for participants to attend all 4 tracks. Though individual tracks can be attended separately, their full value may not be appreciated. We recommend applicants participate in the live meetings or download the replays in order.

Track 1: Industry Standard List of Processes

Track 2: Industry Standard List of Metrics

Track 3: Metrics Collection and Reporting Methodology

Track 4: Implementation System

Law Department Performance Metrics Industry Survey

Participants in the program will leverage their learning to respond to a law department industry survey using standard methodologies. Planning is underway for a Law Firm Performance Metrics Industry Survey.

ACC Annual Meeting Presentation

Preliminary results of the Law Department Industry Survey will be presented at the October 2006 ACC meeting. Details TBD

Survey Report Issued

The results from the Industry survey will be disseminated to the participants in early 2007. The end result will be the precedent- setting ability for legal executives to effectively benchmark their operations against their peers.

Symposia Benefits

Participants in the Legal Process and Metrics Innovation Symposia will benefit from a collaborative industry approach to innovating and setting standards.

Participants will learn baseline strategies for process efficiencies and metrics benchmarking. The group will define as a group the suggested industry standard approaches.

Process efficiency allows lawyers to spend less time on routine work and more time on strategic lawyering. Metrics and benchmarking provides legal teams key insights into business performance, helps identify areas for innovation and helps legal teams demonstrate the value of the legal function within an organization.

Collaboration Among Legal Industry Leaders and Innovators

The foundation has already been set by key legal industry leaders and innovators for process and metrics analysis. The Open Legal Standards Initiative, through the Legal Process and Metrics Innovation Symposia, seeks to collect and share this key thinking with the industry and to use such existing work as a springboard to identify what the standards should be. Consistent with the ultimate mission of OLSI, the goal is not to reinvent the wheel on important work done by others, but to share this work with the industry and have such work be featured as part of the industry standard approach.

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Track Descriptions

To find out more about how to become a member of OLSI and/or participate in the Legal Process and Metrics Innovation Symposia, contact John Ogden, Interim Executive Director, at 888-257-7150 x711. You can also email symposia@openlegalstandards.org or visit www.openlegalstandards.org

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Track 1: Industry Standard List of Processes

Participants will learn about the current efforts to catalog the business processes governing law departments and law firms – from managing legal matters to managing operations. A comprehensive listing of business processes allows organizations to understand their activities across multiple legal functions and to engage in a more organized dialogue about how to improve each process. Participants can propose additions and deletions to what will be the industry standard list of processes.

Track 2: Industry Standard List of Metrics

In order to effectively measure processes and how to understand metrics as a tool for continuous process improvement, participants will learn about performance-based metrics in four key areas: Cost Effectiveness, Staff Productivity, Process Efficiency, and Cycle Time. Participants will learn about the current group of metrics selected to serve as key performance indicators for the legal industry and will be given an opportunity to comment on the list that will serve as the bases for an industry survey on metrics.

Track 3: Metrics Collection and Reporting Methodology (Introductory and Intermediate Sessions offered for this Track)

Participants will learn about suggested approaches for tracking and reporting key performance metrics that allows for more effective benchmarking across organizations – allowing for the apples to apples and oranges to oranges comparisons. Participants will be encouraged to suggest methodologies appropriate for different sized organizations.

Track 4: Implementation System (Introductory and Intermediate Sessions offered for this Track)

Participants will learn how to implement the industry standard approach for metrics collection and reporting within their organizations – from planning, implementation, strategic communication of the program and enforcement. The focus is on how to engage stakeholders to support the industry and organizational drive for efficiency and quality process improvement and metrics.

All sessions take place virtually via Webcasting, will be taught by industry experts and involve participant contribution. Participants can attend either A or B sessions for each Track as well as access replays.

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Schedule

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- ACC Members Receive 20% Discount
- Volume Purchases (i.e., by a law firm for several clients or peer network):
 - Register 2 organizations, get 10% off
 - Register 4 organizations, get 15% off
 - Register 6 organizations, get 20% off

Event*	Dates/Times (Sessions will be available for replay)		Delivery
Track 1: Industry Standard List of Processes	Law Department Session A (All Levels)	Wed., April 19, 2 to 3:30 p.m. EST	Online with replay
	Law Department Session B (All Levels)	Thu., May 4, 4 p.m. to 5:30 p.m. EST	Online with replay
	Law Firm Session A (All Levels)	Tue., April 25, 11 a.m. to 12:30 p.m. EST	Online with replay
	Law Firm Session B (All Levels)	Wed., May 10, 2 to 3:30 p.m. EST	Online with replay
Track 2: Industry Standard List of Metrics	Law Department Session A (All Levels)	Wed., May 17, 2 to 3:30 p.m. EST	Online with replay
	Law Department Session B (All Levels)	Tue., June 13, 4 to 5:30 p.m. EST	Online with replay
	Law Firm Session A (All Levels)	Thu., May 25, 11 a.m. to 12:30 p.m. EST	Online with replay
	Law Firm Session B (All Levels)	Wed., June 28, 2 to 3:30 p.m. EST	Online with replay
Track 3: Metrics Collection and Reporting Methodology	Law Department Session A (Introductory Level)	Wed., July 12, 2 to 3:30 p.m. EST	Online with replay
	Law Department Session B (Intermediate Level)	Thu., August 10, 4 to 5:30 p.m. EST	Online with replay
	Law Firm Session A (Introductory Level)	Tue., July 25, 11 a.m. to 12:30 p.m. EST	Online with replay
	Law Firm Session B (Intermediate Level)	Wed., August 23, 2 to 3:30 p.m. EST	Online with replay
Track 4: Certified Implementation System	Law Department Session A (Introductory Level)	Wed., September 6, 2 to 3:30 p.m. EST	Online with replay
	Law Department Session B (Intermediate Level)	Tue., September 19, 4 to 5:30 p.m. EST	Online with replay
	Law Firm Session A (Introductory Level)	Thu., September 14, 11 a.m. to 12:30 p.m. EST	Online with replay
	Law Firm Session B (Intermediate Level)	Wed., September 27, 2 to 3:30 p.m. EST	Online with replay
Industry Survey	August and September 2006		Online and Print
ACC Annual Meeting Presentation	October 2006		In person - San Diego, CA
Survey Report Issued	First Quarter 2007		Online and Print

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Pricing and Discounts

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Symposia reservations can be made by e-mail symposia@openlegalstandards.org or by phone or v-mail: John Ogden of OLSI - 888-257-7150 x711
Reservations are not confirmed until Registration Form and payment are received.

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Legal Metrics Innovation Symposia and OLSI Membership Special Pricing

Membership Values

Level 1: \$4,995

Full Program Access
24 passes to participate in any Legal Metrics Innovation Symposium Sessions

Level 2: \$3,995

Full Program Access
16 passes to participate in any Legal Metrics Innovation Symposium Sessions

Level 3: \$2,995

Full Program and 12 passes to participate in any Legal Metrics Innovation Symposium Sessions

Level 4: \$1,995

Full Program and 8 passes to participate in any Legal Metrics Innovation Symposium Sessions

Level 5: \$995

Full Program and 4 passes to participate in any Legal Metrics Innovation Symposium Sessions

Membership for All Levels Includes

- ✓ Passes to participate in any of the following Legal Process and Metrics Innovation Symposia:
 - a. Industry Standard List of Process
 - b. Industry Standard List of Metrics
 - c. Metrics Collection and Reporting Methodology
 - d. Implementation System (to implement metrics methodology into law department workflow)
- ✓ All Course Materials
- ✓ All Online Library Content
- ✓ CLE credit will be applied for in states allowing Law Practice Management.
- ✓ 15% Discount on 2007 Performance Metrics and Benchmarking Survey Results and Analysis
- ✓ 15% on Completed Symposia Program including: (1) Industry Standard List of Process (detailed version); (2) Industry Standard List of Metrics (detailed version); (3) Industry Standard Guidelines on Metrics and Reporting Methodology
- ✓ 15% discount on Services of Preferred Consultants on Standardized Metrics and Reporting Methodology Program
- ✓ Access to Members Only Area of Legal Metrics and Benchmarking Community Blog (specific program under development)
- ✓ One Year Membership in OLSI

Additional Pricing Options

Cost	Item	Included
\$295	Individual Track Pricing	One individual session pass and course material; CLE credit will be applied for in states allowing Law Practice Management.
\$795	Course Materials	For all four tracks (available in 4Q 2006)

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Reservations are not confirmed until this Form and payment are received in N.Y. (see below)

Contact Information

Organization			E-mail			
Primary Contact			Address 1			
Title			Address 2			
Phone, Fax	()	()	City, ST, Zip			

Legal Process and Metrics Innovation Symposia and OLSI Membership Special Pricing

Membership for All Levels Includes		Check 1	Passes: 1 pass = 1 person for 1 session	Price
✓ Passes to participate in any of the following Legal Process and Metrics Innovation Symposia: <ol style="list-style-type: none"> 1. Industry Standard List of Process 2. Industry Standard List of Metrics 3. Metrics Collection and Reporting Methodology 4. Implementation System (to implement metrics system in organization) ✓ All Course Materials ✓ All Online Library Content ✓ MCLE credit will be applied for in states allowing Law Practice Management. ✓ One Year Membership in OLSI (per standard membership rules) ✓ Full Legal Metrics Symposium Access	✓ Access to Members Only Area of Legal Metrics and Benchmarking Community Blog (specific program under development) ✓ 15% Discount on 2007 Performance Metrics and Benchmarking Survey Results and Analysis ✓ 15% on Completed Symposia Program including: (1) Industry Standard List of Process (detailed version); (2) Industry Standard List of Metrics (detailed version); (3) Industry Standard Guidelines on Metrics and Reporting Methodology ✓ 15% discount on Services of Preferred Consultants on Standardized Metrics and Reporting Methodology Program	<input type="radio"/>	24 passes to participate in any Legal Process and Metrics Innovation Symposium Sessions	\$4,995
		<input type="radio"/>	16 passes to participate in any Legal Process and Metrics Innovation Symposium Sessions	\$3,395
		<input type="radio"/>	12 passes to participate in any Legal Process and Metrics Innovation Symposium Sessions	\$2,995
		<input type="radio"/>	8 passes to participate in any Legal Process and Metrics Innovation Symposium Sessions	\$1,995
		<input type="radio"/>	4 passes to participate in any Legal Process and Metrics Innovation Symposium Sessions	\$995

Additional Pricing Options		Price	Qty	Tally
Individual Track Pricing	One individual session pass and course material; MCLE credit will be applied for in states allowing Law Practice Management	\$295		
Course Materials	For all four tracks (available in 4Q 2006)	\$795		

Send checks, completed form and list of program registrants to:

Open Legal Standard Initiative
Attn: Registration
501 5th Ave., 3rd Fl.
NY, NY 10017
Make Checks Payable to:
Open Legal Standard Initiative

Sub Total		% Discount		Grand Total	
Signature		Print		Date	

When Confirming registration by e-mail at symposia@openlegalstandards.org, please note which sessions you would like to participate in, or if replay is needed.