OUTSOURCE IS THE NEW BLACK

Presenter: Marco Maggio, VP of Strategic Practices
All Covered, IT Services from Konica Minolta

IN OR OUTSOURCE?

Survey by:

Giving Shape to Ideas
GOALS FOR TODAY

- Compare the pros and cons of insourcing vs outsourcing IT
- Gain tips on how to evaluate technology vendors
- Assess which services to prioritize and why
- Discuss the costs associated with outsourcing IT
- Illustrate how to manage & implement an outsourcing IT campaign
IN OR OUTSOURCE?

Gain focus on your **CORE** competencies
IN OR OUTSOURCE?

Do you require specific **EXPERTISE**?

IN OR OUTSOURCE?

Will you be able to reduce **RISK**?
IN OR OUTSOURCE?

Is **TOTAL**
control important for your firm?

IN OR OUTSOURCE?

Do you need to be the most **IMPORTANT**?
IN OR OUTSOURCE?

Does your firm need better **AVAILABILITY** to access anything from anywhere at anytime?

IN OR OUTSOURCE?

Is there an **ECONOMIC** advantage?

Don’t just think about savings.
IN OR OUTSOURCE?

There’s more to consider than just **COST**!

- Cost Avoidance
- Access to Best Practices
- Increase Capabilities
- Accelerate Productivity
- Access to Tools
- CAPEX Vs OPEX
- Competency Focus

### IN OR OUTSOURCE?

**COSTS** to consider?

- **Labor**
  - Salary
  - Benefits
  - Training
  - • Certifications
  - • Legal App’s
  - • General Recruiting
  - • Recruiter Fees
  - • Background Checks
  - • Drug Tests
  - • Interviewing
  - • Onboarding
  - • Travel
  - • Taxes (Payroll)

- **Technology**
  - Hardware
    - • Phone(s)
    - • Computer
    - • Monitor(s)
    - • Ship/Install
    - • Disposal
  - Software
    - • License Fees
    - • Install/Integration
    - • Upgrade
    - • Security/BC
    - • Badging
    - • Monitoring
    - • Data Retention

- **Facility**
  - Office Space
  - Furniture
  - Equipment
  - Utilities

- **Administration**
  - Management
  - Human Resources
  - Legal
SO MANY VENDORS SO LITTLE TIME?

VENDOR EVALUATION CRITERIA

Understand their true CORE COMPETENCIES
VENDOR EVALUATION CRITERIA

References are great, but you should look behind the curtain to see the potential vendors.

INFRASTRUCTURE & TOOLS?

Meet the PROMISE KEEPERS

Not just the PROMISE MAKERS

Giving Shape to Ideas
Do they **SPECIALIZE** in legal technology?

Will they create a customized **TECHNOLOGY PLAN** for your firm?
VENDOR EVALUATION CRITERIA

Can they realistically **SCALE** up or down to meet your current and future needs?

Who are their **PARTNERS**?
COMMUNICATION
& real time access to the **RIGHT** reports & data is critical!

How **SECURE** will your data be?
VENDOR EVALUATION CRITERIA

Do they have LOCAL resources?

Do You CARE?

VENDOR EVALUATION CRITERIA

Can they easily integrate with your Firm’s CULTURE?
VENDOR EVALUATION CRITERIA

Don’t underestimate the value of **PROJECT MANAGERS** to the Outsourcing process
PMP, PMITS, CAPM, Prince2, CompTIA, MPM, CSM, CPM, ETC

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**Initiate**
- Client Onboarding
- Set Expectations
- Survey/Questionnaire

**Plan**
- Internal & External Project Kickoff Meeting
- Develop Project Plan & Schedule
- Review Project Goals, Plan & Timelines

**Execute**
- Documentation
- Guidebook & SLA’s
- Outage Handling & Key SOP’s, Network Diagram, etc.
- Complete Installs & Rollouts of App’s & HW

**Monitor and Control**
- Install & Configure All Monitoring Tools
- Complete QA/QC
- Documentation, Agents & Monitoring, Addtl Services

**Continual Improvement & Communication**
- Onboarding Exec Summary
- Project Closure
- Agree to format of QBR & Schedule

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**Onboarding High-Level Phases**

<table>
<thead>
<tr>
<th>SMALL ENGAGEMENT</th>
<th>LARGE ENGAGEMENT</th>
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</thead>
<tbody>
<tr>
<td>Simple Onboarding Day 5</td>
<td>Simple Onboarding Day 30</td>
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<tr>
<td>Medium Onboarding Day 7</td>
<td>Medium Onboarding Day 50</td>
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<tr>
<td>Large Onboarding Day 10</td>
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<td>Medium Onboarding Day 25</td>
<td>Large Onboarding Day 85</td>
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<tr>
<td>Large Onboarding Day 30</td>
<td>Large Onboarding Day 90</td>
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VENDOR EVALUATION CRITERIA

How about the **Cancellation** or **Termination** Terms?

WHERE SHOULD YOU START?
## PREPARE THE FIRM FOR OUTSOURCING

### 2018 ILTA TECHNOLOGY SURVEY

<table>
<thead>
<tr>
<th>Service</th>
<th>% of Firms</th>
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<tbody>
<tr>
<td>Entire IT Department</td>
<td>2%</td>
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<tr>
<td>Word Processing</td>
<td>2%</td>
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<tr>
<td>Desktop Support</td>
<td>5%</td>
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<tr>
<td>Litigation Support Professionals</td>
<td>6%</td>
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<tr>
<td>Trial Support</td>
<td>6%</td>
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<tr>
<td>Exchange (Hosting)</td>
<td>9%</td>
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<tr>
<td>Application Development</td>
<td>9%</td>
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<tr>
<td>Patch Management</td>
<td>15%</td>
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<tr>
<td>Lit Support Data Hosting</td>
<td>15%</td>
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<tr>
<td>Security</td>
<td>18%</td>
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<tr>
<td>Help Desk</td>
<td>22%</td>
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<tr>
<td>Infrastructure Support</td>
<td>22%</td>
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</table>

### What SERVICE should you address first?

### PREPARE THE FIRM FOR OUTSOURCING

<table>
<thead>
<tr>
<th>Service</th>
<th>Client Requirement</th>
<th>Current Gap at Firm</th>
<th>Economic Advantage</th>
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<tbody>
<tr>
<td>Infrastructure Support</td>
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<tr>
<td>Data Hosting</td>
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<tr>
<td>Cybersecurity/SOC</td>
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<tr>
<td>Help Desk</td>
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<td>Application Support</td>
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<td>VoIP/Phones</td>
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<tr>
<td>DR/BC</td>
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<td>Legal Application Support</td>
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<td>eDiscovery/Managed Review</td>
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<td>Managed Print Services</td>
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<td>Remote Monitoring/NOC</td>
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<td>Desktop Support</td>
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<td>Patch Management</td>
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PREPARE THE FIRM FOR OUTSOURCING

Not a **STATIC** event!

Form a small **TEAM** of stakeholders
PREPARE THE FIRM FOR OUTSOURCING

Identify and establish **GOALS** you want to achieve through outsourcing

Identify and understand potential **CHALLENGES**
PREPARE THE FIRM FOR OUTSOURCING

UNDERSTAND
what your firm is expected to do moving forward

Establish realistic SLA’s or SLO’s

Which one do you want to be?
PREPARE THE FIRM FOR OUTSOURCING

Schedule and engage the provider in frequent update MEETINGS and establish communication channels moving forward

COMMUNICATE early and often

Why
When
How
To who
What’s in it for the firm and for them
PREPARE THE FIRM FOR OUTSOURCING

Not a **STATIC** event!

LEVEL-SET your and firm expectations
PREPARE THE FIRM FOR OUTSOURCING

Be Pragmatic & Patient & Make Your Endeavor Worth the Leap!

QUESTIONS?

For additional questions:

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THANK YOU FOR YOUR TIME!