

The Lean Law Library

Shaunna Mireau

Law libraries are under pressure to be better, faster, and cheaper. How can we achieve BFC while maintaining high quality services to our appreciative clients? This session will reveal how using the lens of Lean Six Sigma to review law library operations can build BFC opportunities that will also delight law library customers and stakeholders.

Lean Six Sigma is trending to become the 'new' solution to pressures on the legal market place. Law librarians who can use Lean Six Sigma concepts will be able to cross pollinate library with management, increasing the relevance of the library as integral to the organization as a whole, not simply as a room or a team who are important to legal researchers.

Why Better Faster and Cheaper?

▲ Value

- Something tangible is created
- Correct the first time
- Client will pay for it

Lean Six Sigma

▲ Lean

- Eliminating waste

▲ Six Sigma

- Disciplined, data driven approach for eliminating defects

▲ Process Improvement (PI)

Everything is a process

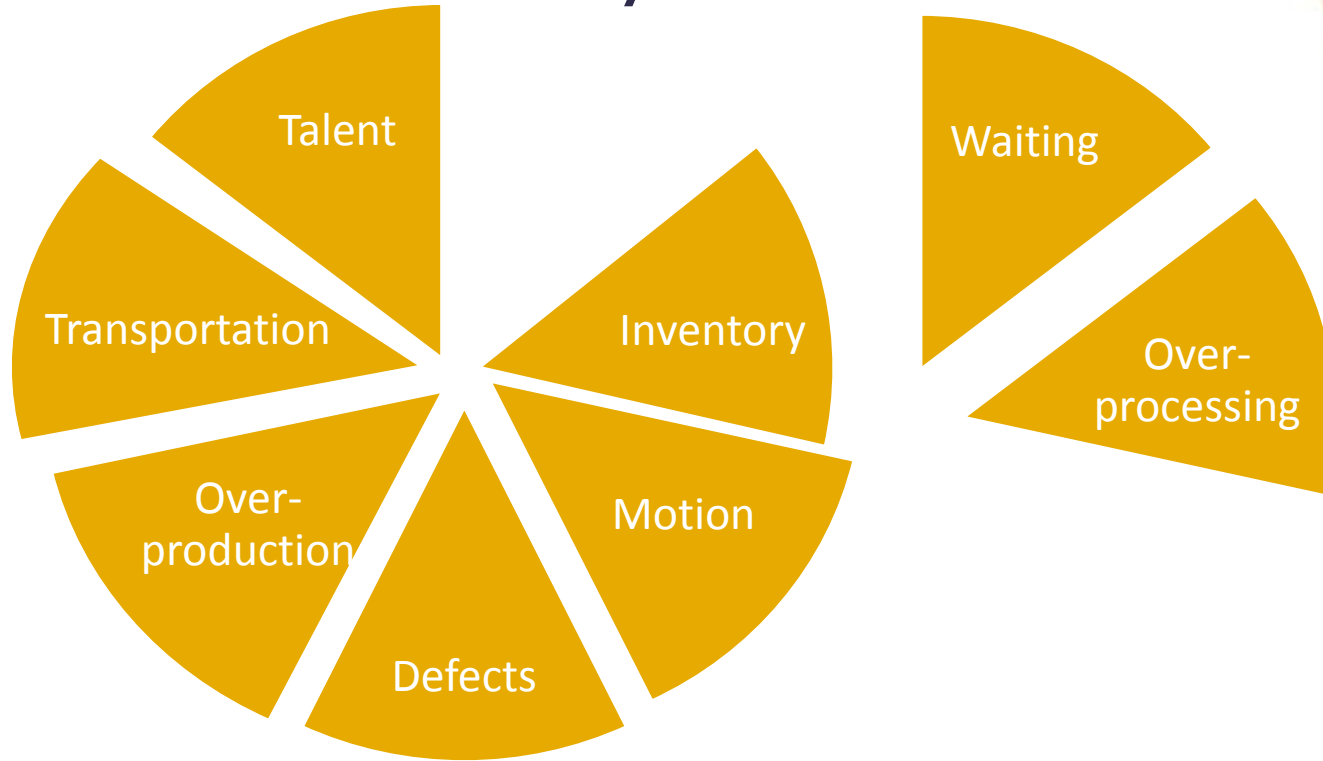
- ▲ Process is “a series of actions or steps taken in order to achieve a particular end”*

*As a noun defined with a Google OneBox

Asking the Question

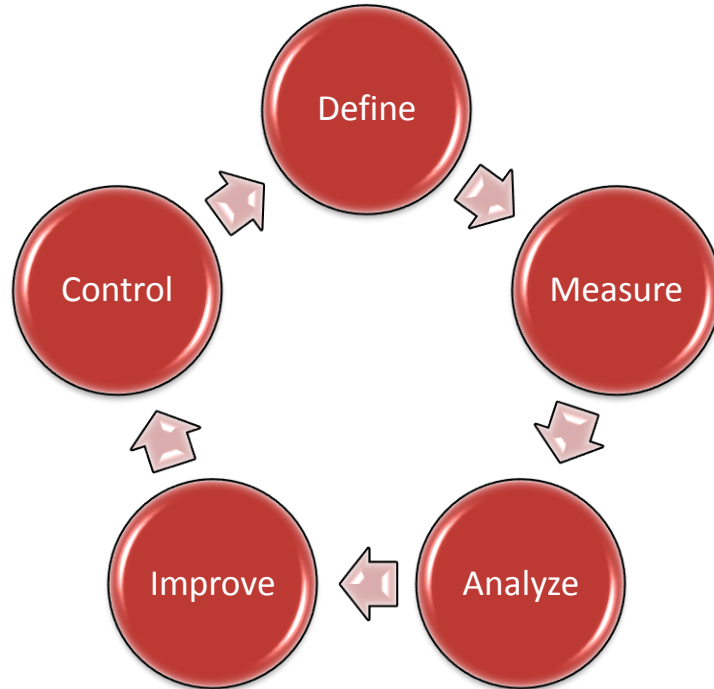
- ▲ PI is about understanding what we do and why we do it
- ▲ “Can we do this better”

Lean - Identify Wastes





Six Sigma - DMAIC



Define

- ▲ Project Charter
- ▲ Identify and validate customer's needs and requirements
- ▲ Create a high-level picture of the process targeted to improve

Project Charter

Project	
Email saving and naming	Benefiting Group(s)
Team Leader	Litigation Groups
Shaunna Mireau	Champion
	Sharon Stefanyk
Project Mission	
Create and document a standard process for collecting email that relates to a client file, and storing it with the electronic file with an eye to finding it at a future time.	
Problem Statement:	
The conversational nature of email makes naming and saving it in our <u>electronic file</u> (and paper file) challenging. The responsibility of electronic filing of email is not standard between Lawyers, Paralegals, and Assistants. Saving and naming of email attachments is also inconsistent.	
Business Case	
Email is a primary communication method for many matters that Fielder lawyers conduct for our clients. Ensuring that our file related email correspondence is stored electronically so that it can be understood in the context of the file is essential, especially in the case where there is a team of Fielders engaged on a matter. A standard method for managing email naming and saving that is simple, documented, <u>easy</u> to train and offers clarity of who is responsible will help to ensure that this task is handled efficiently.	
Deliverables	Goals/Metrics
A standard process for managing electronic storage of email that is ready for internal publication by September 30, 2015; Report on efficiency gains (goals) for EC by December 31, 2015.	A naming and saving process that is followed for 80% of litigation side emails saved to Worldox. Reinforcement of the process through regular communication via litigation practice groups and IT training.
Process & Owner	
Lawyers and Legal Assistants, Paralegals	
Project Scope Is	
Creating a standard email naming and saving process.	
Project Scope Is Not	
Mandating paperless email storage for litigation practice areas; Email naming and saving requirements for solicitor groups	
Key Customers	Expectations
Field Litigation Groups	Committee members will act as ambassadors, will provide data in order to track problems and efficiencies, and will share positive outcomes.

Milestones		Completion Dates
Project Start:		
Kickstart meeting July, 2015		Process and Communication plan by September 30
Draft process September 1 for email <u>dir</u> to Committee		Report to EC on gains by December 31
Project Completion:		
December 31, 2015		
Expected Business Benefits: (16)		
Quantify		Explanation
	1-Time	Annual
<input checked="" type="checkbox"/>	Hard Cost	
<input checked="" type="checkbox"/>	Soft Cost	
<input type="checkbox"/>	Revenue	
<input checked="" type="checkbox"/>	Speed	
<input type="checkbox"/>	Compliance	
<input checked="" type="checkbox"/>	Intangible	
Team Members		
SRS, ADB, CLB, Pamela V., Shaunna and SAM		
Expected Resource Needs (Internal/External)		
Shaunna Mireau for process mapping facilitation and measurement assistance.		
Risk Assessment		
Some Fielders may resist changing to a universal process from something that they perceive as working effectively for them. We will need continuous communication to enhance adoption of this.		
Prepared By	Last Revision Date	
Shaunna Mireau	July 8, 2015	

Project Charters

- ▲ What are we trying to achieve
- ▲ How do you build it?
 - Cross functional team discussion
 - Assignment by a Practice Group
 - Dialog
 - Ask lots of questions
- ▲ Think about who the customer of the process is

Define

▲ Plan

- Know what you are trying to accomplish, why, and who will be affected

Measure

- ▲ Create a data collection plan
- ▲ Implement the plan, understand the process in Sigma language

Measure

▲ Measurement methods

- Surveys (be careful how you ask)
- Data collection in accounting software
- Counting things
- Check sheets

TIME CONVERSION

1 - 6 MINUTES = 01	31 - 36 MINUTES = 0.6
7 - 12 MINUTES = 02	37 - 42 MINUTES = 0.7
13 - 18 MINUTES = 03	43 - 48 MINUTES = 0.8
19 - 24 MINUTES = 04	49 - 54 MINUTES = 0.9
25 - 30 MINUTES = 05	55 - 60 MINUTES = 1.0

Date: _____ Lawyer Number _____

File #	Lawyer	Verb	Description	Time
45601-1			NB Research - business development	
45601-2			NB Research - cannot appear on client file	
45601-3			NB Research - for seminar or paper	
45601-4			NB Research - general interest	
45601-5			NB Research - legislation monitoring	
45601-6			NB Research - research mentoring	
45601-7			Clerical tasks (CA, Circ., processing)	
45601-8			Technical tasks (Database entry/design, orders, ILL, Electronic products, publisher communication, admin tasks)	
45601-9			Field Net / KM	
45601-10			Looseleaf filing	
45601-11			Payroll	
45601-13			Precedents of Pleadings Book Project	
45601-14			Web- gathered CA	
45601-15			Firm History Book	

Analyze

- ▲ Examine the data
- ▲ Watch the process
- ▲ Determine the root causes

Why is this happening?

- ▲ Litigation Legal Assistants are too busy.
 - With what?

	Faxes) – not dictated			2 about 7" verbal instructions
ed/Dictation	● @ Dictation - correspondence		<i>TKL //</i>	Dictation that is correspondence
	@ ● Dictation - pleadings	<i>TKL //</i>	<i>//</i>	Dictation that is not correspondence
	● @ Preparing court documents (not dictated)	<i>TKL /</i>		i.e. Affidavits of Records and documents from precedents
	@ @ Reporting to clients			Use this for any manual reporting that is not

- ▲ Raw data can give the incorrect root cause

Make the data make sense



▲ The 80/20 rule

WHAT ARE THE TASKS WITH LOWER FREQUENCY?

Closing files	0.9%
Commissioning documents	0.2%
Diarizing and limitations	1.9%
Dictation - pleadings	1.2%
Drafting (from precedents and forms)	2.1%
Legal research	0.1%
Opening files	2.3%
Organizing catering	0.1%
Organizing schedules (with external people)	2.1%
Organizing schedules (with internal people)	0.8%
Pulling files	1.3%
Reporting to clients	0.8%
Searches	0.6%

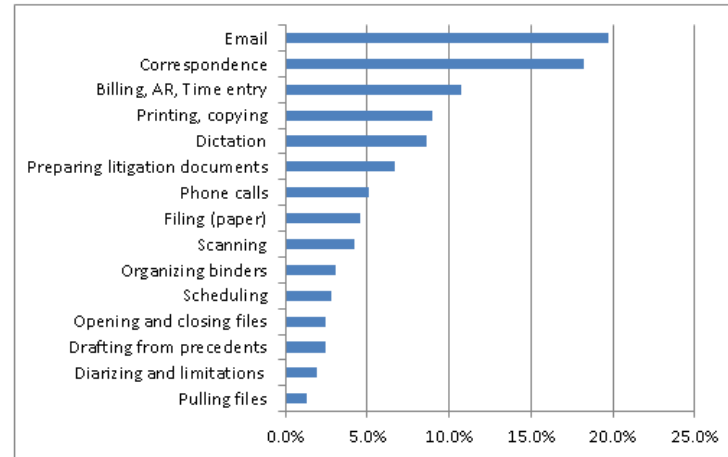
MEMO

To: Litigation Legal Assistants
From: Shaunna Mireau
File no. non-billable

November 18, 2014

Subject: Process Improvement: Report of litigation legal assistant data collection week

Data analysis as of November 17, 2014. 64% of Litigation Legal Assistants (27) returned their data sheets, thank you to those who participated. The data is telling us some interesting things, like where you spend your time.

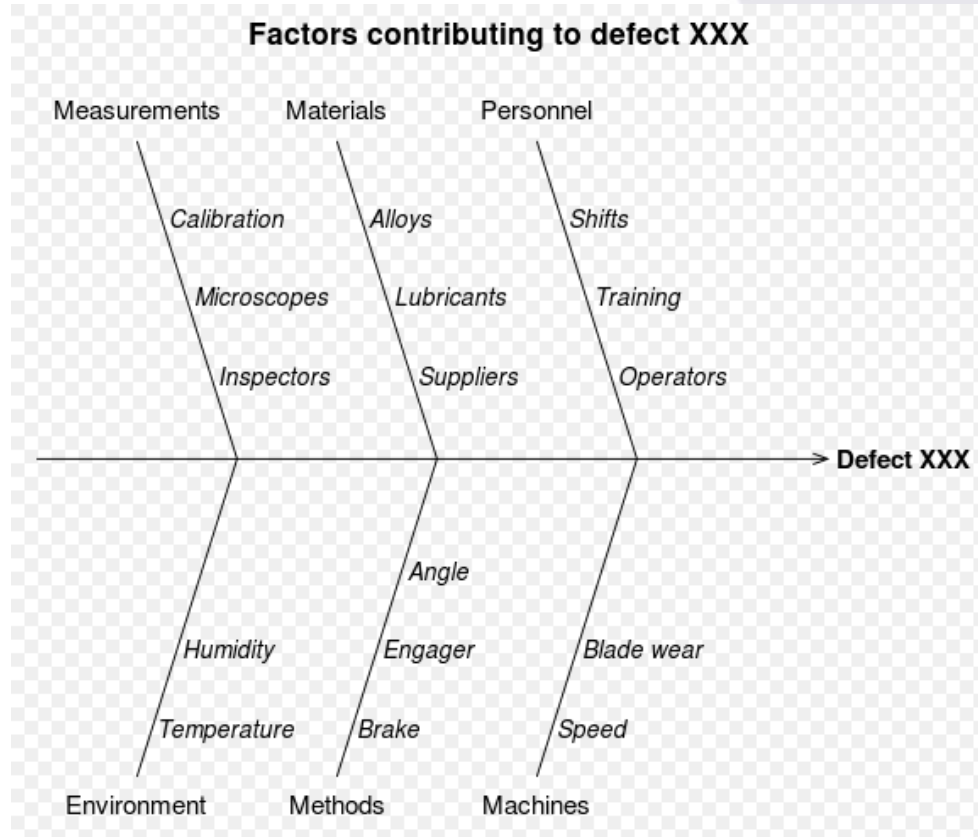


Root Causes

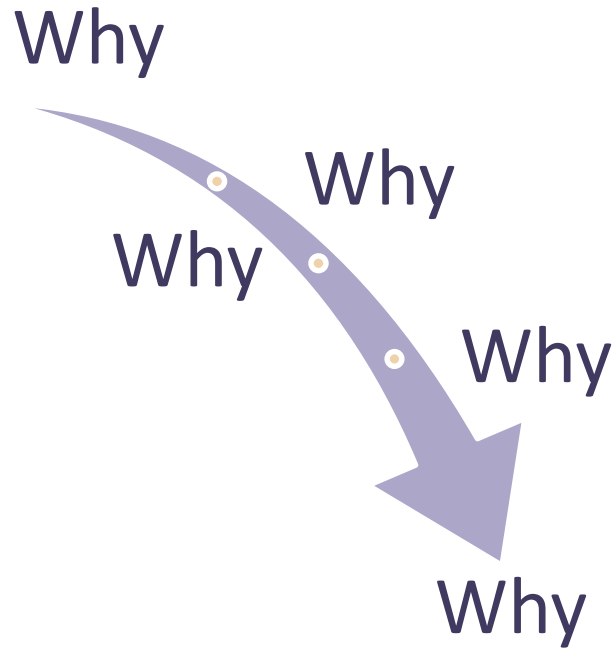
- ▲ Open – Narrow – Close
 - Brainstorm about ideas
 - Create a safe environment for the discussion
 - Use both data analysis and process analysis
 - Cause and Effect Diagrams

6 Ms that problems relate to

- ▲ Machine
- ▲ Material
- ▲ Measurement
- ▲ Mother Nature
- ▲ Man
- ▲ Method



5 Whys



Improve

- ▲ Generate solutions
- ▲ Select solutions
- ▲ Implement solutions

What If??

- ▲ Improve asks what if we did things differently
 - Tests and pilot groups with small teams
 - Practice Groups trying different methods
 - Same output different process and Measure

Example - Ordering Process

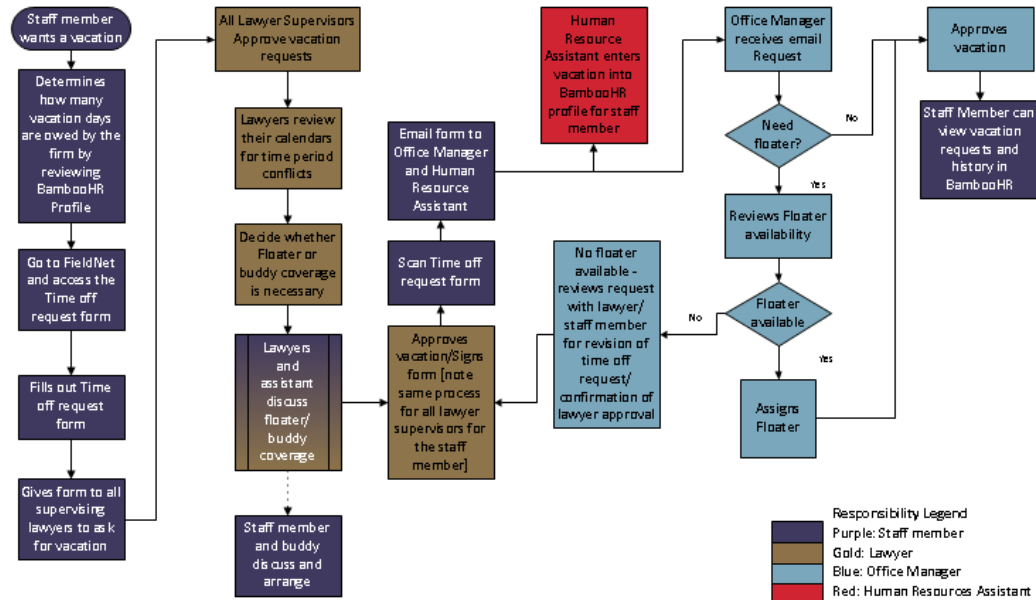
- ▲ Separate table in Access Database for orders
- ▲ Titles on order not in the catalogue for users
- ▲ What if we don't keep an order table?

Paperless time off requests – Group 1

Bamboo Time-off Request Process with FieldNet Time Off Request Form

As of May 28, 2015

*Per Vacation policy –Staff effective January 1, 2008



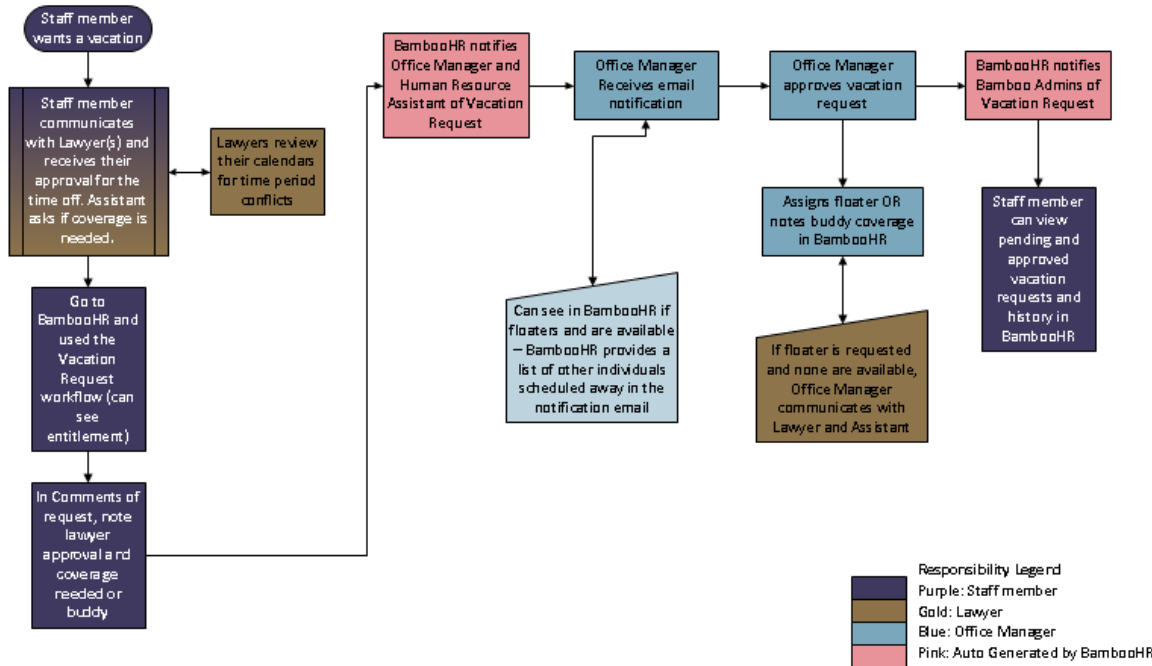
*Vacation Entitlement is calculated in hours as of January 1, 2015

Paperless time off requests – Group 2

Bamboo Time-off Request Process - paperless

As of June 11, 2015

*Per Vacation policy –Staff effective January 1, 2008



Improve

- ▲ Let the people doing the work tell you where the problems are
- ▲ Let the people doing the work tell you what the solutions are

Control

- ▲ Pick the right control method (how are you going to test success)
- ▲ Document the response plan

Sustained Improvements with Documentation

- ▲ Collect the story
- ▲ Share the story
- ▲ Understand the inputs were there that impacted the decision (output)
- ▲ Embed the improvement (training)
- ▲ COMMUNICATION PLAN

Tools – Over share

- ▲ Action lists
- ▲ Progress reports
- ▲ Regular communication
- ▲ PLAN

Law librarians improving in the library

- ▲ Why are we doing things this way?
- ▲ Sacred cows
- ▲ Reporting requirements



Thanks!

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