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challenging.

**Jim Boomer** • Mar. 19, 2012



Keeping up with the changing landscape of technology and practice issues is challenging. More so if you don't have an overall firm strategy, a technology strategy and the proper governance structure to align the two.

**When you bridge the gap between technology and firm strategy, you harness the**

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partners about what technology needs to be implemented. Since IT rarely sees the firm's strategic plan (if it exists), it is difficult to identify solutions and make proactive suggestions. This is an incredible waste of talent and knowledge that could be providing valuable insight into the firm's strategic direction.

When it comes to training and conferences, IT professionals and partners are, once again, not often in alignment. Each attends their individual events and while they may hear the same topic, the messages are delivered differently – resulting in a major disconnect. Compound this with the rarity of post-conference debriefs to make sure both sides are on the same page and you end up with frustration and friction. Great ideas are brought back to the firm, but without buy-in they are not executed.

Take the cloud for example. Partners attend practice management conferences where they hear about the business drivers behind the cloud. IT conferences focus more on the tactical issues related to moving the infrastructure online. Both are addressing the same end goal of moving to the cloud but approaching the initiative from very different angles. And, most importantly, both are critical to seeing the whole picture and making an informed decision.

## **The Path to Alignment**

Do these issues sound familiar? This is happening frequently in our profession. So what can you do to overcome these challenges? Here are five actionable steps to start your firm down the path to bridging the gap between technology and firm strategy.

### ***1. Develop a Firm Strategic Plan***

The strategic plan offers direction for your firm's most vital growth initiatives and should be the primary driver of your technology decisions. If you don't have one, start developing one. IT's involvement in the strategic planning process is critical to

alignment. At the very least, you need to share the end result with IT – and the rest of

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ensure true alignment.

### **3. *Train in Tandem***

There are a number of conferences/trainings where you can recognize the most return by having both technology and business represented at the same event. This ensures they are hearing the same message and can reconcile their different perspectives on a real-time basis. It also offers dedicated time to discuss strategy and apply the new information while it's top of mind.

### **4. *Peer Communities***

Keeping pace with the changing times can be difficult, especially if you don't look outside your own organization for new ideas and best practices. Joining a peer community can push you beyond the limits of your own organization and bring in fresh perspectives. At times it can be frustrating when you learn you are lagging behind, but it can also be very rewarding to learn your firm is on the right path, or even leading the pack.

### **5. *Technology Steering Committee***

Firms that are successful at leveraging technology as a strategic asset realize there is no such thing as an IT Project – only firm projects, led by firm leaders with the support of IT. If you simply throw projects to IT, you're setting yourself up for failure and throwing away time and money. This is where a technology steering committee with cross-functional representation can ensure projects align with the firm strategy and are assigned to the right people who can successfully execute.

Bridging the gap between technology and firm strategy is a process that takes time and effort. If you focus on progress and not perfection you will make great strides towards proper alignment. Start by following the five actionable steps I've outlined

above and you'll start to recognize the power technology can have in achieving

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