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Lawyers on Fire: Hello this is Lawyers on Fire, we are in San Francisco today at the legal tech show. We are talking to Michael Callier. Thank you very much for joining us tonight. Michael is a legal process strategist, his official correct title at a law firm. He has 13 years of experience in private and in-house practice, a lawyer doing things like process improvement, project management, change management. Michael has worked in China and now he is back to US and he has given very inspiring speech yesterday on a panel. We are very happy to talk to you tonight, Michael, thank you very much.

Michael Callier: Thanks for having me.

Lawyers on Fire: What exactly is your job, a legal process strategist, what is that?

Michael Callier: So a legal process strategist is actually a title that I created. My role is to understand the underlying processes for the way that legal services are being delivered and to try to enhance the value derived from those processes. The way that we, we meaning process driven or process improvement professionals, think about things, is essentially inputs and outputs. Everything is a process that includes some input of activity or people or money or information incorporated into some system with the desired output and output is the thing that ultimately touches the client or the recipient of that particular work stream. So my job is to understand the system that is comprised of various work streams, particularly around legal service delivery.

Lawyers on Fire: How did you get into this very particular field of understanding? When you studied you at law school, did you already focus on technology there or have you taken an interest in design thinking already there? How has it developed so far?

Michael Callier: So the evolution of my professional track is this. I knew I wanted to be an attorney when I was 13 years old and so when I started undergrad at the University of Oregon I was a football player and one of the folks who came to



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speaking with our football team was a judge. A judge named Lile Valleur in Laine County Eugene. After the meeting I walked up to judge Valleur and I said “*Hey judge Valleur I’ve always wanted to be an attorney. Can I come and work for you at the court house?*” I was like, I think I was 18 or 19 years old or something like that. He said “*Sure, you can come and volunteer, I don’t know if we can pay you though.*” So I showed up one day in a tie and I said “*I am here, give me something to do*” and judge Valleur, from that point on began to mentor me and gave me a clerkship position eventually and I clerked for him from the time, from about 19 years old until I graduated from law school off and on and so judge Valleur taught me how to brief a case. He taught me the difference between civil and criminal law and he sort of put me on my path to become a lawyer and there were some other folks along the way who are also instrumental like judge Anakin who is the chief administrative judge for the federal district court in Oregon and again the idea was that I would be a traditional lawyer. As I began practicing at a firm in Portland, Oregon I realized that my ability to solve problems seemed a bit limited to the things that I was taught in a law school and then the problem solving frameworks and the mechanisms that we were taught and were used at a law firm. I started out doing transactional work and then I did a mix of transactional work and litigation and so I left the law firm and went to Nike and while I was at Nike in 2008 that’s really when I started to see alternative problem solving mechanisms like information management, knowledge management, lean and lean six sigma, business process improvement and it just opened my eyes to all of the possibilities out there with regards to problem solving and that’s when I also realized what lawyers do is ultimately to solve problems. Now I think in the context of a law firm, it’s good and bad but we often times lose sight of the fact that when we provide some component of a solution to a client that’s not the end of the game for the client. The client is going to take our problem solving output and add it to their ultimate problem solving which is solving a business problem and so all the mechanisms that I discovered while I was at Nike are designed to solve business problems not just legal problems. So when I realized that the



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majority of my professional education in the law was designed to solve just one component of the overall business problem, I became really enthusiastic about finding and mastering other problem solving mechanisms. ... Then I started a master of science and information management at the information school at the University of Washington. At the same time I started my masters I started to try to understand China which is interesting because there wasn't much of a connection between the two other than that when I started at Nike, there were preparing for the '08 Olympics in Beijing and that's when I discovered that China was coming. You know the dragon had woken up and you know I felt compelled to better understand the place. So I started studying information management while at Nike in a very successful business environment. Started to better understand China and then at one point in 2011, I decided to go to China. I bought a one way ticket to Shanghai and moved into a dormitory on campus at a school in Sujo University. I won a government scholarship to study Chinese and so that's what I did for the next year until a friend of mine who operated a process improvement company and who had a project in Mainland China that I'd been helping him with while I studied at Sujo, asked me to be their director of operations in legal counsel which I did. The role included a requirement that I learned process improvement, lean six sigma in particular and so I learned lean six sigma and continued to learn Chinese culture I had to learn both in a manufacturing environment in southern China. At that point I was interacting with European consultants on regular basis and they were all engineers. So they just thought completely differently than the way I did and the way I was taught in terms of problem solving. Vey linear, very you know sort of structured in applying frameworks to the way that they went about to solving problems and the way that I'd never really seen before and so, in 2014 after I'd been in China for almost 3 years, my wife and I decided that we want to move back to states not for business reasons but for personal reasons and so when I arrived back in the states one of the mentors that I mentioned, judge Anakin, found out that I was back and she told me "*Michael before you take any job, before you do anything you have to*



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connect with a guy named Dan Katz.” Dan Katz is a prolific thought leader around legal innovation. He was one of the founders of Reinvent Law out of Michigan state university and Reinvent Law has under Dan’s leadership presented in New York, LA, London and I don’t know where else. Interestingly Dan and I were college classmates and we played on the same football team in undergrad and so Dan actually when I was in my second or third year of practice had already started down this innovation path and I went to hear him speak and that’s really one of the thing that also started me down on this path because he was already talking about social network analysis, six degrees of separation and applying it to the law before any of this current movement in legal innovation. So when I found Katz in 2014 and went to Reinvent Law I discovered that people were actually looking for cross functional lawyers like me and so in fact Davis Wright Tremaine was looking for folks like me in particular to support its innovation effort and I interviewed with the DWT and met with Jay Hall who is the DWT’s chief innovation partner and he hired me and in 2014 I have been working with DWT on its innovation team since.

Lawyers on Fire: Well!

Michael Callier: Long story. Apologies.

Lawyers on Fire: Long story. No apologies, I’ve been listening and listening. You have applied design thinking to legal services actually. Can you give an example? What you did? How you did it and what was the outcome may be?

Michael Callier: So I normally apply that framework to any problem that I look to solve. The way I think about problem solving now, is just you kind of open up a cook book and pull out a recipe and you apply it to a particular circumstance. The recipe is always going to include sort of an empathy phase you try to understand really understand what matters most to the stakeholders on the project, to the folks on the frontline as well as you know for example the project champion who you know is funding the project. You will always be required to define the problem



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itself and we believe that a problem well defined is a problem half solved. You will also be required to define some sort of solution or in a solution state and then you have to design it, what does the solution look like? Getting buy in from all of your stakeholders, it's super important and it's much easier to get their buy in when you already incorporated their concerns which you do during empathy and design phase. And then you know the rest is of about implementation, testing, cycles of learning and reiteration. Yeah it's just you deploy the same sort of framework every time you solve a problem. So I've done that in process improvement space where we had a project where there was 3 million dollars bottlenecked invoices that couldn't get out the door. We applied that approach and incorporated technology and business process improvement and alleviated the bottleneck, reduced all over time, eliminated a permanent position from a role thus reducing cost and then we reduce the payments cycle time by 50% on that particular project. In another project we created the manage service for one of our largest client global procurement work and in the same sense we went in and we defined what was the problem? How would we identify a matrix to measure the problem and just measure the impact of the solution that we incorporated? We implemented and you know 13 months later we helped the client to win the ACC value challenge award and the project is on the shortlist for the international information technology association's project of the year. So we've got pretty good recognition out of that one. Those are just two examples of where we have applied the approach and got pretty good results.

Lawyers on Fire: What have been your main challenges so far in your professional career doing this?

Michael Callier: Doing this work, one of the main challenge is really adoption I think. So when a client asks you to create a solution for them really no adoption problem but when at DWT when we look at moving the needle with regard to innovation we're not just looking at one of the client opportunities but we're really looking to change the culture change the firm and change the way that we practice



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law as a law firm and you know, change is difficult. It's hard for anyone whether it's in the innovation context or otherwise so that's probably our primary challenge getting folks to change by getting them to adopt concepts and solutions that we offer.

Lawyers on Fire: What do you regard as your most successful outcome you're most proud of?

Michael Callier: You know the two projects that I just mentioned and also in 2015 the same international legal technology association awarded us the most innovative law firm of the year award, which was great and so those sorts of outcomes are fantastic but I would also say that some of the best outcomes are client satisfaction and not just the client satisfaction when they say thank you but that client satisfaction when you see a light turn on and they've clearly adopted the approach that you've presented and they are ready to take that approach and you know run with it. And at that point when they begin to innovate themselves you just need to get out of the way because they know their problem landscape much better than we do because they live it every day. That's a great success. I would also say one of our greatest successes is that we've been working with and also hired in full-time roles students from Suffolk Law School, that's ... as one of our legal solutions architects. Michael Ivalin is also another legal project manager, Suffolk law school has an innovation program and these are two students from that innovation program that decided "*we don't want to do traditional – we don't want to practice traditional law so we're going to invest in making ourselves cross functional lawyers and we will have faith there will be opportunity for us when we graduate*". And so where DWT has created an initiative that is driving innovation we've been able to provide opportunities for students like that to come in fully employed and add value in that that space and I think that's a great achievement.

Lawyers on Fire: What would your advice be to the students coming out of law school or actually studying law today? In this different world and this different



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environment what is your advice to them? How should they prepare themselves for the new market?

Michael Callier: I would say be wise, when I think about cross functionality it really is a mix of a traditional practice which is absolutely necessary. You have to understand the fundamental skills necessary to practice law competently but there are also non-traditional skills – project management, process improvement technology – even if you are coding for example you know sort of if-then approach very linear logical approach to coding causes you to think differently, think sequentially. That way of thinking I believe makes you more flexible in your ability to solve problems. I was always taught even as a young lawyer before I started this innovation path that a good lawyer is a good counselor and a good counselor helps a client to achieve his or her objectives as supposed to saying no to those objectives and I think often times folks mistake a lawyers role as one where we are supposed to tell a client *"you can't do that because this law or that law said so"* as opposed to *"Well I hear what you want to do, here are some of the obstacles but here is how we are going to overcome those obstacles"* and with the flexibility that being cross functional provides I think those students will have more capability to solve client problems – my advice to young students: look for cross functional skill building opportunities.

Lawyers on Fire: Mentioning project management, what do you think is the role of project management in legal services?

Michael Callier: I think that the role for project managers in legal services is to create transparency for all stakeholders. You know transparency in my book can be created just primarily through good communication and then you just have to decide which tools help you to communicate best under which circumstances. For example a classic project management tool is a Gantt chart. The chart is really just designed to show dates for certain deliverables and mile stones, tasks that need to be performed. Who is going to perform those tasks? And then because you have a continuous sort of cycle of things getting done, someone has to be



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able to track what's been done and what hasn't been done. Now the communication is not just that higher level communication that creates transparency for our stakeholders through documentation and so on but then you have to have the people skills. For example if someone is falling behind on a task not only they need to be able to calculate the overall impact to the project that delay will have but you have to be able to talk to that person to try to understand why the delay has occurred. You try to motivate them to catch up essentially. So there is a big leadership component to it, but I also believe that good leadership falls into the good communication camp as well. So I think a PM's job in large part is to facilitate transparency through good communication.

Lawyers on Fire: Is the PM a separate person or should every lawyer be a PM at the same time?

Michael Callier: That is a good question. In an ideal future state, every lawyer is a good PM at the same time. However depending on the project you may have to disaggregate some of those roles but I would say that in a law firm context where you have bunch of lawyers with comparable skills, everybody should have the ability to be a PM in addition to play a more legal substantive role as well. I think that sort of positive redundancy creates more opportunity to add more value and create more client satisfaction. A good communication is a key but also good substantive legal skills in lawyering is key as well.

Lawyers on Fire: Just to sum up are there any books you recommend our listeners on this subject process improvement?

Michael Callier: Yeah a few. I would recommend a book called "creative confidence" by the brothers who started IDEO the design firm. I would recommend a book called "the design of everyday things" which is very interesting it also has to do with you know empathy and empathy incorporated into design really user-centred design. Anything by WE Deming if you want to understand continuous improvement and there is a good one called "the lean six sigma pocket tool book"



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which is good if you want to understand six sigma, understand the tools that go into that particular discipline. Then there is one another author name *Peter Senge*, I think one of the most impactful concepts that I derived from some of his book has to do with really a knowledge creating organization. What that means? That gets back to in my book the cross functional nature of problem solvers as well as positive redundancies in those problem solving capabilities. If everyone – say Davis Wright Tremaine, about a thousand employees or so – if everyone is a discrete and dynamic problem solver regardless of what their role is, whether they are lawyers or an assistant or paralegal they're all powerful problem dynamic solvers what type of organization would we be? What type of organization would any company like that be?

Lawyers on Fire: Thank you very much Michael for talking to us tonight. Thank you very much.

Michael Callier: My pleasure thank you.