Choice Management

Tools and Techniques

Marc Lauritsen
Austin, January 13, 2010

Case management

Project management

Change management

Knowledge management

Choice management?



Law practice choices

- What position to take, what advice to give
 - Employee/contractor for org client
- Which claims or defenses to assert
- Where to file
- Whether to settle
- What witnesses to call
- What arguments to make

Organizational choices

- Who to hire/promote
- Case staffing
- Associate and staff evaluations
- What software or hardware to buy
- What vendors/consultants to work with
- What applications to invest in
- Policies to follow
 - Subject area priorities



What makes a good decision?

- Consideration of all relevant options
- Consideration of all relevant factors
- Consideration of all relevant interests and perspectives
- Open, respectful process
- Appropriate focus and weighing
- . . .

Problems we encounter

- People have difficulty making good choices.
 - Hard to compare options, balance considerations.
 - Many procrastinate or are tormented.
 - Some make snap decisions without enough data and deliberation.
 - Misinformation, miscommunication.
- Hard for to help others make good choices.
 - Data overload. Time famine.
 - Reinvention and repetition.

What do choosers want to know?

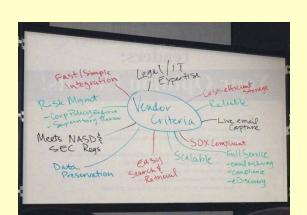
- What do I need to know and do to make a good choice?
- What are my options? (Have I missed any good ones?)
- What factors should I pay attention to? (Have I missed any important ones?)
- Which factors are most important?
- How do the options compare on the important factors? (features and ratings)
- How significant are the differences? (scores)
- How does everything stack up? (What's the balance of tradeoffs?)
- Where can I get more information? Who can help me?
 (Find more options, factors, ratings, opinions, reviews ...)

Tools & Methods

- Gathering info
 - Vendor literature
 - Demos
 - Consultants
 - Calls to peers
 - Web research
 - List serves
 - References
 - LSNTAP
 - **–** . . .

- Deciding & justifying
 - Checklists
 - Pros & Cons
 - Word tables
 - Whiteboards
 - Spreadsheets

— . . .



LStech post, 12/4/09

We are planning to purchase new bookkeeping software soon – and are comparing Sage MIP and Cougar Mountain. Annoyingly, neither product seems willing to let us have a demo version to experiment with and I'm not very willing to pay thousands of dollars without more information.

I'm hoping that someone on this list serve is already using one of these packages – and would be willing to talk with me about your satisfaction with the software and even be willing to share reports, your chart of accounts, and other information.

I'll truly appreciate any help! Thanks in advance.

Mary R. Parsons, Deputy Director Southwest Virginia Legal Aid Society, Inc. **From:** lstech-bounces+lkeith=probono.net@lists.lsntap.org [mailto:lstech-bounces+lkeith=probono.net@lists.lsntap.org] **On Behalf Of** Adam Cornelius

Sent: Monday, June 22, 2009 5:24 PM

To: lstech@lists.lsntap.org

Subject: [LStech] video hosting sites

Hi everyone,

I'm looking for recommendations on video hosting sites. Our probono.net sites can host webcasts (video that comes directly from a video camera), but often I get requests to put video from DVDs or other digital media formats online as well, which probono.net doesn't support.

I have been using archive.org, which will accept video of any size, in any format, and will convert it to several formats for download or streaming (including flash). It can be embedded in another site and as far as I can tell, there are no limits (aside from my time) on the amount of content that can be uploaded. However, there is no way to restrict access to this content. Some of the content we would like to post is more appropriate for our password protected site, and really shouldn't be available to the general public.

Ideally, we'd love to find a hosting service that would allow us to post video that would

Not be made available to the general public

Be able to be embedded in our password-protected site

Not require viewers to sign up with the hosting site or enter a second password to view the video content – the fact that they are accessing it from behind our password-protected site should be sufficient

Be cheap, or at least reasonably priced

In preliminary research, I've found two potential options:

Screencast.com. Apparently this can be used for any type of video, not just screencasts. They do appear to have privacy options, but I don't know exactly how they work. They offer a free and paid version; the difference appears to be storage and bandwidth capacity.

Youtube.com/nonprofits. YouTube typically has a 10 minute limit on video lengths, which wouldn't work for us. However, according to their official site, there is "increased uploading capacity" in the nonprofit program. According to a forum posting, there is no limit on video length and a 20 GB storage capacity limit.

Does anyone have experience with either of these? Pros? Cons? Other hosting sites that I may have missed?

From: lstech-bounces+msgordon=midmnlegal.org@lists.lsntap.org [mailto:lstech-bounces+msgordon=midmnlegal.org@lists.lsntap.org] On Behalf Of Matthew Burnett

Sent: Tuesday, June 23, 2009 10:39 AM

A few other benefits of Screencast.com that I've found useful:

- a desktop uploader for files over 100K
- tracks usage (views)
- in addition to video, you can host (and embed) audio the Immigration Advocates Network hosts all of our podcasts and video/webinar recordings in the same account
- allows you to create RSS and iTunes feeds for content and set different levels of permissions for different folders (great for podcasts)
- integration with Jing and Camtasia Studio

You can host a lot of multimedia on 25 GB of space and 200 GB/mo. of bandwidth is plenty for most projects. If you do find yourself at the upper limits, you can upgrade to the next tier. I've also had good luck with their customer support and they do a good job of notifying customers about scheduled downtime. They also now support the ability to create custom display templates, although I haven't used them because we embed everything.

Matthew

 $\label{lem:from:stech-bounces+mburnett=probono.net@lists.lsntap.org [mailto:lstech-bounces+mburnett=probono.net@lists.lsntap.org] \begin{center} \textbf{On Behalf Of Liz Keith} \end{center}$

Sent: Monday, June 22, 2009 9:16 PM

Hi Adam -

Pro Bono Net and several of our state partners use Screencast.com to host content created outside of the probono.net webcasting system. The files are uploaded to a password-protected account you get when you register, and the files are not made available to the general public. You can share them using a shareable URL or embed code generated by Screencast.com to embed the video on a webpage.

Both the linking and embed methods bypass Screencast.com's password, so users need only log in to your advocate site to access them. Admins in the probono.net network have embedded videos in flexible content pages or in HTML library resources this way, and they work quite well.

We've found the pricing for the Pro Account (\$9.95/month) reasonable, and there's a free version for trial runs. You'll want to check out the file formats Screencast.com supports if you haven't already (the info is a bit buried on the site). The list is pretty broad, but we've encountered one or two WMV files that were not recorded with Screencast.com-supported codecs:

http://www.screencast.com/help/tutorial.aspx?id=393&

Feel free to email me if you want to check out how other probono.net sites have integrated Screencast.com content. I think others on this list have good experience with YouTube's Nonprofit program...

Hope this helps.

Liz



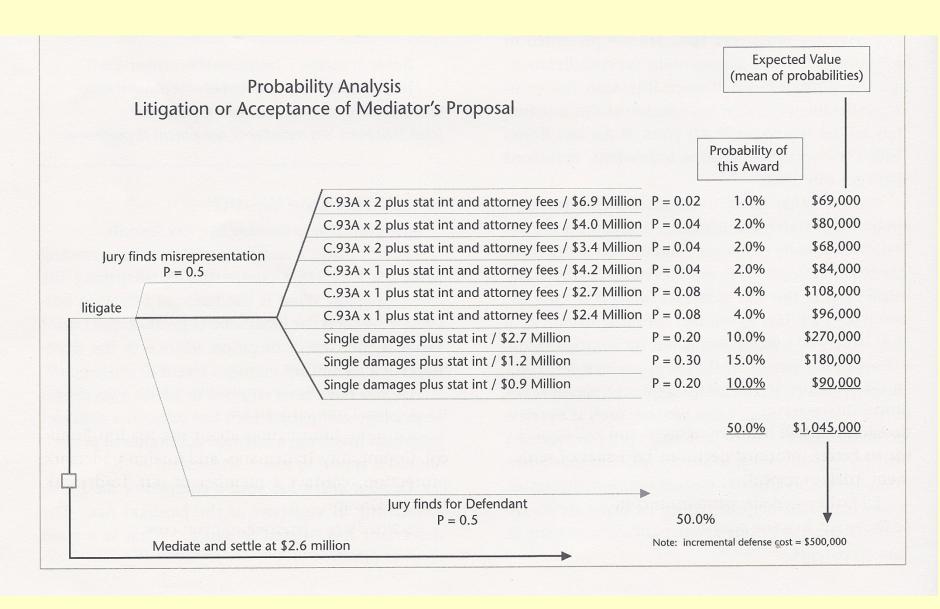
Case Management System Reviews and Ratings

Home > CMS List User login Kemp's Case Works Username: * Publisher: Kemp's Case Works, Inc. Password: * Vendor description forthcoming Ratings Summary: Log in Overall Rating: 🏠 🏠 🏠 🏠 Request new password Your rating: None Average: 4.3 (10 votes) $^{\diamond}$ Ease of Use: Navigation Your rating: None Average: 4.4 (10 votes) Reportina: ∇ CMS List Your rating: None Average: 4.4 (10 votes) Legal Files Customization: 🗘 🏠 🏠 🏠 Legal Server Your rating: None Average: 4.6 (10 votes) Kemp's Case Works Vendor Support: ☆☆☆☆☆ Pika CMS Your rating: None Average: 4.1 (10 votes) Practice Manager Read Reviews (10) View Customizations (0)

1	Assessment of Word Processing Programs for Provider Committee	SAMNA	SAMNA III		FINALWORD		WORDSTAR	
1	January 1985	Does it do it? How well?	120103	Does it do it? How well?	How desir-	Does it do it? How well?	Lowir-	
	Ease of Use						-	
33	Menu driven - bypass?							
	In-context help screens							
1	Not copy-protected							
26	Reference card							
	Documentation				711			
	Index							
	Tutorial							
	Error-message support							
	Screen Formatting							
1	Shows text as printed			6				
	Automatic reformatting							
1	Adjustable margins							
	Centering							
	Shows page, line & column		-					
	Shows memory remaining							
	On-screen boldface & underlining							
-	On-screen pagination							
	On-screen tab rules							
	Split screen (shows two files)							
	Hard Indent word wrap						*	
	Soft hyphenation				SUL SULLEY	THE VIEW		
	Horizontal scrolling							
	Headers & footers			1 - 0 - 1 - 1		3		
	Automatic footnoting	200.4		17				
107	Widow and Orphan control	10 M		At a second	16			
	Move blocks		100					

TABLE 10-8. SUING IN A FEDERAL OR STATE COURT

CRITERIA	Probability of Victory(F	(2) Likely)Damages(D)	(3) Expected Value (EV)	(4) Years to Receive Damages(t)	(5) Present Value(PV)
ALTERNATIVES			(1)×(2)		(3)/1.06.49
Suing in a Federal Court	. 20	\$15,000	\$3,000	1 year	\$2,830
Suing in a State Court	. 40	10,000	4,000	2 years	3,560



	Aspen Workflow	LawBase	Practice Manager (RealLegal)	Practice Master	Time Matters
The product					
Essential features					
Tickler					
Conflict checking					
Remote access					
Reporting					
Other product factors					
Document mgt					
Timekeeping					
Custom intake screens					
Integration with DA					
Relevance to graduates' practices					
Security options					
Vendor stability					
User community					
Other law schools?					
Pre-built modules?					
Cost (product & any newly required software)					
The services					
Customization					
Training					
Cost					
Other notes					

	4	А	С	D	Е	F	G	Н		J	Ę
	1	Vendor Scoring Matrix Prepa	ared by C	apstone	Practice :	Systems, I	February 2	002			
	2	NOTE: the following ratings ar							context.		
	3										
	4					Softwar	re Scores	best is 10,	worst is 0)	
	5						VARNING!		VARNING!		
				Min							
	6	Criteria	Weight	Score	DASH	e-Forms	Ghostfill	Grantha	HotDocs	Rapidocs	
	7	TOTAL WEIGHTED SCORE			4710	4690	4730	4700	4780	4700	
r	8	RANK (1 is best)			3	6	2	4	1	4	
r	9	Vendor/Product Stability									
r		Web-based version shipping									
	10	now?	10	5	6	4	10	5	10	5	
-		Company in business long	10	5	5	5	4	5	10	5	
-		Installed base	10	4	5	5	4	5	5	5	
		Installed base in legal									
		services offices	10	5	5	5	5	5	5	5	
	14	Publicly traded?	10	5	5	5	5	5	5	5	
r		Prevalence of 3d party									
		developers	10	5	5	5	5	5	5	5	
r	16	History of on-time releases	10	5	5	5	5	5	3	5	
-		History of bug-free releases	10	5	5	5	5	5	5	5	
Г		Developer & User Support									
		Toll free user support?	10	5	5	5	5	5	5	5	
		Toll free developer support	10	5	5	5	5	5	5	5	
	21	Usergroups	10	5	5	5	5	5	5	5	
		Annual conferences	10	5	5	5	5	5	5	5	
	23	Listserv	10	5	5	5	5	5	5	5	
	24	Resellers & consultants	10	5	5	5	5	5	5	5	
	25	Available content	10	5	5	5	5	5	5	5	
		Availability of third-party									
		developers	10	5	5	5	5	5	5	5	
		Vendor offers template									
	27	development .	10	5	5	5	5	5	5	5	
		Quality of developer									
	28	documentation	10	5	5	5	5	5	5	5	
	29	User Features									
r		Can jump around dialogs non-									
		sequentially?	10	5	5	5	5	5	5	5	$ \mathbf{Y} $
	4	Scoring Ranking	Sheet3 🗶	2		1				—	





Quick Links

- :: Download Trial
- : Learn About TreeAge Pro
- :: Read Case Studies
- :: TreeAge Pro 2009



- Industry Soutions
- :: View Tutorials
- :: Technical Support

Decision analysis is a transformational tool, changing the way governments, industries and healthcare institutions see today and optimize tomorrow.

With TreeAge Pro decision analysis software you can:

- Model problems as decision trees, Markov models or influence diagrams.
- Analyze decision based models & make better decisions using comparative effectiveness analysis, cost-effectiveness analysis, sensitivity analysis and Monte Carlo simulation.
- Communicate results interactively, including recommended strategy and supporting assumptions.

Interested in building comparative effectiveness models? We have the right software and can provide the technical support you need to get started.

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Shipped Copy

New PrecisionTree® 5.5

PrecisionTree performs decision analysis in Microsoft Excel using decision trees and influence diagrams. Decision trees let you visually map out complex, multi-layered decisions in a sequential, organized manner. This helps you identify all possible alternatives and choose the best option.

PrecisionTree has been rewritten with a more streamlined interface and robust new analyses.

What's New in PrecisionTree

💢 Getting Started in PrecisionTree

PrecisionTree Industries and Applications

INDUSTRY	SAMPLE APPLICATION				
DEFENSE	War and engagement modeling				
ENGINEERING	Earthquake and disaster planning Structural planning and integration				
ENVIRONMENT » Case Studies	Resource management Preservation programs				
FINANCE AND SECURITIES » Case Studies	Portfolio selection Real options analysis				

» Overview

Web-based Software

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- » Our Solutions Inside Your Application
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See how our products work in your world

Select a Market ▼

Comparion™ Suite

Contact Us for a FREE Trial

Collaboration Software for Organizational Decision-Making

Comparion™ Core is a collaborative web-based application that enables teams to achieve alignment, buy-in, and confidence around important decisions.

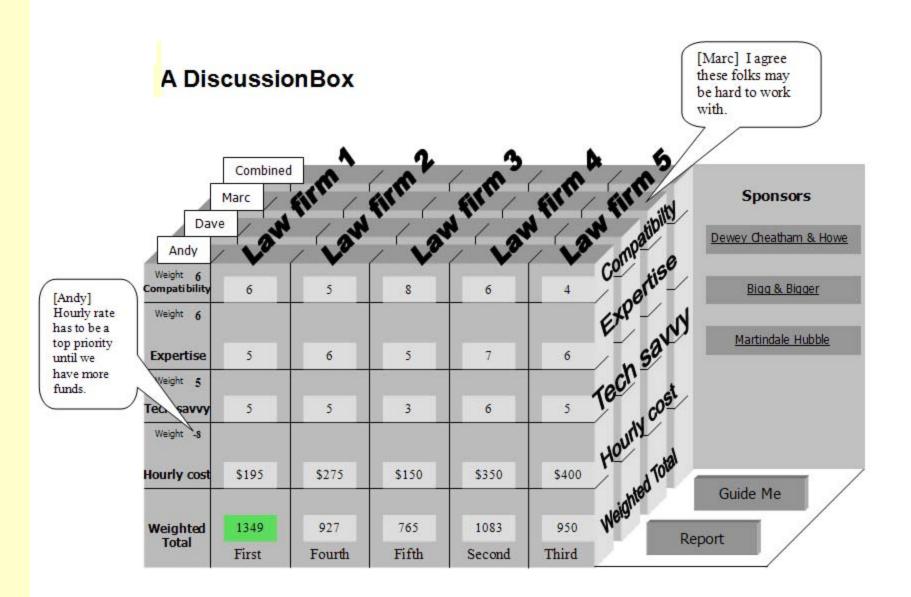
With Comparion™ Core, you can combine the expertise and intuition of your team with quantatitve information to provide valuable insights, explore what-if scenarios, and reach stakeholder consensus and understanding.



- Define the decision goal.
- 0. Define the objectives that relate to the goal and include the alternatives available.

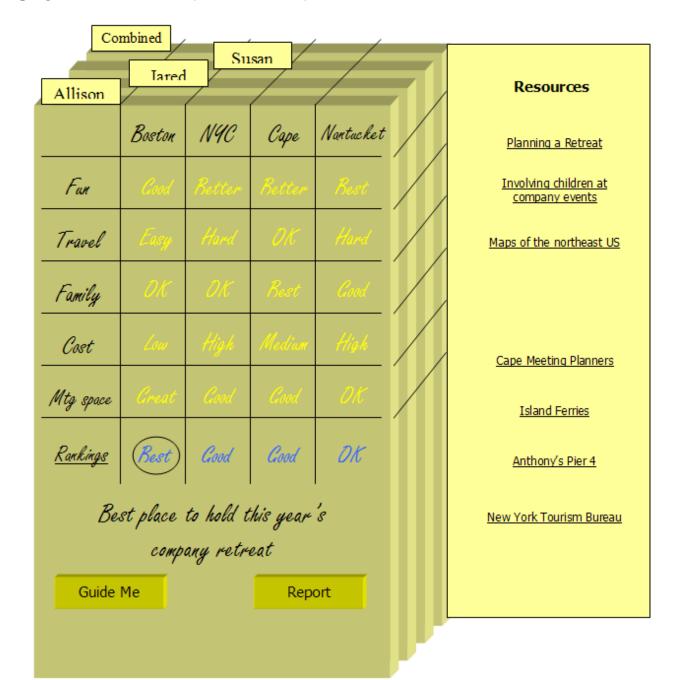
What would an ideal choice management system look like?

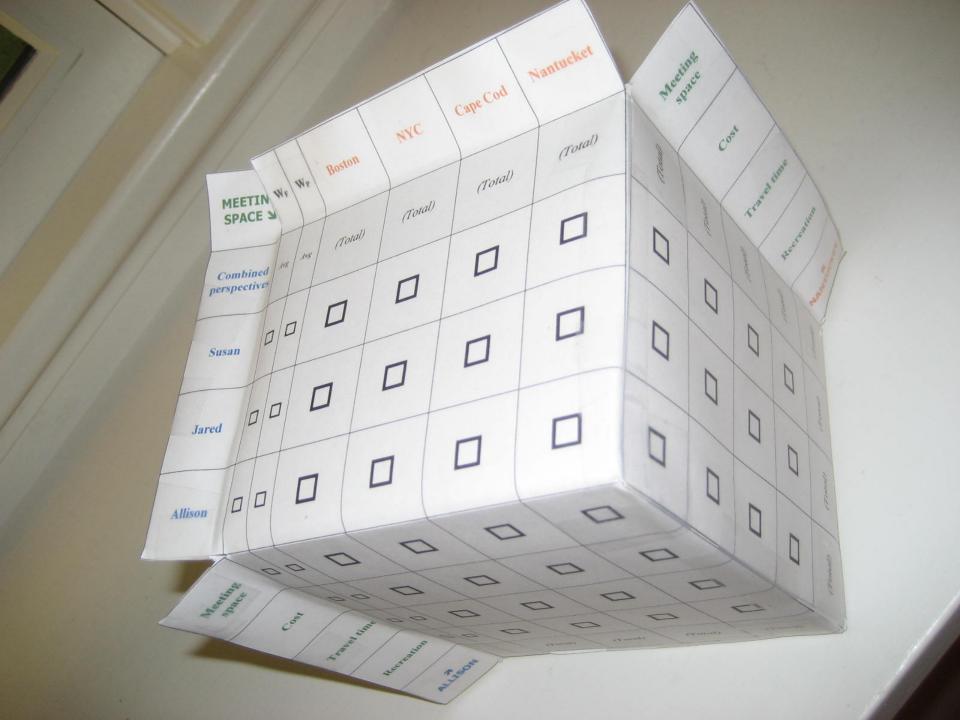
simple beautiful persistent universal collaborative transparent complete fun easy inclusive self-learning accessible granular dynamically reconfigurable autonomy enhancing

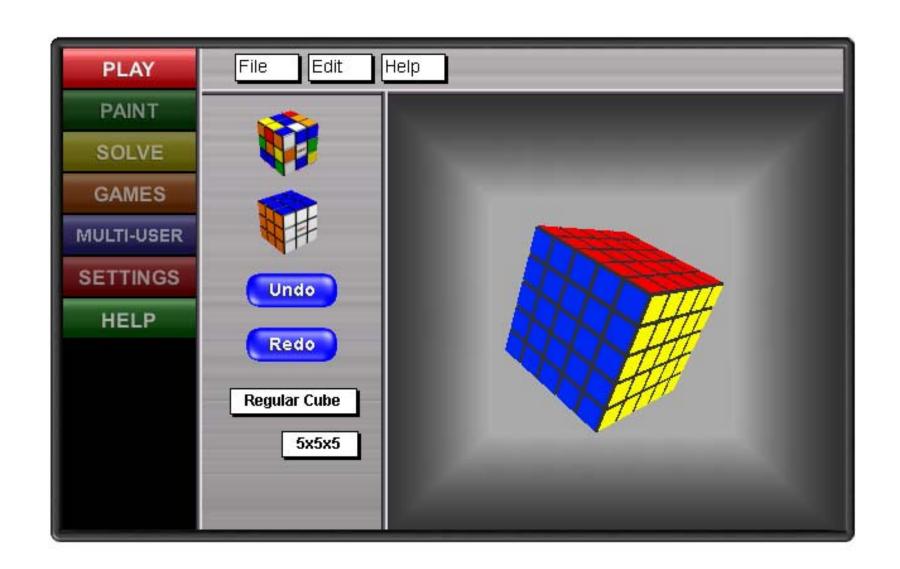


[A subset of one exploratory box, just to illustrate possible look & feel; math is off due to missing rows]

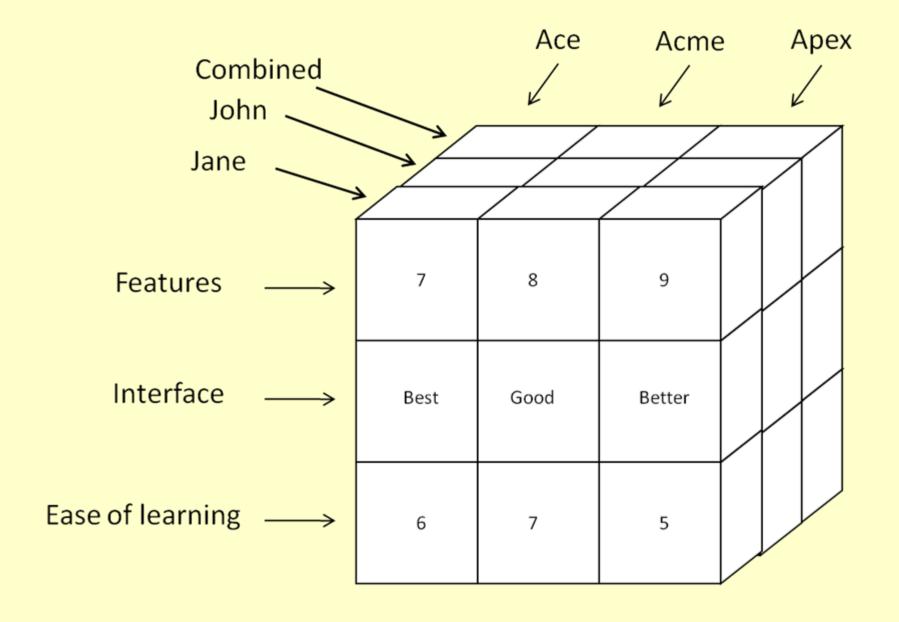
Scenario: Allison, Jared, and Susan have been asked to recommend a venue for their company's next staff retreat (families invited).



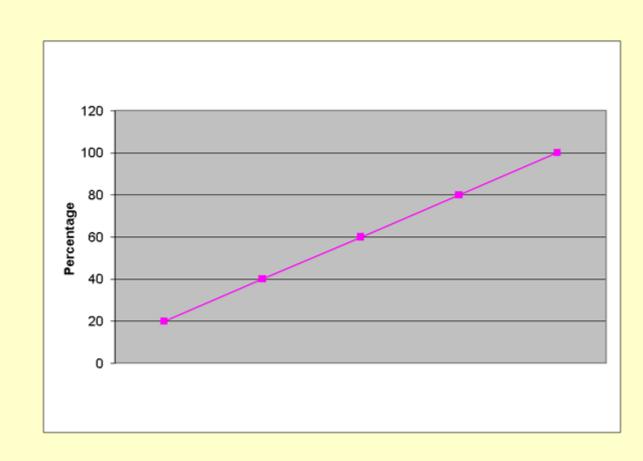




Dan Knight's cube



Best	100
Better	80
Good	70
Ok	50
Bad	30
Worse	20
Worst	0

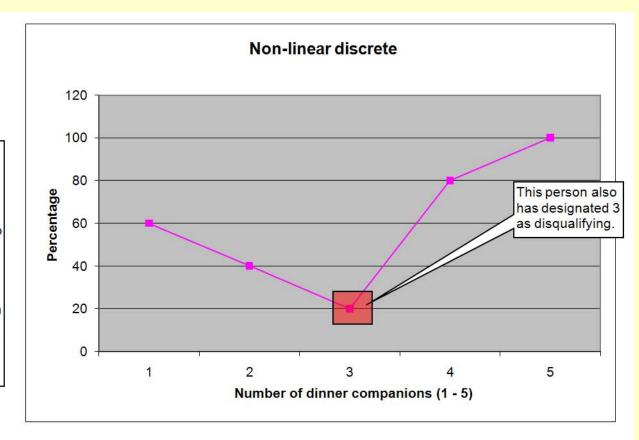


1	60
2	40
3	20
4	80
5	100

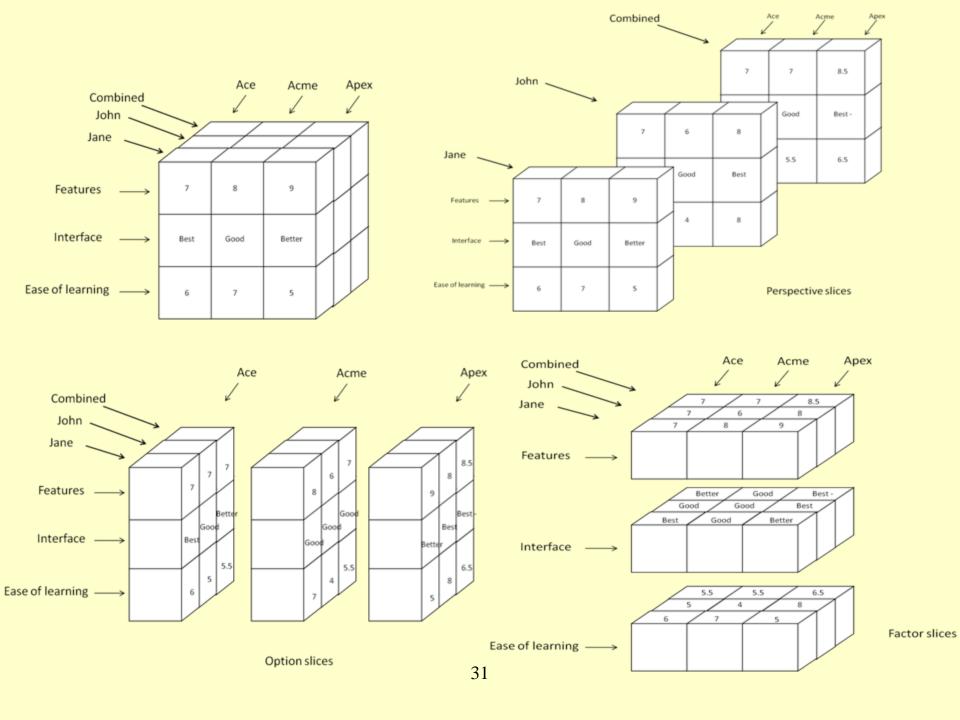
5 rating possibilities mapped non-linearly to a percentage scale

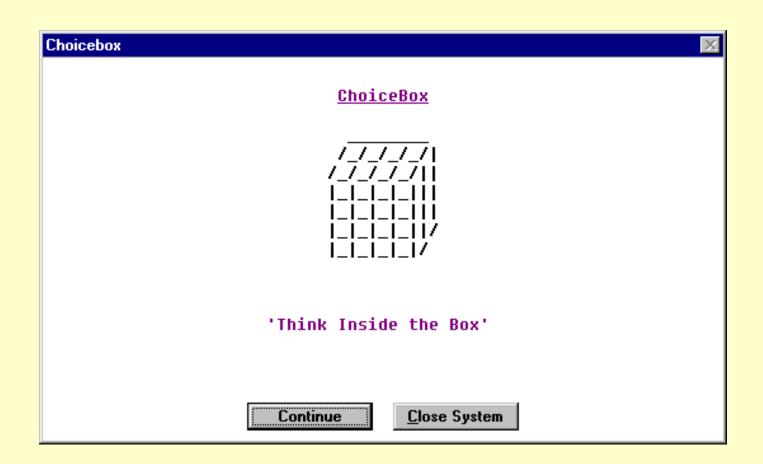
A mixed polarity utility curve: utility goes <u>up</u> as values go up in some areas, <u>down</u> in other areas.

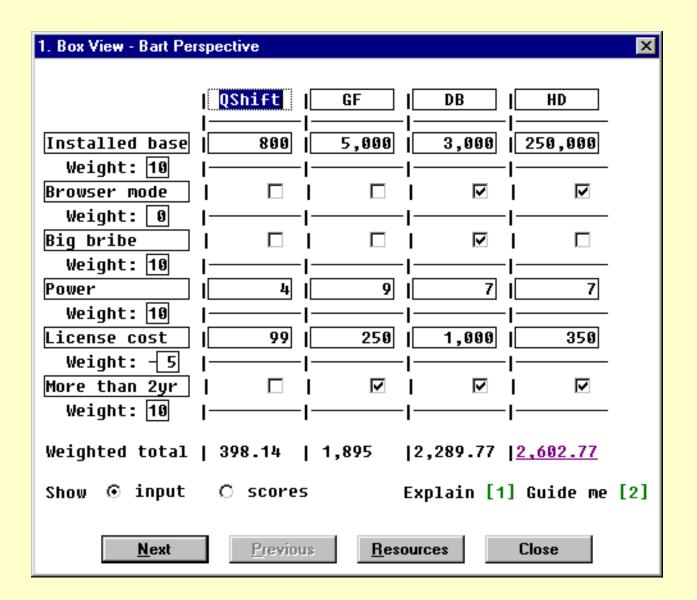
Imagine someone who likes having dinner with one person better than with two, but likes four or five even better. And refuses to eat with three.

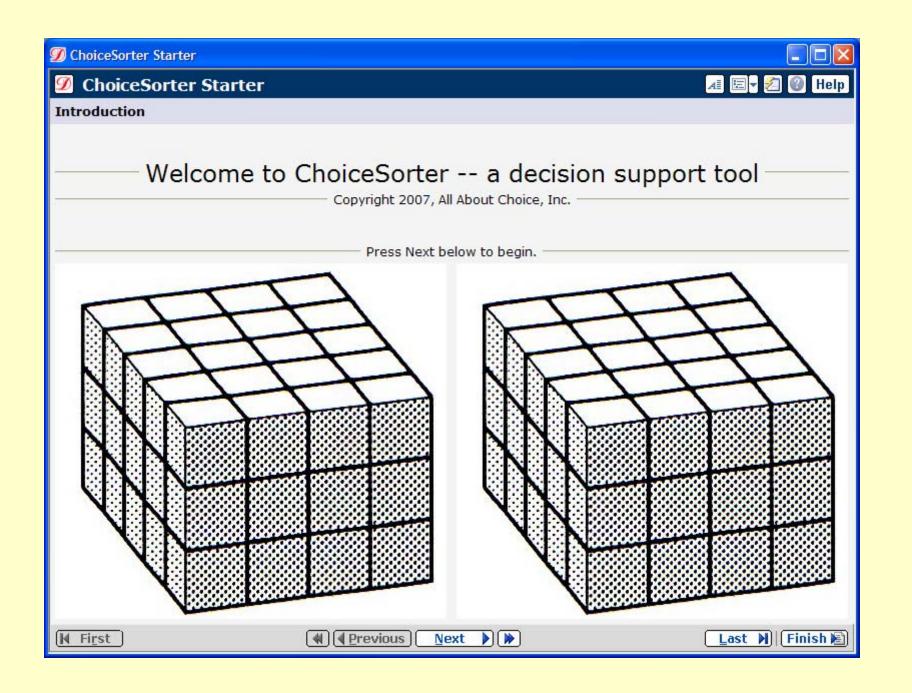


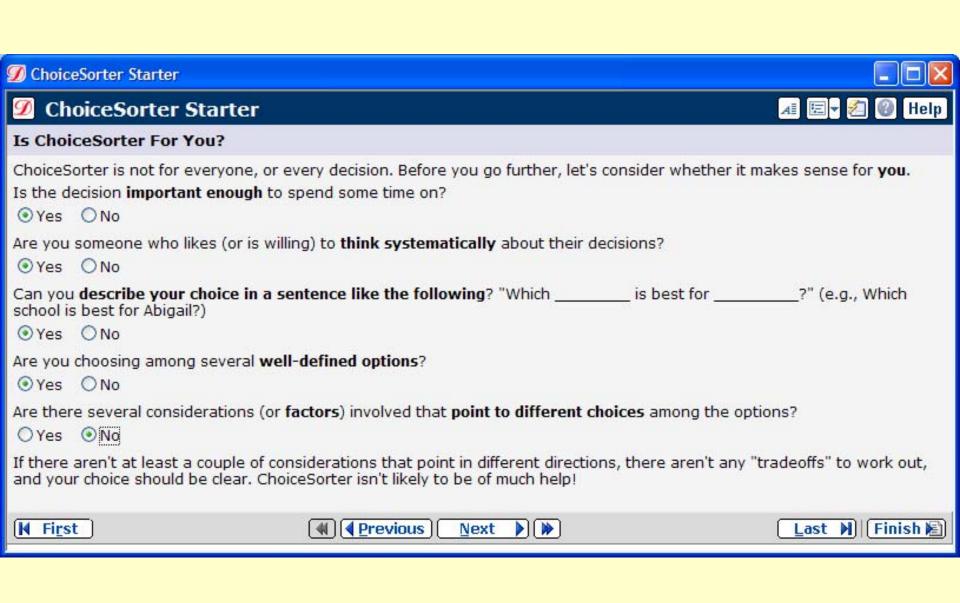
	<u>Jane</u>	Acc	e	Ac	me	Apex	
weight		rating	score	rating	score	rating	Score
5	Features	7	70	8	80	9	90
8	Interface	best	100	good	70	better	80
10	Ease of learning	6	60	7	70	5	50
	Total score for Jane		76.09		72.17		69.13
	<u>John</u>	Ac	9	Ac	me	Apex	
weight		rating	score	rating	score	rating	score
10	Features	7	70	6	60	8	80
5	Interface	good	70	good	70	best	100
2	Ease of learning	5	50	4	40	8	80
	Total score for John		67.65		60.59		85.88
	<u>Combined</u>	Ace	e	Ac	me	Apex	
weight		rating	score	rating	score	rating	score
7.5	Features	7	70	7	70	8.5	85
6.5	Interface	better	85	good	70	best minus	90
6	Ease of learning	5.5	55	5.5	55	6.5	65
)			
	Overall score		71.87		66.38		77.51

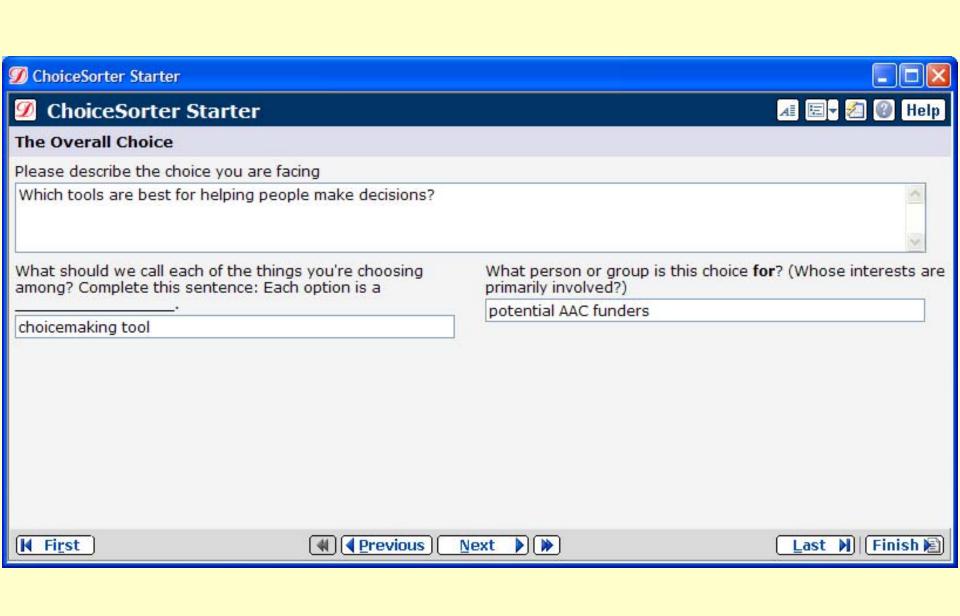


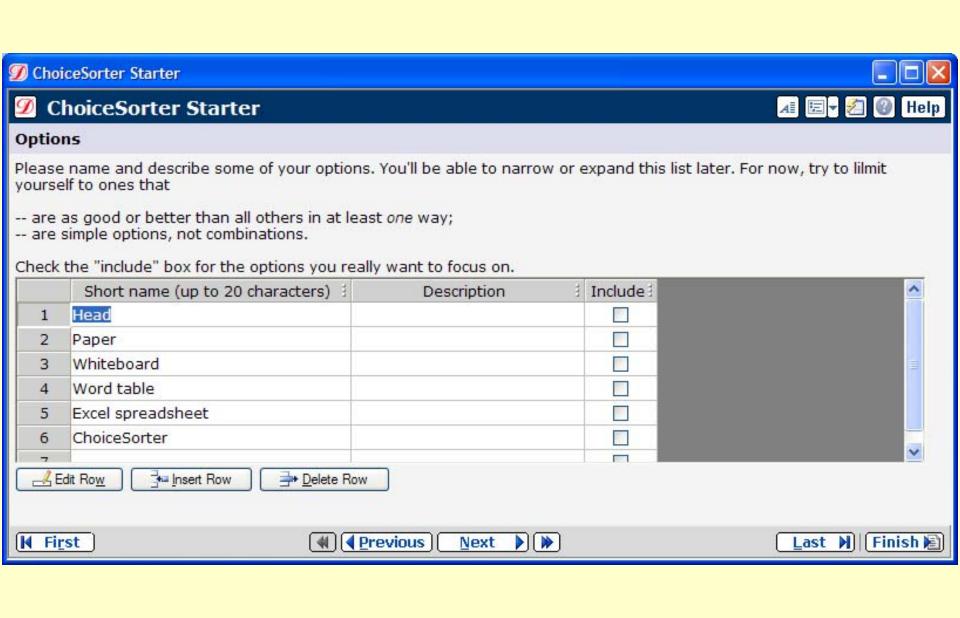


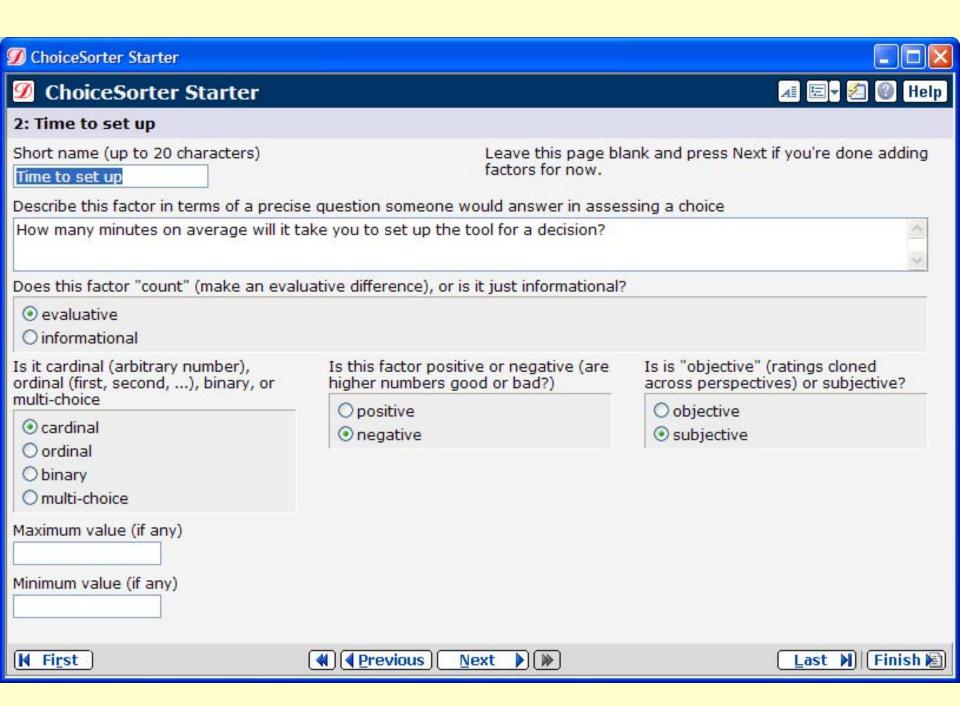




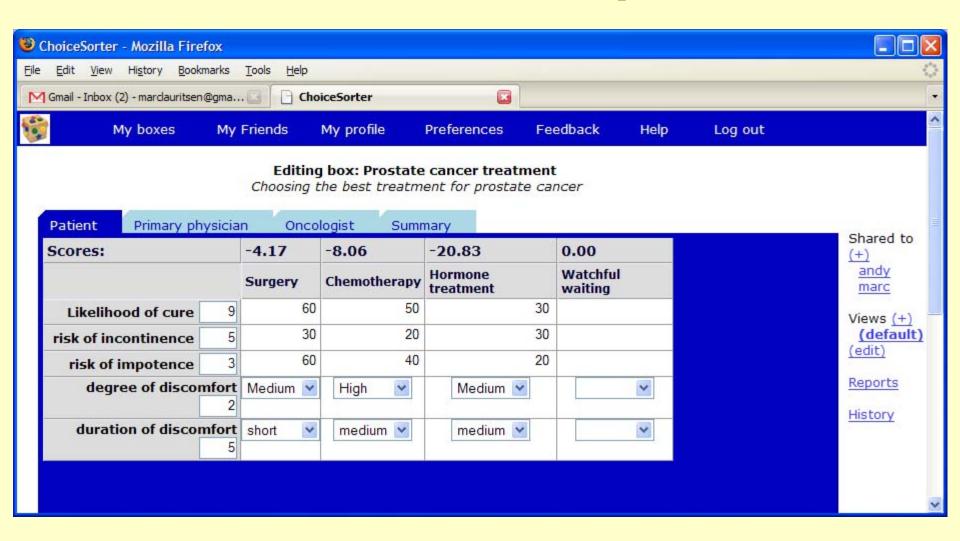








Web Prototype



A simple, intuitive, adjustable tool for collaborative deliberation

Benefits

For clients

- Transparency of options, factors, and perspectives
- Visibility of reasoning
- Persistence of Which and Why
- More confidence in result

For advocates

- More effective advice giving
- Less repetition and 'getting ready time'

For the whole system

- Improved client and advocate satisfaction
- Earlier detection of issues or problems
- Greater cost-effectiveness

Example: choosing an apartment in a coastal community

Weights			Apt 1		Apt 2		Apt 3	
			rating	score	rating	score	rating	score
	8	Blocks from beach	2	100	3	80	1	90
	3	Minutes to work	40	-88.89	35	-77.78	45	-100.00
	7	Square footage	900	87.80	850	82.93	1025	100.00
	6	Quality of view	3	42.86	4	57.14	7	100.00
	3	Monthly rent	\$1,200	-88.89	\$1,350	-100.00	\$990	-73.33
	8	Parking spot?	N	0	Y	100	N	0
avg weight	5.83	total positive		71.65		101.29		86.57
		total negative		-45.71		-45.71		-44.57
		net total		25.93		55.57		42.00

Editing box: New Apartment!

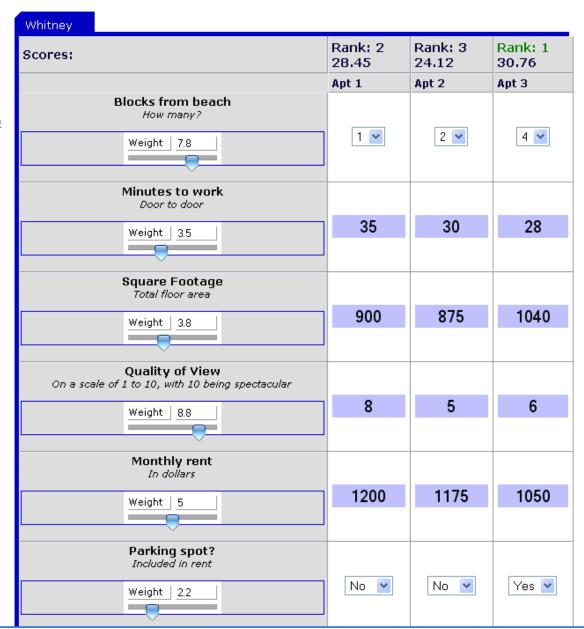
Choosing an apartment in a coastal community

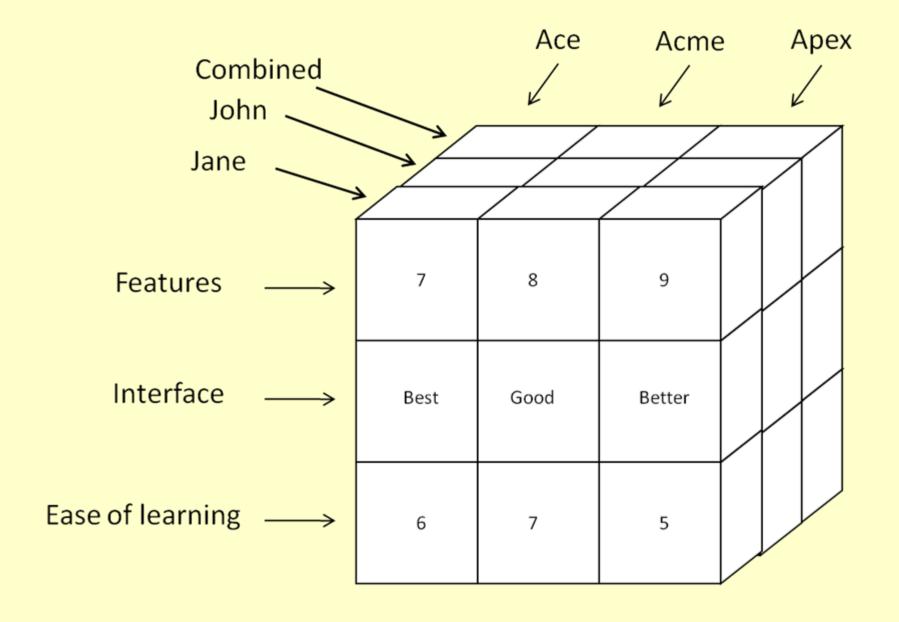
Shared to (+) andy marc whitney

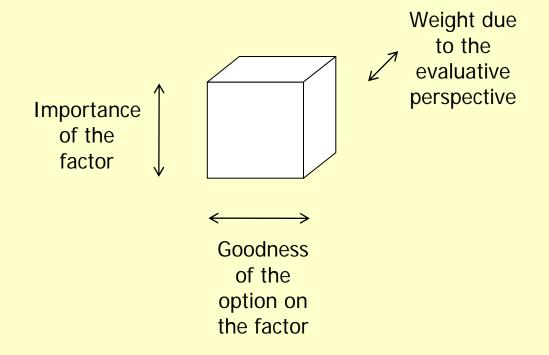
Views (+) (default) (edit)

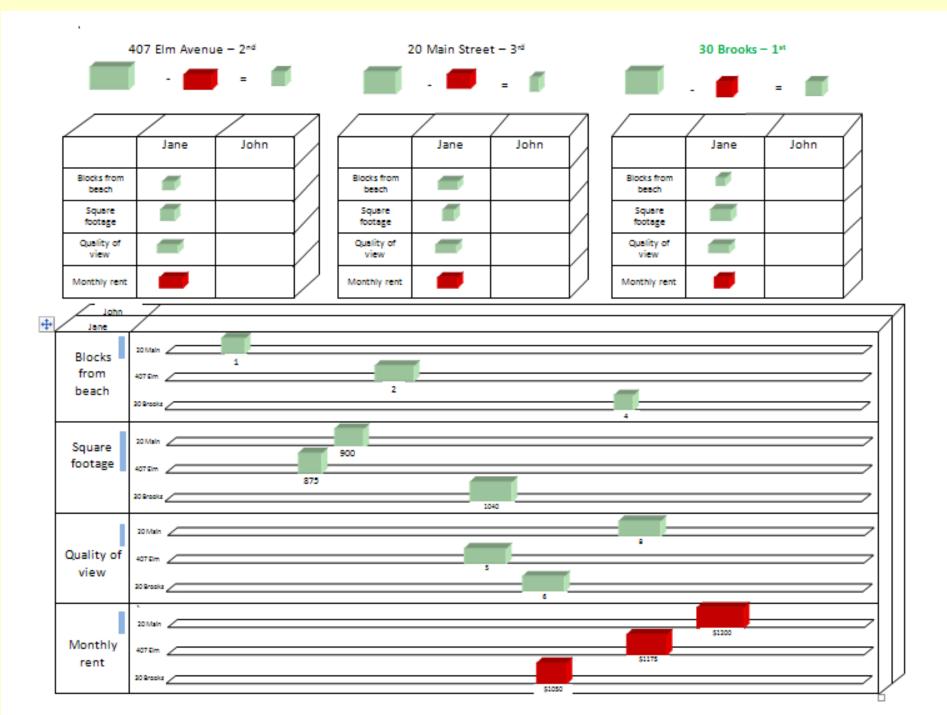
Reports

<u>History</u>

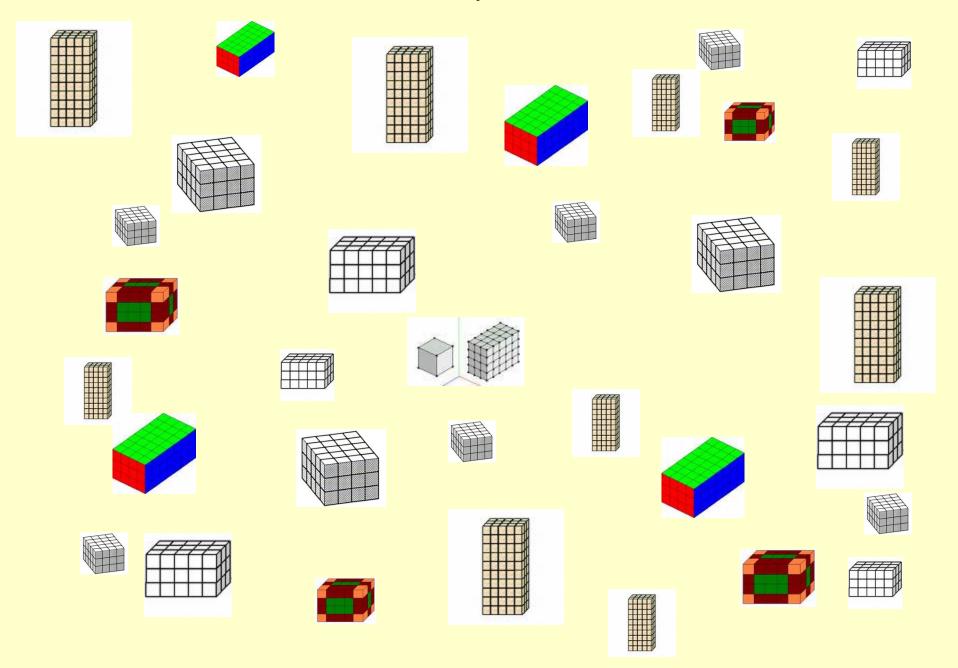








ChoiceSpace



All About Choice

- Powerful yet simple for mainstream use
- Deep, comprehensive, integrated solution
- Interactive visualization
- Collaborative deliberation
- Intelligent system that learns as it's used, through social production (crowd sourcing)
- Commitment to autonomous choice

Would it be helpful if

- When you faced a decision, you could
 - Create a custom choice support environment
 - Share it online with colleagues and other participants
 - Draw on pre-existing and newly added information and insights
 - Filter and sort through your options as you learn more
 - Leave a legacy for others facing similar choice

Questions

 Do you agree that our decision processes can be improved through technology?

 Is "choiceboxing" a step in the right direction?