LM35 Strategic Initiatives Code Set

The means through which a vision is translated into practice. Collections of finite-duration discretionary projects and programs, outside of the organization's day-to-day operational activities, that are designed to help the organization achieve its targeted performance.

LM35.10 Knowledge Management

Organizing, managing and mobilizing the knowledge and expertise of an organization. KM also includes the processes, technology and culture within an organization that facilitates and supports successful knowledge management.

LM35.10.10 Assess and Evaluate

Identifying and evaluating the existing state of knowledge and expertise in the organization, and the supporting processes, technology and culture.

LM35.10.15 Strategy and Planning

Defining and developing a strategy and plan to improve the current state of knowledge management based on the assessment and evaluation performed previously.

LM35.10.20 Implementation

Planning and executing strategies associated with people, process, technology and culture.

LM35.10.25 Measure and Report

Developing metrics and analytics to report on benefits realized from new knowledge, expertise, process, technology and culture strategy.

LM35.10.30 Maintain and Update

Maintaining enhanced levels of expertise, knowledge, processes, technology and culture, and validating against the vision defined previously.

LM35.15 Information Governance

The multi-disciplinary structures, policies, procedures, processes and controls implemented to manage information at an enterprise level, supporting an organization's immediate and future regulatory, legal, risk, environmental and operational requirements.

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LM35.15.10 Information Management

Documenting and managing internal strategic and operational business information. It includes controlling access to information and the protection of personally identifiable information (PII or PHI) and confidential information.

LM35.15.15 Intellectual Property

Capturing and preserving knowledge and operational, creative, and historical artifacts that hold commercial, business, or strategic value (e.g., marketing and branding materials). It includes knowledge management resources, contact information, business development strategies, strategic plans, case management strategies, financial information, policies and procedures.

LM35.15.20 Information Security

Delivering proactive cyber security prevention, protection, and response services. Provides an objective perspective on the current cybersecurity posture of the organization's operational/business networks. Includes management of ethical walls, confidential access controls and the protection of personally identifiable information (PII or PHI).

LM35.15.25 Information Requests

Responding efficiently, consistently, and appropriately to requests for information, including Request for Proposal (RFP) responses, questionnaires, surveys, counsel guidelines, and audits.

LM35.15.30 Mobile Devices/BYOD

Providing guidance on compliance with policies/procedures with respect to acceptable use and security of company-issued and personally owned devices (i.e., “bring your own device” or BYOD).

LM35.15.35 Matter Lifecycle Management

Capturing new engagement information that is organized by areas of law and/or practice groups, including engagement documentation and perpetuating the collection/distribution of

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authoritative information. The process of systematically deactivating matters in matter management systems at the end of formal representations (matter closing) is also part of this umbrella process.

LM35.15.40 Matter Mobility

Moving matters and their associated information into and out of law firms or legal departments; triggered by lateral moves, representation terminations, and other events.

LM35.15.45 Records and Information Management (RIM)

Creating and periodically revising operational guidelines for managing information assets, including file folder structures and taxonomy.

LM35.15.50 Document Preservation and Mandated Destruction

Preserving potentially responsive information, ensuring the suspension of scheduled disposition, and certifying custodial legal hold compliance during the discovery phase of litigation, investigations or audits. Also, the destruction of information as mandated by the court or by agreement among parties.

LM35.15.55 Retention/Disposition

Applying lifecycle management practices to stored information, enacting disposition as authorized, and applying defensible disposition to legacy information.

LM35.20 Organizational Development

Organizational performance and how it develops its human resources. Activities address improving organizational effectiveness and training employees to meet current and future job demands. Also includes change management, coaching, leadership development, succession planning, career development, social networking, measurement systems and outsourcing employee development. Includes the process of knowledge sharing and the transfer of knowledge from departing personnel.

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