Informing the Vision: Communication with Organizational Leadership about LegalServer & Related Projects

Session Handout

Instructions: If you have a topic to raise with your leadership team, use this guide to help you prepare for that conversation following communication practices for a successful result.

PART 1: Frame Your Topic

Describe your topic. What are you trying to communicate?

PART 2: Who Is the Decision-Maker?

List the member(s) of the leadership team with whom you need to communicate. What are their current priorities and key areas of focus?

Stakeholder / Role	Their Top Priorities
Executive Director	
Legal / Program Director	
Grants Manager	
IT Director	
Other:	

How does your topic or what you are trying to communicate connect to leadership's priorities?

PART 3: What Are You Trying to Communicate?

Before your next leadership conversation, identify the communication type and complete the prompts below.

Communication Type	What Leadership Needs to Know
Raise a Problem	Why is it a problem? How urgent? What do you need from them?
Share Information	Key takeaways only. What does this mean for the organization?

Propose an Idea	Have a plan. Anticipate questions on cost, capacity, and mission fit.
Make a Request	Be specific. What's the ask and the return? Bring a written proposal.

My upcoming communication type is:

- ☐ Raise a Problem
- ☐ Share Information
- ☐ Propose an Idea
- ☐ Make a Request

In one sentence, what is the key message I want to land?

In one sentence, what does leadership need to know or do?

PART 4: Build & Maintain Routine Communication Structures

Examples of topics you can add to your next communication

- Current state of LegalServer and related systems
- Major milestones, accomplishments, and use cases
- Data quality and reporting updates (include success stories)
- Upcoming projects, timelines, and resource needs
- Staff feedback: what's working and what isn't
- Sector trends and what peer organizations are doing

What format do I communicate in (email, in person, written report, live dashboard)?

What data accessibility or relevant training do I need to offer (e.g., definitions, how-to on filtering reports)?

How often should I communicate or check-in and with who?

PART 5: Keep Leadership in the Loop

Win or outcome to highlight (what improved, what risk was reduced, what time was saved):
Champion to elevate (a staff member or team modeling success):
Take a moment to celebrate with the team and key colleagues involved in the LegalServer/tech project. How will I do this?
Shareable material I can prepare (1-pager, dashboard, quote, photo):