Informing the Vision

Communication with Organizational Leadership about LegalServer & Related Projects

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Presenters:

Sarah Freymiller
Data Specialist
Legal Services of Eastern Missouri

Melissa Huerta
Database Specialist
Neighborhood Legal Services of Los Angeles County

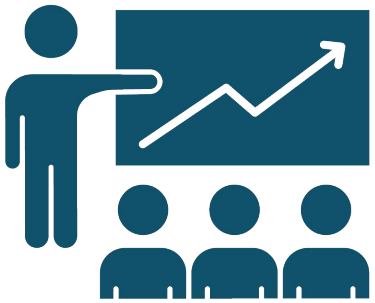
Cheryl Lopez
Director of Operations
City Bar Justice Center

Sonia Lopez
Director of Innovative Programming
Lone Star Legal Aid

Poll: Let’s Learn About You

Please scan the QR code on the screen to answer a quick poll.

Learning Objectives



By the end of this training, participants will be able to:

1. Identify key decision-makers in their organization and tailor communication strategies to their priorities and needs.
2. Apply the appropriate communication type — whether raising a problem, sharing an update, proposing an idea, or making a request — when engaging leadership on LegalServer and technology projects.
3. Build routine communication structures that keep leadership and the team informed, engaged, and positioned to support technology as a strategic organizational asset.

Why It Matters

1. LegalServer & related data or technology projects are essential to organizational operations and for key services delivery
2. This area of work is often invisible to leadership until something breaks or once confronted with a significant challenge
3. Active communication and transparency builds trust, secures resources, supports staff and positions you as a strategic partner — not just a systems administrator
4. **The goal:** leadership sees LegalServer and related projects as organizational assets, not just IT or operations overhead

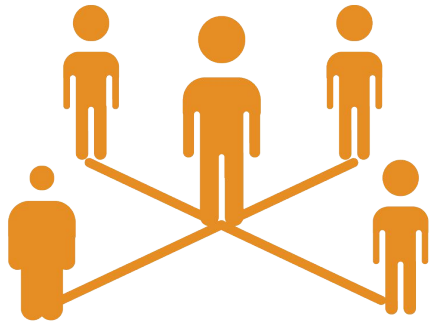
Before Going to Leadership

Be sure it's a collaborative decision, and that your proposal is driven by staff needs.

- Is this tool or feature something your team actually needs? Do they want this change to happen?
- How easy or challenging would staff training and implementation be?
- How would it impact different teams or roles?

Know Your Decision Makers

- Map your org chart with a communication lens. Who holds final decision making?
  - Common key players: Executive Director, IT Director, Legal Services or Program Directors, Board
- Understand each person's priorities
  - Executive Director: big picture sustainability, mission alignment
  - Legal Director: staff efficiency, client outcomes, case data integrity
  - Grants Manager: reporting accuracy, funder requirements, deadlines
- Identify where they feel the greatest gaps exist — then connect those gaps to work you're already doing or could be doing with technology/data. ***How can you help?***



What Are You Trying to Communicate?

Mixing these up is one of the most common communication mistakes — walking in to "share information" but needing a decision or raising a problem without signaling what kind of support you need.

Communication type	Leadership needs to know
Raising a problem	Why is it a problem? What's the level of urgency? Do you need them to take action or anything else?
Sharing information or an update	Keep it brief, sharing key takeaways. Frame it around what it means for the organization and connect it back to organization goals/the mission. A 1-pager or dashboard can go a long way!
Proposing an idea	Have a plan in mind. Anticipate questions around cost, capacity, and mission/leadership alignment.
Making a request	What's the ask (be specific) and what's the return? Have a written proposal with a budget, timeline, staffing and hours, etc.

Let’s Practice!

Breakout Session

- **Step 1:** If you are not already in a group, please find one to join and work with.
- **Step 2:** Choose one hypothetical scenario (on the next slide) or use a real-life example to apply what you just learned.
- **Step 3:** Use the session worksheet to help you prepare for your meeting with leadership. Choose one person in your group to complete the session worksheet for your group.
- **Step 4:** We’ll ask 1-2 people to share one takeaway from the exercise. Did you learn anything new? Did anything surprise you?
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Hypothetical Scenarios

Choose one of the hypothetical scenarios below or use a real-life example:

#1: You've discovered a new technology (e.g., Paladin, Lawfully) that fills an important gap in your organization's operations. Implementing it would require integrating the tool with LegalServer. *Consider: What information do you need to gather for your proposal? Who are the stakeholders you'd need to involve, and in what order?*

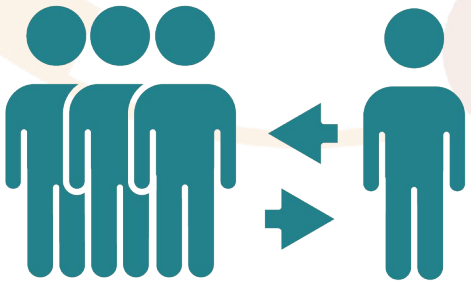
#2: Several staff members want to use LegalServer's Magic Notes (a new AI voice-to-text feature) to improve client intake. *Consider: What information do you need to build the proposal? What's your communication plan?*

#3: A board member asks how many cases were rejected last year due to lack of staff capacity. When you pull the data, you find three rejection reasons – lack of capacity, outside program priorities, and not within program protocols – and it's unclear whether all three should count as "lack of capacity" given how they're phrased. *Consider: What steps would you take to answer the board member's question while addressing this ambiguity? How do you keep leadership involved throughout the process?*

Scan QR code to access the worksheet

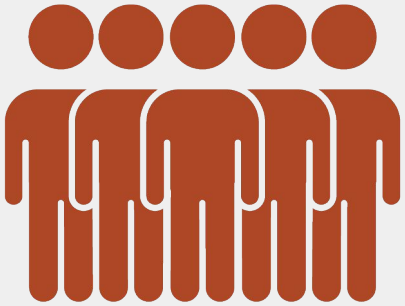
Build Routine Communication Structures (and Relationships)

- Don't communicate only when there's a problem or an ask, normalize regular check-ins
  - Send that recurring calendar invite!
  - Balance with understanding of the time constraints that program staff face.
- Suggested agenda items for briefings:
  - Current state of LegalServer and related systems (e.g., recent accomplishments, current challenges)
  - Data quality and reporting reports (e.g., impact stories, dashboards)
  - Upcoming projects, timelines, and resource needs
  - Staff feedback: What's working? What's not?
  - Sector trends and what peer organizations are doing
- Put it in writing
  - Have a single running agenda that serves as a historical document
  - Follow up meetings with brief recaps and action items



Engage Your Whole Team (Not Just Leadership)

- Stay connected to staff across different roles, functions, and departments regularly
  - Keep it casual or have structured engagements (e.g., Tech Committee)
  - Send out surveys on an annual basis to understand what's working and what isn't
- Their day-to-day challenges are your best source of insight for what to prioritize
- The broader your connection to and understanding of the team, the stronger your case. **When multiple voices across the organization are aligned on a need, leadership is more likely to act on it.**
- Keep them in the loop as projects or initiatives move along.



Listen First, Then Advocate

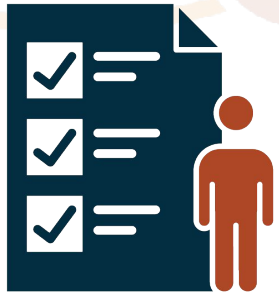
- Resist the urge to lead with solutions — lead with questions and listening first
- Frame your work or project(s) from the perspective of staff and leadership priorities (e.g., cost savings, compliance, client impact)
- Translate technical concepts into plain language — avoid jargon

Keeping Leadership in the Loop

- Regularly report on project developments, collaborations, partnerships, and trend
  - Provide shareable materials (1-page impact reports, dashboards, quotes, photos)
  - Frame updates around outcomes: what improved, what risk was reduced, what time was saved
- Identify and Elevate Champions
  - Highlight staff or teams modeling success with data or new tools
  - Use real examples to demonstrate project effectiveness
  - Celebrate wins — big and small — and position leadership to share in the credit

Takeaways: Putting It All Together

- **Know Your Audience.** Identify key decision-makers and tailor communication to their priorities and concerns.
- **Communicate with Intent.** Distinguish between the four types of communication and apply the right approach for each.
- **Build Proactive Communication Habits**. Establish routine structures to keep leadership informed before problems arise.
- **Broaden Your Coalition**. Engage staff across the organization to surface real needs and strengthen your case to leadership.
- **Frame Technology as a Strategic Asset**. Translate technical work into leadership-friendly language focused on outcomes and mission impact.



Resources

- **Materials from today's sessions are posted on this webpage:**
  - Informing the Vision: Communication with Organizational Leadership about LegalServer & Related Projects (Slides)
  - Informing the Vision: Communication with Organizational Leadership about LegalServer & Related Projects (Worksheet)
  - Meeting Agenda (Template)
  - Request Tracker/Log (Template)
- **Data Storytelling Framework:** How to communicate data to various audiences
- **LSNTAP: Data Management & Visualization Toolkit**
- **Stephanie Evergreen:** Create dashboards to improve data communication with leadership and staff

Q&A Session

THANK YOU!