

The Attorney's Commune: Knowledge Strategies for Better Collaboration

by Jeff Fried of BA Insight

There is an epic battle playing out in law

firms between knowledge and information. Legal teams are seeking knowledge faster than ever before, but they must sift through an unprecedented amount of information. Search technology offers powerful capabilities that can catapult firms forward, increasing both effectiveness and efficiency. Many firms, however, do not make sufficient use of the technology available to them (or even the technology they own). By focusing on a few areas using proven effective knowledge strategies, firms can become more competitive — even in the face of an ever-increasing information landscape.

Content to the Max

Legal teams can begin the redefinition process by addressing two key elements of their approach to existing and prospective information.

- Apply more effective search techniques, and focus on improving the way they find and deliver their most common documents. This not only saves time, it also opens up the firm's content for reuse. Connecting the search system to multiple information systems to create a unified view is a best practice.
- Leverage their vast archive of information to simplify routine tasks that have become commoditized by incorporating document assembly techniques into their drafting processes.

Knowledge Strategy: Use a search-based application developed for the legal industry, which empowers attorneys to find critical information using client-matter and subject-matter search interfaces. Connect this application to all key systems (document management, matter management, practice management and client management), and create a unified view of information.

Don't accept a one-size-fits-all solution. Instead, expect to customize your systems to the unique information management needs of the firm's different practice groups. Using search technology to provide agile information integration, law firm support teams can reduce their efforts dramatically and provide users with a natural, intuitive interface tailored to each group.

The most effective tactic is to use a template-based approach with SharePoint since it is built on an existing infrastructure with which your IT team is already familiar. It will also offer team members a unified view across an entire inventory of client records, which will help develop a holistic understanding of the knowledge and relevant information applicable to a particular case.

That insight will help your professionals plan and coordinate their missions. A single search query can provide access to legal memoranda in a document management system and billing information from a practice management tool, as well as key data from CRM applications and legal research platforms. Ultimately, by bridging information and creating natural, interactive systems, firms can increase their efficiency and effectiveness exponentially without the burden of manually combining their archives.



Find the Grooviest Expertise

While social media tools have made users more comfortable with sharing information about themselves, it has not consolidated those biographical details into a single location. Typically, people don't spend substantial time updating their profiles, and information about them and their expertise is split across many systems. This disaggregation limits the ability of organizations to maximize their talent in response to an immediate need.

By harnessing the details in billing records, document authorship, role (such as matter-responsible partner), support on major cases and performance reviews (among other details) into a complete composite of each individual in the organization, one can accelerate a search for expertise by creating and surfacing a unified profile. This speeds many activities, such as staffing a team for a new matter, finding the right person to answer a question and improving business development. By developing a familiarity with historical work — including coding decisions prior to evaluating a document's value — and the profitability of similar matters, professionals can enhance their competitive position in a fixed-fee environment.

Knowledge Strategy: *Develop a cohesive system of finding expertise in order to select the most talented people to address issues that are best suited to their skill sets. The key to finding such experts is in their “implicit information” — including activities, content and contacts — rather than what's solely in their profile. This gives a complete panorama of his or her background, providing a more comprehensive perspective. Enriching each individual's profile is also a good general practice.*

Billing records and associated matters, for example, help reinforce an individual's background. Sometimes the most essential skills are not apparent from a basic firm bio or resume. They are only visible from a search of one's full content portfolio.

THE FORMULA FOR SEARCH SUCCESS

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In the current resource-constrained environment, where heightened client expectations demand an unprecedented level of speed and efficiency, it is imperative that legal teams find ways to leverage information.

This is possible via a comprehensive platform for information integration and access that centers on strong search, supplemented with three key capabilities:

- 1. CONNECT:** Bring data into the search experience in a secure and meaningful manner from the systems used in the firm. By combining content from multiple systems into a single index, a unified view can be created easily and flexibly.
- 2. ENRICH:** Increase the findability of content and expertise through tagging, classification and content normalization. As the volume of content explodes, there is no possible way to maintain this kind of metadata manually, so machine-created metadata plays an essential role.
- 3. INTERACT:** Activate content to allow for a deep, immersive experience with the information. This includes content exploration and visualization as well as document assembly and similar workflows that take action directly from the search experience.

Embarking on a campaign to connect, enrich and interact will reduce end-to-end search time for legal staff while ensuring senior members of the legal team can find and reuse the information they need in the most efficient way possible regardless of its location.

Free Your Minds with Collaboration and Social Sharing

Employee habits and expectations at work increasingly are set by their online experiences at home. Everyone uses search engines as consumers, so there is no longer a tolerance for deficient search capabilities within the firm. Instead, there is an expectation of ease and accessibility.

Similarly, social networking has become mainstream, both at home and in the office. Collaboration online is, therefore, central to transacting business, rather than ancillary to communication. Firms must streamline the nature of search within their organizations to provide a familiar, simplified and highly usable interface. They must also filter data results to promote sharing.

Fostering social behavior of this type requires improvements in findability and an orientation toward learning from user choices. For example, if attorneys routinely select a particular motion for summary judgment as a sample on which to build, they are endorsing the relevance of that document.

Knowledge Strategy: To maximize the utility of searching, organizations should develop a practice of tagging documents and enriching them with metadata. This can include manmade metadata (i.e., individuals classify documents with particular designations associated with related matters based on a preset taxonomy) and machine-made metadata where the technology automatically assigns the metadata based on the content and context of a document. Metadata can also track behavior (for example, frequently opening certain documents, which often indicates they are relevant).

A dynamic system can infer key tags that should be associated with certain documents. It then displays them as part of the experience of finding and exploring content. By employing this system, a firm can improve its effectiveness and encourage collaboration, social sharing and content reuse.

No Bad Trips: Security and Usability

Despite the promise of an open and integrated technology platform, data security remains a prominent concern. Until IT teams convince their users these tools incorporate industry-leading safeguards, adoption rates might lag.

Most firms have separate document management, practice management, CRM and billing systems. Each generally has a proprietary security model inconsistent with other platforms. To accommodate a unified view of the data landscape and address this lack of uniformity, IT administrators must install best-of-breed technology that blends security across multiple content silos with divergent requirements. This will let users interact with all relevant content easily and securely.

Knowledge Strategy: To accelerate the search process and enhance its efficiency, organizations must align the security protocols of their suite of tools. A common framework will allow users to access a fully integrated information inventory to yield the maximum amount of knowledge.

A company can implement a single sign-on approach, for example, to provide secure search and secure data access. Don't underestimate the difficulty of achieving this, and remember to check periodically whether people are setting the proper access security on their documents.

Establishing this infrastructure will require a collaborative effort between those responsible for knowledge at the firm and others with technical oversight. That combination of talent and recognition of a common purpose will yield immediate results.

Follow the Golden Rule (and Ethical Walls)

Despite the increasing value of fully accessible information, firms have an obligation to limit one's ability to review data in matters that pose a potential conflict or the threat of an ethical violation, e.g., where a firm represents both a client and its competitor in unrelated transactions. Since this situation can arise dynamically, depending on information architecture or content library organization, support for ethical walls is often inadequate. The ability to create one easily on demand is essential and can be a competitive advantage to a firm. This limitation is also part of an implied promise to safeguard the information of each client. Even the smallest breach of that covenant is unacceptable.

Knowledge Strategy: By carefully and automatically linking individuals to a sophisticated series of permissions related to the data, firms can mitigate their risk of inadvertently bypassing an ethical wall, particularly when the authorization dynamically adjusts based on certain milestones. Employing systems that support these restrictions — dynamically limiting information access based on them — is an effective practice, particularly in a compliance-driven environment.

Knowledge Strategies = Power

Law firms are at a watershed. They must adapt to a new world: a perfect storm of information explosion combined with heightened expectations from clients focused on efficiency and cost-effectiveness. Meeting this challenge requires new knowledge strategies and effective, tailored, secure information systems.

Those that can reveal hidden knowledge assets by unifying multiple data-rich back-end systems in a single view will gain a competitive advantage. The use of search technology can eliminate the need for costly systems integration and leverage current investments in existing enterprise systems and tools.

Incorporating search-based applications, machine-generated metadata and security across multiple systems along with ethical wall best practices as knowledge strategies can make legal teams more effective.

Embarking on a campaign to connect, enrich and interact will reduce end-to-end search time for legal staff while ensuring senior members of the legal team can find the information they need in the most efficient way possible regardless of its location. By redefining your knowledge strategies in this fashion, you can empower your entire organization and instill greater confidence in the clients it serves. P2P



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