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All in The Family: Collaborating within Your Own Firm

Presenters:
Dominic Jaar
Guy Wiggins

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Introduction

We have no intention here to turn you into collabo or discuss about the [Vichy Regime](#). However, it is interesting to note that since the 1940s, the pejorative term that was collaboration has won back one's spurs in the last couple of years. In short, collaboration and the use of Web 2.0 has become one of the hottest and fastest growing trends in the business world. For anyone needing proof that Web 2.0 is big business, just look at Microsoft's battle with Google for an equity stake in Facebook, one of the leading social networking sites. Microsoft now owns 1.6% of Facebook after making a \$240 million investment, marking a \$15 billion valuation for the high-traffic website. Wikis, blogs and social networking – once exclusively the Internet playground for techies, kids, and assorted enthusiasts – are being adopted by corporations at an explosive rate. The race is on to embrace the power of the web to harness collective intelligence and sell products and services in new ways.

ChangeWave Research recently completed a benchmark survey on Web 2.0, which confirms the explosion in Web 2.0 usage. They surveyed 2,081 companies and the results showed a huge percentage not only believe in the benefits of collaborative Web 2.0 tools but are rapidly moving to implement them in a wide variety of ways.

Key findings include:

- One-in-four respondents (24%) say their company already uses Web 2.0 social software. Another 8% say they'll begin using it in the next 12 months.
- Focusing on specific web technologies, they found that Wikis (20%), Blogs (18%), and Social Networking (15%) are attracting the most attention.
- Surprisingly, while current users find Wikis to be most beneficial to their company, future users think Blogs (26%) and Social Networks (21%) will be most beneficial.

All told, two-in-five respondents (39%) report their company is very or somewhat willing to use Web 2.0 social software for business purposes.

The top two reasons given by current users are both internally oriented:

- To improve internal employee collaboration
- To increase internal efficiency and productivity

However, a wholesale transformation is occurring between current and future corporate users in terms of why they're making use of Web 2.0 software. While current users are more 'internally oriented' in their usage, future ones will be far more 'externally oriented.' Here are the top reasons given by future corporate Web 2.0 users:

- To improve internal employee collaboration
- To improve **external** customer service and support
- To increase **external** brand awareness and loyalty
- To increase **external** sales of products and services

Another study that focused on higher education also illustrated the major benefits of collaboration and all of these benefits apply to law firms and corporations as well :

More effective use of individual talents. Modern business is increasingly complex and demands an ever widening range of skills. Often, no single individual possesses all the knowledge, skills, and techniques required. In principle, an individual might be able to learn or acquire all the techniques needed to solve a particular problem, but this can be very time consuming. If two or more workers collaborate, there is a greater probability that among them they will possess the necessary range of skills.

Transfer of knowledge or skills. This benefit is the corollary of the previous one. Much knowledge may be tacit and remain so until workers have had the time to deliberate and conclude. Frequently, considerable time elapses before the knowledge appears in written form. Collaboration is one way of transferring new knowledge, especially tacit knowledge, at an earlier stage.

Source of stimulation and creativity. This third benefit may result from a clash of views or a cross-fertilization of ideas that may in turn generate new insights or perspectives that individuals working on their own would not have grasped or grasped as quickly (Loucks-Horsley et al.,1998). Hence, collaboration is greater than the sum of its parts.

Extension of the individual's networks. An individual may have contacts with a limited number of workers in his field around the world who can be contacted for information or advice. By collaborating with others, the network can be extended and further productivity ensured.

Dissemination of information. Using the increased network capability, experiences and findings can be disseminated more widely, either formally, in written form, and conference presentations or informally through discussions.

Adaption from Loan-Clarke, John and Preston, Diane (2002) Tensions and benefits in collaborative research involving a university and another organization. *Studies in Higher Education*, 27 (2). pp. 169-185. ISSN 0307-5079

Why is Web 2.0 so hot?

Currently most law firm collaboration is on a small scale. It is something that takes place amongst small teams, individual business units, departments, groups - and not across the entire business or enterprise. If interaction across business units happens at all, it is often limited to the exchange of services for a very special need. The reality is that most of us are focused on our principal business function and we ignore what the other people in the organization do, what they might know and therefore how they could help us.

But the tables are turning. The growing accessibility of information technologies built on standard web platforms puts the tools to collaborate, create value and compete at everyone's fingertips. These new low cost "weapons of mass collaboration" are giving rise to new collaborative capabilities and business models that have the potential to revolutionize the way business is done. Even in law firms.

The goal of this paper is to give you a quick survey of some of the major concepts and technologies behind this new mode of collaboration. By providing you with a review of the platforms and tools available to leverage collaboration within your organisation, we hope you can identify the benefits of increased collaboration.

[Collaboration](#)

A good synthesis of the [different definitions](#) of collaboration found in major dictionaries exists in Wikipedia which states that:

Collaboration is a structured, recursive process where two or more people work together toward a common goal—typically an intellectual endeavor that is creative in nature—by sharing knowledge, learning and building consensus. Collaboration does not require leadership and can even bring better results through decentralization and egalitarianism.

Before diving into the matter, we want to draw your attention to the fact that [collaboration is not a software](#). Software is used to ease collaboration. However, to reap benefits from collaboration, certain obvious key human elements are necessary.

[Collaborative software](#)

Theorists draw a line between social and collaborative software. Nevertheless, we will discuss them randomly as we feel, within an organization, they both participate in a better collaboration environment. The theoretical reason to separate both type of software is the output :

[Social software](#) produces social ties as its primary output ([list of social networking websites](#)) whereas [collaborative software](#) produces a collaborative deliverable. For example, here is a [list of collaborative software](#) in two separate categories: [Open source or freeware](#) and [Proprietary software](#).

Generally speaking, when we say "social", we focus primarily on "[virtual community](#)" while when we say "collaborative" we are more concerned with [content management](#). For the purpose of this paper, we will focus on the major collaborative software that can be implemented internally. Obviously, it would be possible to internalise many other solutions which we do not have time to cover here.

[Client vs Webapp](#)

Amongst the different software we will discuss, there are those which are webified and the more classic clients. A client is an application that remotely accesses a service on a server through a network. However, more and more, web browsers are becoming the

universal clients and the Web or the intranet, the network. This type of web-based application offer many benefits. The first one definitely is that it avoids the need of downloading a large piece of software onto any computer. Another major one is the fact that you don't need anymore upgrades, patches, etc. since all modifications are applied once at the server level and all users benefit from them when they next connect. An even greater advantage is the fact that web apps work regardless of the user's computer operating system: no more headache with the Microsoft vs. Apple compatibility war! The downside is you need to be connected to the Web all the time and in some cases where the volume of information is important you need a good bandwidth. Therefore, when you choose any of the following solutions to collaborate, think about the pros and cons of each type of software.

Three levels of collaboration

There are three levels of collaboration or, should we say, three depths.

Communication

This is the basic level of collaboration where different tools are used to share information between people. In this category, we include [e-mail](#), [fax](#), [voice mail](#), [SMS](#), [website](#), [Wiki](#), [blog](#), [folksonomy](#), [social networks](#), etc. Due to the common nature of most of these tools, we will look more precisely at latter four.

Wiki

The most well-known wiki certainly is [Wikipedia](#) which we used extensively to draft this paper. Practically speaking, a wiki is an online database where users can enter and share information on different topics but most importantly to edit the information entered by another user. CommonCraft created an interesting video that explains [Wiki in plain English](#). It is one of the best examples of the results of [collective wisdom](#). Wikis are excellent for knowledge management since, not only does it centralize different people knowledge, but it also hyperlinks contents. Therefore, it helps to identify where the objective (documents) and the subjective knowledge (people) is within an organization.

Blog

Another tool we have heard and read a lot about lately is blog. In fact, this probably the most user-friendly way to publish on the web. Most platforms do not require any technical knowledge such as HTML coding. CommonCraft created an interesting video that explains [Blogs in plain English](#). In theory, blogs could be used to communicate. However, what we have seen happening lately is the rise of bloggers who act more and more as journalists, turning their blogs into journals and magazine, and leaving no space for the readers to comment. Nevertheless, due to the fact that blogs are so easy to use and enable users to integrate multimedia seamlessly, they would be a good solution to share information within a law firm or a group, and to get comments from its members, thereby positively orienting the decision-making process.

One of the main collaborative tools in blogs are the ability for readers to add comments to blog posts and essentially continue the conversation started by the blogger. The blog posts and related comments are also instantly searchable - whether you are using Google on the web (which now includes a specialized Blog Search function) or your internal Enterprise search engine which should automatically be crawling all content generated on your Intranet/Portal.

Another important collaborative feature of blogs are social tagging. In fact, Blogs were the first tools on the Internet to popularize the "Tag Cloud" - which is a visual depiction of user-generated [tags](#). Tags are typically listed alphabetically, and tag frequency is shown with font size or color - the bigger the Font the more that Tag has been used. Thus both finding a tag by alphabet and by popularity is possible. The tags are usually hyperlinks that lead to a collection of items that are associated with a tag. This leads us to the importance of collaborative or "social" tagging - one of the most important inventions of the new social web and what we believe will become one of the cornerstones of the collaborative web 2.0 future.

[Collaborative tagging](#)

Most lawyers bill by the hour and constantly fight with time, unless they realize there is only 24 hours in a day. Nevertheless, lawyers unconsciously like duplication. Within the same firm or department, many lawyers have the same contacts, but they all enter them in their personal contact list. They probably access the same websites and each save them in their own favorites. In order to locate these websites, they probably ran the same or similar searches on the web. Well, they could have saved some time by sharing their bookmarks but also their knowledge by using what is known as [folksonomy](#). (Folksonomy is defined as user created tags or definitions that exist side by side with the standard taxonomy that your firm is using to help define it's business. An example of a standard taxonomy list would be your firm practice areas and departments.)

CommonCraft created an interesting video that explains [social bookmarking in plain English](#). When you save URLs to your favorite in most browsers you do not have a chance to add value to the information contained on the website: you can create folders and subfolders with themes. However, often a page could fit in many folders at once but you do not save it 10 times. Classic favorites are also problematic because you can't create a folder for each and every theme that would be applicable. Worst, your favorites are always locked into your computer.

The same problem exists with documents on your firm's document management system. Typically, most DMS's allow you to search by author, title, client matter number etc. But there is no easy way to determine if a particular document has been used as a model many times for a particular type of transaction or pleading or if it has particularly useful clauses - or perhaps some important weaknesses for certain types of transactions.

All these issues could be cured if documents were as easy to tag as web pages - and accessible through a common search interface on your Intranet. Instead of going to the search interface of our DMS, imagine being able to access a cloud of tags on your intranet where you could click on "e-discovery" and in a second, get all the websites and documents relating to e-discovery that were tagged by your users. And imagine if anyone could add comments and even rate documents as easily as you can a blog post or a page on . This combination of user generated commenting and tagging, already in wide spread use throughout the Internet, could over time make it much easier to find key documents that others have found very useful - and give you insights into why. You'd have the potential to access the combined wisdom of many different users over a period of time.

Social Network Services

As the astounding popularity of websites like Facebook and MySpace attest, social networking sites are now the hottest new thing on the web. Since Facebook's creation four years ago, some 60 million people have already signed up, and that number is expected to grow to 200 million by the end of 2008. Recently, Microsoft purchased a small part of the company that places the overall value of the site at over \$15 billion dollars. But the ideas behind social networking sites are not new and many of these theories have been around for 50 years or more. The difference is that there is now a technology platform that makes it possible to put these theories into actual practice.

At it's most basic a social network is a structure made of people that have some kind of connection or bond in common. These can be ideas, values, friends, professional experience etc. Social network analysis then tries to understand the strengths and weaknesses of these bonds and the way in which often informal networks play a critical role in determining the ways in which organizations are actually run, problems solved etc. Research into Social Networks has shown that power within organizations often comes more from the degree to which an individual within a network is at the center of many relationships rather than the actual job title. Social networks also play a key role in hiring, in business success, and in job performance.

Interestingly, the shape of a social network can determine how useful it is to the participant. Smaller, tighter networks can be less useful to their members than networks with lots of loose connections ([weak ties](#)) to individuals outside the main network. More open networks, with many weak ties and social connections, are more likely to introduce new ideas and opportunities to their members than closed networks with many redundant ties. In other words, a group of colleagues who practice the same kind of law may already share the same knowledge and opportunities. A group of individuals with connections to other social worlds is likely to have access to a wider range of information.

This, in a nutshell, is the concept behind social network sites like LinkedIn, FaceBook, MySpace etc. All of these services are web based and provide a collection of tools for users to interact, such as [chat](#), [messaging](#), [email](#), [video](#), [voice chat](#), [file sharing](#), [blogging](#), [discussion groups](#), and so on. A key feature of services such as Facebook

and LinkedIn is a recommender system that is linked to trust. For example, with LinkedIn you receive a request to join someone's network, typically based on another mutual connection. You can decide to reject the request if you don't have any idea who the mutual connection is. With Facebook, there is a similar concept of groups - where you have to be invited into a group based on the person's trust.

How can these new social networking services be put to use in a law firm? Here are a number of possibilities:

- Use Social Sites for screening applicants, especially younger applicants recently out of school
- Use Social Networking to hook up with Alumni of your firm and keep in touch with them.
- Use social sites and networks to recruit, saving time and money
- Use social sites for marketing purposes, and to keep an eye on what is being said about your firm or company on the web

Another way to leverage these technologies to improve the networking at your firm or company is to consider social tagging of internal resources at your firm. An interesting place to start might be to add Facebook like capabilities to your internal personnel directory.

Conference

This level of collaboration involves more interactivity between the people sharing the information. It includes [internet forums](#), [chat](#), [Instant Messaging](#), [telephony](#), [video](#) or [data conferencing](#), [whiteboard](#), [application sharing](#), etc. Once again, due to the common nature of most of these tools, we will not spend time reviewing them.

Let's just say that [internet forums](#) and whiteboard can be useful within a law firm for internal management or for team work. Internet forums are a good place to post ideas or questions for the whole office to see. Particularly if your forums have RSS feeds, everyone will be informed of the new post and will be able to answer. The principle benefit lies in the fact that the answer will be available to everyone (education) but also that many people will be able to comment and improve the quality of the answer (higher truth).

Management

Management is the most sophisticated level of collaboration and involves the most complete and useful applications. Even if they are likely to generate huge returns on investment, the hardest part in the implementation of the following technologies is to get integrate them with your existing technologies - if feasible and most importantly, to effect a cultural change that moves lawyers and their staff away from using e-mail to genuine web based tools.

Enterprise Portals

An enterprise portal is one of the most important collaboration cornerstones in any modern law firm or corporation. An enterprise portal can be defined as a set of (typically proprietary) architecture and application frameworks that allow the delivery of complex business applications via a web browser. They allow content to be concentrated and centralized, make collaboration possible and offer a variety of necessary security services. And importantly, they offer ways of securely exposing and integrating information stored in back end systems such as accounting, case management, time and billing and data warehouses.

Key features

One of the things you want to focus on when implementing a new collaborative tool, or any technology for that matter, is mirroring the way the employees work. It is a lot easier to customize a software than it is to teach people a new way to work. You also have to make sure the learning curve is not too steep so that they can quickly see the benefits. In such a context, they will be more likely to use the tool. Collaborative technologies being viral, the employees who sink their teeth in your solution will share their positive experience with others and invite them to join to see for themselves. Here are some tips to make sure your project picks up:

Single Point of Entry :

People like simple things: look at Google... You should not create extra steps to use the tools you are putting in place. Accordingly, do not ask the user to recreate a new profile with password, etc. Use a [single sign-on](#) instead. The easiest way to do that is probably by incorporating your tools in the intranet or on the portal so that, once the user is logged-on his computer or the portal, he can access all applications.

Integration:

As we just suggested creating interactivity between your different applications will participate to the marketing of your tool. For example, if your documents are managed centrally and you can share them on a wiki that is located on the corporate intranet, by doing this you are publicizing the existence of the wiki and the fact that documents are managed centrally.

Federation:

Instead of having to "manually" update your intranet on a daily basis, you could automatically integrate content provided by other platforms or systems. For example, you could create a section on your intranet where all new documents that made it to your knowledge management system are posted. Anytime a department publishes a newsletter, abstracts could be added to benefit to the whole firm.

Personalization:

A key feature of a good portal system is that it knows who you are and what information you find useful. For example, a lawyer could have her own MySite with access to information on the 10 most recently accessed clients and matters, the most recent cash receipts from her clients, good RSS feeds from legal blogs in the area of law she practices in etc. The same principle could apply to the document she has most recently accessed. The lawyer can also customize the look and feel of their environment, adding their own links, internet favorites, or as we said earlier, tags!

It is also a good idea to enable the users to incorporate material from out of your firewall. For example, RSS feeds from external websites could populate a lawyer's MySite about news regarding his clients or a particular subject that is relevant to his practice. This will not only increase his efficiency but will increase his fidelity and attachment to his MySite.

Permissioning

In collaborative initiative, the IT department should be removed as the only gatekeeper for providing security: control should be returned to the business owner. Accordingly, a portal should allow for the easy creation of team and other business sites and makes it easy for the business owner to control who has access to the content and services on a particular site. This takes a big burden off of the IT department, empowers the business owner and increases organizational flexibility. (This is especially true for internal sites behind your firewall. Given the importance of maintaining client confidentiality, you may want to ensure that the IT department still controls access to external web sites, or extranets.

Leading Enterprise Portal Vendors

Microsoft: SharePoint 2007

SharePoint 2007 is quickly becoming the leading portal environment in the legal world because most law firms are heavy users of Microsoft products, especially Microsoft Office and Outlook/Exchange for e-mail. Furthermore, developers already familiar with the Microsoft programming tools such as Visual Basic and .Net can leverage the features of SharePoint easily. A free version of SharePoint (WSS) is available with Windows Server 2003.

IBM: Websphere

BEA: Bea Weblogic Portal

OpenSource Portals:

DotNetNuke

Metadot

Key Portal Collaboration Features

The following features are typically available in most enterprise portals but are certainly not exclusive to them. Importantly, these features make it possible to centralize functions that typically are managed by individuals in applications like Outlook.

Electronic calendars (AKA time management)

A central web calendar that makes it possible to schedule events and automatically notify and remind group members when key dates are approaching. Virtual meeting workspace spaces can also be created so that meeting notes, agendas and other information related to a specific meeting can be maintained. Important features include:

- Graphical month, week and day views or list views of all events entered
- The ability to filter, sort and archive information
- Color coding of different meeting types
- The ability to "roll up" calendar information from different calendars into one central calendar
- E-mail alerts that can be set based on key date fields in the calendar application that go to distinct users or groups.
- Files that can be attached to events so that users can see an upcoming PowerPoint presentation for example
- The ability to synchronize with an individual calendaring application such as Microsoft Outlook

Project management

At its most basic, project management is a system to schedule, track, and chart the steps in a project as it is being completed. The goal is to move away from e-mail and Word and Excel documents towards a central web site where all team members can see who is working on what task, what the status of the task is etc. On this page, they can add notes, comments and collaborate.

While many businesses have instituted more formal project management processes and hired trained Project Managers, this is a concept that is still very new to most law firms outside of the IT Department. In our experience, very few legal practice groups use any kind of formal or semi formal methodology or tools to more easily track complex legal projects such as a litigation. Again, this is often because of the lack of truly easy to use tools that require next to no training to learn and deploy.

With the advent of more sophisticated enterprise portals such as SharePoint in law firms, this is bound to change. Modern portals such as SharePoint make it easy to create custom lists that can be used to manage projects and assign individual tasks. Easily created custom fields such as Status and Percent Complete make it possible to track the task. Using even a simple Sharepoint list can make it significantly easier to track who is doing what, whether it is a contract review or a complex litigation.

For more ambitious project management on standardized tasks such as new New Matter Intake process, it is possible to use workflow tools to assign tasks to people and

then automate the flow of work from person to person until the complex task or project is complete. (See Workflow below for more details.)

More sophisticated options for very complex projects include Microsoft Project Server which can integrate with SharePoint server.

Finally, for larger law firms and businesses that wish to actively manage a "portfolio" of various projects, there are specific solutions for managing all of these projects and making sure the projects are aligned with key business objectives. A popular Project Portfolio package used in a number of law firms is Eclipse from [Solution Q](#).

Project Management Outside the Firewall

If the project to be managed includes working with people outside the corporate firewall, there are many different options. An extranet site controlled by the law firm could be used to track various projects or purely Internet based tools can be used to manage projects. Some examples include:

[Google Docs](#): Create documents and spreadsheets to track project tasks and easily share them with others

[BaseCamp](#)
[Ace Project](#)

Workflow systems

Every business and law firm has essential processes that must be completed on a regular basis for the business to survive. In a law firm, examples include the New Matter Intake process, the New Hire and the Lateral Hire process. These processes can be very complex and can involve a number of steps performed by different people in different departments.

Take, for example, the New Matter process. If a new client comes into the firm, the partner or his assistant typically has to fill out a form that details the name and contacts of the client, the nature of work, the parties involved, marketing information etc. Once filled out, the form might then need to be sent to the Finance Department to run a credit check. If the client passes the credit check, the client and matter then needs to go to the Conflicts department to make sure there is no conflict with an existing client. Finally, it may need to be reviewed by the New Business Committee before finally getting assigned a client and matter number in the firm's accounting system.

In many law firms, this process remains paper based, with a paper form being passed from department to department. But technologies exist to automate this entire workflow, significantly streamlining the process and offering much better visibility into who is working on a particular task at a moment in time. An electronic audit trail is kept of each step in the task and over time it is possible using these systems to capture very detailed metrics on how long a particular process takes.

Is this collaboration in the sense of Web 2.0 technologies such as Wikis and Blogs? No, but workflow tools do make it much easier for teams spread out over large distances to work seamlessly as a team. In this sense, workflow tools are a very important collaborative technology and we believe a key enabler in the digital business of the future.

In Thomas Friedman's *The World is Flat*, he spoke explicitly about how workflow systems have shattered geographical boundaries and made it possible for knowledge workers in India to work seamlessly as part of a team to review tax returns, write computer code etc. US law firms are now using these same technologies to automate legal work with the help of attorneys in India. For example, a US law firm can now scan a contract, upload it to a web portal and initiate a workflow whereby the Indian attorneys review and mark up the contract and then have the workflow continue to their US counterpart that do the final review of the contract before sending it back to the client.

Sophisticated messaging systems such as Lotus Notes have had workflow capabilities for years, something that has been missing from other e-mail systems like Outlook/Exchange. This gap has been filled by many different third party workflow vendors such as MetaStorm. However, with the advent of SharePoint 2007 and the new Windows Workflow Foundation workflow is now becoming a part of the operating system and will soon become widely available at a much lower cost than was previously possible. The commoditization of workflow promises to revolutionize the way many business processes are done and will be a key enabler of the fully digital enterprise.

Look for Workflow tools to become embedded in your portal environment, document management system, e-mail system, web browser and other key tools and an essential part of the way you do business over the next 5 years, if it has not already happened.

Leading Workflow Vendors

- IBM - Lotus Notes and Websphere
- Microsoft - Sharepoint 2007 and the Windows Workflow Foundation
- MetaStorm - MetaStorm Enterprise
- EMC - Documentum Process Suite
- OpenText - Livelink ECM Workflow
- Interwoven - Interwoven WorkSite

Document management system (DMS)

Documents are the life blood of any law firm - the key work product that law firm's produce. And because law firms generate such large numbers of documents, and making them easy to find is so important to efficient operation, most law firms of any size started implementing document management systems years ago.

At a basic level, a DMS should feature the documents history to be able to identify who accessed the document, when, what was changed, where it was transferred. It should also make it easy to secure documents so that "Chinese Walls" can be easily

implemented which allow only small groups of lawyers to be able to access sensitive documents. A DMS should also make it easy to integrate document comparison and other advanced editing tools. Finally, a DMS should make it easy to search for a document, either by a field such as the client or matter number or full text.

These types of features have been standard in the leading legal DMS's for years - but newer features promise to further expand the role of the DMS in a law firm. These include:

- "Client Matter Centricity". In the law firm of the future, critical client matter information that is collected as part of an electronic new matter opening process is automatically incorporated into the client matter information in the DMS. Here's how this might work. When the attorney fills out the new matter form, she would enter key information about the matter. For example, let's assume the new matter was offering consultation to a bank on the acquisition of a healthcare company. The new matter form would capture the fact that the practice group was Corporate Finance, the area of law was Mergers and Acquisitions and the industry was healthcare. Then, whenever a new document was added to this specific client and matter number, every document would automatically get tagged with these attributes. When a new deal involving healthcare came to the firm, the DMS/Portal would make it very easy to search by these categories. The key point is that the data is entered once in the new matter form and all subsequent documents automatically get tagged with this metadata. There is minimal work required by the attorney.
- A key aspect of a modern client matter centric DMS is that any user should be able to search by client matter number or look in a client matter folder in the DMS and find whatever has been created for that matter, regardless of office location. This would overcome a significant weakness of older DMS's which use document libraries based typically on the geography of the office first and then the client matter number. The office location should not matter - only the client matter information.
- Integration with e-mail and records management systems. Because lawyers today tend to live in their e-mail systems, the DMS should integrate seamlessly into this environment. For example, since most people spend their day in Outlook, the DMS should be accessible through Outlook and should permit the user to drag and drop emails from the inbox to the client matter folder in the DMS. Importantly, as mentioned above all of the metadata related to that matter should already be in the system so that no additional profiling is required when the e-mail is added to the folder - it automatically inherits it. And once in the client matter folder, the DMS should integrate seamlessly with the firm's records management system so that key documents and e-mails are automatically archived and eventually destroyed - based on the firm's records retention policies.

- Integration with Enterprise Search tools: traditionally, DMS's had their own search tools and these search tools worked only for finding documents, not other important sources of information such as web pages, blogs, wikis etc. The goal is now to provide one interface for searching everything in the firm, and Enterprise Search tools make this possible. With an enterprise search tool, once search box would enable you to search securely across all of your key systems including Time and Billing, Case, Matter and [Human Resource Management Systems](#) to find the information or the expertise you are looking for.

The trend in the software market is that individual DMS systems will eventually disappear and merge into what are called ECM's or Enterprise Content Management systems that will manage all of the key information, including e-mail, web pages and documents. In turn, ECM's may eventually get swallowed into the enterprise Portal. This appears to be Microsoft's roadmap with Sharepoint, although it is still years away from attaining this goal and there is much work to do by third party vendors.

Leading Legal DMS Vendors

- OpenText - DM 5.2 and Livelink ECM
- Interwoven - Interwoven WorkSite
- EMC - Documentum

Enterprise Search and Knowledge Management Systems

So far, we have talked about how a number of important tools such as Enterprise portals, DMS's and Blogs and Wikis and can be used to collect, organize and share information. But the key to making all of this user created information instantly accessible is an accurate Enterprise Search tool. A well designed Enterprise Search tool can index, organize and quickly return results on both unstructured data (web pages and wikis) and structured data residing in key databases such as your time and billing systems, document management systems and HR systems. They have the potential to give users a 360 degree view of all of your relevant data and create connections between your data to improve the decision making process.

Here's an example using the M&A and healthcare matter we discussed above. Let's assume you are searching for information related to the purchase of a healthcare company for a client. When you enter the search term in your enterprise search tool, it would return the key documents with the most relevant documents at the top of the list as well as information from your HRIS system that contains bios on your partners detailing their background in healthcare M&A and information from your time and billing system with a list of the attorneys with the most hours billed on a recent M&A healthcare transaction -- all on one screen. In one search, you could potentially find both the best documents and the people throughout your organization with the most relevant expertise.

The technology now exists to perform this magic because of the sophistication of the technology. Today's most sophisticated enterprise search platforms can automatically

identify concepts within and across information resources and combine or "federate" search results from both unstructured and structured information sources, all while adhering to the firm's security requirements. But the cost and difficulty of integrating this technology puts it out of the reach of all but the largest and most sophisticated firms. However, look for the cost of deploying Enterprise Search tools to drop significantly over the next few years as tech giants like Google and Microsoft seek to get their search tools widely used inside of corporations.

In that regard, Microsoft's recent announcement that it was going to purchase the FAST Enterprise Search company is a big step in that direction. The expectation is that Microsoft will incorporate the FAST technology into the Sharepoint 2007 search function to improve its capabilities and scalability.

Here are some of the key features to look for in Enterprise Search tools:

- Find pages "conceptually similar" to other documents, using sophisticated algorithms, not just word matches.
- Ability to index structured and unstructured data and combine results, while obeying security constraints. (This is typically done via the use of a "connector" to the structured data source)
- Ability to summarize or extract contents of documents
- Support for the clustering of search results based on similar concepts and custom thesaurus for synonym searching
- Option for personalization and search agents
- Option for community and collaborative filtering
- Option for user profiling and automatic alerts
- Option for indexing multimedia: video and audio files.

Leading Legal Enterprise Search Systems

- Reconnind - Reconnind MindServer
- Microsoft - Sharepoint 2007 Search and FAST Enterprise Search
- Interwoven - Universal Search powered by Vivissimo
- Google - Google Enterprise Search Appliance
- Autonomy - Autonomy Enterprise Search

Future tools

As many of us have experienced, technologies evolve so quickly that the solutions put in place are often obsolete by the time they are put in production. We feel it is important to gain a certain understanding of where collaborative tools are heading in order to plan for the integration of new tools and functionalities in the ones being developed. For more details, consult the [Web 2.0 Technology Road Map](#).

Conclusion

Social media like blogs and wikis and online journals offer unique ways to capture, share and store an enterprise's most valuable asset—the accumulated knowledge of its people, even those who have retired or moved on. This is an opportunity too valuable to pass over lightly for law firms. But the information captured in social media also needs to coexist with more traditional knowledge created by law firms, especially important information stored in other database systems such as documents and their related metadata, biographical and other important personnel information stored in HR systems and client matter information stored in accounting and time and billing systems.

The law firm or legal department of the future will combine social media with Enterprise Portal and Enterprise Search tools to revolutionize the way knowledge is created, managed and found. This new way of working, which is just starting to emerge, has been called the "[Writable Intranet](#)" and Enterprise 2.0. It is a place where lawyers can collaborate, exchange thoughts, create plans, capture meeting notes, track projects, and create documents. Fundamentally, the concept is simple - leverage human sociability and turn practitioners into users and contributors that use the Intranet on a daily basis to get their work done. This new way of working will finally get rid of e-mail as the collaboration platform of choice for lawyers and revolutionize legal knowledge management.

To give you an idea of where the train is heading, [Your Search Advisor](#) announced Google Sites which is scheduled to be launched sometime in 2008. It will expand upon the Google Page Creator already offered within Apps. Based on JotSpot collaboration tools, it will allow business to set up intranets, project management tracking, customer extranets, and any number of custom sites based on multi-user collaboration. This truly means that collaboration will be available to everyone from lawfirm to solo practitioners.

Postscriptum

This paper was created with [GoogleDocs](#) and [Wikipedia](#).