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Content Management for the Rapidly Changing Firm

Using an enterprise search platform to support efficiency, transparency, simplicity and increased business velocity in law firms

Executive Summary

Today's law firms are in the midst of a transitional period as their clients put more focus on cost control, transparency and structured file management practices. To stay competitive and profitable, legal organizations must move away from legacy systems that make it more difficult to adapt to the changes facing the industry. By leveraging the latest technologies—including advanced content management systems such as enterprise search platforms—law firms can take advantage of built-in flexibility that will immediately drive productivity while establishing a future-proof platform.

Understanding the Challenges Facing Today's Law Firms

The legal industry is experiencing significant change surrounding its practices and client expectations. For example, open-ended hourly fee structures are under pressure as clients become more budget conscious and cost control tops their list of requirements. Clients are also demanding more transparency, predictability and efficient collaboration in their engagements. In some cases, clients are requesting performance metrics to gauge a firm's use of funds. With client organizations becoming savvier and more frugal about legal services, the volume of work available for law firms is shrinking, the market is getting increasingly competitive, and client satisfaction is becoming more important than ever.

Despite these drivers, many firms are unsure about the exact approach they should take and struggle to meet these requests for greater efficiency, cost-control, transparency and collaboration. Many are facing institutional obstacles—such as a resistance to change or legacy technologies—that prevent immediate action. To compound the already substantial challenges firms are facing, there is an absence of an absolute prescriptive path for such a change. In other words, even for those firms with the courage and fortitude to push for such changes, the next five years will reflect a competitive market that continues to evolve how law firms practice and work with their clients. This constant state of change dictates cycles of trial—and sometimes errors—rather than a single monolithic process of business re-engineering.

This process of self-examination, learning and correcting errors is a model for business agility that will lead firms to operate more efficiently and develop strategies to meet client demands. In turn, it will require the firm to have an agile architecture for technology-based automation, a crucial element in determining how content is created, managed, accessed and re-utilized, both by the firm as well as its clients.

Specificity, Simplicity and Speed: a Refined Business-Technology Modality

As client concerns with cost and transparency escalate, law firms need to find ways to significantly boost efficiency, reduce costs and be prepared to further improve collaboration with clients. To accomplish these goals, firms must adopt flexible enterprise content management solutions such as search that drive specificity, simplicity and speed.

Specificity

The first step to improving efficiency is to ensure that attorneys can access specific information needed to gain insights into a matter and help their clients do the same. If firms are expected to work more productively, attorneys can't waste time hunting for important information and knowledge hidden within thousands of documents, emails, or layers of data buried in a financial system. The faster attorneys can narrow down data collection to substantive, in-context material, the easier it is for them to develop strategic insight early in the process and gain a key advantage in time-sensitive cases.

And because clients are demanding more transparency in the legal process, driving specificity also means that firms need a better approach to content management. For example, when a client requests data that relates to a specific area of a matter, attorneys should be able to quickly access that information and provide specific details about the matter and client. This level of specificity includes not only work products, precedents or legal research—but also matter management-related information such as matter-related performance metrics, financials, stakeholders and electronic correspondence. If all of this information is specific to the work they are doing at any given point in time, attorneys will be even more effective in managing a case, more efficiently managing their matter’s procedures and far more responsive to client demands for more transparent matter management.

Simplicity

Simplicity is essential to overcoming the challenges of a rapidly changing business environment, processes and technology automation. Innovative firms will look to the latest technology trends and vendors who implement them to inspire ways to drive simplicity by streamlining familiar workflow processes and how they look and behave. Cloud-based content management solutions such as Dropbox and web-based search applications like Google will inspire new solutions for law firms. The firm’s attorneys are also exposed to the “IT consumerization” trend. Increased use of social media, hand held information and collaboration devices and “anytime-anywhere” network access are every day experiences and can provide models for ways that firms can simplify how they use information and communications technology.

In today’s law firms, even attorneys who have practiced for decades are familiar with the value of consumer technologies like tablets and smart phones for improving access to information and collaboration. By focusing on simplicity, firms can drive the adoption of new process automation technologies like enterprise search to meet their stated goals for greater efficiency. It is hard to do, but if you keep it simple they’ll use it.

Speed

By automating administrative processes, firms can increase both the velocity and accuracy of their workflow and outcomes. This accelerated process enables attorneys to gain early insights that can guide case strategies. Implementing and deploying automation and technologies to support your firm’s changing business processes could be a lengthy process. Speed to market—or to your users—is now becoming even more important since the firm and its attorneys will need to adjust quickly or, as an alternative, for the implementation to “fail fast” and move on.

Your chosen platform for speedy deployment is even more crucial during this period of change. Consider how quickly you can get a solution to your users, the inevitable cycles of change and whether a technological platform can support those goals. In this regard, predictive coding-based content management platforms can present opportunities for speedier planning,

configuration and deployment, compared with legacy “query based” logic. Get there quicker and the value to your firm will increase.

Using Technology to Tackle New Challenges

As law firms look for ways to bring simplicity, specificity, and speed to overcome the challenges that are pressuring the industry, investment in new technology will continue to be a top priority. There is simply no other way to address the demand for change and remain competitive than to leverage advancements in purpose-built technology that stands to impact the profession significantly.

Technology solutions that improve efficiency are not new to legal organizations. Knowledge Management (KM) and Customer Relationship Management (CRM) solutions have been standard in the legal industry for some time, but the downsides of these technologies create additional challenges for some firms. For example, entering, managing, curating, and cleaning huge volumes of data, which are necessary for successful KM and CRM systems, is time-consuming and unprofitable work that, though essential, often takes a back seat to more strategic and actionable work.

Traditional KM and CRM systems do not include built-in analytics, requiring attorneys to spend a significant amount of time manually analyzing hundreds of data sets. The solutions also do not address new types of data, such as email and social CRM, which are essential to many cases. Conflicts databases—also a traditional law firm tool—are equally difficult to maintain and fraught with data quality issues that result from manually keying in massive amounts of information. Many legal professionals believe that conflict databases will become obsolete sooner than later, potentially leaving a void for firms that have relied on their capabilities.

KM tools are the predecessor to innovative new content management and search solutions, such as enterprise search, which is one of the most powerful, flexible solutions available to the profession today. When used as a platform, enterprise search addresses many of the challenges facing the legal industry today.

Investing in Enterprise Search as a Platform

Enterprise search solutions have been successfully deployed at many organizations and are now finally gaining wider adoption with law firms. These solutions offer a simpler, more transparent foundation for a document review process that is efficient, accurate and cost-effective. Out-of-the-box, enterprise-grade search offers immediate and intuitive value—it helps consolidate actionable information and knowledge from multiple sources that hitherto were difficult to access and therefore leverage. Consider the impact of Google on our lives and you will see the value of such a platform to your attorneys, their work efficiencies, and ability to leverage the firm’s accumulated knowledge and information.

But this is only half the story. Investing in enterprise search as a platform provides a foundation that allows firms to retrieve, filter and analyze information and knowledge from multiple internal and external sources in real-time and delivery it to users wherever they are, using actionable content aggregation platforms such as your web portal or email management. The right enterprise search solution is a platform and not a single purpose tool (i.e. typical search box and results page). It should be an extensible architecture upon which the firm will be able to rapidly build intuitive solutions to be used by your attorneys and clients.

This foundation also complements emerging cloud-based solutions that will make collaboration with clients, as well as access by dispersed attorneys, much simpler and more effective. Using enterprise search technology not only boosts efficiency and extends a firm’s capabilities, it can also future-proof a firm by overcoming the ongoing challenges presented by a changing industry landscape.

Selecting the Best Search Platform for Your Organization

With a wide variety of search platforms available, it’s important to understand the capabilities of each solution and how they can deliver the specificity, simplicity, and speed your firm needs. For example, an effective enterprise search platform must incorporate automation as a base feature to drive efficiency. It should automate key processes, such as enabling attorneys to examine vast data collections quickly and generate comprehensive results without requiring a lot of time or effort. Here are a few of the key features that a robust enterprise search platform should contain:

Concept-based Search | Specificity and Simplicity

Enterprise search solutions that include concept-based search allow attorneys to go beyond basic keyword search by automatically identifying material that deals with specific topics or themes. Concept-based search uses sentiment analysis to determine the meaning of a document or piece of content, and categorizes or classifies it into meaningful groups. In this way, concept-based search enables attorneys to immediately narrow a data collection down to substantive material, while eliminating superfluous matter.

By pinpointing key documents, people and matters of interest, concept-based search provides deep insights and further assists attorneys by locating content from past cases that may be relevant and re-usable for a current matter.

Built-in Analytics | Specificity, Simplicity and Speed

For today's law firms, built-in analytics is another important capability. Analytics is a powerful feature that filters search results into contextual, actionable output, capabilities like analytical concept grouping can help attorneys identify key concepts related to a case and have the system analyze the data collection for instances of those topics. Analytics can also help to streamline the review process by identifying precedents and prioritizing content. And applying analytics to documents and email correspondence related to a specific matter unveils details about the matter's context without requiring extra manual review work. As a result, attorneys can accelerate fact development and build early case assessment significantly faster than is possible using traditional linear review tools alone.

Advanced analytics functionality can certainly increase productivity, but it also helps firms reduce errors in the review process. By applying several layers of automated analysis, including near dupe identification, concept categorization, phrase extraction, language identification, predictive coding, and string sampling, built-in analytics capabilities provides powerful time- and cost-saving tool for law firms wrestling with traditional, manual document review.

Easy to Install and Use | Speed and Specificity

It's important to find an enterprise search solution that does not require extensive implementation or training. To be successful, law firms need a solution that can be up-and-running quickly and painlessly without requiring a lot of training. Enterprise search for law firms is especially effective if it was designed with the attorneys and their needs in mind.

Widespread and rapid adoption requires the solution to be intuitive and useful to attorneys. It should make it easy to aid productivity and efficiency, and resolve content management challenges without requiring lots of extra time and effort. If users don't realize the tool's benefits early on, they won't be as motivated to use it.

Extensibility and Speed

In addition to concept-based search, analytic capabilities, defensibility and ease of use, an enterprise search platform must be flexible to meet constant shifts in client requirements and ever-changing technology offerings. The platform should allow firms to make modifications over time, such as scalability and incorporating the latest technologies without needing to start from scratch or abandon previous IT investments.

For example, many enterprise search solutions already permit integration with collaboration platforms such as SharePoint and document management systems, allowing attorneys to quickly access their most recent documents and other content related to a specific matter. However, it

is entirely possible that those solutions and other such sources will change. Law firms using a search platform that provides capabilities for rapidly changing and incorporating additional platforms and sources are well-positioned for future success, even as the law industry continues to evolve.

Taking Search to the Next Level

Implementing an enterprise search platform is a good step toward future-proofing any law firm. With a solution in place, firms will have ample opportunity to leverage its current capabilities to meet changing client demands and market conditions. And with a solid platform in place, firms will be prepared to take advantage of many high-value features that are expected to come in the content management space over the next few years.

To truly gain the benefits an enterprise search platform, search capabilities must be embedded into the daily context and workflow of busy attorneys. In most cases, search is currently executed using a separate tool that attorneys access only when they need it. But search tools can be incorporated into frequently-used applications so they're just a click away, intuitive to use, and facilitate search for information in-context and in real-time. In other words, attorneys should not have to waste time and lose momentum by opening a separate tool to retrieve data. Law firms using enterprise search platforms with embedded search capability gain an immediate advantage over firms saddled with conventional, one-dimensional search solutions.

Another opportunity for law firms is the ability to retrieve information from both internal and external sources using a single tool. With case-related data increasingly derived from untraditional sources like text messages, corporate websites, and social media resources like LinkedIn, providing an automated tool for gathering this information will be tremendously valuable to attorneys engaged in enterprise search.

In addition to retrieving data from various sources, the best enterprise search platforms also leverage information and intelligence from third party content providers. These providers may offer specific data about companies, industries, legal precedents, news feeds, and other information that can impact the outcome of a case. By integrating with search capabilities with third-party content sources, the search experience can provide greater context and be more meaningful from a knowledge management perspective.

Embracing Enterprise Search to Address the Changing Legal Environment

The legal industry has witnessed several changes that are altering the playing field for law firms. Clients are more budget conscious and demanding more transparency and collaboration than ever before. At the same time, the market is getting increasingly competitive and client satisfaction is becoming more important than ever. To address clients' demands for exceptional service and lower costs, firms must look for a more efficient approach to automate the workflow process—one that leverages an enterprise search platform.

Enterprise search solutions are the key to addressing the changes taking place in the legal industry. These solutions provide attorneys with the tools like built-in analytics and concept-based search to work more efficiently and more effectively. With a solution that combines specificity, simplicity, and speed, law firms can save time, money, and develop strategies to meet client demands by increasing business agility. By deploying next-generation content management technologies, law firms can be well-positioned to succeed in today's environment and prepare them to meet the challenges of the future.

About the Author

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Shy is founder of ii3, where he provides vision and direction to both ii3 and to ii3's clients. In addition to his role in executive management, Shy regularly works with ii3's teams to develop practical solutions to complex knowledge and information management challenges with special focus on legal and professional services firms. Shy blends practical experience and focus to achieve results, with innovation and creativity that helps his clients address their highly competitive and constantly changing business environment.



Shy is a KM pioneer who speaks regularly to the business community on the strategic impact of knowledge management and is recognized as a thought leader in this area. In addition to being an entrepreneur, Shy is also an avid photographer and an enthusiastic cook.

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