

Questions & Answers

Advance Knowledge



Deploying a Successful and Comprehensive Law Firm Knowledge Management Solution

February 11, 2004

Note: Some questions were duplicative and have been merged for the sake of brevity. If your question was not answered, it likely has to do with information deemed confidential by McCarthy Tétrault.

KM Organization:

Q: What does the KM Partner do during the 200-300 hours they work on KM?

A: A KM Partner's key activities involve working at a senior level on strategic and business objectives, reviewing the operational activities of their Knowledge Manager, reviewing metrics and statistical analyses, overseeing the activities of the KM Committee and working with individual partners to ensure smooth KM workflow integration.

Q: How did you convince a billing partner to give up much of the billing of his time to become a KM Partner?

A: The KM Partner role is a part of our firm's management structure; no one is disadvantaged by taking on management responsibilities.

Q: How many members are in the KM Committee?

A: This varies according to the size of the practice group, but we try to keep the number between five and ten. We occasionally break down into specialty areas, such as Environmental Law.

Q: Please reiterate the number of "knowledge managers" McCarthy has dedicated to the initiative.

A: We presently have seven KM professionals, and are closely integrated with our national libraries.

Partners:

Q: How did you persuade partners to take time from billables to KM, which presumably is non-billable?

A: KM-related work is treated as “firm directed” non-billable work. This ensures that KM work is properly considered during year-end reviews.

The treatment of KM work is only one contributing element to the “persuasive” case which must be made. As I mentioned during the Webinar, a number of human factors play into partner acceptance of our KM initiative, including subtle peer pressure resulting from one’s senior colleagues’ active contributions.

Maintaining our credibility by communicating and meeting our business goals also contributes significantly to overcoming reluctance.

Q: How is it factored into evaluations – does contribution = points in rating partners and associates? How is partners' compensation affected by their KM contributions/usage?

A: I am afraid that I can only respond in general terms, for confidentiality reasons. Our partners include KM commitments in their annual personal plans, which form the basis for their reviews. Associates’ KM expectations are set on a practice group level, and are a key element of their performance reviews.

Q: How did you overcome resistance from partners – concerned about sharing their expertise, worrying about losing their niche and "non-experts" practicing in areas they don't have experience in?

A: This was one of our initial concerns in rolling out our KM strategy. Certain specialized practice areas also voiced concerns while we were developing their KM deployment plans. In practice though, this issue simply has not manifested itself in our firm.

This concern, like many others, already exists in most firms. However, we have found that KM crystallizes many pre-existing issues (such as this one) and forces attention to be paid to their impact and resolution.

We promote KM as a way for our lawyers to gain visibility within the firm and make their expertise known to their colleagues. We have had many instances of this occurring, with lawyers contacting colleagues in other practice groups or offices based on KM system searches. Our Knowledge Management professionals are also key hubs for expertise location. For example, I was recently contacted by a Labour lawyer faced with a tax issue; I conferenced in our Tax Knowledge Manager, who linked in the Tax partner with the most expertise on the issue under consideration.

Q: Who's enforcing the quota system? Does that apply to senior partners as well?

A: Our Practice Group Leaders, KM Partners and KM Committees review our metrics – which include detailed lawyer-by-lawyer breakdowns on contribution and usage – on a quarterly basis. In addition to annual reviews, it is their responsibility to intercede where a Knowledge Manager suggests that an individual is not meeting their objectives.



General Deployment:

Q: How was your taxonomy developed and is it broken down by practice group or otherwise?

A: Our taxonomies are broken down by practice group and, occasionally, by sub-group. We built them along practical, rather than theoretical lines. Each topic list was developed with a few key lawyers in each practice group and vetted by the Practice Group Leader.

Q: Do you cull material from the knowledge base? Once it has passed its "best before" date?

A: Yes; this process is both organic (as the law changes) and systemic (with content reviews by designated lawyers). Maintaining currency is a cornerstone of our KM strategy.

Q: Will you tell us a little about how ii3 supported this project?

A: ii3 led us through Joint Application Design (JAD) sessions and drafted the system's functional specifications based on these sessions. The JAD sessions explored all sorts of ideas around lawyer workflow and client needs, with dozens of use cases. Through their leadership of the JAD sessions ii3, and particularly Hugh Ranalli, helped us work through the implications of our original strategic thoughts and asked insightful questions that led to the exploration of new concepts and features. ii3 then developed AdvanceKnowledge and is now providing on-going support and upgrades. ii3 also regularly and emphatically focused us on the need for a deployment strategy. This, of course, was advice well taken!

ii3 now owns and re-sells AdvanceKnowledge to the market at large as well as provide deployment consulting services.

Q: We have deployed InterAction for contact management, inter alia, but one of the obstacles we are facing is keeping the data fresh -- how do you manage that? What sources/providers do you use beyond what is provided by the lawyers? Our attorneys often have incomplete/incorrect info, and we have found that data providers often have outdated info too. How do you deal with this?

A: We too use InterAction, and have encountered many of the problems you discuss. We are looking at integrating the KM workflow and resources we have built to support and leverage the new version of InterAction. We designed AdvanceKnowledge to "speak to" InterAction; the latter's latest version should now enable us to achieve the same result in reverse.

Q: How even is the adoption in various practice groups and why?

A: Adoption is relatively even between practice groups; this is a testament to the comprehensive nature of our deployment regime. Any variance in results can be directly attributed to instances of deviation from the plan.

Q: What are the major challenges and resistance issues that you may still be facing or faced in the past?

A: Like all law firms, we faced general skepticism that surrounds any large-scale business project. This was dispelled by co-opting the firm's different stakeholders into the deployment plan preparation and implementation that I discussed during the Webinar. It was also very important to work closely with opinion leaders in the rollout stages and thereafter.



Our most difficult specific challenge was to engage the participation of our librarians and research lawyers. Due to initial timing challenges, they were not integrally involved in the development of our KM system. We have since worked hard to integrate their ideas into our strategies, and our head librarians are full members of our KM team.

Measures of Success:

Q: Did you begin the workflow changes prior to the system itself being deployed?

A: Yes, we did. We collected hard copy contributions for six months prior to the system's beta launch, which helped to establish KM-related work patterns for our lawyers and their secretaries. Training and content seeding were a pre-launch requirement for all of our practice groups.

Q: How do you benchmark against other law firms, e.g., Linklaters? Do you measure your efforts based on thought leaders such as Professor Richard Susskind, Transforming The Law's "Legal Grid"?

A: Benchmarking against other firms is done through reviews of industry studies, publications and literature, supplemented by our own interaction with colleagues in the KM field.

Susskind's legal grid has been very helpful in demonstrating the benefits of strategic and systemic integration within the firm. We designed both our KM system and deployment strategy to facilitate the interoperability of our client-side and internal resources. This is a process that is ongoing. For instance, the rollout of our updated CRM system involves integration (including data synchronization) with our KM system, and will be deployed through the use of KM team resources.

Q: Did you do a cost benefit analysis or business case?

A: Yes, on both counts. We repeat this process annually, as knowledge management expands in scope and utility.

Q: What kinds of metrics are you using to quantify the success of your KM initiatives?

A: We use a number of metrics, both hard and soft, to paint a full picture of our KM initiative. With respect to contributions, we set expectations for our lawyers on a practice group basis and review progress monthly. We also set measures for qualitative assessments of the value of the content in the system, which are reviewed quarterly.

On the usage side, we set initial six, twelve and eighteen month usage rate expectations, broken down by partner and associate designation. We also assess the value derived from the system by using surveys, focus group discussions and individual lawyer meetings.

Q: What specific value do practice group leaders get from AdvanceKnowledge?

A: Obviously, seeing substantively how client mandates were executed is a large benefit; other benefits include reviewing work performed for specific clients, deals or disputes by dollar value, expertise location and others. The metadata that we collect lends itself to a variety of managerial reports.



Q: How do lawyers react when the KM person says a submission is not good enough to publish?

A: We would never tell a lawyer that their contribution “isn’t good enough.” Rather, the Knowledge Manager is responsible for speaking with the lawyer in question and asking questions which will increase the value of the context provided. In rare occasions, a KM Partner may be asked to intercede, but this is done with great diplomacy.

Q: On average, how long per lawyer does the training in office take?

A: Twenty to thirty minutes.

Q: How is the KM biz unit measured? It’s one thing to say it’s a unit, another to do a P&L.

A: As I have mentioned, we have a number of qualitative and quantitative metrics by which we measure success – both of the KM initiative generally as well as the performance of those tasked with its implementation. Our KM Organization is reviewed regularly to ensure that we are setting value-based objectives with measurable results.



Additional Note: Joshua has done his best to answer all of your questions as comprehensively as possible. However, some queries could not be answered for reasons of confidentiality.