

Portal Dos & Don'ts

Advance Knowledge



Information and Knowledge Portals – A Practical View

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Margaret Grotthenthaler:



DO

- Create multi-disciplinary project team - create KM team
- Don't view it as a technology project
- Include and indoctrinate management so you get the budget you need
- Talk it up and constantly communicate what you are doing
- Articulate vision in writing and in detail
- Invest in content management solution that lets anyone be a portal editor

Don't

- Don't assume participation means acceptance or understanding
- Don't believe vendors' claims about their products because they don't understand legal products or the way lawyers work

Jamie Booth:



Lessons Learned

- **Identify Solid Business/Practice Drivers**
 - Have a reason to implement the portal that is scalable to other practices. KM is the best fit. Find the right champion.
 - Think global – act local. For example, strategic investment proved with an immediate success certain infrastructures in place or at least well understood strategy.
- **Ensure Content is Available:** or can be made available – address process & cultural barriers.
- **Measure Success:** Portal use & progress toward stated goals.
- **Serious Sponsors Only Need Apply:** Accurately target the opportunity, drive content, focus on process, sell change.
- **Understand Total Cost of Ownership:** License Costs are typically a small percentage of the total costs – meta estimates 15%.
 - Technology Components: Servers, Dev S/W, Networking Costs, Middle Ware, Search, Content, Maintenance.
 - People Components: Content & KM, Program/Project Management, Portal Administration (not the same as web master), Development time, Consultants, Training.
- **Realize That Portals Aren't Solutions:**
 - They are frameworks that can make solution delivery more cost effective.
 - Non-trivial technology (Web services, XML, external content technologies, etc.).
 - Require cross functional team (practices, interface design, developers, content maintainers, network infrastructure, content vendors).
- **Architectures are Critical:**
 - Content - Information / Knowledge – structured and unstructured – internal / external.
 - Technology architectures – hardware, software, network.
 - Security Architecture – as you aggregate and contextualize, confidentiality, ethical walls, etc. must be preserved.
 - People Architecture (technical, content, knowledge skills – in practice / out practice).



People Architecture

Support Groups

Content Strategist (CIO / CKO Position)

- Architect knowledge strategy
- Develop knowledge organization
- Build cross functional teams

- Practice Group Content Analyst
- (Non-Practicing Lawyer/ Paralegal)
- Identify Priority Content Needs
- Drive Content Creation & Pub. Process
- Liaison to Technical Team

Technologists & Architects

- Portal / Middleware Technologies
- Search Technologies
- Process Automation
- Software Development



Practice Group

Precedent/Content **Partner**

Define Content Goals for Practice Group
Identify Subject Matter Partners & Assign Ownership
Participates in Firm Precedent/Content Oversight Group

Team Level

Subject Matter Sponsor **Partner**

Develop Specific Team Objectives
Solicit Participation & Monitor Progress
Participate in Oversight Group as Appropriate

Knowledge or Content Coordinator

(Paralegal - Part Time focus to start)
Coordinate Publishing & Organization of Content
Work Closely with Subject Matter Partners & Content Analyst
Actively Manage Published Content

Work Group

All Lawyers

Author documents, Articles & Suggest Useful Content
Submit Documents & Content According to Guidelines

Secretary or Paralegal

Submit Documents & Content According to Guidelines

Mark Zoeckler:



DO

- Ensure clear sponsorship by executive leadership
- Involve users across corporate functions in portal development and testing (professionals and support staff)
- Think beyond what a portal can do internally – focus on collaboration opportunities with clients and partners
- Pilot initial efforts and adapt for feedback
- Invest in content management system to ensure quality, available content for portal

Don't

- Just deploy a technology – ensure business integration
- Overlook communication, training and support
- Deploy a “read only” information portal – fully integrate applications and allow full connectivity to back-end systems



Other Considerations

- Have I consulted others who have more experience?
- Have I looked at the issue from a number of angles?
- Have I considered an analogous case to see if it offers a fresh perspective?
- Have I shared my thinking with someone else?
- Have I considered the impact of my decision or recommendation?
- Have I supported my colleagues when they have turned to me for help?