

Questions & Answers

Advance Knowledge



Information and Knowledge Portals – A Practical View

June 2, 2004



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Questions we did not have time to answer during the webinar:

Q: Does web content management have a role in a law firm's knowledge management and how does this relate to portals?

Margaret Grothenthaler

Yes. The Content Management System (CMS) has to be integrated with the KM initiatives, particularly the taxonomy. Information is being published to our portal by category and we want to enhance that by allowing further personalization by deeper categories. Information or knowledge products can live in different parts of the portal and we need the CMS to facilitate publication.

The categorization aspect, which is essential to efficiencies in publication, is clearly a KM function. While we have a homegrown CMS that is serviceable, we find that we now need something much more sophisticated to make the personalization and the pushing out of information work better.

Mark Zoeckler

Web Content Management ("WCM") is a critical aspect of portal deployment. Without effective WCM, a portal deployment can:

1. Significantly increase the manual overhead of generating, reviewing and publishing content;
 2. Increase the risk of "stale" or poor quality content;
 3. Increase content maintenance costs and as a result significantly degrade the cost-effectiveness and business impact of a portal.
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Q: Often portals are developed and KM teams have the attitude 'build it and they will come'. What are the panelists' views on building support solutions that focus on participant interaction rather than solely delivery?

Margaret Grotthenthaler

I think one needs a bit of both approaches. Initially our portal was based on a build it and they will come approach, but still a relatively strategic one and we used focus groups. That approach gets users thinking about the possibilities.

Now the initiatives really have to come and are coming from the lawyers. But we have to keep in mind that most lawyers have no idea about what the capabilities of the technologies are; they both over and under estimate it. So they need direction and they need to see it with their own eyes to some extent before you'll get feedback and input and interest.

Mark Zoeckler

Involving end-users in the up front organization and design of a portal is essential to ensure that the end result is something that reflects users needs and is integrated with essential business processes.

The use of focus groups, user adoption scenarios and user testing is important to ensure that a full range of business requirements and user needs are taken into account.



Q: Can you explain how you encourage contributions to the knowledge bank?

Margaret Grotthenthaler

- We have KM on the agenda of each practice group meeting and we constantly request information in that forum. Often we will focus on a particular item that we want to collect to make the task bite-sized. Most practice groups have a lawyer (often a partner or very senior associate) who is given KM responsibility in the group. Some have a paralegal that also keeps their information up to date.
- We have some practice support lawyers who work with one or two lawyers in the practice group to collect and organize materials
- We troll the DM system and we have a special document type for research memos and reasoned opinions (although that is not used too often). We're going to add a simple button to the document profile form where the creator can indicate if the document is a potential contribution to the knowledge repository.
- We highlight new contributions that we think are particularly good on the home page of our portal and mention the contributor's name.
- We try to harass (nicely) the lawyers that we know have the good materials.

Jamie Booth

The firm's knowledge bank strategy has evolved informally at the Practice Group level (the firm's broadest organization units spanning Business, Litigation and Regulatory disciplines), at the team level within individual Practice Groups or coalesced around areas of expertise or interest. As a result, contributions are variable in terms of quantity and quality based upon levels of leadership among the groups.

Over the last two years, the Library Services team within IT, in conjunction with four Practice Consultants, have been tasked with increasing momentum via a variety of formal and informal outreach programs and focus sessions. As a result, interest has grown significantly and the number of knowledge banks AKA communities under construction or in deployment have grown significantly.

Mark Zoeckler

At PwC, knowledge sharing is a strongly encouraged activity for all members of the firm. It is recognized via performance evaluations, peer recognition and other metrics.

In addition, many engagements have dedicated Knowledge Brokers who are responsible both for the identification and contribution of relevant knowledge, as well as training and awareness around knowledge systems.

Q: How is content publishing and formatting handled at your firms? Can anyone publish or is publishing limited to a select group?



Margaret Grotthenthaler

Publishing to the legal repositories is handled by specific people. At this point our system is just too difficult for anyone untrained to use. Even as we move to a simpler system there will be a level of review and categorization before something is put into the repository, although we will include just about any legal memorandum without much review.

Publishing to our intranet is managed by our CMS, but we give many different people rights to publish onto the site. Probably well over 100 people have edit rights. Announcements to the home page go through our web editor.

Jamie Booth

Publication rights to a specific knowledge base (or community taxonomy as we tend to refer to it), are defined by the sponsor or sponsoring group. Depending upon content type and location, a combination of resources ranging from the Library Services team, Practice Consultants (acting as a content specialist for the community), member of the sponsoring group or, if the content resides in the document management system, an automated process, combine to identify and surface content.

Mark Zoeckler

Knowledge managers and selected subject matter experts are generally the individuals involved in the review and approval of published knowledge content.

Often other individuals, depending on the nature of the content are involved in the review and quality assurance process, but final publishing is generally handled by a somewhat limited number of people.

Q: Concerning taxonomy development: How difficult has it been to develop and maintain a unified taxonomy vs. a fragmented approach driven by individual groups or practice areas?

Margaret Grotthenthaler

So far it has not been that hard because only one or two people are managing it at the moment and working on developing it.

We need to constantly work with the practice groups to keep the taxonomy up to date and to make sure it syncs with those used in other groups.

It's difficult to work with Marketing professionals who want a matter type taxonomy for a different function than the lawyers do, but you just have to keep explaining to each group what the needs of the other are and come up with a compromise.

Jamie Booth

As the most critical 'infrastructure' component, constructing a well conceived and useful law practice taxonomy has received the least amount of focused attention. There are several reasons for this.

- First and foremost, taxonomies are difficult both conceptually and practically to architect and implement effectively.
- Secondly, by definition, taxonomy development requires a collaborative effort comprised of insightful practioners, technologists and resources (internal or external) skilled in uncovering, or perhaps even 'divining' whatever passes for the 'right' organizing principles.

Experience and best practice would indicate that approaching from the bottom up first, in order to ensure that topics and categories reflect real-world processes important to each community or workgroup, and then placed within a broad framework might yield the best result. There seems to be ample evidence that attempting to build a detailed taxonomy from the top down has not been all that successful.

Mark Zoeckler

In a large and complex global firm, taxonomy development can be quite a daunting task. In such a scenario, it is important to involve separate business units in a distributed effort, but ensure a consistent approach and method for documenting and communicating taxonomies and related data architectures. \

In a smaller, more controlled environment, a central approach may work, but it is still essential to involve key business leaders or representatives to ensure linkage to key business issues and functions.



Q: What is your opinion of the trend towards matter centricity? Is this another fad? Can portals deliver in this area? Will lawyers see matter centric access to information, knowledge and workflow a useful thing to do? Can you change the way they are used to working now?

Margaret Grotthenthaler

I don't think matter centricity is a fad.

It allows the aggregation of information that can be helpful in certain stages of managing a file. The document management part of the file could be managed through the DM system using folders etc. so you don't really need a matter centric part of the portal for that alone. However, if you want to add some other useful things to that feature, like up to date accounting information – e.g., the Work In Progress (WIP) on the file and status of receivables - or a team contact sheet generated from InterAction, or some task management - it helps to create a website for the transaction.

I also think that developers need to understand that matter or client centricity is not the only perspective on categorization, organization or aggregation that would be helpful to lawyers. Pages for types of matters, hot topics, could also use the same techniques. So there is a need to provide for flexibility.



Jamie Booth

In my view, the meta data and content of all types generated from work processes we group within the concept of 'matter-centricity' is absolutely critical to long term and robust knowledge-leveraging strategies.

These work processes are the 'factories', if you will, that produce not only content but also at least some of the context (via meta data) that is vital, fashioning this 'raw material' into shared and applied knowledge.

To not develop the technology, information and knowledge frameworks around these core business processes of the firm would seem to miss the mark in a fairly dramatic way. Is matter centricity a fad? To the contrary, it is a fundamental step forward.

Q: How do you deal with the ubiquity and dominance of the email client, be it Outlook or GroupWise? Shouldn't the email and PIM (personal information manager) client somehow become the portal?

Margaret Grotthenthaler

To a certain extent – we can use the email client for document organization quite easily and to access the portal or certain parts of it or discussion groups, etc.

However, the email client does not have the real estate to be useful as a workspace. Also, the aggregation from other applications like InterAction and the accounting system isn't possible. Or pushing related information – e.g., if I create a client matter page on a specific type of transaction, having a link to the last 10 transactions of that type or the last 10 matters for that client appear on the page would add value and I can't see that type of feature being incorporated into the email client in any useable way.

Jamie Booth

Tools for building a house aren't the same as those used in developing the design or managing the project.

Each has its role in the process of achieving the desired outcome. Lawyers frequently work in their e-mail system but so do they in their word processor. Word processors obviously are not portal candidates.

Similarly, PIM's or e-mail systems aren't either. Neither are platforms that can deliver on the strategic potential represented by portal technologies. However, the content created with or housed by these tools, as part of a business process i.e., communicating with the client, authoring content, etc., are important sources of matter-centric, and ultimately, portal content.

Mark Zoeckler

At PwC, integration of email and calendar functionality in the portal is an option provided to the user. Currently, most portal technologies are somewhat cumbersome in their integration of email and calendaring functionality. At our firm, while the user is encouraged to make the portal their main "desktop" application, quite often they still use the individual email client separately.



Q: Once the portal is built, who owns it? Who maintains it? If a portal's real value is in information management, doesn't that mean lawyers, librarians, or knowledge managers should be in charge of the portal?

Margaret Grotthenthaler

In terms of the lawyer work functions or legal repository aspects of the portal then there must be distributed ownership among all KM professionals, such as the librarians and the KM team. In our firm we have our KM lawyers, research infobase managers, firm writers (i.e. lawyers who write practice notes, marketing materials) and more and more often practicing lawyers (quite senior ones) with KM responsibility for their practice group taking responsibility for developing and maintaining the portal.

Jamie Booth

Since I'm fond of analogies ... we all own, or lease as the case may be, an automobile. To acquire one we go through a process where requirements are defined (handling, cargo capacity, fuel economy, etc.), prototypes developed (select candidate models), a proof of concept executed (test drive), and finally, a purchase is made (implementation). Most of us 'own' the outcome of this process (satisfaction with the selected model) and are responsible for the ensuring the ongoing quality of the experience (basic up keep).

Fundamental maintenance and support (scheduled maintenance and repairs) are typically left to specialists i.e., mechanics. So it should be with the portal. Those that benefit from using properly contextualized and organized content have to take ownership of processes and best practices endemic to authoring it, organizing it and maintaining it.

Technologists own the technology infrastructure and the proper development of the technical components of the overall solution. Practitioners, as knowledge workers, and their knowledge support resources (librarians, PSL's and others) must accept ownership of the content in order to guide it's transformation into actionable knowledge assets.

Mark Zoeckler

At our firm, Portal deployment and management falls under the responsibility of a firm-wide knowledge management group that handles all aspects of requirements gathering, information architecture development, content management, as well as communications and training. All of the infrastructure and technical elements of the portal are managed by a shared services technology organization.

Questions for Jamie Booth:

Q: What sort of external content are you referring to in your presentation?

Jamie Booth

The firm's portal aggregates news feeds from LexisNexis for top client news, prospective client news, H&W news, competitor news, and topical news (IP, Antitrust, risk management, legal technology). Topical news often surfaces inside specific portal communities. Other information feeds from BNA provide practice-specific content (antitrust, patent, environmental, tax, labor, commerce & law, product safety & liability, securities regulation & law, toxic law).

Outside of LexisNexis, supplemental news sources include Corporate Counsel.net, Factiva and MoreOver. Most of these resources can be browsed or subscribed to (receive via e-mail) as a service enabled by the portal framework. Access to external resources like Lexis, Westlaw and other law practice research services are also provided through links and portlets (gadgets).



Q: What products are you looking at for enterprise search?

Jamie Booth

There's been significant discussion among firms regarding the merits of proprietary knowledge management services like West KM and Lexis Total Search versus an emerging category of technologies known as Enterprise Search.

Products from InXight (www.inxight.com), Google perhaps, Hummingbird (EIP with the underlying Knowledge Server based upon Fulcrum technologies), and Recommend MindServer (www.recommind.com) are a few examples. Recently, the technologies from Recommend and Inxight have captured most of our interest.

Q: How do you distinguish between find and search?

Jamie Booth

My view is that most search engines based upon text string and Boolean techniques have not met the need for finding content across the firm. These technologies, as a knowledge management enabling technology, do not seem to scale well across multiple or individual large repositories of documents. Newer technologies have combined search engines based upon semantic or other linguistic statistical techniques and entity extraction techniques with the ability to index repositories that matter most to firms i.e., structured document management systems, unstructured content, electronic mail and other SQL-based systems.

The value proposition being that with less brute force (i.e., structured taxonomies and ongoing vetting processes, etc.) these technologies surface

more relevant content to practitioners with less effort and hence less cost to the firm. This is not to say that additional value doesn't accrue from process and taxonomy development. However, these technologies may well lower these barriers to entry by reducing the time and costs required to identify, organize and add context to the law practice content.

In short, the promise of these technologies is to enable lawyers to find, rather than search, content more accurately, and with less organizational overhead, than their text string and Boolean-dependent predecessors.

Questions for Margaret Grothenthaler:

Q: Taxonomy -- what specifically are you doing to create a taxonomy and what drove the decision to put energy into building a taxonomy versus simply using an excellent search engine?



**Margaret
Grothenthaler**

We have worked and are continuing to work with our practice groups and different departments, such as marketing, to develop Legal Topic, Industry, Matter Type, Practice Group, Expertise and other taxonomies of both categories and keywords.

We are working with ii3 to develop a system for maintaining a formal taxonomy and applying it to information in our legal repositories, such as memoranda, precedents, seminar and marketing materials, etc.

We feel we need the taxonomy for a lot of different reasons. It's not just about search, it's about publishing information and pushing it out by email or to different parts of the portal or to extranets in a personalized way. We need to do that by category and for that we need the taxonomy.

Also, we now get back so many hits in a search of our legal memo bank that we need some system to refine searches or at least categorize the results. Legal terms can be used and used often in a memorandum without the memo actually being about that topic. For example, searching for "abuse" in the competition area is different than in the family law area, but the term competition might never appear in a memorandum on the subject of abuse of market share.
