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LEGAL INDUSTRY KNOW-HOW CASE STUDY

Creating vision within a solution

Client Profile:
A large international law firm, founded in early 1900's, specialising in all areas of business law. Its legal teams consist of over 600 specialised lawyers based in Europe, the Americas and Africa.

Driver:
Documents are amongst the main assets of a law firm. The knowledge contained within them helps generate revenues for any firm. In this case the firm felt that they needed to enhance their know-how system and make it more useful and accessible to all its users worldwide. More importantly, it had to ensure that offices without up-to-date technology and training would still be able to access and use it.

Challenges:

- *Determine what knowledge pockets existed within the firm and who controlled them*
- *Understand how the users worked and what would be the most effective Taxonomy to adopt*
- *Define an effective know how process that would be adopted by its users quickly*

" Any effective Know How System has to be simple to understand and simple to use, otherwise it defeats the whole process."

Building the perfect Taxonomy though not impossible is extremely laborious and time consuming. Building perfect taxonomy would require years to be developed and perfected. However by the time it is completed and documented it, the user perspective, corporate standpoint and statutory position would have changed.

The major challenge was not a technological one, but rather a one of change management with a clearly defined strategy. The only tools used were simply pencil and paper. The program was initiated the previous year. The Knowledge Officer had to gain a clear understanding of the firms competences and , individual fee-earners requirements and working processes and based on that, create a team of individuals whose only function was to be fully informed of the ongoing activities both inside and outside the firm.

Solutions:

From the outset it was determined that there would be two areas of knowledge that would need to be captured: internal know-how to include precedents, boiler templates and practice specific documents; and external knowledge that would be obtained from journals, libraries, catalogues, legal web sites and legal engines. Having understood this, it was obvious that most of the know-how would be in some form of a document and therefore the required link into the internal document management system became an achievable requirement.

The next stage was to determine how the information would reach the know-how system. Two main streams were again identified: submission and gathering. The latter would be easy to obtain, however the former required overcoming perceived cultural barriers and a willingness to share. When a user created a document, a trigger would be activated informing the Know-How team of the existence of the document who would then be able to review it. The incentive of reward and recognition for peers, helped to promote the submission process. In the gathering option, when a new document was created it would activate a trigger informing the PSL in the appropriate practice of the document existence, the PSL would then review the document to see if it was worthy of inclusion within the Know-How System.

As knowledge was generated and used in logical vertical stovepipes within the firm, the taxonomy had to be able to reflect this by having nodes per practice and further nodes per expertise. This allowed a user to drill for required knowledge and know where to find it. The close relationship between certain fields of expertise made it possible to have the same document existing in multiple nodes. The firm was able to use their existing document management with some customisation; however, the project proved that extensive research was required to understand the existing knowledge before attempting to manage it.

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