

knowledge management

tying the
organization
together



JUNE | 12
DIGITAL
WHITE PAPER

i/+^

SharePoint's Pivotal Role in Successful KM

by Erik B. Goltzer of
Bradley Arant Boult Cummings LLP



Erik B. Goltzer is the Chief Information Officer at Bradley Arant Boult Cummings LLP. Previously, Erik was the chief information officer for Miller Johnson from 2004 to 2012, where he led numerous innovative initiatives that positively impacted revenues and increased client satisfaction. Erik has been recognized by CIO Magazine with a CIO100 award and by Computerworld Magazine with a Premier 100 IT Leader Award. He can be reached at egoltzer@babc.com.

Law firms have a wealth of intellectual and relational knowledge embedded in data systems that can be leveraged to drive efficiency and ultimately revenue. Many law firms practice knowledge management with stunning results and some with utter failure. But many firms are somewhere in the middle, without a clear measure of success across the practices.

Knowledge management has grown far beyond the precedent systems of the past, which archived “model” content as a reference point for future similar documents. These early systems required a lot of review of content, and many attorneys perceived

them as unwieldy and unsustainable. This has had an adverse effect on modern knowledge management efforts for many firms; however, there are a handful of firms making huge strides in modern knowledge management efforts, which is driving their revenue and giving them a strong competitive advantage. Nearly all of these modern success stories see SharePoint playing a pivotal role.

SharePoint Has Penetrated Legal

SharePoint is a collection of technologies that allows organizations to create, present and distribute content and data. These are key definitional elements of knowledge management. There are firms that have successfully integrated SharePoint into their legal-specific

applications. This SharePoint integration has given them the ability to put their content into powerful, meaningful context via business intelligence routines that leverage data from a variety of sources. SharePoint can be modeled to fit your firm's taxonomy and provide rich integration to your organizational model. The platform supports many of the core elements of knowledge management and provides the foundational toolkit that can be leveraged as the superstructure for a modern and advanced knowledge management platform.

As I conduct presentations on SharePoint, I poll attendees on their use of it. Most firms are utilizing it to provide their extranet, intranet or both. A smaller percentage are using it for some type of critical practice management solution or perhaps a key administrative

process, such as client and matter intake. This indicates to me that SharePoint has fully entrenched itself as a key firmwide application within law firms. ILTA's e-groups are filled with SharePoint questions, solutions and ideas, further supporting this point.

Advantages of SharePoint

SharePoint offers a free version — SharePoint Foundation. As your needs grow, you can upgrade to various versions, each of which expands your capability. Almost all firms use MS SQL databases, and that translates into nominal startup costs. If your server infrastructure is virtualized, you don't even need to buy any hardware. This means that for a reasonable (if any) startup cost, you can begin to experiment on solutions. This is a distinct advantage over traditional legal industry solutions.

SharePoint has an extremely large knowledge community that often shares solutions, code and ideas for free. There are tens of thousands of user communities, blogs and boards for you to review, ask for help and expand your knowledge base. Often there are dozens of SharePoint user groups in your own local community; this is again a distinct advantage over traditional legal industry solutions.

A Vertical Problem

More than likely, you have seen within your organization the problems that are created when vertical solutions do not play well together. This has been a curse on our profession for many years now.

Legal industry technology solutions tend to be designed to meet a specific need and typically do not integrate horizontally. Need an accounting system? Pick one of a very few. Need a document management or CRM system? Again, pick one of a few. Our industry has deep vertical solutions; however, we are often left with a patchwork quilt of verticals that do not integrate.

The very few times you manage to actually get applications to work in perfect alignment, patch Tuesday rolls around and something goes awry. We all know

how frustrating this can be. Some firms have addressed this with broad and deep purchases of data warehouse solutions. Such solutions often promise content and data nirvana, but leave you in project management purgatory with never-ending scope creep.

Where To Start

With commitment and a bit of sweat, there are many ways to expose your vertical solutions. You can create integration points into your key systems, such as accounting, document management, records and docket, CRM and practice management solutions. You can then leverage SharePoint's workflow and data presentation capabilities to expose and route content in a much more meaningful fashion. Client- and matter-centric views become much more powerful when you can expose more than just email and document content. With SharePoint, one click allows you to expose client- or matter-centric views detailing document and email content plus billing information, accounts receivable, records, critical date information and who-knows-who data. This explodes the typical "content only" model.

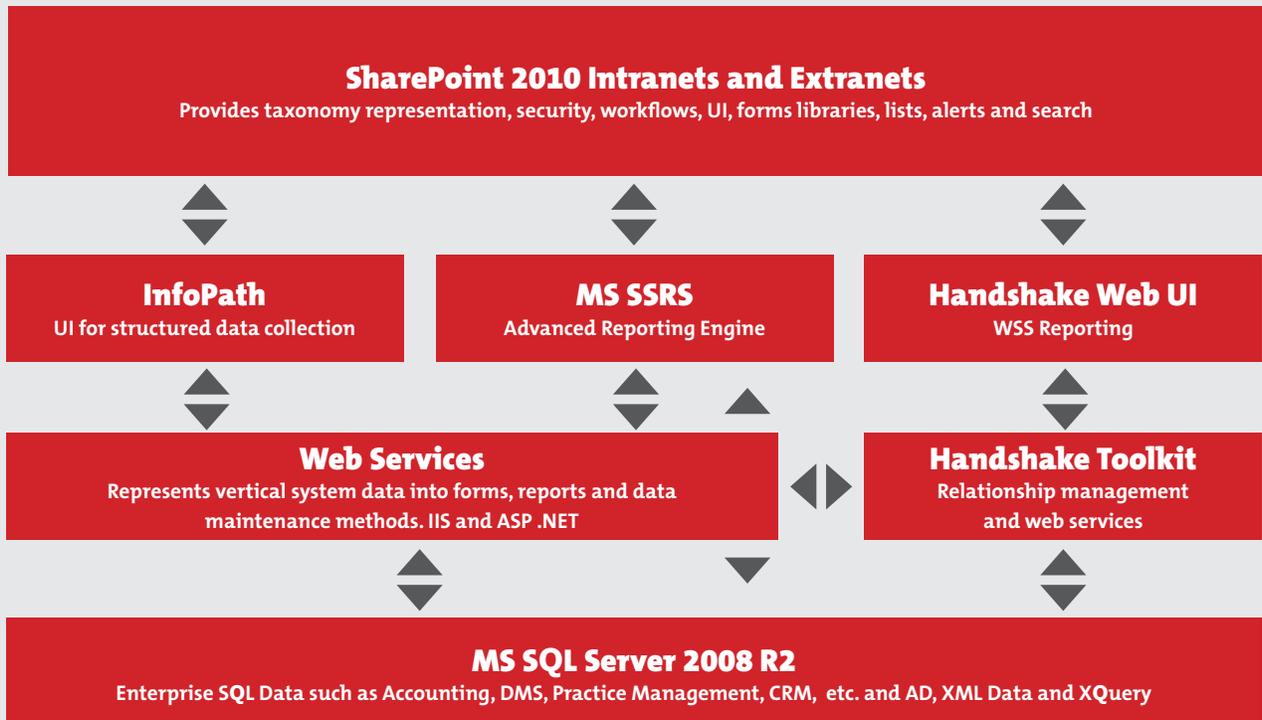
As powerful an example as this is, creating these integration points is not yet knowledge management.

A SharePoint Methodology into KM

Last year I was recognized with a 2011 CIO 100 Award for my former firm's SharePoint deployment. They used the following model — it serves as a good example of how SharePoint can be leveraged as the tool to aggregate and represent a wide variety of typically disparate firm content.

This model shows how you can connect the dots on a wealth of critical data and present that information to your attorneys in a meaningful context based on the project/matter tasks they are working on. Now you have the platform elements you need, plus the integration into your legal verticals, to develop a robust knowledge management platform and much more.

SharePoint Content and Data Aggregation Model



With such a solution, you can consume content into a variety of Web parts that lend context based on how those parts are displayed and the data they represent. Again, given the substantial community of SharePoint resources available on the Web and within your local community, you have many more options to drive integration and creativity than typically available for our industry.

A SharePoint Success Story

My previous firm struggled for years with burgeoning email systems, varying retention policies and the lack of a comprehensive solution for storing, retrieving and leveraging email content in support of a client/matter.

I came to the conclusion many years ago that in order to help my firm move beyond a technology department that focused on infrastructure and application patching,

there had to be a way to create a new knowledge management paradigm. We needed a platform that would allow us to be in control and sufficiently integrate into verticals to create a broad horizontal solution. The platform could be leveraged for practice and administrative solutions and emerge over time into knowledge management processes that matched our organizational model. The platform had to be nimble, sustainable and allow for a quick launch that could be consumed by the firm and our clients quickly. SharePoint 2010 was that platform.

The firm used SharePoint for several years before deciding that we needed a solution that would provide attorneys a method of profiling and retrieving content that mirrored Outlook — mainly drag-and-drop and navigating into folders. This solution would also have to ensure content was tagged with a diverse amount of

metadata to facilitate the profiling and retrieval functions. The implementation of a system that could address all of these concerns was completed in Q2 of 2011.

This solution was an industry first — deploying a SharePoint-based full lifecycle email management solution leveraging Handshake Software’s Email Management Director (EMD) and the firm’s SharePoint-enabled content pipeline. With this solution in place, users are now empowered with a feature-rich system that enables seamless profiling of content into SharePoint with attorney-friendly, drag-and-drop folders, the retrieval of content by the firm’s matter-centric views and an enhanced point-and-click client-/matter-centric portal embedded within Outlook. This solution also includes a custom import of all users’ existing email folder structures from Exchange 2003 into SharePoint.

This new approach to dealing with email “in line” with other critical matter content and information has been very well received. Because the firm was familiar with SharePoint from their previous years of use, requests for improvement were turned around rapidly, which is virtually impossible with traditional legal industry content management solutions.

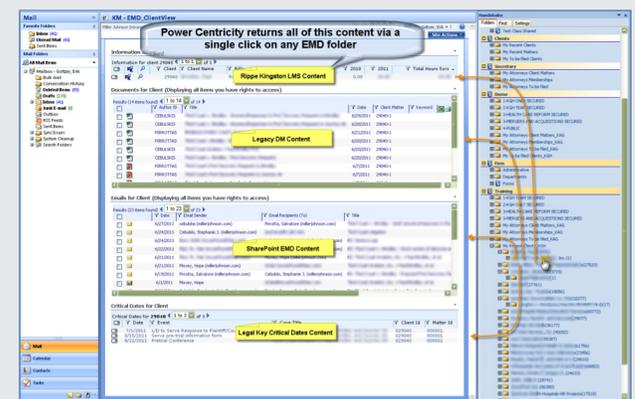
Project Facts

- The project took 1.5 years for development and planning.
- 210 users were converted in two months.
- We imported 7.1 million content items (4.5 million email messages with 2.6 million attachments) from Exchange 2003 to SharePoint — over 450GB of email.
- SharePoint aggregated 24,000+ clients and 100,000+ matters into client-/matter- centric views.
- A 180-day uniform retention policy was implemented for all firm personnel, reducing the Exchange store from 450GB to 75GB.

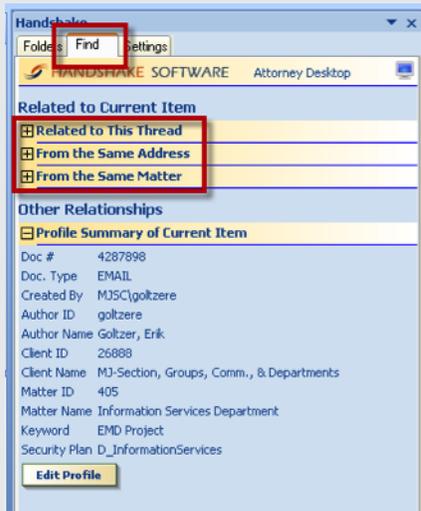
The Benefits

- The solution saves time and frustration. Users do not have to jump between numerous applications to find email messages, documents, docket, records or accounting information.
- The design includes a user-friendly archive of Exchange 2003 imported email that mirrors the folder structure of the user’s traditional Outlook folders.
- Email content can easily be tagged at the folder level with a client and matter number, and shared with other individuals or groups. Once tagged with a client/matter number, these folders respond to client/matter search queries from anywhere within SharePoint. Within six months, attorneys rarely looked at their archive anymore, as those email messages were returned via a simple mouse click.
- Attorneys see only their clients and matters. Secretaries see only their timekeepers with separate views for each timekeeper’s clients and matters.
- Metadata automatically gets assigned to data added to structured smart folders.

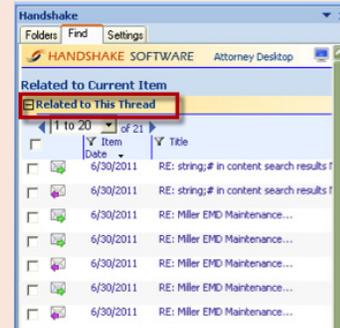
- Items stored within SharePoint are easily retrieved at the client/matter level via a single click on a smart folder.



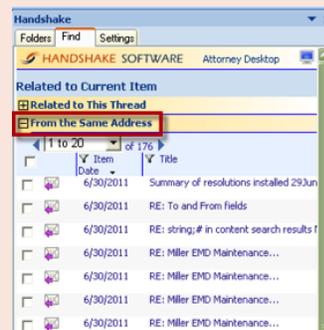
- A simple in-line search allows attorneys to find content without the need to launch the full content search tool. It also leverages a wealth of metadata and native Outlook email properties.



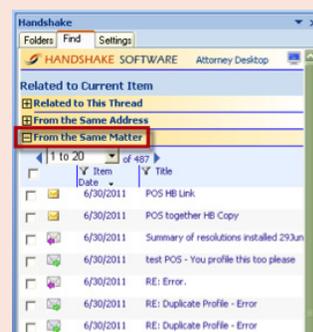
There are a variety of ways to find email messages related to the one selected in your Inbox. Here are just a few examples:



SharePoint dynamically consumes selected email thread IDs and returns email messages specific to the thread.



SharePoint dynamically consumes the sender's email address and returns email messages from the same sender.



If the email message has been profiled, SharePoint returns content profiled to that client and matter.

Advocates for SharePoint

Developing a sophisticated KM system with SharePoint will take time, you will have to involve key leaders and raise a variety of data quality issues. However, given the fact that many of the ingredients for such a system exist at most firms, there is a compelling argument to be made that SharePoint is a viable platform to leverage. I know I will be advocating for such solutions with my new firm. Will you? 