

Briefing

THE NEW KNOWLEDGE

JULY 2013

Interview

Lucy Dillon

BLP's knowledge chief on knowledge sharing, process, projects and more

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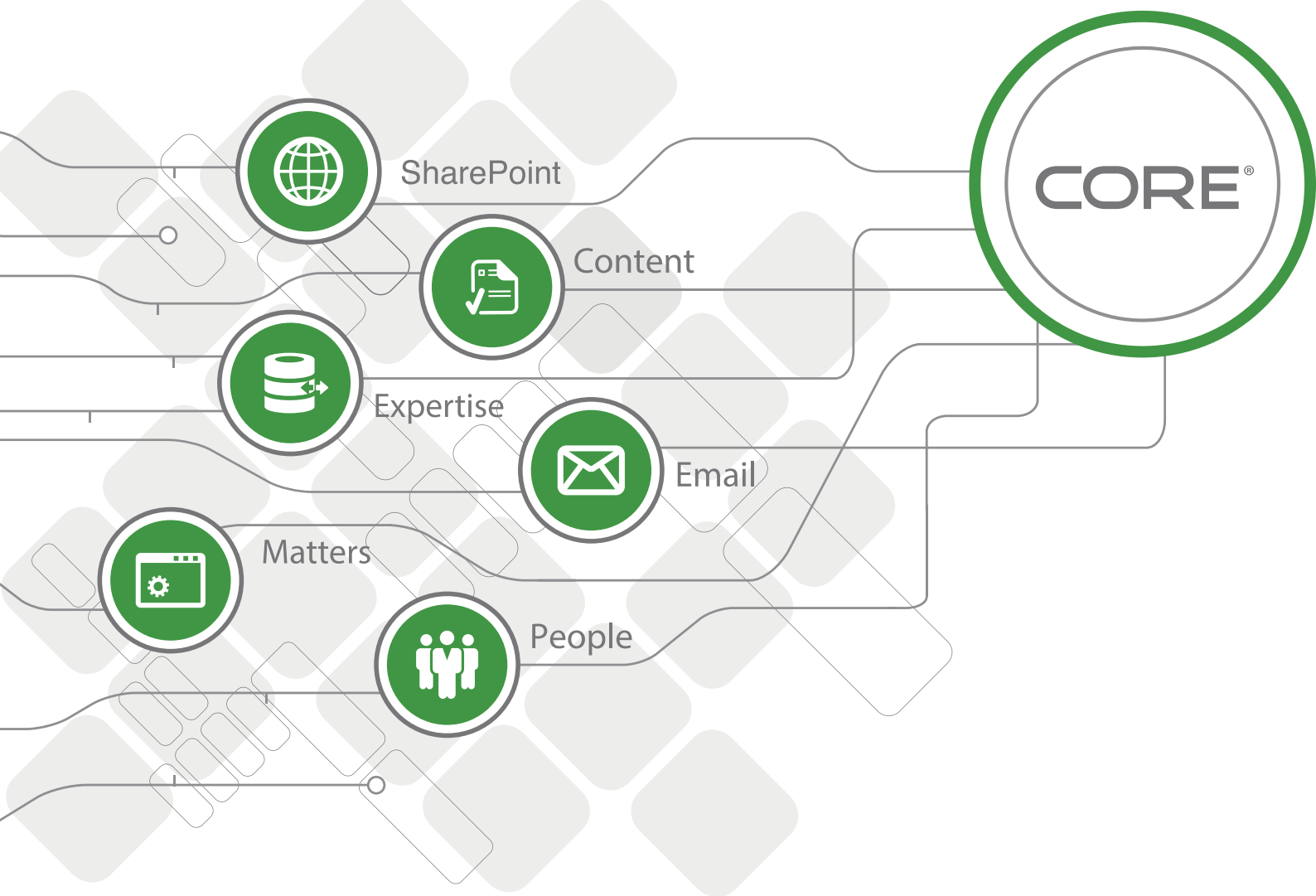
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Law firms produce and trade in information. Some of that information is paid for, some of it – a rapidly increasing amount – is not. That's why the knowledge function is at the very heart

of legal, and why it can also lead firms into a more process-led, client-connected world – because it sees the information that connects and underlies the business of law.

And so, this month we interview **Lucy Dillon, KM chief at BLP**, about project management, knowledge sharing, matter management, workflow, innovation, process management and why knowledge will always have enormous value in legal. We love Lucy.

We also have a sweeping feature article interviewing KM leaders from **Addleshaw Goddard, Herbert Smith Freehills, Linklaters, Pinsent Masons, Reed Smith, Simmons & Simmons** and **White & Case**.

And we have insightful industry comment into the future of information in law firms from issue sponsor **Recommind** and others.

I hope you enjoy this issue – and feel free to email me with your thoughts on it at rupertw@lsn.co.uk.

Rupert White, editor of Briefing

Interview: **Lucy Dillon, KM chief, BLP**



Berwin Leighton Paisner's KM guru on the evolution of information management and knowledge

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Feature: **Knowing me, knowing you**



How is knowledge driving growth? We ask KM heads about project management, collaboration, pricing and more

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Survey: **Where now for knowledge?**



We quiz the top knowledge chiefs on whether KM needs a much broader scope to be valuable in tomorrow's firms

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Industry analysis index

This month's industry views:

Briefing talks to Simon Price at issue sponsor **Recommind** about how the evolution of search has led his company to a new world of knowledge management based on the physics of social networking; and **Solcara** outlines when KM doesn't work, and why its future is creating the wish for more collaboration among users.

This month's interview with **Lucy Dillon at Berwin Leighton Paisner** was transcribed by:



Photography of Lucy Dillon: Jonathan Goldberg

Briefing Industry Interview

What if search was more like Facebook? It will be...



Briefing talks to **Simon Price at Recommind** about how pre-emptive information flows will change the way law firms work

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Towards a collaborative future



Rob Martin at Solcara outlines what KM often is, what it could be, and how to achieve an effective legal knowledge solution

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The Briefing Interview

Where knowledge goes next

Project management, knowledge sharing, matter management, workflow, innovation, process management and much more – this is the world of tomorrow's knowledge leader (just don't mention the 'management' word). Rupert White talks about creating more valuable internal and external conversations with Lucy Dillon, head of KM at Berwin Leighton Paisner



What do tomorrow's firms look like? Law firms are document factories, or rather they always have been. But what will that make them as their black boxes open up, as they spend ever more time on client value adds, communication with the outside world and other pursuits? Does it make law firms more like content businesses? If so, who will manage, distribute and enable the sharing of that content? And can those people become something broader in the process?

Bring on the new knowledge managers – or rather, the knowledge people. Knowledge management is a cumbersome concept, implying knowledge can, in fact, be managed, and that corralling knowledge is the job of one kind of person. This view is changing, fast – doing more with knowledge, really a facet of leveraging knowledge sharing within the business, is everyone's job, especially in law.

So, the KM game has changed. How much you know about a client's needs, their work, their clients, how you're running their matters, whether their matters are run as efficiently as possible, how the processes behind the legal work are running, and how to ensure work is project managed and profitable ... these and more are the new hunting ground of the KM person. All those elements revolve around information flow and knowledge sharing in some way, and the processes and value chains to which they relate will be vital to tomorrow's firms in creating more loyalty, more value and more business.

Lucy Dillon, head of knowledge management at Berwin Leighton Paisner, is one

of those who have to take KM on this journey..

As a quarter-billion-pound legal business poised at number 15 in the Lawyer's top 200, BLP is at a point in the table where its future lies in expansion, creation of value and differentiation. Like almost every firm around it in the table (Eversheds, Ashurst, Simmons,



Pinsents, Bird & Bird) it managed a small revenue hike in 2011-12 (only Clyde & Co managed much better with revenues up £35m in that period), but at least it was better than most of its near competition. But BLP and its kin have to come up with much better ways of working to brush off the cold hand of fate.

That is, in part, going to fall to people like Dillon. Her team now plays a vital role in the firm: they play a key part institutionalising the client relationships, as Amanda Burton, COO at Clifford Chance and last issue's interviewee, might put it. Dillon and the BLP

KM team serve up value-added goodness in the shape of non-chargeable legal knowledge and information that's driving the client engagement, trust and – here's the key word for this interview – conversations that bind clients to a firm.

BLP has invested in international offices and pricey magic circle names in recent years, and it's created 'sidebar' businesses and new offers to clients.

It's also rested success partly in the lap of technology (its IT director for many years, Janet Day, is one of the most respected and listened-to legal IT leaders). These are drivers for the firm to find success in competitiveness, so Dillon's mission (when she's not ensuring the basics of KM) is to drive up efficiency and deliver more value.

But does all this talk of value, project management, efficiency and client engagement mean the role of the KM person is effectively over? In five years' time will KM be fundamentally something different? Will it even exist as a discrete area? Dillon says that though the basics of knowledge management (a term she dislikes, she says) have in some ways become commoditised – outsourceable, democratised across the firm – the knowledge person will become more important as time goes on, because they will be the ones tying together the increasingly complex web of knowledge sharing tools and work processes across the business.

"KM will be different, but one of the joys of KM is that it is constantly evolving," says Dillon. "When I started out it was about drafting standard form documents. Now

I'm running a team that's talking to clients, doing process mapping, project management, document automation and working with IT. We can weave ourselves into any area of the business. With matter management, we're working with finance and looking at profitability – [we're embedded in the business]. The vast majority of the answers to

"When I started out it was about drafting standard documents. Now I'm running a team that's talking to clients, doing process mapping, project management, document automation and working with IT."

Lucy Dillon, head of knowledge management,
Berwin Leighton Paisner

process improvement have their solutions in KM. Whether it's about having a checklist or how to work smarter, it's all about leveraging knowledge better.

"I think we will become much more embedded with finance and helping them and helping the firm to price better. I'm really excited about that. The issue is that we keep expanding to take on more exciting things, but I'm not given an unlimited budget, so it's about how you use resources in a better way (by outsourcing some basic KM content, for example) so that we can still do bread and butter KM but also focus on the forward-thinking things."

Fundamentally what KM does, she says, is R&D. But “as long as people understand what you’re doing and you’re adding value to the business and you’re adding value to client relationships, within reason, I don’t much care what I’m called”. So KM may be called something else in the future, and what knowledge pros do might be much more advanced, it’ll still be its own discipline.

Some might argue – even one or two KM people did, in fact, in our research into the top 100 KM leaders (see p14 onwards) – that KM could be dissolved into one of the bigger business services departments, such as BD or HR or finance. Dillon accepts this as a concept, but it wouldn’t kill the need for dedicated knowledge people. “KM could sit within any of those departments, but we play into all of them, which is why we need to be separate – it gives us the freedom to respond to need where it is.”

It’s not important what KM is called or where it ‘lives’, she says. “Director of knowledge would probably be better, because ‘management’ devalues it. But there are more important battles to fight.”

BLP has form on the innovation front, at least. The firm spun off its interim or ‘virtual’ lawyers service, Lawyers on Demand, into a separate company last year while maintaining an 80% stake in the business. Its Managed Legal Services arm has the potential to be an innovative attempt to reformat the relationship between a commercial firm and its clients, effectively taking over parts of in-house legal teams, delivering alternative fee structures and committing to more cost-effective resourcing of work.

In a firm that’s both trying to become the client’s in-house function and offer lawyers on an ad hoc basis, creating stickier relationships with clients and delivering much more for less

(or the same) is vital. KM people at BLP (and other business services people there) do this, says Dillon, by dishing out free information and knowledge to clients. This drives down the fear of being charged for every conversation, but it also drives up the quality of the relationship that the firm as a whole has with the client.

But it didn’t happen quite as strategically as one might have hoped. “It started really with the downturn, when there wasn’t as much transactional work around, trying to keep those relationships alive and fresh and deepening them. Relationships between my team and clients have developed and evolved, and we’ve created another link between the firm and the client, which is easy for partners to tap into when they need it. We did it because it was the right thing to do, and now it’s an important part of our client relationship.”

What’s happening at a higher level, though, is perhaps a movement towards the two ‘sides’ of a law firm finding their own identities – chargeable work, or advice, and value-added information, or ‘content’. Is this learning to see the law firm as, fundamentally, a content business rather than a document business? And if it is, might law firms be learning the lessons newspapers and other content businesses have had to learn, hard and fast, over the past 10 years: that most people will not pay for most of the information they want?

“There’s always been the debate around [whether knowledge and information, rather than legal advice] is something that clients will pay for. In some instances they will, but it’s more important to create a deeper relationship with clients. It’s content, but it’s content that’s very bespoke to the client.” Because of the client relationship, says Dillon, KM and others can create ‘content’ for clients that’s more tailored than any content provider could hope to achieve. And because this relationship is

wider and less costly for the client than the ‘client-lawyer’ relationship, it has its own value.

“Being in-house can be very lonely – you haven’t got a corridor of people you can talk to about what’s happening in your world,” says Dillon, which is partly why clients value non-chargeable knowledge and advice highly – it’s a useful conversation, not a transaction.

Whether law firms will ever be able to charge for any information that’s not legal advice is debatable, but it seems unlikely. Some publishing businesses charge for some of their content, but most (if not all) operate a dual model – some content is free; some is chargeable. The more commoditised or ‘non-core’ the content is, the less you can charge for it.

This is because information is not what law firms sell. Legal advice and delivery – the merger, the successful litigation, the new property – is what they sell. They sell ‘delivery’, not data. So any content or information that’s not within the sphere of advice can never be chargeable – but it can have huge value. It’s knowledge, not just information. But as Tim Berners-Lee said, “information wants to be free” – and anything that’s not paid-for legal advice has to be free.

This ‘knowledge as content’ model “will create a stronger relationship, which will mean the client will think of us more often and it may well directly produce work”, says Dillon. What it’s doing is creating more opportunity for the client to rely on the firm..

It’s very ‘new media age’: creating conversations, which in turn will, they hope, create more value. “That’s exactly where it is,” says Dillon. “Our IT department does the same – we help clients with their IT issues, for example. You’ve got to be strategic about where



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Lucy Dillon, head of knowledge management,
Berwin Leighton Paisner

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KM’s role is changing in other areas too. Because, one might say, its core is now widely accepted (useful forms and documents, great search, intranets, knowledge sharing, etc), KM now has to find a new home. Fortunately, the skill sets and brains in KM are singularly useful in some areas law firms desperately need to get

better at: project management, improvement, process.

“The core of what we do is about quality control, quality maintenance and quality enhancement, but we find ourselves talking to clients about getting involved in process improvement and project management and management of the legal process.

“Project management has been something that has never been done particularly well in law firms. It was not very popular when times were good. We were told: ‘clients love what I do, so why should I change?’. But at last, project management’s time has come because with pressure on fees, the only way you can deliver a decent product for a decent price for the client and [retain a] decent margin is by being more efficient, and project management plays into that. So all of a sudden, KM and project management and project efficiency are right in there – which is a delight.

“To me project management is all about communication, making sure that the people know the right thing at the right time. Technology now allows us to do some really exciting things, such as tracking work [delivery] so much better, using client portals and matter portals that will allow you to see where everybody [on the matter] is with it, what they’re doing at any point in time. We’re just in the early stages of this, but that’s going to make a massive difference.”

Thinking in terms of process and making that happen firm-wide will have a demonstrable effect on a firm’s bottom line, says Dillon. “If you project manage better, if you review your processes to make sure that the right people are doing the right work at the right level, cut out duplication, waste and so on and communicate what people are doing, it will cost the client less and you should be improving your margins. It’s a win-win situation.

The last 10 years or so in legal business have been marked by many things – recessions, mergers, failures, outsourcing, new entrants and new regulations, to name a few – but perhaps one of the most affecting, though we may not be seeing the results much yet, is the explosion in information sharing.

People share things now, because it’s useful. They share knowledge and understanding (and pictures of cats) in their personal lives, and they want to do it at work. Sharing knowledge and understanding within a firm makes people more connected, but it’s not as easy to make this happen in the workplace as it is to get your cat photos shared on Facebook.

“We will get there, but it’s not a simple process,” says Dillon. “You can put things [like wikis, blog and so on] out there but people have to have a need to use them. It has to solve a problem. They have to have a business issue that can be solved by going to a blog or in some other way gathering that information. Having it there for its own sake when you can pick up the phone or walk up a corridor [won’t work].”

But it will doubtless help connect together tomorrow’s more distributed, international firm – firms that have more touchpoints with clients and that need to share more information with them.

“This knowledge sharing network gives internal people the ability to get involved in a conversation – where there’s a new development or a new client and we put a blog up, and people who are remote in some way but who want to participate can get involved. Social media is an answer to the problem of knowledge sharing and it’s a tool set which I think we are beginning to see the power of – power that will only increase as people become less concerned about airing their views in public, even within the confines of the firm’s internal systems, which I think has been an



issue for some.”

But knowledge sharing in law firms might be driven more by a new version of an existing technology: video conferencing. Knowledge sharing happens best in the face-to-face environment, whether that’s on a Skype or on a video conference, or in person, says Dillon. Of course, KM people would really like people to put all their comms on blogs, wikis and so on, because it can be fully captured, she says – but it won’t happen if a path of less resistance exists.

BLP has a couple of desktop-to-desktop video trials, says Dillon, with some loving the tech and some less enamoured. But anything that drives conversation and sharing, that works, is good.

“Knowledge management is about putting people together, and if you can put people together who are in different countries or different locations by giving them better tools, so they’re looking at each other and communicating and sharing documents and so on, that is all for the good.”

In the end, we have to make knowledge sharing human. Video is more human than most online/tech interactions, so perhaps it will win out. But, Dillon says, firms will need a basket of approaches to get the best benefit. “You can’t get away from the fact that you need repositories of knowledge, you need standard form documents, and so on. It’s all part of the mix. You can share documents across a system, but if you want to bring those documents to life so that people use them, you need the interpersonal side of things. Everything feeds into each other.”

Which is why, perhaps, KM will still be with us in five years’ time – someone needs to connect the dots, join the business up, connect the workflows and map the brain of the firm. And who better than those whose business is knowledge? ●

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Feature

Knowing me, knowing you

What are knowledge people doing to help drive tomorrow's global legal expansion? How are they using project management and collaboration tools to join up increasingly distributed businesses? Joanna Goodman opens her hyperlinked, online contact book, gets a database snapshot of the best people to talk to in legal KM and uses new media to bring their words to life



It has long been recognised that a firm's unique knowledge resources – the collective skill, expertise and experience of its lawyers – as well as the effectiveness of its support systems in terms of technology, processes and people are the key to market differentiation and underpin competitive advantage.

Globalisation, market consolidation/liberalisation and a challenging economy have created new opportunities for growth, particularly for large firms with international aims. But global expansion brings some unique challenges, including providing consistent standards of service to multinational clients across multiple jurisdictions, and driving collaboration between diverse groups and teams to win and retain business – while delivering global corporates' now permanent expectation of 'more for less'.

This has expanded the remit and the role of the knowledge function. "The stars are aligning for KM in law firms", says David Halliwell, director of knowledge at Pinsent Masons, partly due to today's tough business environment. "Profit shares are being squeezed and law firm management is realising that knowledge disciplines can help to protect margins and relationships."

For Mark Gould, head of knowledge management at Addleshaw Goddard, the value of knowledge (and KM as an area) is dependent on context, on usability: rather than capturing everything, knowledge needs to be actionable and managed coherently. One of his American counterparts, Oz Benamram, chief knowledge officer at White & Case, agrees, but differentiates between 'just in time' KM – delivering knowledge at the point of need – and 'just in case' – where knowledge is captured because it may ultimately become useful. But KM that boosts client service and wins business needs to focus both on

streamlining services and delivering the right resources when and where they are required.

Making global firms work

The KM function underpins today's global expansion in legal. Herbert Smith Freehills is using KM tools to cement its 2012 merger – although the KM functions of the former firms are not yet fully aligned, a global network of PSLs and KM contacts maintain close contact with their Australian counterparts. Herbie's head of legal knowledge, Simone Pearlman, liaises with her counterpart in Australia every week, for example. Online visibility of resources is also important – all databases and knowledge resources are accessible by everyone in the firm.

Rachel Manser, global head of knowledge and information at Linklaters, observes that large firms differentiate themselves in the market by the quality of their client service – something that's underpinned by KM. Ian Rodwell, head of client know-how services there, agrees with her, but says KM's interactive role extends outside legal knowledge. "It's also about understanding clients' business and the context in which they operate," he explains. "There is also process knowledge – how to manage matters and teams – and firm knowledge, relating to how we operate globally. A global KM function is about bringing together these different realms of knowledge to drive competitive advantage."

This new(ish) world of global KM has at its heart learning from experience and sharing the outcomes across the firm, such as capturing the lessons and experiences of setting up a new office to make the process easier and more efficient next time. This links to the need for global consistency – a strategic priority for international firms, particularly in

the way that knowledge and information are accessed and presented. Global knowledge and expertise systems support a ‘one-firm’ strategy, underpinning firm-wide practices and processes and strengthening international brand.

White & Case, for example, is streamlining its document management system into three regional libraries to facilitate collaboration between offices. “Consistent processes around saving information make it easier for people to find each other’s work,” says Benamram. “We streamlined and automated our new business intake process and we are working on a collaborative intranet and extranet.”

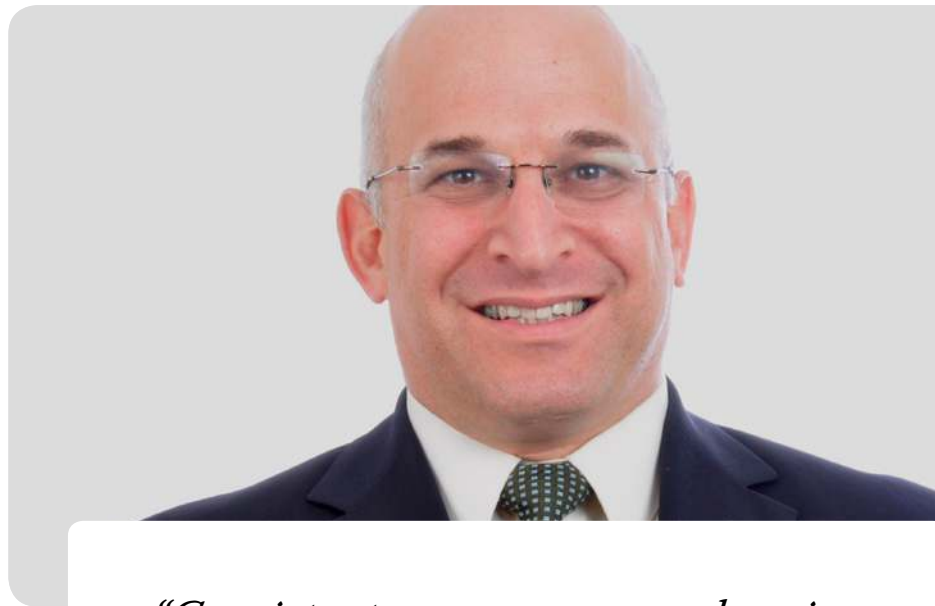
Supporting the growth of sector groups

Firms above a certain level increasingly operate sector groups, involving different offices, practices and individuals. This provides the opportunity for knowledge initiatives to become more focused on delivery of legal work, expanding KM’s role.

But a key challenge for big international firms is staying on top of developments in key sectors. At Linklaters, Manser underlines the importance of PSLs as enablers: “We have some 90 PSLs who work together to connect various practices, and get them looking at the same developments from different perspectives. Our banking and litigation lawyers, for example, might be working on

the same or similar matters.” Cross-region knowledge sharing is supported by a range of technology at the firm, including blogs and broadcasts.

Organised knowledge sharing is a critical success factor for doing business in some regions. Lesli Ligorner, a partner in Simmons &



“Consistent processes around saving information make it easier for people to find each other’s work”

Oz Benamram, chief knowledge officer,
White & Case

Simmons’ Shanghai office, advises international clients operating in China as well as Chinese clients expanding into Europe and the Middle East. She maintains regular contact with global practice and sector group colleagues.

“We have regular calls where we share leads and opportunities and discuss the impact of developments around the world on regional clients and markets. A good example is how the EU banker bonus cap will affect our clients



in Hong Kong.” KM connects skills and services at Simmons, supporting cross selling across offices, practice and sectors. International teams who work for the same global clients share knowledge, such as on IP and competition law issues affecting life sciences. Most partners at Simmons are aligned with at least one growth market group. Ligorner shares China know-how with lawyers in the South-East Asia growth market group, many of whom advise the same clients. Having shared clients and opportunities across the region, and the fact that lawyers often move between offices, supported the recent launch of a new Simmons office in Singapore.

At Pinsent Masons, the firm’s international expansion strategy is supported by four global sector groups, aided by sector-led KM. Halliwell explains that the KM function is structured around sector and client relationships, rather than legal specialisms. “PSLs tend to be aligned with client teams and sector groups, developing forward-looking business and legal intelligence around understanding the implications of forthcoming legal developments, rather than looking back at precedents.”

The client perspective

KM’s remit is increasingly driven by clients’ requirements. Corporate clients encourage collaboration between their panel firms, yet firms still compete to be first to produce legal briefings.

Gould at Addleshaw Goddard wonders why this is, given that PLC and others invest heavily in producing this type of content – in other words, why do this work yourself when it’s become effectively commoditised?

“The value from racing to produce the first update is surely less than the value from

developing good relationships with the people who actually give us work,” he says. Addleshaw Goddard is working on doing things differently: “We established our employment channel video update about 10 years ago. Another project, Torchlight, is a website focused on the financial services sector, with the intention of flagging actual and potential developments and offering guidance on the possible implications.”

Brains for hire

Secondments have long been a way for global firms to get an in-depth understanding of their clients and knowledge professionals are no exception, but they’re not necessarily fee earning associates who go. Herbies regularly places PSLs on secondments, for example. This is a win-win – the client organisation benefits from the firm’s KM expertise and the firm gains insights into client’s working practices and culture.

“Some of our biggest clients’ legal teams are as big a mid-size law firm,” adds Rodwell at Herbies. “The GC is effectively its managing partner and faces similar challenges around collaborating effectively and demonstrating value to the wider business.”

At Linklaters, KM function supports its clients with publications and training delivered via a variety of different platforms. But GCs also expect business and skills training. One way of delivering this is through reverse secondments: in-house lawyers working in the firm’s litigation department, for example.

Compliance and confidentiality are key challenges, here. Gould at Addleshaws says

that “the principles haven’t changed, but the extent to which they have to be supervised and managed has made knowledge professionals’ lives harder”.

“As firms expand, they need to become more careful about how they store and manage client information.”

This focus on information management

Compliance and confidentiality are key challenges – “the principles haven’t changed, but the extent to which they have to be supervised and managed has made knowledge professionals’ lives harder”.

Mark Gould, head of knowledge management,
Addleshaw Goddard

has been driven partially by clients, with some corporates writing specific requirements into panel agreements and auditing how firms handle their information. The challenge is to facilitate collaboration without compromising security or confidentiality. But, managed properly, this strengthens client confidence and underpins the firm’s ‘trusted adviser’ status.

Process, pricing – and value

Many large firms have embraced process re-engineering and automated processes to boost

efficiency and quality – automated document assembly and other workflows can also boost value and enhance working relationships. It's often KM that's at the core of these efforts.

Pinsent Masons, for example, has automated over 300 documents using DealBuilder document automation. Process mapping has proved highly successful, driven by the pressure on partners to perform in a challenging market. This has led to an extension of the process mapping exercise to maximise the firm's interactions with its clients – reminiscent of the way Clifford Chance is using continuous improvement to understand where client inefficiencies can be reduced, outlined in **Briefing on: Law firm strategy** (June 2013).

"We are working with clients to help them instruct us in the most efficient way, by identifying key trends and helping them improve their contracts, for example, to minimise business and legal risk," explains Halliwell. This is a primary example of leveraging client knowledge gained from process management to build a long-term 'trusted adviser' relationship.

Addleshaw Goddard is using process mapping to increase clarity and certainty around pricing, says Gould. The firm used external business analysts for a process-mapping initiative, involving legal work across its core practice and sector groups.

"External analysts challenged existing practices and identified gaps where more collateral was needed, whereas PSLs might have subconsciously filled these gaps with tacit knowledge," he explains. "Documentation and guidance reflect who's undertaking each step in a process and highlight where to make breaks in the process and when to refer matters upwards." Working practices must be aligned with clients' expectations, he stresses.

Reed Smith's KM team is closely aligned with its dedicated pricing and project

management group, which supports the firm's bids for fixed-fee work. "It's incumbent on us to find every opportunity to make our lawyers as efficient as possible," says the firm's chief knowledge officer, Tom Baldwin.

He's using technology to enhance the speed and accuracy with which certain tasks can be completed, such as Kingsley Martin's automated contract comparison tool and DealBuilder. "The idea is to identify the stages of a matter where KM tools can make our lawyers more efficient," says Baldwin, adding that fixed-fee work motivates efficiency, which in turn develops and retains business.

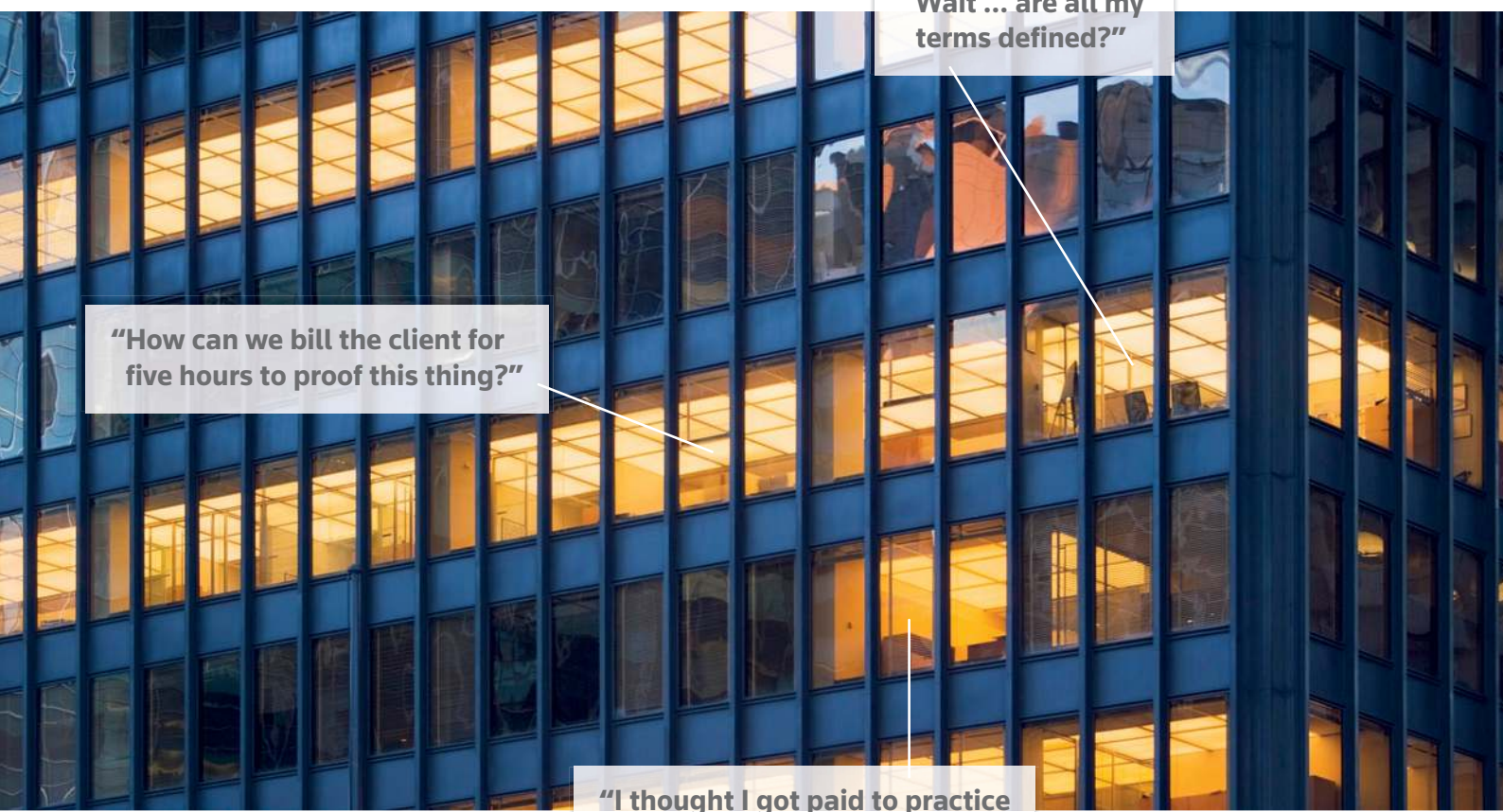
Benamram at White & Case has taken the process management thing even further, creating pathways to support transactions. "These [pathways] are a basic guide with the first steps to take: a good article on the topic, the form you need, training you might be interested in and the relevant people to contact," he explains. "Pathways facilitate pricing and budgeting, because at any point we can see which step of the matter has been reached and how long it has taken."

Many large firms have introduced automated processes around matter management and legal project management (LPM).

Linklaters's dedicated global LPM unit disseminates best practices via a mixture of online resources and training sessions. According to Manser, it's a multi-use area. "LPM is a growth area supporting legal teams working on big agreements, but we also use it across business services, such as HR processes."

Easy access information

Gould says the value of presenting information that focuses on connections rather than content is enormous. "If search results uncover



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relevant expertise, it might be worth contacting the author, as this can often reduce time spent searching for and consuming information and enable you to get straight to the crux of an issue.”

And getting straight to the crux of every issue increases productivity and value for money for the firm and its clients. White & Case has applied this principle in the form of a global information hotline. “Lawyers have one email address to access any information, and the team will either find the answer or reroute the request to the appropriate person, who might be a PSL, IT support or a partner, depending on the nature of the query. Responses are based on location and practice,” explains Benamram.

Although the same information may be available on the firm’s intranet, it makes more sense for a partner to email the information hotline rather than spend time searching. White & Case introduced Recomind’s search and expertise finder to boost efficiency and discourage people from sending emails copying in everyone. Benamram says his strategy is to create simple, intuitive systems and, as far as possible to standardise systems across the firm’s global offices.

But we can make information even easier to find – perhaps by being more deeply connected with it, just like when we use our personal social networks.

Many firms are looking at enterprise social networking to bring together teams from different jurisdictions. Reed Smith is experimenting with Pulse, an enterprise version of Yammer. Pinsent Masons recently completed a successful pilot using Yammer, but Halliwell says he’s still looking for a tool with more robust security.

Other types of tools are used to bring together groups within firms to share knowledge and experience, but driving

collaboration across a global firm is also about facilitating conversations and meetings. Linklaters, for example, focuses on learning and development to foster connections as well as interactive multimedia events – including a live chat-show that is televised and shared online.

And at White & Case, attention management is the order of the day. The firm recently rolled out Linex news aggregation, giving people the ability to subscribe to topics, rather than receive generic updates.

Windmills, not treadmills

All these initiatives are focused on finding efficiencies. The new world is about doing more with less, and doing it cheaper for the client while making the best use of lawyers’ time.

The drivers and the tools may have changed, but the principle of ‘Baking KM into the system’, expounded by Chris Boyd and Ron Friedmann in 2006, remains valid, particularly for global firms: “Think of a windmill rather than a treadmill: whereas a treadmill keeps turning only via human effort (analogous to PSLs) or dedicated power from a generator (analogous to KM-specific software), a windmill relies on dependable winds (analogous to work flows and processes that exist independent of KM requirements).”

Baking KM into the system is supporting international firms’ expansion, driving efficiency, client service, and value for money. Most of the tools and tactics are around promoting a collaborative culture and saving lawyers’ time.

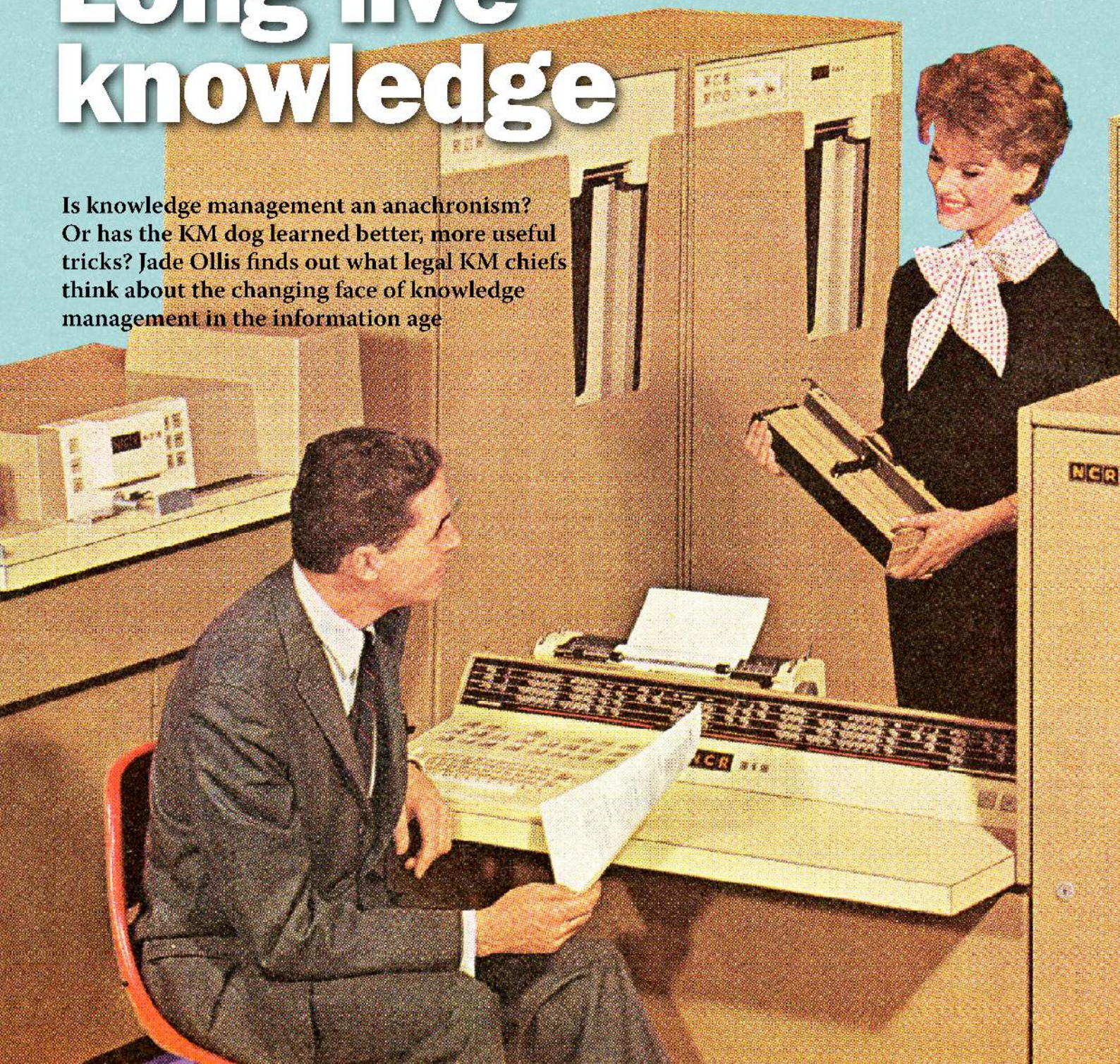
As Mark Gould puts it: “Good knowledge management is about working well and making the job easier next time.”

He makes it sound so simple... ●

Top 100 Directors Research

KM is dead. Long live knowledge

Is knowledge management an anachronism? Or has the KM dog learned better, more useful tricks? Jade Ollis finds out what legal KM chiefs think about the changing face of knowledge management in the information age





“No one believes in the Nonaka & Takeuchi SECI model any more.”

Not many remnants of the 1990s remain intact in legal. Knowledge management has changed perhaps most of all – the distance between now and the days when the Nonaka & Takeuchi model held sway is huge.

The above quote, referring to the now-defunct theory of organisational learning, comes from a top 10 law firm KM director we quizzed for the first LSN Top 100 Director research focusing on knowledge. It’s a metaphor for how much KM has changed: digital platforms, different ways of working due to technological change and, of course, a global financial crisis have all since altered the legal business environment, and knowledge management specially.

As part of the KM tranche of our Top 100 Directors research, the first time we’ve looked into the KM role, (see the full list of top 100 KM leaders on p14), we asked them this question: did they agree or disagree that “law firm knowledge leaders need to broaden their scope to incorporate matter budgeting task-based billing, project management and monitoring”? To those who agreed, we then asked whether ‘knowledge management’ is still an accurate phrase in KM?

The results were overwhelmingly in agreement with the main statement: almost three quarters (74%) agreed with the notion that KM needs to broaden its scope (22% were unsure and only 4% disagreed).

Who owns the knowledge role?

Across the top 100, there are 53 KM leaders; in 45 firms, the position doesn’t exist. The smaller firms in the top 100 are far behind the larger firms in their adoption of KM as a department – eight out of 10 top 25 firms have a KM leader, whereas in the 76-100 segment, eight out of 10 are without one.

This could pose serious problems for some firms. A growing information-based economy, much sharper client focus on cost and value, and the need to more heavily automate the delivery of legal work and distribute information, both inside firms and out, have made it imperative for legal businesses to have a focus on managing their most valuable asset: knowledge.

One top 25 KM leader says: “Knowledge management as a term has long been useful, and we can build on this

reputation to grow into new areas. One key area is supporting or increasing profitability using KM initiatives. This is not something which enough firms are addressing yet, but as the legal marketplace changes it will be critical.”

KM is an evolving and multi-faceted discipline, so perhaps it's no surprise there's a wide variety of titles applied to the people at the top of the legal KM tree. Of 15 director roles listed, only seven are 'director of knowledge management'. There are 35 'head of ...' positions, but only 19 of those refer specifically to KM. There are also two people in the KM 100 with C-level positions, but neither of them have KM titles (a COO and a CTO). Other KM titles refer to 'information management', 'information resources', 'learning and development', 'best practice', 'research', 'business infrastructure' – and many more.

This indicates, perhaps, that those in charge of KM are already doing much more than just managing knowledge. In fact, says one top 50 KM leader, “the role should be renamed to just 'knowledge' or 'knowledge development', not knowledge management. It's impossible to manage knowledge nowadays”.

What are knowledge chiefs doing, then? A bit of everything, says one KM leader: “A blend of knowledge creation, information management, IT development, project management, knowledge and process engineering, consultancy, change management, communication and more.”

Another KM chief says the role should extend to business process, big intelligence and big data. Other suggestions for a new name for KM director included 'business excellence manager', 'best practice manager' and 'business intelligence manager'.

“KM has the responsibility for nurturing the development of knowledge, but also for exploring new avenues and tools to support all types of knowledge work,” says one top 25 KM chief.

To one KM leader, the role is best dubbed 'open innovator'. “Why? Because we need to ensure we have the means to innovate, which requires learning, management capability and an openness to look both outside and within traditional boundary driven-businesses, and deliver new solutions with direct and wider business benefits.”

Find the list of top 100 KM directors on our website at: www.lsn.co.uk/knowledge-management/top-100 ●

Sample: We gained 23 responses from the top 100 firms; 15 from the top 50 firms, seven in the second 50



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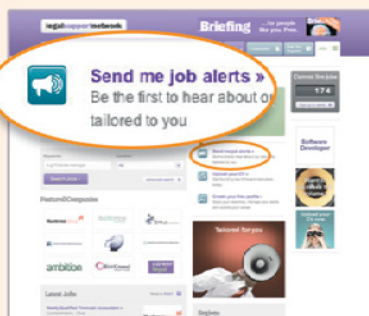
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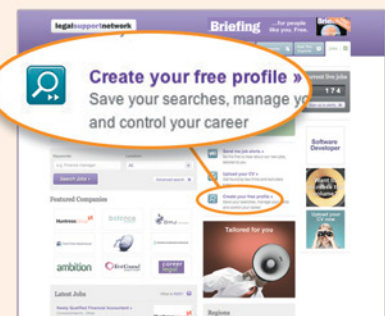
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INDUSTRY ANALYSIS INDEX

Making knowledge social



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Towards a collaborative future



Rob Martin at Solcara outlines what KM could be, and how to achieve an effective legal knowledge solution

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Briefing Industry Interview

What if search was more like Facebook? It will be...

Briefing talks to Recommind's Simon Price about how pre-emptive information flows present lawyers with new ways of working, which set the stage for more informed conversations

Lawyers and business services people alike now consume rather than create more information than ever – vastly more. The information generated and consumed in the life of a matter can now be huge, and it will only increase. But legal businesses also need to find relevant information around a matter or a piece of knowledge faster – a need that’s made more difficult to meet by the quantity of information in play in a law firm.

Being able to search for this knowledge across disparate and sizable document libraries is still incredibly important, but that ability no longer meets all the needs of today’s lawyers, who want relevant information in front of them whenever they need it, says Simon Price, managing director for Recommind.

“We reckon companies are doubling the amount of data they create every two years, and this growth is almost certainly higher for knowledge-based businesses such as law firms,” says Price.

What’s changed as result of this, he says, is that though legal users often need to answer a single question, they need context to make best use of that answer. Because of this need, and because many of us now live in a web and social media-enabled world in which information is pushed to us constantly, there’s an increasing expectation to have more relevant information passed to law firm users without having to go and specifically look for it.

Recommind’s search capabilities have been helping law firms mine their knowledge resources for almost 15 years, and have evolved significantly in that time to match these changing needs, says Price.

“One of the reasons Recommind has gained so much traction in legal is because we’ve been

able to provide the most relevant information in an uncomplicated and meaningful way. Search will always be central to KM and it’s essential that systems meet the evolving needs of the user. We are not at the end of the journey, nor are we ever likely to be.”

Beyond searching for answers, the ever-increasing flow of electronically stored



“Outside the office, we live in a world where we follow streams and feeds of information. That kind of ‘pre-emptive’ information flow would be incredibly useful”

Simon Price, managing director, Recommind

information relating to practice areas, clients and matters has meant that today’s firms need a better, easier way for their lawyers to ‘consume’ that information.

“Outside the office, we live in a world where we follow streams and feeds of information online,” explains Price. “It’s how Facebook keeps people engaged and why Twitter is a better source of news than a printed newspaper for many people now. The flow of information



in your social feeds will likely be more relevant to you than any single news source designed for mass consumption. For many of us, Facebook or Twitter feeds even pre-empt our information needs – they give us relevant information about specific topics or people before we even think to look for it.

“How many of us go on Facebook and perform a search? Not many. But we do go on Facebook, look at a friend’s profile, see they had a barbeque on Sunday and then, when we meet them the following day, ask: ‘Hey, how was your barbeque? Who came along?’ This consumption of information is starting new kinds of informed conversations.”

That kind of ‘pre-emptive’ information flow would be incredibly useful for a firm, says Price. “If as a partner I could see that the closing contracts for a transaction were sent to the client on Monday, when I see the associate who sent them I can ask: ‘Did the transaction close? I saw the final contracts went out on Monday.’”

So, Recommind is creating solutions to give lawyers the ability to find a new way of working – to more easily consume relevant information in a timely and meaningful way, says Price. “We’re taking recent trends in online data consumption and making them happen inside the enterprise. We’re working on creating the ability for lawyers to subscribe to relevant information streams. For example, a user will be able to follow matter X and to consume all relevant activities for that matter in the last 30 days: who added time notes to it, who created or emailed a document to the client, who rang the client and so on.”

This would represent a step change in working practices for law firms, better informing lawyers in a more timely fashion but also dramatically reducing time spent searching for answers. “A partner will no longer need to ask the senior associate each day for an update on a particular transaction – they can ‘follow’ it,” says Price. “This will help drive more informed conversations and save busy lawyers from searching for answers, because they will already have them.”

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Knowledge management and the IT underpinning it have come a long way, but there's still confusion as to what KM actually is. Some view it simply as a better search engine, others as better classification and management of know-how while others believe it's all about collaboration.

Focusing on any one of these will add some value and help fee earners, but is that KM?

One mistake that firms make is focusing on search as the primary solution to the KM issue.

The belief is that by deploying a better indexing and search solution it will be easier for fee earners to find what they need and improve access to high-value know-how. However..

Not all content is created equal. Specific know-how materials can get lost in the huge volumes of other indexed content. Different content management and search strategies may be required.

Not all content is available. Much of a law firm's know-how is sourced from online web

services such as Practical Law (PLC), Westlaw, Lexis Library and others.

Not all know-how is neatly encapsulated into individual files or documents. Know-how is often defined by the relationship between multiple files and across multiple systems or services. For example a video, a case report, an example precedent and a practice note might, with commentary and guidance notes, be defined as a single piece of know-how.

Not all firms have the time, resource, infrastructure or budget for large-scale data mapping and indexing projects. Those that do can still find there's a limit to what can be achieved.

This issue was summed up recently by the chief knowledge officer of a US global law firm. When asked at the PLC Knowledge Forum in London in April 2013 how firms can effectively integrate internally developed know-how with the different online services that they use, he said his firm has an effective indexing and search solution for internal content, but not all online providers make content available in a way where the same approach can be taken, and even if the content providers did make their content available in a format we could access, he said: "I don't think we are quite ready to boil the ocean."

When considering KM, the challenge faced by many firms is rarely a systems or infrastructure one. In many cases the basic building blocks already exist. These might include: document management, CRM, library systems, enterprise search and multiple online information services.

The KM challenge is two-fold: how to link the different internal and online systems in a way that focuses on know-how content; and how to empower users to add value through personalisation and collaboration.

The simple organisation of precedents or practice notes into a folder within your document management system or the

creation of a set of links to online services from your intranet doesn't address the KM issue. This makes individual files and services easier to find but rarely goes much further. Indeed, the majority of systems used by firms aren't designed to support classification and management of content across multiple systems and services.

To be effective, a KM solution needs: to be connected to systems where valuable content lives; to link content across systems using a classification that's relevant to individual practice groups; to treat multiple physical files as if they were a single entity, and to support access to these with appropriate and up-to-date commentary and guidance notes; and to identify key individuals responsible for know-how in specific areas and link users to these experts when appropriate.

This approach relies on specialised know-how solutions and experienced professional support lawyers or knowledge managers.

The Holy Grail is when individuals personalise their content and collaborate with their peers. Such a solution evolves more rapidly than one managed from the centre. In this environment, PSLs become moderators more than administrators, ensuring content quality and advising fee earners.

So how can this be achieved? The rule must be to focus on the business issue. Secondly, any solution must be easy to use – complex problems don't always warrant complex solutions. Finally, build upon the IT infrastructure you have available, connect content, systems and services to ensure flexibility and extensibility – and avoid the common mistake of trying to boil the ocean.

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