

Briefing

CREATING VALUE WITH KNOWLEDGE

JULY 2012

Interview

Sam Dimond

Norton Rose's group director of knowledge on how KM can create efficiency, growth and client value

Feature

Knowledge 2.0

How the smartest law firms are turning knowledge into workflows, processes, apps, portals and profit

Industry views

Searching for value

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Is knowledge working for you?



Knowledge is just intranets, precedents, library stuff. People with glasses. It's boring, right?

Wrong. Well, except for the glasses.

Relatively few firms seem to realise KM's true value. A firm's knowledge can be used to create client value, increase revenue, drive up profitability, make a firm more efficient, help hugely with business development, and help

lawyers and business services people work better together.

How can your knowledge team do all this? If you read this issue of **Briefing**, you might get some pointers as to how to make it happen.

Our interview with KM and collaboration leader **Sam Dimond** outlines how he's delivering this at Norton Rose, while our feature talks to KM leaders in top firms about how they're creating more value – and more efficiency. Plus we have informed industry views from issue sponsor **Recommind** and others in our industry analysis section.

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Rupert White, editor of Briefing

Interview: Sam Dimond, knowledge chief, Norton Rose



Rupert White talks to Norton Rose's group director of knowledge about how KM can create value, revenue and efficiency in firms that can see the true value of knowledge

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Feature: Knowledge 2.0



Rachel Davies examines how knowledge leaders and their departments are changing how law firms do business – from building up business development to redefining how firms deliver legal work

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Briefing jobs



Management roles in KM, business development, client services and HR on the **Briefing** jobs page – pass it along (or perhaps not)

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This month: **Briefing** interviews **Recommind's** chief about how advanced search can bind a firm's knowledge together, wherever it's held, and why relevancy is more important than ever.

This month's interview with **Sam Dimond of Norton Rose** was transcribed by:



Briefing Industry Interview Searching for value



Briefing talks to Simon Price, managing director at **Recommind**, about how search can deliver law firm and client value, and better risk management

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Connecting the docs



Knowledge must be made more relevant, says Rob Martin, director of federated search strategy for **Solcara**, part of Thomson Reuters

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A professional headshot of a middle-aged man with a receding hairline, wearing black-rimmed glasses, a light blue checkered shirt, and a dark blue patterned tie. He is looking directly at the camera with a slight smile. The background is plain white.

The Briefing Interview

Doing the knowledge

Norton Rose's knowledge leader talks to Rupert White about how knowledge management at its best can deliver more value, and more revenue, to tomorrow's firm

Sam Dimond is a very difficult man to get hold of. He's not the most difficult person Briefing's had to pin down (that accolade would always go to a finance director...), but he appears to work ridiculously long hours, think very hard about lots of cool stuff, get invited to speak at the best events, and he's now 10 months into his life at Norton Rose, handling knowledge for one of the biggest law firms in the world. That's busy.

Before all this, he spent 16 years at Clifford Chance rising from being a tax lawyer to director of knowledge systems. Now, he's Norton Rose's group director of knowledge – a job title that sounds almost like science fiction, as if he were running a giant brain.

This may well be true, because to succeed in a highly competitive and globalised future, firms like Norton Rose (and very many firms much smaller) will have to be better connected internally, swapping information across practice areas, building ad hoc relationships, and holding and remembering corporate information in vastly better ways. Law firms really are going to have to remap their corporate brains.

Collaboration, therefore, is the new black when it comes to knowledge management. But it's not all about wiki this and social media that. In the end, you can only deliver the collaboration that people want and need.

"It's very much not about the systems side of things," Dimond says. His previous role at Clifford Chance was, he says, primarily systems-focused (a tale most knowledge people could tell), which just reinforced to him that

knowledge is really about "behaviours and business benefits".

"The technology around collaboration is pretty easy, for various reasons – it's cheap, it's freely available and, as opposed to so many other technologies, it's something we're all familiar with.

"We use Facebook and Twitter [at home] and yet it's one of the hardest things to bring

"We use Facebook and Twitter [at home] and yet it's one of the hardest things to bring into a firm, because it's so different for a firm to work that way. Social media is a very different paradigm."

into a firm, because it's so different for a firm to work that way. [Law firms are places where people are] focused on version control of documents and being careful about what gets sent to whom. Social media is a very different paradigm."

Dimond says he's learned that the barriers to successfully introducing sharing technologies, whether it's wikis or blogs or anything else, lie in getting people to use them rather than any implementation process. "If you have a group of people who need to communicate but are not communicating, giving them a wiki is only going to do one thing – highlight the fact that they don't communicate."

The perfect targets for a law firm wiki, says Dimond, are those who like to work together and collaborate but are frustrated by some of the difficulties they have doing so. This applies perfectly, for example, to the kind of client or sector groups that law firms are increasingly creating.

As well as enabling collaboration within a client or sector group, for example, such set-ups would also deliver personal development and responsibility for junior staff. An example of this, says Dimond, is getting trainees to write “a guide to groups”. There’s great value to the firm and the individual, he says, in getting trainees to write about a group and take responsibility for the chapters they have experience in, “rather than have some poor soul in the training group have to write the entire document themselves”.

Enabling business development

But collaboration and group knowledge systems can deliver a lot more value when turned towards the client and business development.

Email is failing to help in areas such as expertise searching, says Dimond, because it’s hard to keep a chain of input together with email and it’s almost impossible to retain the outcome of email discussions as knowledge. “So bringing in a blog can work very well: ask a question, get the answer back very quickly and it’s there for posterity, grouped by topic. It’s about getting the business need first, then finding the technology to enable it. Enabling is the key thing.”

Social media is also being fed into most lawyers’ daily lives, encouraged as they are to build LinkedIn networks and collaborate internally and externally with clients. BD people and many others in business services

The UX Bomb

Why usability is everything

Technology drives better knowledge management, but it’s useless if it’s hard or unpleasant to use, says Sam Dimond. Sadly, that’s what a lot of knowledge technology is like...

“How often can you say that systems and interfaces that are designed for law firms are really usable? I’d like to say I’m staggered – but I’m not – by huge multinational technology companies that sell you a product but the design is not that slick, [when that’s clearly possible to achieve].

“The usability of the interface is what gets people to use the product and buy products. We [in KM] are dealing with an internal market. We want people to get the benefit from the systems they were designed for in the first place, but I have still found that on big technology products there is not enough attention to usability.

“A successful intranet project, for example, right from the word go needs to think about user behaviours and be tested right through the design stages. Beautiful is simplicity in this case. So often, the downfall of a big project or IT system is that it’s too difficult for people to use.”

Dimond admits that companies like Apple, for example, that have devoted squillions of dollars to user experience (UX, in IT parlance) might be further queering the pitch for enterprise IT companies.

“I’m struck by how many partners carry iPads around with them, and how many meetings I go to and people are sat there with their iPads. Now why could that be?

“I think it comes back to being easy – and useful.”

are also being drawn into the mix. But one of the downsides to all this enabling is who owns this information, now? The only way to ‘solve’ this problem, Dimond says, is to think differently about it.

“It’s not about guarding your intellectual property, it’s about nurturing a culture whereby you do not have to worry about it so much.”

A physical example of this cultural shift is creating client relationship teams, changing the relationship from an individual to a group one.

Where KM comes into this, says Dimond, is around “communities of practice and interest” – of which a client relationship team is a perfect example. “Knowledge enables this teamwork through storing the information and using web 2.0 technologies to help them share information.” This is an area where BD and knowledge work together well, he says, but it’s “very much about a cultural shift”.

Management and knowledge

Linking BD to knowledge is a big part of what this issue of Briefing is about. This happens through improving processes, of course, in which knowledge can play a big part, “but you have also to think about the relationship in between the matters, the value-added services”.

A lot of those are going to be knowledge-focused, Dimond says. “Whether it’s the use of the library to keeping the client on top of compliance issues, or making sure they are getting access to your training, client

briefings [and so on], firms that are engaged in true thought leadership [are analysing] what problems the clients will be facing in the markets they operate in and how you are going to help them. BD is going to be instrumental in that, and knowledge is another



“Knowledge is a discipline that will naturally help move the firm towards the right culture to do value-added services and thought leadership in the future.”

of the disciplines that will naturally help to move the firm towards the right culture to do value-added services, thought leadership, in the future.”

This binds into thinking much more strategically, and about the firm’s strategy not just a department’s goals. Dimond says those at C- and D-level in the larger firms think much more strategically these days, whether they’re business services or fee earning people.

This is a significant development, because it

will play a pivotal role in determining whether those firms succeed on a global stage. Lawyers are now also getting good management training, at least in firms like Clifford Chance and Norton Rose, he says.

Dimond, like many KM people, started professional life as a lawyer, and he's done his formal business training at Oxford's Said business school. What we want to know, then, is whether his experience represents what many other KM leaders in smaller firms (ie most firms) will have to be thinking about.

"For a start, we don't talk about knowledge management here," he replies. It's a limiting phrase, he explains – but it's also hard to find a better one. "We just talk about knowledge, and how knowledge is used and for what benefit." People raise their eyebrows and ask how this is managed, he says, but "you have to describe where you are taking people and communicate that in a way that enthuses people and convinces them to come with you on that journey".

What Dimond's describing is the bread and butter of a very new role, in legal and elsewhere: the chief knowledge officer. "You have to think strategically, you have got to know the various routes you can take, what you are going to focus on and, more importantly, what you are not going to focus on.

The areas that KM leaders will have to own from now on centre on the ability to rise above the information deluge and how to get people to work better together, he says.

"If anything epitomises the 21st century's way of thinking, it's collaboration. I think people in knowledge are really good at that. Another thing that gives us strength is coping

with a huge flood of information – KM people know how to organise it."

Focus on process

As reality bites, in the form of long-term economic hardship and competition from more 'business-like' legal service providers, knowledge departments have a golden

"We don't talk about knowledge management here. We just talk about knowledge, and how knowledge is used and for what benefit."

opportunity to help their firms by leading internal change towards a more process- and project-driven way of working.

"I've always seen process improvement as something that knowledge is hugely set up to do, or contribute to, because [whether it's a Lean or Six Sigma process, for example], it's about getting everybody who's involved in that process understanding how they fit into the big picture – having better knowledge about why they are doing this process in the first place."

KM people, he says, are attuned to seeing the flow of information in a business in a way that can be cleaned up and made better, and they hate wasteful ways of working so they're naturally gifted in terms of continuous improvement – "and who better than the

knowledge department to do it”? Doing this means working with learning and development and finance, one area that will understand where inefficiencies have crept in, he says.

But is this something just for KM leaders at the top of the tree, or is it a direction that more can take? It depends on the firm’s strategy, says Dimond – but “when you come to improving a legal process, a lot of the improvements you are going to make are about putting in place standards and quality, training, checklists, process maps – and what is that other than knowledge management”?

A moment of amusement: Dimond was adamant that he doesn’t use the phrase ‘knowledge management’ and didn’t like it. So when it eventually pops out, as it did there, it’s like peeking behind the sofa in a very tidy house: so ingrained is this phrase that not even a man whose job title doesn’t contain it can avoid it for long. This might be indicative of a greater challenge – how hard might it be to

truly change the KM role into a ‘knowledge’ role, one based on process and informational flows rather than on guarding precedents and intranets?

Growing into a strategic role

Turning work into process delivers cost savings to the firm but also to clients, because it creates workflows and suchlike that let you deliver work with fewer and/or less expensive people. But for KM people, says Dimond, this isn’t new (though the scale of it surely is).

“If you think about it, what is the most traditional thing law firms have done in terms of knowledge? Come up with legal templates and precedents. And what’s that other than taking 20 years of experience of a partner and writing it into a document, which becomes itself a knowledge asset. “Precedents were always about coming up with a starting point

Why email will never die... (however many times you try to kill it)

Whatever collaborative IT you can get your firm to use, it won’t fully replace email. In fact, email will probably remain a primary way in which users use a collaboration system, says Sam Dimond

“If you create a solution that’s too divorced from email, it’s just one more place for people to go to, which is the last thing lawyers want. So for these solutions to work really well they have to be seamlessly integrated with email.”

“Email isn’t a terribly good place to collaborate, but unless people are getting an alert to the device that they carry with them, when they need it, when you need a question answered, they are probably not even going to know [the better

collaboration tool] exists. You also need to be able to reply via email, even though your reply goes back onto a blog.”

This is changing a little, as more mobile devices allow direct access to intranet collaboration systems, he says, “but I have not really found a solution yet that has worked really well when divorced from email.”

“You can change people’s behaviour, but not that much.”



that you could give to a more junior lawyer, to get them past the painful drudge and up to the more interesting stuff.”

But this doesn’t mean that everything a law firm does can suddenly be done by a paralegal, he says quickly. “Every legal matter can be broken down into repetitive processes, but you also need to look at how best to do that. And when you look at those [repetitious processes], are the appropriately skilled staff doing it?”

Knowledge leaders now have to be as business-focused and strategic as their firms (perhaps they should be much more so, unless their firms are very corporately run).

“You need to understand how [your initiatives] relate back to your ultimate business objectives, which are always going to be around delivering the best quality service to clients, raising revenue and reducing costs. That is what a business is about.”

To do this, KM leaders must get their people to think bigger about their goals, their systems and their relationships. “You have to force people to take their answers to the next level and, unless they can tell you how it is going to increase revenue, improve client experience or reduce costs, you don’t have a very good business case.

“At the end of the day, when you sit in front of the board and say why they should invest however much money and change management and resources in a new search engine, you have got to have a pretty good idea [behind it].

“You need to ask ‘Why is it important?’ so that you can give the best possible advice to your client. That means knowing the possible

problems the client is going to be going through, so you’re using your knowledge to help your client do business. Why do you do that? Because caring about your clients and doing business this way is good for business.”

This picture is a big shift away from how KM used to be done in law firms.

“Knowledge has a more obviously actionable, strategic, economic role [now],”

“You need to understand how your initiatives relate back to your ultimate business objectives, which are always going to be around delivering the best quality service to clients, raising revenue and reducing costs. That is what a business is about.”

Dimond acknowledges. “I think it’s understood more.” At last, he says, people in law firms are learning about and seeing the value of what is happening behind the information products that they make. “It is almost like they didn’t question where this thing came from,” he says.

Knowledge is not just about law any more – knowledge is about understanding clients and their industries, and how they and your firm operate as businesses. This has turned it into something of constantly growing importance. “It’s at the centre of what a law firm does, its economics, and how to survive and thrive as one of the winners,” Dimond says.

“The ones that do not have it are going to have a challenging time ahead.” ●



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Knowledge 2.0

Rachel Davies examines how knowledge leaders and their departments are changing how their law firms do business – from building up business development to redefining how firms deliver legal work

Inside law firms there's a world of information that, until fairly recently, remained locked up. Used by lawyers and PSLs to deliver work, it was rarely seen by outsiders. This valuable resource was guarded by people who knew, almost better than anyone in the firm, how work was done – and the processes behind it.

But this knowledge and the skills of the people behind it are worth a fortune in efficiency and client value – if only firms can bring them out of the back room.

How firms can do this ranges from creating mobile apps to extending their extranets to the general public, from offering clients regulatory updates to building workflows within firms to automate work. But the common thread is this: knowledge management is changing, and it's changing how legal business is done.

Some firms – mostly those outside the top tier – are re-purposing internal knowledge by creating apps that clients can use for anything from lawyer directories to being better informed about the legal issues around their businesses.

Management consultant and author Kim Tasso assessed the state of play around law firm apps in her 2012 white paper [‘Apps by UK law, accountancy and property firms – Are we missing the mobile revolution?’](#). Pushing knowledge out through apps, she says, has “huge potential” as a way of establishing a firm as ‘the go-to’ firm in a particular area and of creating client value and strengthening the client relationship.

Some big firms are also in on the act. Allen & Overy is one of the few firms that has two

apps – an expertise and lawyer directory and an investment tracking app. Tasso says A&O's moves probably relate to its having an innovation team, which helps decision makers in the firm see the potential of apps while the majority of firms have yet to do so.

Harnessing your contacts for client value

Duncan Ogilvy, ex-head of knowledge (and one-time managing partner) at Mills & Reeve, says that because law is a know-how business, “how effectively you harness who knows what

“How effectively you harness who knows what and who knows whom is an absolutely key competency, and that competence is a source of value.”

Duncan Ogilvy, consultant, Mills & Reeve

and who knows whom is an absolutely key competency, and that competence is a source of value”. Creating client value should be at the heart of KM's role, he says.

Mark Gould, head of knowledge management for Addleshaw Goddard agrees, adding that KM's bottom line value can also be indirect, such as in reducing risk or delivering cost savings. KM teams should focus on “making sure that people have everything at their fingertips to ensure that whatever the client needs is delivered”. This doesn't necessarily mean divulging detailed technical

knowledge – just getting under the skin of what the client needs to know is a skill in itself, and knowledge management and learning can help improve that skill, says Gould.

A&O's firm directory app, which gives clients easy access to people and services in the firm, is a great example of the 'simple' side of this behaviour.

Though KM's role varies widely across the legal sector, it's increasingly being refocused by savvy knowledge leaders on improving the way work is done and making people in firms better connected. "[These areas] must always be at the core of the firm, but it may not always be called knowledge management," says Gould.

Collaboration is key

Colette Bewley, Burges Salmon's director of development and innovation, views knowledge management as an 'end-to-end' process.

Collaborating with the client is crucial, she says – you're co-developing something, not working in isolation. Burges Salmon's KM team is guided by the firm's strategic goals, she says, from which she deducts what it can or should contribute to achieve those goals.

"Our ultimate focus is on how to help the client," she explains. "There's no point in the client trying to do something separately from us, or us from them. If we're going to deliver maximum value, we need to look at the ways we work together to get maximum efficiency."

Gould says most firms haven't yet properly grasped the idea of good collaboration with clients. Being open to different ways of doing things is the key, he says. Where KM teams become indispensable, he adds, is by focusing on value rather than just on knowledge for its own sake.

"It's their skill and understanding about the processes, techniques and disciplines relevant

Win-win: How sharing knowledge helps Mills & Reeve create value for clients

Caring and sharing

Turning knowledge into added value

Mills & Reeve is in the vanguard when it comes to repurposing knowledge to provide added value to clients.

The firm has set up six internet portals to deliver its knowledge to the outside world, ranging from web sites and services for consumer legal information to extranet extensions for in-house corporate counsel and institutional clients. These range from a divorce website and a procurement process advice portal, all the way to straightforward extranet extensions.

Assessing inquest risk, online

Mills & Reeve has created a knowledge portal on inquests for clients that uses the firm's knowledge to help clients – and help the firm only do work that's really worth doing. The portal uses the firm's experience in inquests work to deliver a kind of decision tree and 'risk engine' to clients, which works out whether an inquest needs intervention from Mills & Reeve or if in-house counsel can handle it themselves.

The risk profiling tool assesses the critical attributes of an inquest and advises clients on the likely risk level of the inquest, as well as providing useful information for in-house lawyers.

Duncan Ogilvy, ex-head of knowledge at Mills & Reeve and now a consultant with the firm, says the portal "helps the client to make informed purchasing decisions and to manage without our legal services at all in suitable cases – and it helps us, because it means we are only working on the more profitable bigger things where clients really do need us".

to knowledge that delivers the value that partners and fee earners need,” he says.

But how do knowledge leaders get involved in these vital areas? Ogilvy’s position is that KM leaders must back up their potential value. “Anybody working in KM should be quite up-front and ready to talk value for money and return on investment in relation to any know-how project.”

A big challenge knowledge chiefs face is that investment in KM can be expensive. You can’t always get a return on that investment in year one – if at all. This situation is made worse by the fact that law firms tend to account on a profit per-equity partner basis, so some partners will be torn when confronted with these investments.

Mills & Reeve has, however, recognised the value of turning knowledge into a client-facing value proposition and a driver of efficiency. It’s created an app on divorce and a knowledge portal for inquests (see box on p16). The divorce app delivers information on the legal, practical and emotional issues people face when considering divorce, while also serving as a way for clients to screen themselves before coming to the firm.

“If we can save them from using us for relatively straightforward work, they can keep their legal budget for more complex things where they really do need us,” Ogilvy says. This is a shrewd move, because it also keeps Mills & Reeve’s name in the market but keeps it away from the more commoditised, routine work.

But, warns Gould, value-adds should always be targeted, “otherwise we’re just piling stuff up like presents under the Christmas tree, when

we haven’t really thought about addressing the challenges our client faces”.

Helping clients towards compliance

An as-yet-untapped area of added-value is in linking KM to clients’ risk management



“Technology is being put in place that enables proper information governance, but clients need to be shown the rules to apply to it.”

David Reed, founder, Data Governance Forum

elements, to give clients the knowledge they need to be compliant. This can also help the client reduce legal spend, and it delivers real value either way.

Ogilvy’s view is that firms should focus on helping clients remain compliant, rather than on when it’s all gone wrong. It’s not about helping clients to spend less – though that might be the result. Instead, KM is now helping clients better direct compliance spend.

David Reed is a journalist and founder of the Data Governance Forum, a member body promoting best practice in information governance (DGF members include major law firm client targets, from financial services businesses to Marks & Spencer). KM should focus on helping clients before problems arise, he says. “The regulatory environment for everyone is tightening [and] technology is being put in place that enables proper information governance, but clients need to be shown the rules to apply to it.”

Helping clients set up a proactive information governance culture is a great value-add that law firms are well positioned to deliver. But Reed is of the opinion that KM isn’t done as well as it could be, because firms don’t learn from what they do. As a firm moves through an e-discovery process, for example, it should identify the types of information to be disclosed, and make that part of its knowledge base. This has big side benefits, he adds: “Better KM would have the knock-on effect of better risk management.”

Sharing knowledge interactively

KM can really reshape its place in the legal world by helping firm generate business and to ‘groupthink’ – to share information in a way that delivers more revenue. Intelligence gathering on people in the firm and their connections (expertise intelligence) is, says Ogilvy, “as important as intelligence gathering about the law. The ability to do this is a competence that helps define a successful firm”.

Knowledge can also deliver more to clients

by helping to make their own document base better. When Reed Smith recently audited some client agreements, it found significant gaps that the client wasn’t aware of. Tom Baldwin, chief knowledge officer at the firm, says that this has “delivered a high degree of confidence in our abilities. The client is happier and it has led to more work for us beyond the



“The challenge is how to create communities that are talking to each other and sharing that knowledge all the time - the real cutting edge stuff.”

Colette Bewley, director of development and innovation, Burges Salmon

fact that we helped solve a risk for them”.

But, says Bewley at Burges Salmon, some knowledge needs to be shared socially, interactively – it isn’t all about getting great data into a system. “The challenge is how to create communities that are talking to each other and sharing that knowledge all the time – the real cutting-edge stuff,” she says.

Her firm holds interactive lunchtime sessions and is trialing the use of blogs for people to post internal questions and draw on the firm's knowledge. It's those sorts of mechanisms that enhance the value KM can create, and it's especially useful to firms moving away from practice area structures and towards a key client/group structure.

Baldwin is also building a more collaborative environment over at Reed Smith. He's about to start using the internal social networking tool Tibbr to shift conversations from email onto a social platform that's more readily accessible, shareable and searchable. Tibbr lets you follow subjects as well as people, creating a better visibility of the knowledge it holds.

Innovate towards strategic goals

Though KM has been a target for cost-cutting and outsourcing in the recession, the economy has forced firms to do more fixed-fee work and create much larger efficiencies. This creates opportunities for those in KM roles to become the go-to people for creating efficient workflows and processes within their firms – because they're the ones who understand how the firm delivers legal information.

Baldwin at Reed Smith has directed his KM team to identify repetitious work and turn it into a process. They now use project management-inspired methodologies, such as process mapping and process improvement, alongside the Kiiac document automation system, to create workflows and precedents.

Baldwin also points to a growing trend in the way knowledge is helping to change how firms work: legal project management (LPM). "Our focus on LPM has definitely raised the visibility of the KM group and helped to illuminate partners who may not have been quite as understanding of what KM offers." Reed Smith

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is also upgrading its extranet to enable more functionality for legal project management.

But whether it's cutting costs and raising efficiency by creating workflows, or winning work by enabling BD, the value of KM now lies in being aligned with a firm's strategic goals.

Whatever knowledge leaders think they can do to make their area more client-focused, they need to become innovators to be able to achieve those goals. This could involve using technology such as social networking and apps to share knowledge internally and with clients, or helping to change the very way their firm delivers its work.

So – does your KM team have the potential to deliver more value than just 'doing' KM? ●

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Legal Knowledge Management

Thursday 27 September 2012

Central London



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- Discuss the **challenges** that a changing world means for legal KM
- Learn how **cultural change** and **internal attitudes** to KM can be successfully managed for the benefit of your firm

Chaired by:

Mark Gould, Head of Knowledge Management, Addleshaw Goddard

Speakers:

Jane Bradbury, Director of Learning & Knowledge Management, Field Fisher Waterhouse

Sarah Cameron, Legal Director, Pinsent Masons

Lucy Dillon, Director of Knowledge Management, Berwin Leighton Paisner

Catherine Kenwright, Head of Knowledge Management and Learning Services, Irwin Mitchell

Jessica Magnusson, Head of Knowledge, Osborne Clarke

Cathy Mattis, KM Project Manager, Berwin Leighton Paisner

Simone Pearlman, Global Head of Legal Knowledge, Herbert Smith

Alison Rae, Knowledge & Information Manager, Higgs & Sons

Paula Reid, Partner & Head of Knowledge Management, A&L Goodbody

Helene Russell, KM Consultant

Wendy Small, Legal Knowledge Management Consultant

Kate Stanfield, Head of Knowledge Management, CMS Cameron McKenna

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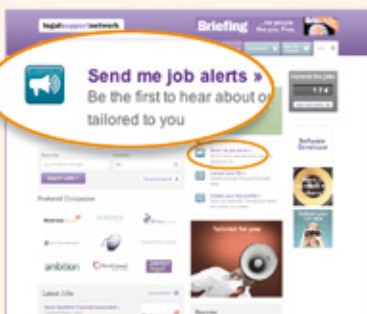
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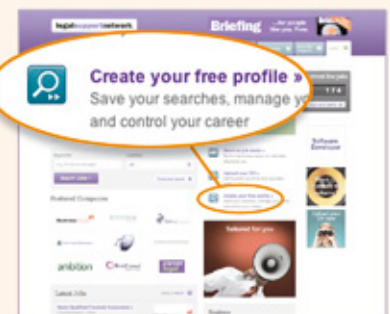
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If you are interested in applying for this role please contact tim.skipper@totumpartners.com, or deborah.gray@totumpartners.com

Totum has been exclusively retained by CMS Cameron McKenna to work on this assignment. All third party or direct CVs will be forwarded to Tim and Deborah for review.

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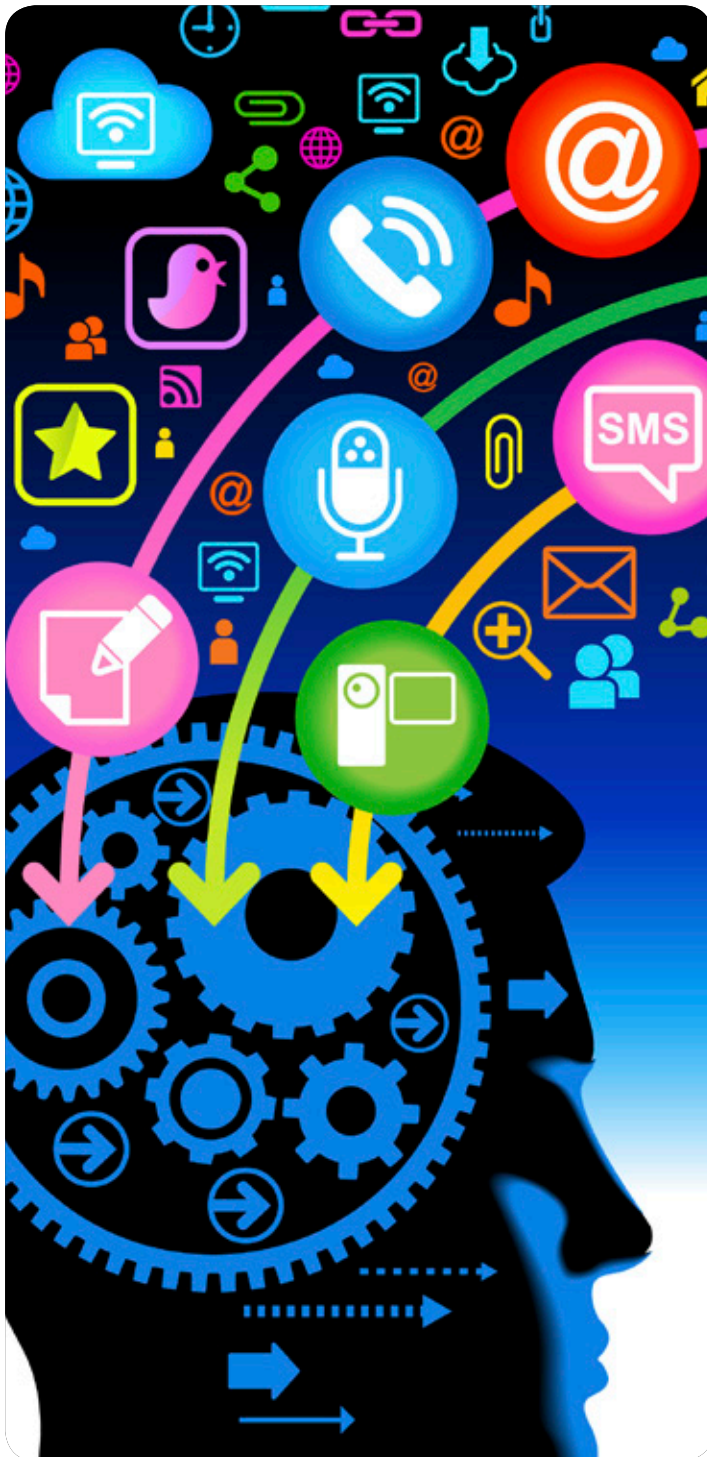


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Briefing Industry Interview

earching for value

Briefing talks to Simon Price, managing director at Recommind, about how search can deliver law firm and client value, and better risk management

Law firms are knowledge businesses, but good knowledge is proving increasingly hard to find. This has more effects than you might think – it reduces lawyer and business services capability, and it increases risk.

Search isn't ubiquitous in law firms – but, says Simon Price, managing director for Recommind, to make relevant knowledge rapidly accessible, firms will need a search engine working across all the systems that hold their knowledge.

In this month's **Briefing** interview, Sam Dimond's view is that KM has broadened to be more about knowledge and less about management. This is in line, says Price, with what search can now deliver.

"It's about surfacing knowledge that already exists, rather than relying on a highly manual approach to managing and creating knowledge. Enterprise search, whether it's looking at high-value knowledge content or on a much broader scale across all of the firm's knowledge, is the bedrock for exposing knowledge to the people in the business."

Price says Recommind has also been working on enhancing search results by visually connecting the people who've created

knowledge alongside content.

"All I have to do now is click on one of those people and up comes their biography, their contact details and a list of all the content they've authored." This creates connections and drives engagement within a firm.

Developing business with knowledge

Knowledge isn't just about knowing the law and creating documents and clauses any more – it's now deeply connected to winning work as well as delivering it.

Knowledge systems and search help this hugely, both by making expertise easily accessible and by providing the ability to connect people to the knowledge others have. This produces superior expertise location and increases the ability to cross-refer legal work within the firm.

"It's basic sales," explains Price. "Being able to connect a client with someone else in the firm who can help them, even if you've never communicated with them before, is a very impressive client service."

Expertise knowledge is pretty vital when it comes to pitching too. Being able to put the right profiles and the right people on that pitch, "and being able to show relevant experience, case studies and so on, is fantastic", says Price. "However, if you're not doing it dynamically

using a search engine, the only other way is to rely on lawyers to fill in experience forms – and history shows that never works.”

Search shouldn’t replace dedicated expertise and customer relationship management, says Price – but it can make them sing together.

“The search engine pulls this together, and our proprietary ‘dynamic joins’ technology enables the solution to judge relevance across data from multiple sources to influence the relevance of an object – be it a matter, a fee earner or a client contact. Search is very much complementary to CRM.”

This is, in effect, creating ‘weak tie’ connections to help a fee earner refer or connect a client to someone else in the business whom they’ve never met.

All this is functionality supported by the Decisiv Search technology in Recommind’s Core platform, says Price. “Core is able to bring multiple sources together into an environment where analysis can be done.”

This allows, for example, visualisations against search results. “When a user finds a matter or a client, they don’t just see a static profile for the client – they can see dynamic charts showing a breakdown of the people working for this client, or of the matter types the firm has been working on. And I can quickly see that 70% of the work we have done for them in the last six months is commercial litigation, for example, but we have done no IP work for them in that period.

This creates more value for the firm, but knowledge must now also work for clients.

“A lot of our law firm clients are also trying to surface information to the clients in a way that cost both sides very little, but is worth a lot. This helps them retain the high-value, bespoke legal work that’s paid for on a billable hour basis. Following the Legal Services Act, that’s going to become an even bigger pressure

on all firms but in particular on the bigger ones, where they have to make a bold decision: how much do we give away to keep the client? And technology is key to delivering that value.”

Firm-wide advanced search can also be a great help in risk management – in particular, managing email.

“The email archive has created more problems than it solved. It did a good job of getting emails out of Microsoft Exchange, but the problem now is that it’s very hard to find

“Law firms have to make a bold decision: how much do they give away to keep the client? And technology is key to delivering that value.”

relevant emails stored in the archive.

“We’re helping firms categorise email content with Decisiv based on its relevance to the firm.

“If there’s a dispute with a client, I can retrieve all the conversations we’ve had with or about that client – because the likelihood is that cause of the problem is not in the emailed advice you gave them – it’s in advice you didn’t give them which was in an email that wasn’t filed.”

So, do firms need search? Perhaps it depends on whether they want to be able to find all the information they need – or just some of it.

Find out more about how
Recommind can help your firm
www.recommind.com





Industry analysis

Connecting the docs

Knowledge must be made more relevant through effective linking, integration and personalisation, says Rob Martin, director of federated search strategy for Solcara, part of Thomson Reuters

As legal businesses grow in complexity, they face new knowledge challenges – specifically around collaboration, delivering personalised, relevant information, and joining up distributed pools of information.

To meet those challenges, innovative firms are embracing new ideas and concepts around knowledge, and they're looking to build environments where all the firm's knowledge can be integrated and shared, and used to improve efficiency as well as the quality and timeliness of advice.

KM solutions have always been driven by two distinct teams – library and information services and IT. L&IS are the information experts – they focus on organising, profiling and classifying information, and they guard its quality and consistency. IT are the experts in infrastructure systems and solutions, and they focus on wider data management, storage and infrastructure issues. IT also usually holds the

budget for software, including KM solutions.

IT, though, are often trying to build to scale, whereas L&IS are trying to gain maximum quality and relevancy. This creates an inherent tension in a firm's knowledge management, and that has to be addressed. Getting the two 'sides' to work better together is often led by knowledge managers or directors, whose remit is to use knowledge to achieve the business's goals – not just those of IT or L&IS.

Knowledge, not information

KM should not be just organising information resources from the centre and deploying IT solutions to make finding that information easier. Information is not knowledge, and any successful solution must help support and personalise content so that users know the currency and reliability of the information

behind it and how it's been used before. It's also important that they can see the relationships between different types of information and the feedback and insights from others who have used it to solve real business problems.

Many KM strategies start with the IT systems in play in the firm and try to enhance or extend them to support managing knowledge – from document management (DM) and intranet and SharePoint portals to enterprise search. But to concentrate on any of these to the detriment of the others won't deliver really useful firm-wide knowledge.

Better connected

I believe the starting point of a KM strategy should never be the IT systems – it should be the content, and an understanding of where it is and how it is produced, stored and managed.

None of the content required to create real knowledge will ever be held in a single system, nor is it possible to normalise the structure of all content resources. Information comes in all shapes and sizes, and much of it is neither managed nor owned by those who consume it.

The content that underpins a good KM solution ranges from internal precedent libraries and checklists, client information and information on who works in your firm. These can be stored across a wide range of solutions, from DM to practice and customer relationship management to SharePoint repositories.

I think this means a strategy that focuses on linking and networking content across systems is the way forward, not large-scale, high-cost content consolidation exercises.

This would deliver one simple and intuitive

user interface, personalised views to direct users to the most relevant content as well as alternative views to access less frequently materials, collaboration (in the form of linking, commenting upon and sharing content regardless what underlying platform it's on), and a deep understanding of how content is consumed across the firm.

This 'connecting' approach doesn't replace DM or enterprise search systems, or suggest

“There's a growing need for a solution that can give any type of insight into workflows and matters and how the firm is doing financially – not just from an operational perspective”

they are irrelevant. Knowledge management is the glue that binds different underlying systems and services together to present the user with a more pleasant and supportive experience. It shouldn't be forced to change if the systems or services change beneath it.

KM is fast becoming something that enables data linking, collaboration and personalisation. This approach relies on many IT systems, but it should be dependent upon none of them. Technologies such as federated and semantic search will help deliver this, for the benefit of information consumers and their clients.

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