[17]During this period she had been a member of an editorial team responsible for the *European Law Libraries Guide* prepared by IALL under the auspices of the Council of Europe (Morgan-Grampion, 1971) and assisted Charlotte Lutyens, Librarian of Middle Temple, in compiling a timely bibliography, *Community law: a selection of publications on the law of the European Economic Community* …. (BIALL, 1973)

[18]*De Novo*, the Newsletter of the Law Library of Louisiana, 2 no. 2, Summer 2003

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Research Revolution at Eversheds

Abstract: Melanie Mancino discusses the implementation of a firmwide research and enquiry service at national law firm Eversheds. It explains why the decision was made to centralise the service, and how this was achieved, and goes on to explore why it was important for standardisation to take place. It ends by looking at the process involved in introducing an electronic enquiry management system and provides a summary of basic functionality. The benefits of the new service for the both the firm and the IS team are also highlighted.
Keywords: multi-site law firms; enquiry management systems; legal research; project management; law firm libraries

Introduction

I have worked for Eversheds Information Services for the past seven years and was appointed to my current position of Programme Manager in March 2005. I was assigned responsibility for managing and developing our research and enquiry service with the primary aim of centralising and standardising the service and introducing an electronic enquiry management system.

This article explores these issues and looks in particular at the challenges encountered when centralising and standardising the service and the process involved in developing the enquiry management system, including a brief summary of its basic functionality.

Centralising the research and enquiry service

My first task was to look at centralising our research and enquiry service. At that time each region offered its own service and only collaborated during what we called "extended hours", which was from 8am until 9am and 5pm until 6pm. This system had been implemented some years earlier to standardise the hours that the service operated and to assist the smaller teams who were not able to staff their service from 8am until 6pm. We simply adapted our in-house email system, Groupwise, to deliver this.

In practice, it meant that we had any two members of the firmwide IS team on the enquiry desk during those times and they dealt with enquiries from all offices. A rota had been introduced to ensure that the shifts were allocated fairly, and that preferences for early starts or late finishes were taken into consideration, and each region simple put its enquiry email inbox on forward to a central email address which was not advertised to the legal advisors. A single delegator took responsibility for monitoring that inbox and delegating the enquiries appropriately. Anything that could not be dealt with during the extended hours was passed back to the originating team to complete.

My aim was to get the team working on enquiries together at all times and to therefore implement a truly firmwide research and enquiry service. I anticipated that it would be relatively straightforward given that we already had the technology in place and the procedures that had been drafted to cover the extended hours service could simply be reviewed and amended accordingly. A new rota would need to be drafted and implemented to cover the entire working day.

A small project team was therefore set up to review procedures, which was fairly straightforward as anticipated. The new rota proved to be slightly more problematic because we had to decide how long each shift would last, which was not easy given that people had different preferences. We had to decide how many people were required for each shift and take into account responsibilities that some people had at certain times of the day and ensure fairness in the allocation of shifts, which we knew would be tricky at times.

As soon as agreement had been reached on the rota, the procedures were reinforced amongst the team and a decision was taken to trial the service for a short period from the beginning of May. Nothing was communicated to the business and we decided that we would field questions as they were raised and if it did not work we would revert back to our previous system and consider alternative solutions.

Standardising the research and enquiry service

Despite there being some resistance from a small number of the IS team, the process worked extremely well and it took a relatively short amount of time for the team to get used to this new way of working. There was no negative feedback from the business although a small number of legal advisors were surprised that their enquiries were being dealt with by someone other than their local team members. A simple explanation as to what we were doing was sufficient and they weren't concerned so long as they got the information that they needed. Given the overall success a decision was made that we would continue to work in this way.

It became clear almost immediately that although each region had been providing its own research and enquiry service for some time they were in fact very different services. There were considerable differences between the demands made of the teams in the various offices and the types of enquiries they were receiving. They varied significantly in volume, complexity and subject area. Each team was providing a different level of support to their legal advisors and subsequently had different attitudes and approaches to enquiry work. Finally, although we had already standardised most of our electronic sources there were still some disparities and we were all using different regional external information providers.

If the service was to be a success and a high level of quality was to be provided, we needed to address these issues and ensure that full standardisation took place. A road show was rolled out which discussed our approach and attitude to research and enquiry work and the level of support that we would provide. Access to sources was also standardised as far possible.

Results

Introducing the firmwide research and enquiry service has been beneficial to both the firm and the IS team. As far as the firm is concerned it means that we are able to offer a standard service across all offices from 8am until 6pm. This in turn means that our legal advisors get the same level of support regardless of their location.

The IS team on the other hand has been exposed to a wider range of research and enquiry requests and are therefore constantly learning and developing their research skills. In the past some teams were busier than others and this left little time for them to develop their skills in other areas. The new system has removed this problem because the workload is spread evenly across the whole team and there is time to work on enhancing service delivery in other areas and to develop new information and knowledge products.

Implementing an electronic research and enquiry management system

The next stage in the development of the service was to implement an electronic enquiry management system. Although our email system worked well, it was not effective enough to cope long term with the number of enquiries that we were receiving or to support the virtual enquiry team. We needed to be able to reduce hardcopy administration, track enquiries and determine exactly what had happened to them. We needed to be able to pull off statistical reports by capturing that information online as opposed to having to manually complete enquiry forms and input the data into Excel. We also needed to make it easier for legal advisors to submit their enquiries.

Project teams

A project team was formed and consisted of myself, an IT project manager, a business analyst and an IT developer. The IT project manager had overall responsibility for managing the project from an IT perspective and this included ensuring that adequate resource was provided and that timescales and costs were met. The role of the business analyst was to understand how we worked and what we wanted to achieve. He then used this information to write a Requirements Definition (RD) which outlined everything that the system needed to be able to do. The IT developer then worked from the RD to design, build and deliver a solution.

A small IS project team was also formed to assist with testing the system, implementing procedures, gathering feedback from the rest of the team, and marketing the system in preparation for launch.

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Timescales

We were allocated three months for the completion of the project. The build itself was expected to take just six weeks and with work commencing in May, the final product would therefore be ready by early August and ready for launch to the business shortly after.

Scoping

The first stage was to meet the business analyst so that he could gain a clear understanding of how our research and enquiry service operated and how we wanted it to develop. This enabled him to write the RD which outlined, in a non technical way, everything that the system needed to be able to do and some of the processes involved.

The content of this document had to be agreed by both parties and signed off before the actual build could begin. Given that we only had six weeks allocated for that, we had to prioritise each individual element and decide what we would be willing to forgo if we ran out of time. In addition to this, we had to be sure that we had included all of our requirements, because nothing could be added to the scope of the project following sign off.

Software

Following the scoping exercise we had to decide whether we needed to develop the system ourselves from scratch or whether we could use and adapt a piece of existing software that we already had in-house. A number of teams within the firm were already successfully using a Business Process Management solution from Metastorm called e-Work and a decision was made that we would also use that. Our IT developer was an e-Work expert and he was confident that it could be tailored to provide all the functionality that we required and much more.

Design & build

As soon as the RD had been signed off and a decision made on the software, the IT developer began to design and build the system. We did not meet him at all during the scoping phase because it was important that we did not influence his interpretation of what was required. His area of expertise is to look at what is required and to design and build the best possible solution based on those facts. It was impossible for us to envisage what the system would look like and we therefore had to place our trust in him to deliver what was required.

As soon as the build was complete, we spent a significant amount of time testing the system to ensure that the process worked correctly and that all bugs were fixed. Although this pushed back the launch date, it was time well spent because it was important for us to get it right and to be happy with the end product.

IS team training

A detailed training guide was written and group training sessions were held for the whole of the IS team. Although the system was ready for launch, we decided to delay for a short time to allow the team to get up to speed and feel comfortable with it. It is intuitive, but significantly different to our old email system, and again the delay was time well spent.

Launch

The system was finally launched to the business at the end of November. We used a phased marketing approach to ensure that everyone knew what was happening and what to expect, including a flashscreen stating that a "new and improved" service was on its way and that more information would follow shortly. Leaflets were then distributed by the team explaining a little more about the service and inviting people to drop-in sessions where they could see the system in action. When the going live date was finally decided A4 posters were put up in all offices to advertise it.

Following the launch we decided to continue our marketing campaign and offered a small prize for every 100th enquiry received during the first month of launch. We also awarded a prize for the most interesting enquiry received during that time.

The system was very well received and during the first month we received over one thousand enquiries. A small number of enquiries continued to be received by email, as would be expected, but it was quick and easy to educate those individuals on the new process. There was no resistance, in fact, we received very positive input from the business as to how the system could be further improved.

Functionality

The system has vastly improved our ability to manage the enquiries that we receive. We receive on average just over 1,500 enquires each month and these range from simple requests for copies of articles or cases to more complex legal and business research.

Our legal advisors now submit their enquiries using a simple electronic enquiry form which sits on the homepage of our intranet (Figure 1). As soon as an enquiry is submitted, they receive an automatic email acknowledgement which provides them with a reference number and a link to their enquiry form so that they can track its progress. We have retained a personal element to the service by ensuring that the team follow up with a telephone call to scope the enquiries.

All new and outstanding enquires come through to a central point (Figure 2) where they are managed by the

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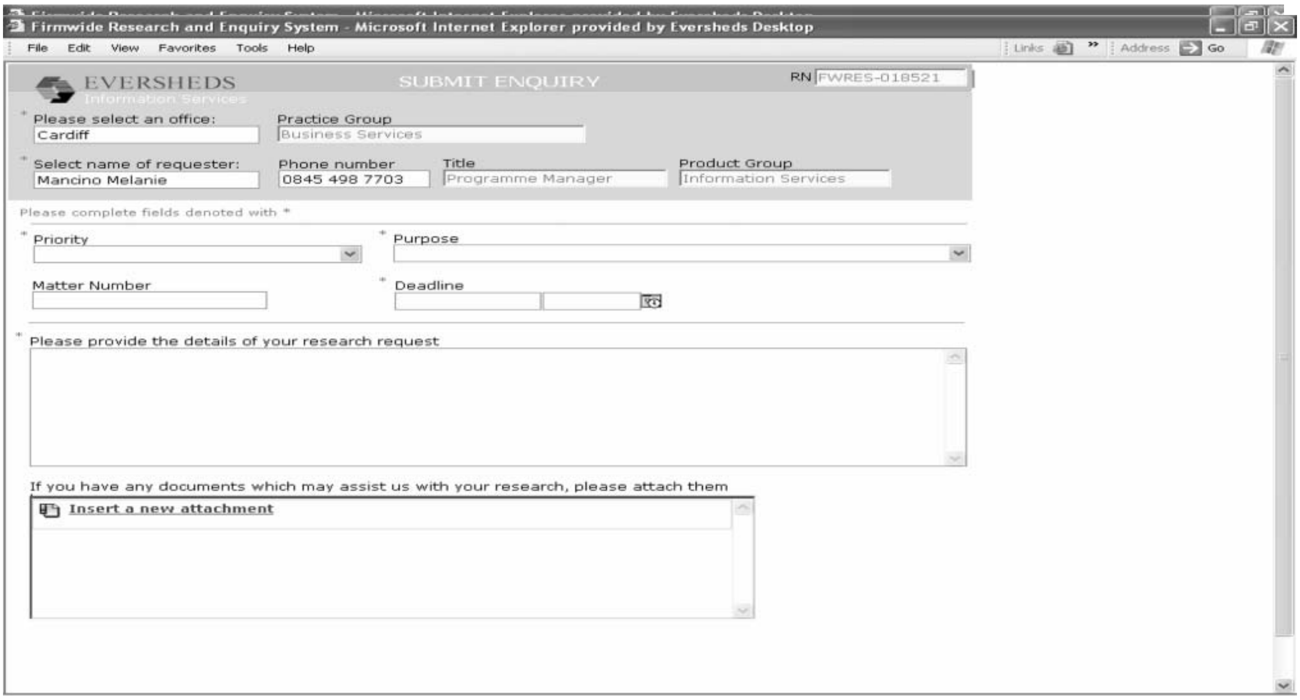

Fig. 1: Electronic enquiry form

delegator and distributed to members of the team across the country.

This screen enables the delegator to see the total number of enquiries that need to be completed, in addition to basic information such as the name of the requester, the deadline and the urgency of the request.

Viewing the details of the request is quick and easy as are other functions such as updating the enquiry details, sending an email to the requester and actually delegating the enquiry (Figure 3).

Any action taken on an enquiry is noted in the Enquiry History as is the text of any handover notes and emails (Figure 4). This is extremely useful in helping us to track what had happened to an enquiry and what the final outcome was. It also enables the legal advisor to track the progress of his enquiry.

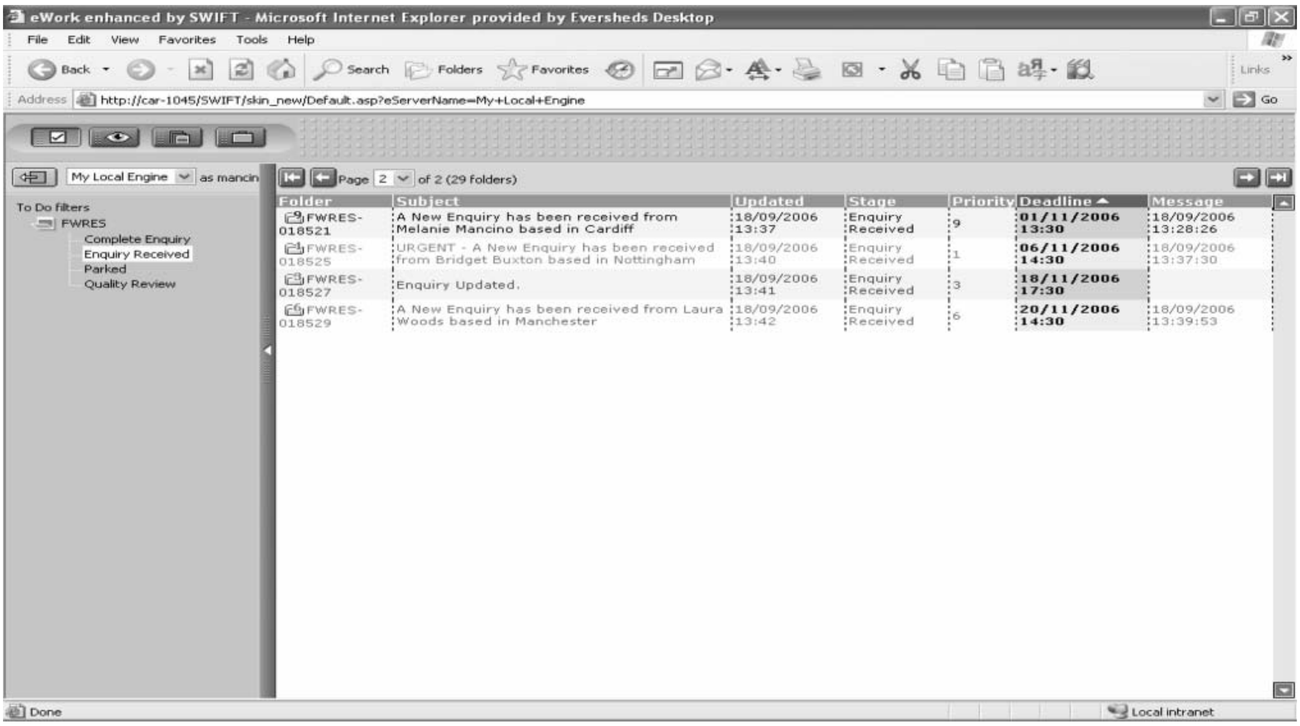

Fig. 2: Central point for receipt of enquiries

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FWRES-018521 - Microsoft Internet Explorer provided by Eversheds Desktop

Submitted Enquiry | Enquiry Form | Enquiry History

EVERSHEDS Information Services — SUBMIT ENQUIRY — RN FWRES-018521

Please select an office: Cardiff
Practice Group: Business Services
Select name of requester: Mancino Melanie
Phone number: 0845 498 7703
Title: Programme Manager
Product Group: Information Services

Please complete fields denoted with *

Priority: Low - within the next week
Purpose: Client Matter
Matter Number:
Deadline: 01/11/2006 13:30

Please provide the details of your research request
Can you please provide a copy of Frampton v Gillison (1927). I'm afraid I don't have a reference

If you have any documents which may assist us with your research, please attach them

CC List

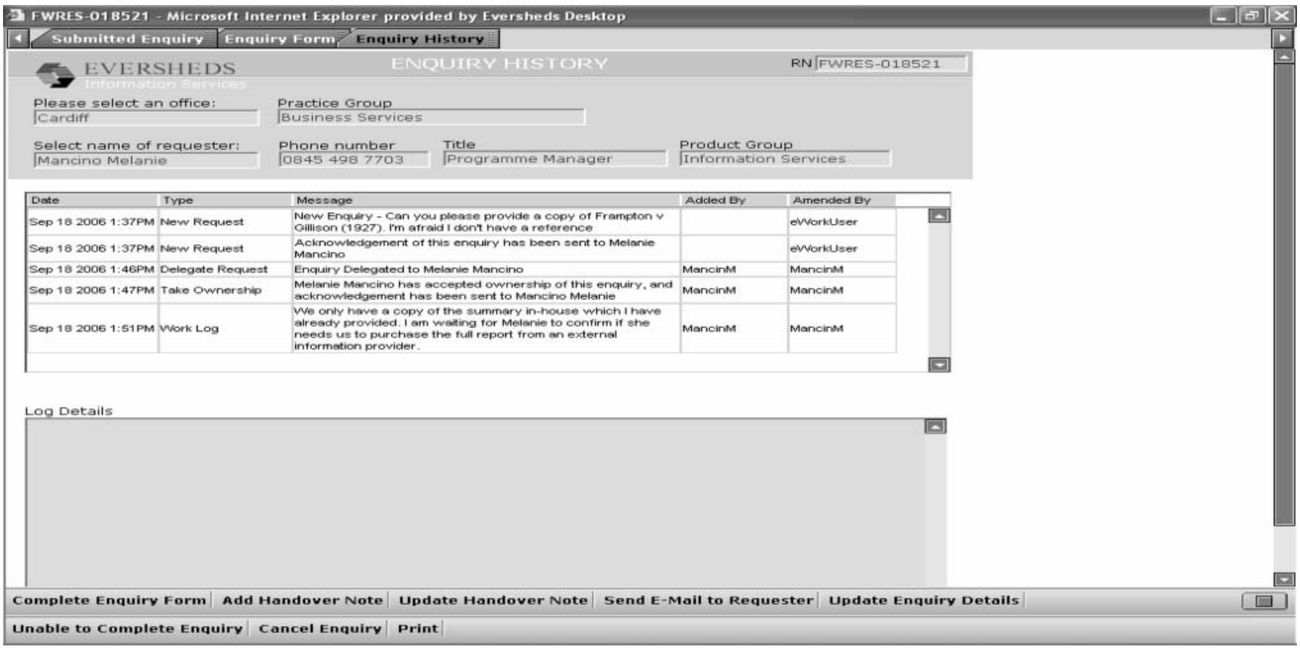
Delegate | Add Handover Note | Update Handover Note | Send E-Mail to Requester | Update Enquiry Details | Cancel Enquiry | Print

Fig. 3: Delegating the enquiry

Before an enquiry can be closed the Enquiry Form needs to be completed. As you will see from Figure 5, this enables us to capture valuable information such as the time spent, the sources used and the cost incurred.

We are also able to search for enquiries by reference number or the name of the requester amongst other things (Figure 6). We can link directly through to the enquiry forms from the results list and can also export the list and the attached information to Excel which allows us to run detailed statistical reports.

The system also has a quality module which enables us to see how an enquiry was handled and the response that was sent. We can also send quality surveys to the requester asking for feedback on the work that we did for them.



FWRES-018521 - Microsoft Internet Explorer provided by Eversheds Desktop

Submitted Enquiry | Enquiry Form | Enquiry History

EVERSHEDS Information Services — ENQUIRY HISTORY — RN FWRES-018521

Please select an office: Cardiff
Practice Group: Business Services
Select name of requester: Mancino Melanie
Phone number: 0845 498 7703
Title: Programme Manager
Product Group: Information Services

Date	Type	Message	Added By	Amended By
Sep 18 2006 1:37PM	New Request	New Enquiry - Can you please provide a copy of Frampton v Gillison (1927). I'm afraid I don't have a reference		eWorkUser
Sep 18 2006 1:37PM	New Request	Acknowledgement of this enquiry has been sent to Melanie Mancino		eWorkUser
Sep 18 2006 1:46PM	Delegate Request	Enquiry Delegated to Melanie Mancino	MancinM	MancinM
Sep 18 2006 1:47PM	Take Ownership	Melanie Mancino has accepted ownership of this enquiry, and acknowledgement has been sent to Mancino Melanie	MancinM	MancinM
Sep 18 2006 1:51PM	Work Log	We only have a copy of the summary in-house which I have already provided. I am waiting for Melanie to confirm if she needs us to purchase the full report from an external information provider.	MancinM	MancinM

Log Details

Complete Enquiry Form | Add Handover Note | Update Handover Note | Send E-Mail to Requester | Update Enquiry Details
Unable to Complete Enquiry | Cancel Enquiry | Print

Fig. 4: Enquiry history

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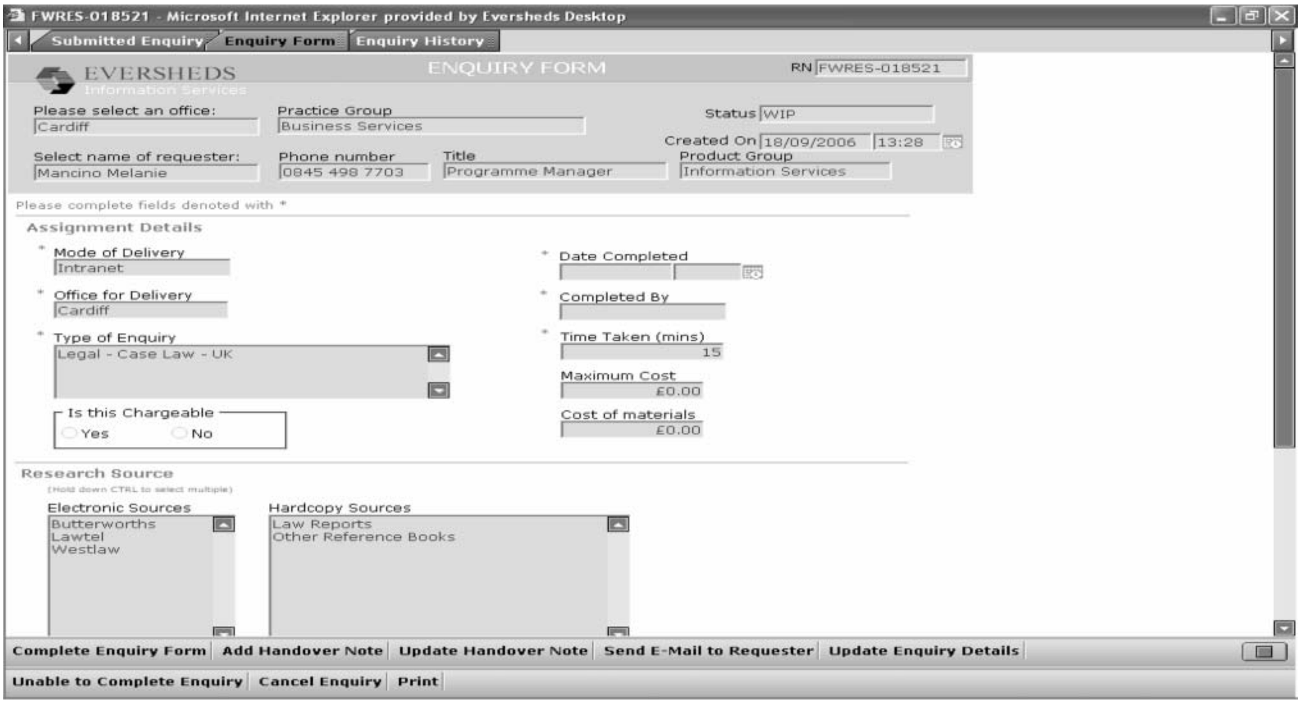

Fig. 5: Completion of enquiry form

Benefits

The benefits of introducing the system have been great in that we have:-

- Increased service delivery levels dramatically, making it easier and quicker for our legal advisors to submit their enquiries, increasing productivity levels all round;
- Significantly raised the profile of the service as a whole, alerting the business to what we can do and how we can help. As a result we are now receiving enquiries from a wider range of people and from across the business as a whole;

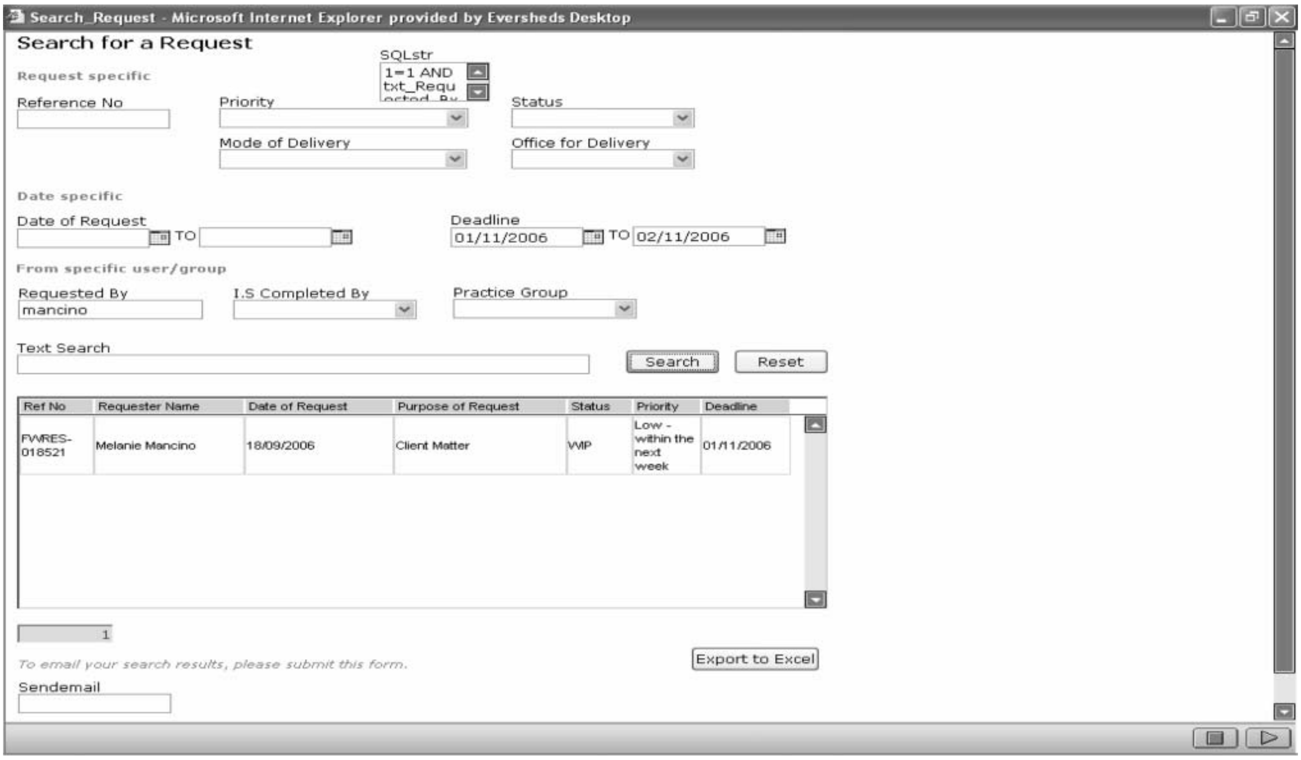

Fig. 6: Searching for enquiry requests

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- Introduced the information "signpost" concept, i.e. we are directing enquiries which we cannot deal with ourselves to the people who can deal with them;
- Made it possible to track the progress and status of enquiries;
- Increased the efficiency and management of the enquiry desk, increasing the volume of enquiry work without increasing headcount;
- Removed the need to complete manual enquiry forms and can now generate statistical reports quickly and easily;
- Started to build a useful database archive of enquiries that we can refer back to and learn from - know-how for the IS team;
- Started to generate detailed, monthly management information which tells us, amongst other things, who is using us and how often in different practice groups, allowing us to target our marketing far more directly.

Conclusion

The project was extremely challenging and some useful lessons have been learnt. It would have been far easier for us to have continued to provide three regional enquiry services and for each team to have developed and supported those services independently of each other. However, as soon as we trialled the firmwide service it became clear that we were right to challenge it and to implement the change. The change process did prove difficult for some people within the IS team - as we expected, cultural issues and resistance to change were some of the greatest obstacles in the early days of the project but we had to do what was right for the business and could not accept a situation where our legal advisors were being provided with different levels of support, dependant on where they were based. In addition, access to different sources coupled with the knowledge and experience of their local team could have seriously affected the quality of the service that they were being offered. All of this therefore quite rightly needed to be addressed.

Working with IT was a rewarding yet challenging experience. It was frustrating at times to be dependent on them and to only have the resource available at particular times. It really brought home the need to think very carefully about what you want your end product to do because it would have been so easy for key elements to have been omitted from the RD or for our requirements to have been translated incorrectly. It is important to push for answers to questions and to ensure that adequate IT support is provided post delivery.

The system has been in place for almost ten months now and we are starting to look at a Phase III development. It was not possible to include all of the required functionality during the first phase, so we intend to complete those. We also need to make some changes to the process so that it makes it even easier for the team to manage and complete enquiries and we also need to take into account the views of the end user and implement some changes that will be beneficial to them. The final word should, perhaps, go to one of the partners in our Newcastle office who frequently tells us at the bottom of the electronic enquiry form that, "I really love this service!" That kind of unsolicited feedback lets us know that all of the hard work has been worthwhile.

Biography

Melanie Mancino joined Eversheds seven years ago as a Senior Information Officer and then moved on to the role of Information Services Manager for the Cardiff office before being appointed to her new role of IS Programme Manager in March 2005. As part of her current role she has responsibility for the research and enquiry service, for developing its relationship with the business development team and for looking after the training and professional development needs of the IS team. Prior to working at Eversheds she worked as an assistant librarian at SJ Berwin in London.

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