Further reading

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Biography

Penny Bailey has worked in the legal library sector since 1986, both as an employed librarian and as a self-employed consultant, where she was involved in a significant number of projects to set up, trouble shoot or run library and information units in law firms, barristers chambers and business enterprises. Her work experience also included training and project management roles. Penny is now Managing Director of Bailey Solutions which incorporated in 2002. Penny is the 2006 winner with Brian Thomas of the *BIALL / Lexis Nexis Butterworths Awards for Excellence for Best use of Technology in a Library Project for the BIALL website.*

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From Spark to Flame: Implementing LawPort

Abstract: In this article, which is a summary of his presentation at the 38th BIALL Annual Study Conference held in Sheffield in June 2007, James Mullan provides an account of how the Content Team at CMS Cameron McKenna implemented LawPort and the issues they faced from the initial pilot to completion of the project.
Keywords: portals; enterprise information management; law firms

Introduction

CMS Cameron McKenna is an international law firm, the result of a merger between McKenna & Co and Cameron Markby Hewitt in 1997. The firm currently has offices in Bulgaria; Czech Republic; Hungary; Poland; Romania; Russia, Sofia, Ukraine and Slovakia. From March 2003 to November 2004 I was part of a small content team that implemented LawPort at CMS Cameron McKenna. This was a major project that involved team members from all the support departments including Knowledge & Information Services. Renamed Spark (Sharing Practice and Relationship Knowledge) Knowledge Centre, LawPort was one of two products, the other being Spark Client Centre, which aimed to streamline fee-earners' workflow and make their use of our internal systems more intuitive and fulfilling.

Knowledge systems at CMS Cameron McKenna

Cameron McKenna has always had a good collection of know-how in its London office and has had a central knowledge management system (FREIA) since 1989. However, prior to the implementation of LawPort, the firm used a number of separate systems: the firm's intranet, Mercator; the firm's know how (Merlin using Microsoft Sharepoint), a direct replacement for FREIA; Excel and access databases and contact lists. Each of these systems had to be searched independently and publishing know-how and other information meant being trained and having an understanding of two different processes. As it stood, there was no one place to find everything. This was a key issue for the Content team.

What were we trying to achieve?

There were two key objectives/challenges: ease of access and improving knowledge sharing. **Ease of Access,** the first challenge the team faced, entailed improving the access to, and the sharing of, practice group know-how through a single interface. At the same time, the team wanted to organise the information available clearly and make its use intuitive. The second challenge we faced was **Improving Knowledge Sharing** by providing fee-earners with one place to see, publish and review their know-how and make it available alongside daily practice materials. The team was also hoping to improve collaboration by advertising the "publish once, distribute many times" element of LawPort. This would allow a professional support lawyer (PSL) or fee-earner to publish an item, not only to their pages, but also to any page or view they thought might be of interest to others.

The benefits

Users would benefit from a "seamless" desktop experience through the integration of all our internal systems and external sources of information. Users would have a single information source that they would want to contribute to and that would lead to less "information stress" and encourage the sharing of know-how. LawPort would additionally provide a single web-publishing platform and replace several IT systems.

What is LawPort?

LawPort is a portal system supplied by SV Technologies a U.S-based firm. LawPort integrates the many sources of data which are used on a regular basis, and makes them easily accessible via the user's desktop. LawPort does this by drawing together the data contained within the separate systems in a "data warehouse". These separate systems include our HR system, our finance system, our document management system (DMS), existing know-how from Merlin and from Mercator and links to external information sources (websites and commercial databases). At the very heart of LawPort is a global taxonomy, which enables us to link disparate types of information from a matter to a document and display this information on "views". (*See Figure 1 – Data Warehouse*)

Creating and using views

There are seven different types of views on LawPort:

Client View

This pulls together information about clients and the work being done for them. This will include a snapshot of the WIP (Work in Progress) and details of fee-earners working for this client.

Matter View

This pulls together relevant internal and external information, documents and the details of fee-earners who are working on this matter.

Team View

This displays information relevant to a team. For example, there are three banking teams in London who will need to see information relevant to them only, plus banking teams in our other offices.

Office View

This view displays information about the office for staff outside that office and information used by the staff working in the office. Each office has its own page, with everything from the details of its location, where to stay, what visas are needed, how to find a taxi, through to websites which are useful for the teams working in that office.

Personal View

This view is tailored to each individual and can show whatever that person finds useful. The view could display details of their ongoing matters, their email inbox, clients they are working for, matters they are working on, recently edited documents and subject based know-how.

Category view (taxonomy)

Every term (category) in the taxonomy enables a dynamic view to be created. For example, if "Debenture" is a term in the taxonomy, a view called "Debenture" will be created. This view will automatically be populated with any information that has been categorised as "Debenture" This allows for a large number of views with very specific information on them. These views can either be navigated to from the taxonomy itself, or via Team views.

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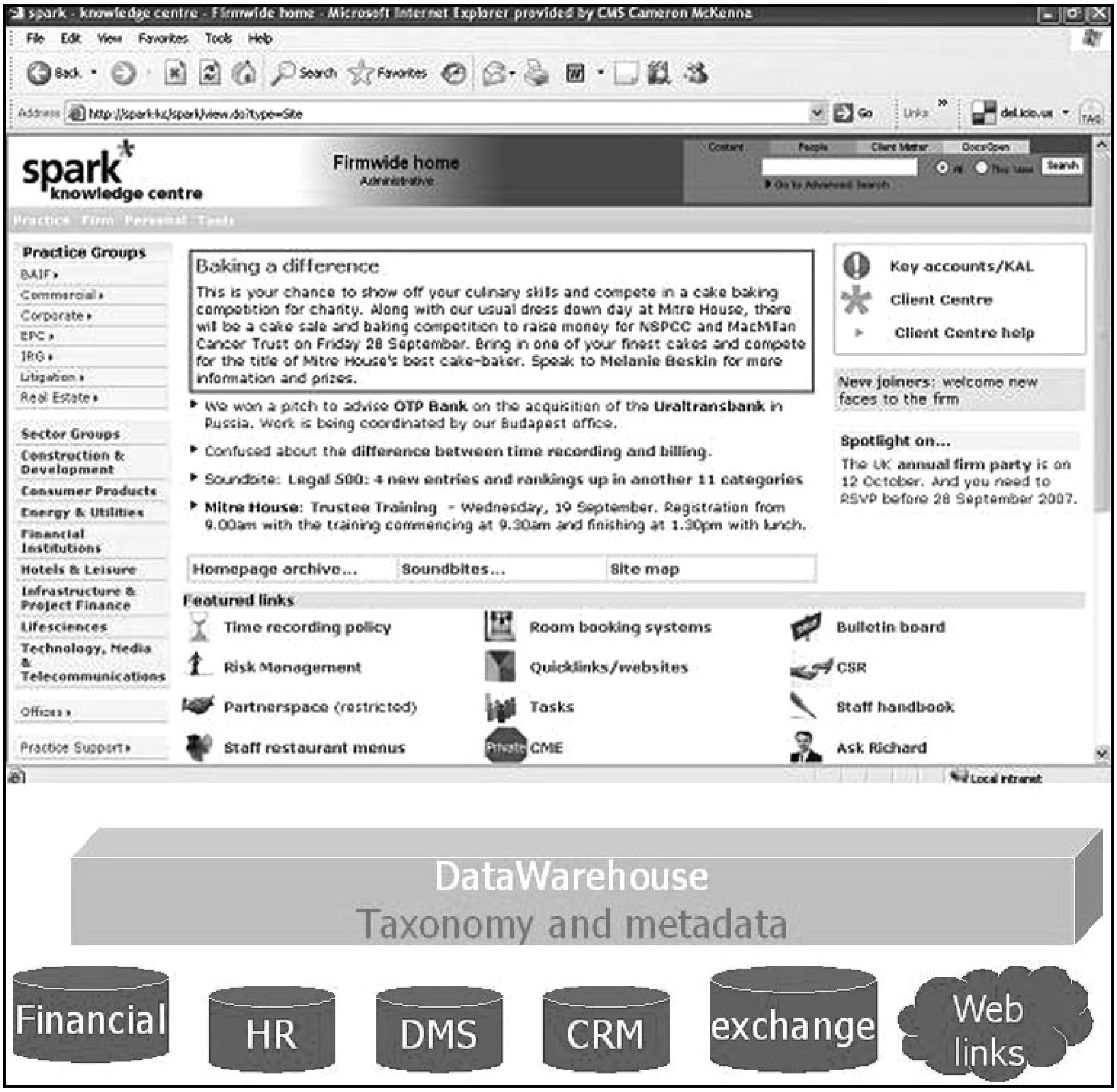

Figure 1: LawPort – DataWarehouse

Populating the views

Once we had created the views, the next step was to populate them. Views display components, which in turn have items (information) published to them. These are called Pubitems or Published items. We use a series of Pubitems which describe the different types of information created by the firm. For example Know How Standard Form is a Pubitem, Quicklink is a Pubitem and Document is a Pubitem. Components can display any of these Pubitems provided you have created the component correctly. Components can be anything from lists of items to hyperlinks (weblink) or free text (html). Lots of individual components grouped together will make a view. Components can be created at either a system or a view level. Building system level components allowed us to create templates for the different types of views, so that when fee-earners used them they were familiar with the same groups of components. View level components enabled us to add any additional components to the view we were currently administering. (*See Figure 2 Components added to a view*)

The "Pilot" March 2004

Preceding the pilot the Content team spent a considerable amount of time with each of the teams involved, auditing their documents and determining what they used on a regular basis. Some very practical information was gathered at this stage and was subsequently published to LawPort. The content team also discovered that there were many documents in existence that weren't being shared either within London or between London and our overseas offices. As well as the content team's work on

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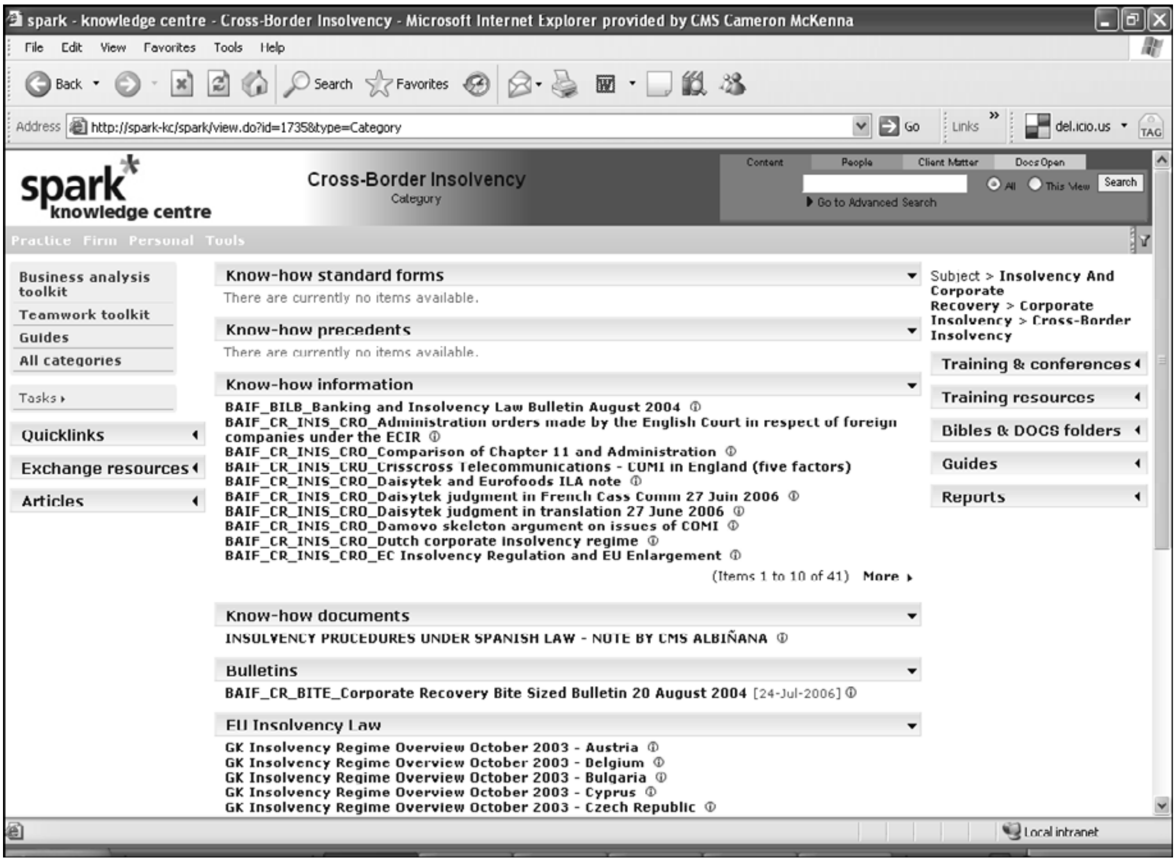

Figure 2: Components added to View

auditing documents, the PSLs in the pilot groups worked on their standard forms and precedents to "fill" any gaps, confirm their usefulness and remove any duplicates.

The content team also spent some time reviewing, revising and removing nodes from the taxonomy; the subject (category) taxonomy especially went though many versions. This was an important piece of work to undertake, as it ensured that PSLs and fee-earners had the appropriate category views to publish their know-how to. It also ensured that they felt comfortable with the pages they were publishing their know-how to. Once the taxonomy was agreed, the team set about "mapping" content from our existing internal systems to it: for instance, the Library catalogue subject terms were mapped to the Subject (Category) Taxonomy and the DOCS Document Types were mapped to the Document type taxonomy, a small part of the Subject (Category) Taxonomy.

Once we were happy that LawPort was working as well as it could be and there was enough content available we made it available to the pilot groups. The pilot groups consisted of two Practice groups **Banking** and **Energy Projects & Construction** and two support departments **IT** and **Knowledge & Information Services**. The pilot was used as an opportunity for:

- The groups to "get their hands" on Knowledge Centre.
- To discuss with users their thoughts about Knowledge Centre, including what could be changed and what couldn't and what should be built into future development.

From user group feedback with the BAIF and EPC teams it became clear that we needed to resolve three key issues:

- Ease of access
- The amount of information displayed
- How the information was displayed

Specifically users told us that the **London** views were too cluttered and that they would prefer to see a "cut down" view (*See Figure 3 – Banking & International Finance view pilot version and Figure 4 HR View pilot version*). They also told us that they didn't want material displayed by type, but by subject. Users didn't care if it was a standard form or a precedent, they just needed to know that it existed and crucially that they could access it. Fee-earners felt that the Personal view wouldn't be used and also that they found searching difficult and when they did return results, they weren't the items they expected to return.

Users also told us that the Firmwide view was one of the most useful views on Knowledge Centre, as it was

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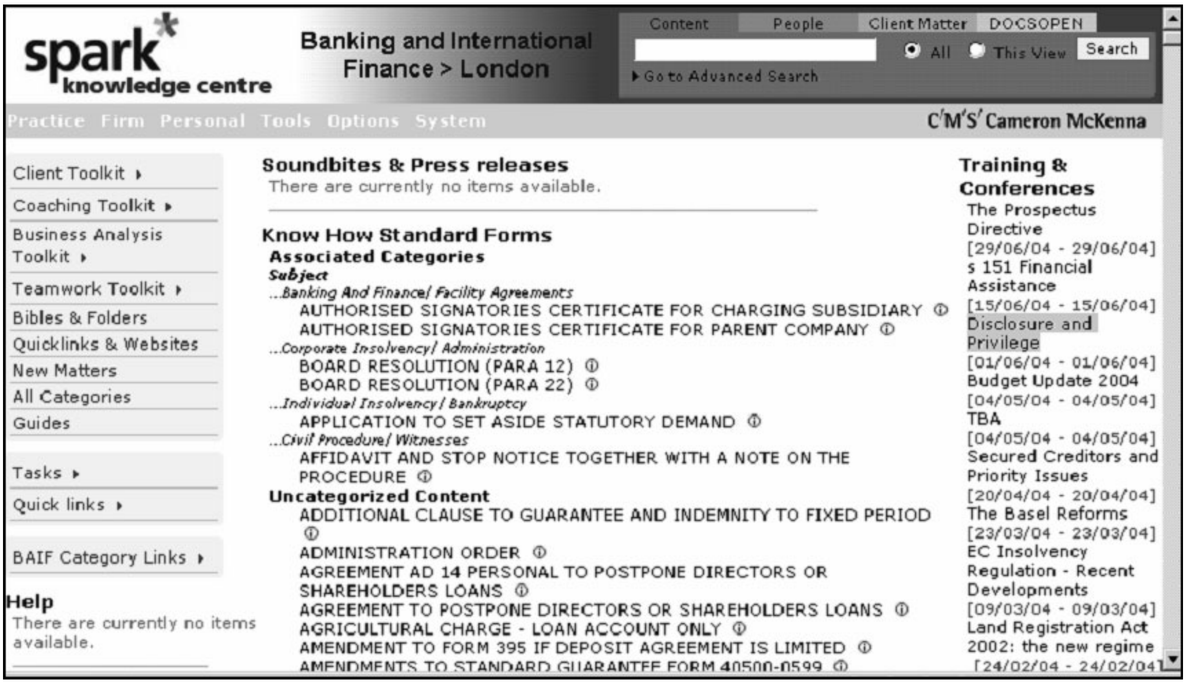

Figure 3: Banking & International Finance View pilot version

almost a portal in its own right, providing links to important/key pages on Knowledge Centre and publishing stories that would be of interest to all members of the firm.

Users were also surprised both at how much content was already on Knowledge Centre and by how much would be available at the end of the rollout. The content team felt that this might have been one of the reasons why the search wasn't perceived in a good light: users simply weren't used to seeing the volume of information that was now available on Knowledge Centre in one place.

Time to leave the building?

Not quite yet. In fact, the pilot had been successful in a number of respects. Users had told us that they loved

Figure 4: HR View pilot version

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the use of icons as either shortcuts to other pages on Knowledge Centre, or as shortcuts to commercial/external sources of information. After reviewing all the feedback that we had received from the focus groups, we set about giving Knowledge Centre a new look. This involved:

- Changing the navigation slightly so that it included more team views.
- Including more white space to make the views cleaner and clearer.
- Adding more icons and banners to highlight important resources and information that users should be looking at.
- Focusing less on components and more on HTML and free text elements.

The results of all these changes were much cleaner and more user-friendly pages. See Figure 5 New Banking and International Finance view and Figure 6 New Human Resources View.

Training

Training was a key element of the rollout, although for the initial pilot we didn't provide structured training sessions. Instead we worked with power users to identify issues and make small changes/additions to Knowledge Centre once they had been identified. This we did by regularly walking the floors of the practice groups involved in the Pilot. Once the initial pilot was complete, we designed a training session with input from the PSLs, which we implemented with the assistance of the IT training team. The training was tailored to each practice group with appropriate questions and searches and involved an hour of hands-on training. The training was also available as an e-learning package. After training we ensured users were comfortable with the system by having floorwalkers stationed within the practice groups.

What's happening now

The Spark Content team is currently looking at the integration of commercial resources, so increasingly we are planning to add deep links and content from third parties. An example of this is the SCORE Report, which uses Lexis Nexis Publisher to produce a report, which is published to Knowledge Centre. The team is continuing to rebuild some of the older views and this will continue.

The future – what next?

There are a number of improvements to the software that would be useful, especially in relation to the search functionality and the sharing of people expertise or "Know-who". The Spark team has begun to integrate commercial/external data and this process will no doubt continue especially with the developments in federated searching and the willingness of commercial database to work with firms to integrate their resources. We are also

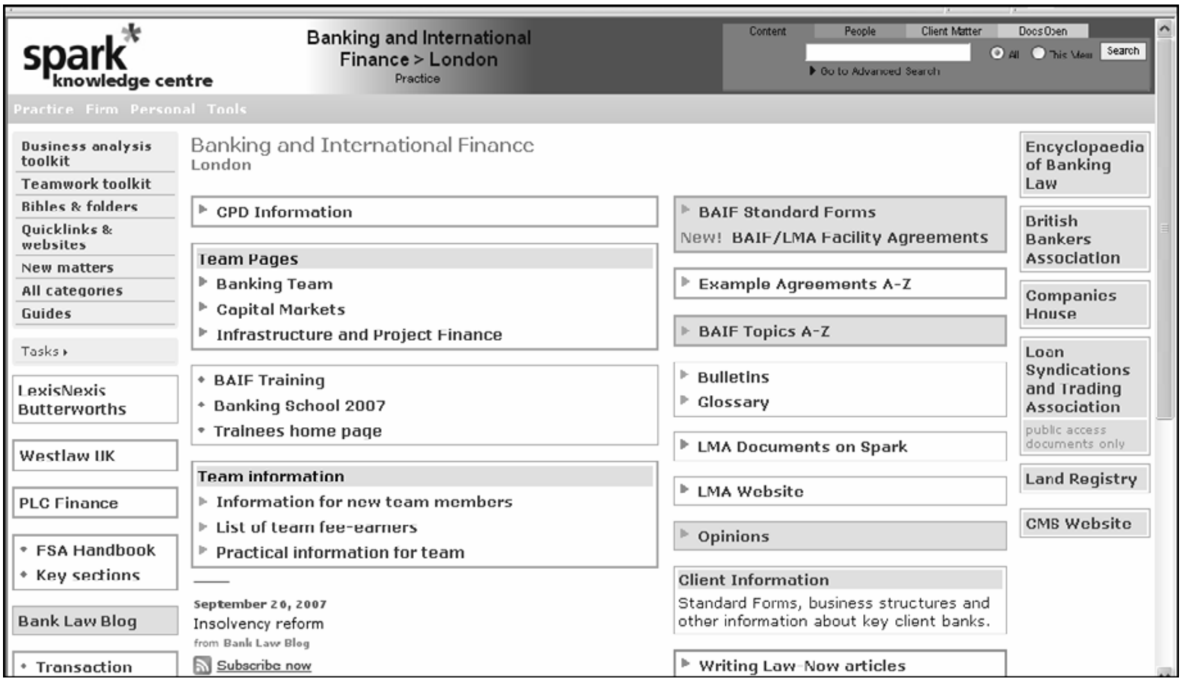

Figure 5: New Banking & International Finance View

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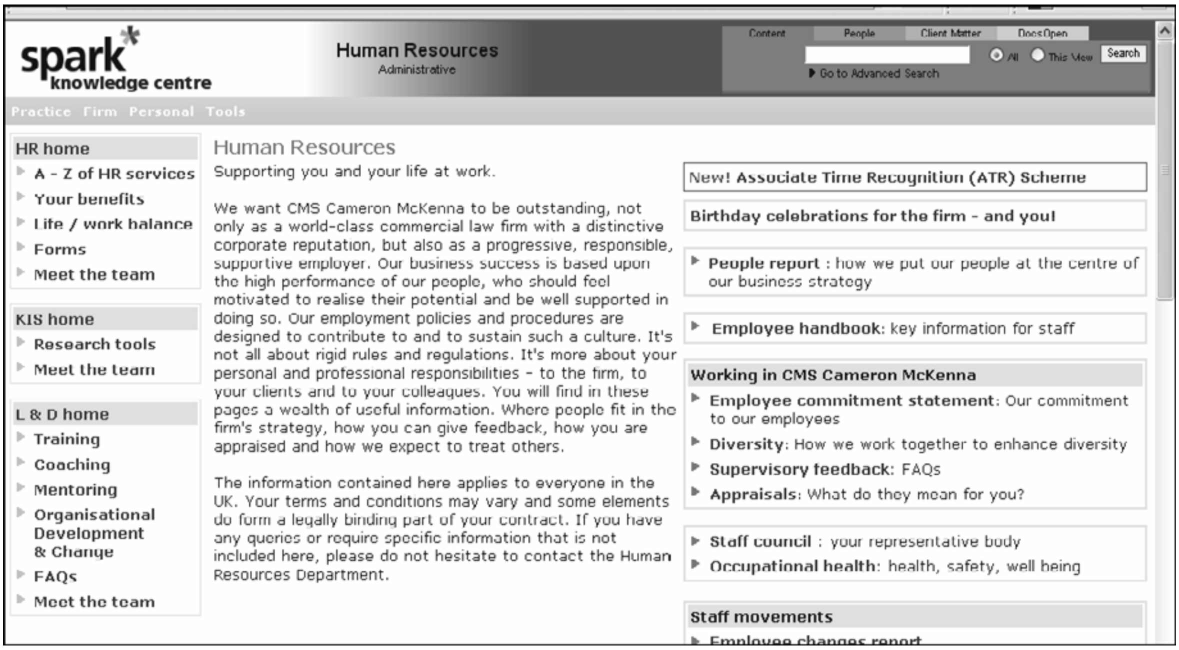

Figure 6: New Human Resources View

looking closely at social software (Blogs, wikis and RSS feeds). Having already completed a pilot wiki project with our trainees and having established a number of internal blogs, the team is now exploring the possibility of integration of Spark Knowledge Centre with other social media.

Conclusion

The project was enormously enjoyable to work on as it exposed me to all the practice groups in the firm and I met a number of individuals and groups whom I would not otherwise have done. It was at times stressful trying to reach several deadlines at once and working with both the suppliers – SV Technologies – and our own IT Department on the technical elements of the project. The portal goes from strength to strength and the efforts put in to the project were rewarded when Kate Stanfield, the Project Manager for Spark Knowledge Centre, won the Inaugural 2005 BIALL/Lexis Nexis Butterworths award for Best Use of Technology ina Library Project. However, the most important result of the project has been the growth of knowledge sharing amongst fee-earners, who now have established processes for both the collation and processing of know-how. The system has given them the confidence to know that if they submit a piece of know-how it will be made available quickly and on an application where they will be able to find it.

Biography

James Mullan has worked at CMS Cameron McKenna for several years, having qualified as a librarian in 1996. He is the general chair of the Legal Information Group and runs the BIALL.

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