

Implementing an Enterprise Wide Search Tool in a City Law Firm

Abstract: In a paper presented at the 39th Annual BIALL Conference held in Dublin in June 2008, Victoria Jannetta, described how her firm implemented a new tool to help better exploit its internal information resources.

Keywords: law firms; knowledge management; enterprise search

Introduction

Two years ago, following the recruitment of a new Director of Knowledge Management, City law firm Field Fisher Waterhouse (FFW), began a process of investigating ways to better manage its internal know how. The aim was to find a solution which would make the firm's know how and precedents more easily accessible to everyone in the firm. This article will discuss the 2007 project that I participated in, to select, implement and launch an enterprise wide search system for Field Fisher Waterhouse.

Field Fisher Waterhouse – some background

FFW is a medium sized law firm with more than 120 partners, 230 assistants and more than 800 staff in total. The firm practises in a number of different areas of law including corporate and commercial, IP and technology, regulatory and real estate. Since I joined the firm at the end of 2006 it has embarked on a strategy for growth, as demonstrated by the ongoing recruitment of lateral hires and the opening of offices in Brussels, Paris and Hamburg.

This strategy has made knowledge management very important for the firm. New staff and new offices need to be able to get up to speed with the way the firm operates. An effective search tool can enable them to access the firm's precedents and know how and find out who are the experts in the firm. It can also enable them to share their own knowledge and expertise with their new colleagues. Many of the lateral hires are recruited from firms which have sophisticated KM systems in place. FFW needs to be able to meet their expectations.

Knowledge management at FFW

Knowledge management is a relatively new discipline to FFW. When I joined the firm there were only a handful

of professional support lawyers (PSLs). Now, nearly every practice group has the support of a PSL and an information officer. Information officers have moved out of the central library and now sit with the fee earners they support. The PSLs have created a knowledge bank of know how and precedents from documents authored both by themselves and fee earners. This relatively late introduction of knowledge management has been a benefit to the firm. With no legacy systems to contend with, we have been able to take full advantage of the new technology which is available.

Knowledge management resources at FFW

Although prior to the appointment of a knowledge management director the firm did not have a clearly defined knowledge management strategy, it did have a number of knowledge resources and repositories.

Precedents and know how

The firm's precedents and know how documents are stored within Interwoven, the firm's document management system, in a dedicated repository which is split into folders for each practice group. The folder structure for each practice group comprises the firm's taxonomy. The problem with using Interwoven is that the search interface is not very sophisticated and this makes documents hard to locate.

- **Experts**

The firm's partners are all experts in their field, but we did not have an effective way of connecting them with those who would benefit from their expertise.

- **Subscription based legal research tools**

The Information Services department subscribes to a number of research tools, including PLC, Lexis and Westlaw. We wanted to make these services more accessible and to link them with internal know how.

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- **Library catalogue**

Despite our best efforts, the library catalogue is a neglected resource and fee earners often forget to search the book collection when they have a legal research query. Again we wanted to combine the knowledge contained within our book collection with internal know how.

- **Intranet and website**

We needed to harness more effectively information held on the intranet and the website. In particular that information relating to individuals in the firm.

Our requirements for a search system

Having established that knowledge management was key to the successful growth of the firm, and also having identified the knowledge resources the firm had access to, we were in a position to set out our requirements for a search system. These were as follows:

- Ability to share and find knowledge from multiple offices.
- Ability to search over a variety of systems, including the document management system and external resources.
- The requirement for minimum input from PSLs and information officers in preparing documents for searching, such as adding metadata.
- The option to have an expertise database.
- A simple user interface which would suit the Google generation.
- Respect for existing security settings so that privately marked documents would not become accessible to all in the firm.
- A system which would go beyond single word searching and incorporate new search technology, such as concept searching. Concept searching uses an algorithm which identifies word patterns which convey the more meaning than single words.

The selection process

The implementation of an enterprise wide search tool was going to be a significant investment for the firm. It was important that we made an informed decision based on what the firm needed. We were aware that there were a number of potentially suitable products on the market but, as a team, we did not have any prior experience of selecting this type of tool. It made sense to employ some consultants who did have experience in this field to assist us. We took on consultants 3Kites,

who are highly experienced in knowledge and IT applications in law firms.

We decided to organise some initial demonstrations of a selection of the products on the market. At this stage we did not reject any system on the basis of cost. It was important that we saw a range of products, so that we could gain an idea of what it was possible to do with a search system.

To assist with the selection process 3Kites designed an evaluation form. This enabled us to score each product according to the same measures and also ensured that we asked each vendor the same questions. Measures included search capabilities - such as whether the product employed concept searching, and full text searching and could search across external sources. We also looked at how easy each system was to use, how easy they would be to configure, and how much value for money they offered. We met six vendors in one day.

Next, based on our findings on the evaluation scorecards, we narrowed the choice down to three products. We sent a request for information (RFI) questionnaire to the selected vendors and invited them back for further interview. Questions asked included:

- Further information about each company - we wanted to make sure we were going to be dealing with a going concern.
- What experience each vendor had of the legal sector.
- Questions about the product itself, such as how easy it would be to integrate it with our existing systems, and could it search across documents written in languages other than English?
- Did the product support federated searching, i.e. search over multiple sites?
- Did the product have the flexibility necessary for us to be able to customise the user interface?

It was important that our evaluation of the products matched the requirements of our users. In order to obtain some user feedback, we ran workshops with some of our main users including partners, information officers and trainee solicitors. One of the key requirements of our users was to have a system which would retrieve documents more efficiently than our document management system currently does. They were also interested in having a single search interface for internal and external information.

Our choice – Recommend Mindserver

We finally selected the search system Mindserver, sold by Recommend. There were a number of reasons why this system became our preferred option. Recommend returned a professionally presented RFI and they provided a strong indication that they really wanted to work

with us, which was not the impression we got from all the vendors we dealt with.

At the time we made our selection Recommind had very limited experience of the UK legal market, but they did have some high profile legal clients in the United States which gave us confidence in their knowledge of our sector.

We were impressed that Mindserver could search across multiple languages and alphabets. This was important because not only has the firm's expansion into Europe meant that we have documents written in languages other than English, but FFW also has a number of Japanese lawyers.

The system supports both simple and advanced searching. It was felt that the single search box would appeal to the Google generation and the advanced search option would appeal to PSLs and information professionals. Because the system is so simple to use we anticipated minimal user training would be required and our fee earners would be able to start using it almost immediately.

When we purchased Mindserver it was capable of searching across external websites and also the legal research tool PLC. The system's full-text concept search supports searching by keyword, natural language, phrase and Boolean searches.

Implementation

The implementation stage took approximately three months. We worked closely with the vendor's software developer and our own IT team. The knowledge management team was not involved in the technical part of the implementation, but it seemed to be relatively easy to link it with our accounts system, and the document management and HR systems.

Mindserver is accessed via our intranet home page. We worked on making the look and feel of the new system match as closely as possible our existing intranet pages, including colours, branding and navigation options.

As we started testing the system it became evident that, as a firm, we needed to become much more rigorous about ensuring internal documents had appropriate security settings. Because Mindserver's search capability is so powerful, documents which had long been buried in our document management system suddenly became potentially available to all. We had to go through a testing exercise to ensure nothing confidential, such as HR related documents, was accessible to the whole firm. We also had to do some training to remind people how to make necessary documents private. Mindserver respects the security settings of our document management system.

As mentioned, the results of our user workshops revealed that the option to search over multiple sites was quite high on our users' wish list. When we implemented the system it was set up to search across PLC, but searching over other subscription-based sites was not as simple.

When we spoke to LexisNexis we were given a not insubstantial quote for the software which would enable us to search their content via Mindserver. Other data vendors were still in negotiations with Recommind. Currently, PLC remains the only external site our version of Mindserver searches but, despite our users' original demands for the ability for it to search such databases, this does not detract from the usefulness of the product to the firm.

As is inevitable with implementing any new IT system, we continue to have technical issues to deal with, but nothing insurmountable. We have employed a new team member who has, as one of her responsibilities, the job of dealing with any technical issues relating to the system. She acts as a very useful intermediary between IT and the Information Services team.

We thought long and hard about what to call the system but finally opted for the not very imaginative, but descriptive, KnowledgeSearch.

User training

As anticipated, because KnowledgeSearch is very simple to use, training was kept to a minimum. We wanted to ensure we had the approval of the decision makers in the firm so our first demonstrations were to partners. To raise awareness quickly we ran a series of demonstrations at practice group meetings then followed up with more in-depth training as required, for individual users. Training on KnowledgeSearch is now part of all new joiners' induction programme.

Benefits for the firm

The implementation of KnowledgeSearch has been a great success for the Knowledge Management team. We now have a one-stop search tool for all internal documents with the exception of emails. By employing experienced consultants we were able to complete the project with the minimum investment of staff time. The system is as simple as Google to use, but employs sophisticated filtering options, so that users can narrow down an initial results set of thousands by focusing on, for example, business unit, author, source, or date authored.

The system guides users to the firm's best documents on a given subject by ranking documents from our Knowledge Bank above results from other repositories. Because the system's search capability is so powerful, minimum effort is required from our PSLs when applying metadata to documents submitted to the Knowledge Bank.

Going forward

Recommind respond to user demands. As more law firms in the UK purchase the system, it is being

developed to meet their requirements. As a firm we may consider extending the content the system searches to emails. It would also be useful to be able to search our CRM database. In the Information Services team we would be interested in exploring federated searching once again.

Conclusion

The implementation of KnowledgeSearch has improved the firm's effectiveness at sharing knowledge. It is a system which matches our original requirements, was straightforward to implement and has proved easy to use.

Biography

Victoria Jannetta is currently Head of Information Services at Field Fisher Waterhouse. She has worked in both legal and accountancy information services. Her previous positions have included working at KPMG and Charles Russell. She is an active member of BIALL and was Chair in 2004–2005.

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Federated Searching – the Process and the Problems

Abstract: This paper, taken from a presentation given by Melanie Farquharson, 3Kites Consulting, to the 39th Annual BIALL Conference held in Dublin in June 2008, discusses recent developments in the provision of federated search systems and how they can ease the legal research process. It also considers the attitude of legal publishers to such systems.

Keywords: online information; law firms; federated search; knowledge management

Introduction – too much information

We are now producing more information annually than it is possible to store¹. There is so much information, and things change so quickly, that it is a real struggle to keep up. New sources of information crop up all the time, and new ways of mining that information become available. Knowing where to look and how to use the sources is challenging. For lawyers the challenge is particularly acute – they have to provide the right answer, not just a good answer, and clients expect quick responses.

Librarians in law firms are experiencing greater demands to provide a 24-hour service. In my practice as a lawyer I have many painful memories of what I call 'the Sunday afternoon syndrome'. Working on something that has to be on the client's desk on Monday morning, but looking out of the window and wishing I could be doing

something else, I would diligently produce the best quality advice I could. However, when a point of law needed checking, or some factual information needed to be confirmed, there was no-one around in the office to help me. I was on my own. As a junior lawyer I would have used the available information sources constantly to carry out research, and I was very familiar with them. As I gained experience, and became a less frequent user, the sources changed and became more sophisticated. Trying to find one's training notes from the last release of a legal publisher's online service on a Sunday afternoon, when all you want is a quick answer to a straightforward question, is very frustrating and it has left its scar on me.

So in my mind it is clear that an important part of the role of the knowledge and information team in a law firm is to work out how to make the right information accessible, easily, when lawyers need it, without them necessarily having to call the library for help. Federated searching has a role to play here.