

WEST KM CASE STUDY DOWNEY BRAND LLP

LEVERAGING DOCUMENT MANAGEMENT
AND WESTLAW WITH WEST KM

DOWNEY BRAND LLP

LEVERAGING DOCUMENT MANAGEMENT AND WESTLAW WITH WEST KM



Downey Brand opened their first office in Sacramento in 1926. Today they have 118 attorneys practicing in 25 areas of law focusing on business, litigation, and natural resources. They are Sacramento's largest law firm, serving clients from regional offices in Stockton, South Placer, and Reno.

THE CHOICE

Mike Libby, IS Director at Downey Brand, has a passion for knowledge management. He was immediately intrigued when he was introduced to West km[®]. The firm had a fairly standard document management system at the time that had been in place for several years, but the problem with the system according to Libby was that document types were poorly defined. "In the past, the searching capability of the document management system was so limited that people used it primarily to access their own working documents. We had 800,000 documents indexed in our document management system but the attorneys couldn't find the knowledge they needed within that collection."

West km was appealing to Libby on many levels. He originally approached knowledge management 15 years ago, creating key term index databases for opinions and documents drafted by attorneys in an effort to make the information accessible to others. "It was really an index to documents. I was reading documents and trying to pull key issues or subject matter so that someone could do a search that would find those documents based on legal issues. It took a tremendous amount of effort on my part to keep the system going, and it was very limited, and ultimately, very flawed."

"One of the key things that allowed our implementation to be so successful is that anyone in the firm can use this tool and they see it as helping them to do their jobs better."

Mike Libby
IS Director

Compared to other knowledge management products, Libby was most impressed with West km, especially the fact that West km had a solid and satisfied user base at Downey Brand.

West km is specifically designed for law firms to increase knowledge sharing by combining access to an organization's collection of work product and leveraging their document management system (DMS) and Westlaw® research.

THE PROCESS

The firm formed a knowledge management committee, including partners, associates, and staff. While the group unanimously agreed that knowledge management was important, they also agreed there was a disconnect between making a plan for knowledge management and actually effectuating change at the firm. Betty Barth, IS Manager, articulated the disconnect saying, "How do you get attorneys to actively participate in making sure the documents they're putting together are exemplar documents, and who is going to be in charge of researching that the caselaw contained within the documents is current?"

Barth believed that to get attorneys to use a knowledge management system, it had to be presented in a familiar and comfortable format. "That's why I really liked West km because even if they weren't going to initially buy into the concept of doing a West km search, any time they would be in a Westlaw database and see the Downey Brand icons, it would remind them that we have these very same documents referencing those cases and statutes right here in Downey Brand."

Downey Brand started with the West km for Litigation module. It incorporates familiar West features such as the KeySearch® taxonomy and KeyCite®, West's powerful citation research service, to search internal documents from the firm, as well as publicly available information on Westlaw. It didn't take long, however, before the attorneys were clamoring for other West km modules.

"After the successful West km Litigation rollout, we set up a demo of West km Transactions and Deal Proof®, for a large group of transactional attorneys," says Barth, "and one of the attorneys got excited and yelled, 'Here's my credit card! How soon can we get it?' The attorneys had never seen anything like it."

VETTING

Before any real knowledge sharing could happen at Downey Brand, Mike Libby knew that the document management system had to be reorganized using the West km Vetting Toolkit.

The West km Vetting Toolkit fine-tunes the selection of documents from an organization's document management system (DMS) before indexing them in West km for Litigation or West km for Transactions. Rules define which documents should be included, as well as which should be excluded, by identifying documents using profile attributes or full-text searching. The number of unwanted, or noise, documents is thereby reduced, ensuring that only appropriate documents are selected.

Downey Brand wanted to be closely involved in the implementation process. They worked with West km representatives to thoroughly understand the vetting process and fine-tune rules. "We made several passes through our whole document system starting from the least important type of document to the most important type of document," explains Libby. "The idea was to end up with a few document types that had high potential of containing knowledge. And then we narrowed it down even further."

"All our work paid off," affirms Barth. "We came up with an amazing set of documents, and then we tested it with a pilot group and had very few problems. Once we sorted out the shopping lists for Saturday night's big dinner party, soccer team rosters, fax covers – that sort of thing – we were delivering nothing but quality documents."

TRAINING AND IMPLEMENTATION

When West km was rolled out at Downey Brand, attorneys were offered a 30-minute training session to learn how to use it. Attendance at trainings and interest among the firm's attorneys were unprecedented. "We had 98 or 99% participation," says Mike Libby. "That was just unheard of. They were on fire." Libby explains the ready acceptance of West km this way: "One of the key things that allowed our implementation to be so successful is that anyone in the firm can use this tool and they see it as helping them to do their jobs better."

West km training is now part of new user orientation. "New associates ask about getting access to West km before they even know where their offices are," laughs Libby.

FOR MORE INFORMATION

Visit west.thomson.com/westkm to find:

- Product demos
- Brochures
- More case studies and white papers
- System requirements
- and more

Or contact your West representative.

NEXT STEPS, NEW DREAMS

Mike Libby's passion for knowledge management has not abated. He is exploring avenues to use West km in creative ways above and beyond what Downey Brand bought it to do.

When a litigation partner at the firm approached Libby with the idea of accessing publicly accessible legal research documents from a particular Internet Web site which did not provide robust searching capabilities, Libby was intrigued. His team was able to grab a copy of the documents from the external Web site and then import those documents into a custom West km database. Now these valuable documents are easily accessible using West km's rich and familiar searching capabilities.

Another innovative documents collection was created at the behest of the Energy Law Practice Group at Downey Brand. Libby created the California Public Utilities Commission (CPUC) final rulings and resolutions database. From West km, users can now access CPUC documents in a manner substantially better than that available on the CPUC Web site.

Even more recently West km was used to create an expert witness database at the firm so users can search West km for expert witness CVs, depositions, and reports.

Libby sums it up, "West km really had the potential of satisfying what I was looking for. It ended up giving me what I had always dreamed of and now I'm just starting to come up with new dreams."

For more information visit west.thomson.com/westkm or contact your West representative.