

## WEST KM CASE STUDY

# BAKER, DONELSON

BEARMAN, CALDWELL & BERKOWITZ, PC

SUCCESSFUL KM ADOPTION DRIVEN  
BY CLIENT SERVICE FOCUS

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#### SUCCESSFUL KM

When Meredith Williams accepted the role of director of knowledge management for the global firm of Baker, Donelson, Bearman, Caldwell & Berkowitz, PC, she was well aware of the task that lay before her. She joined the full-process litigation and transactional law firm five years prior as a knowledge management attorney and had watched it grow. In 2007, Baker Donelson was ranked by *The National Law Journal* as one of the 100 largest firms in the country.

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#### Meredith Williams

Director of Knowledge Management  
Baker, Donelson, Bearman, Caldwell & Berkowitz, PC

Through strategic acquisitions over its 120-year history, the firm has expanded to include more than 540 attorneys who operate from 16 offices in the southeastern United States, London and Beijing. With each acquisition, so grew the number of work products as well as the difficulty in accessing them. The firm’s document management system (DMS) currently manages more than 10 million documents accessible by attorneys and paralegals across its five practice groups – Advocacy, Business, Health Law, Public Policy, and Labor & Employment Law.

“The DMS platform we have certainly meets the goals of its primary purpose,” Williams said, “but it was lacking in the ability to provide effective and efficient search results. In the practice of law, time is money, and we are always

cognizant of that fact. The more effective we can make the searching, the more money we are able to save for our clients.”

Working with the firm’s librarian and its information technology (IT) team, Williams began to source solutions for the problem. The firm needed to find a way to deliver research services more effectively and efficiently while keeping the overhead costs down. It didn’t take long for them to find the answer. In early 2004, Baker Donelson installed West km® for Litigation, followed in mid-2006 by West km for Transactions.

“Ultimately, we chose West km because it puts to use our firm’s best work, regardless of the practice area, allowing us to increase our knowledge sharing and knowledge transfer,” she said. “It’s also very easy to use. Virtually every attorney learns Westlaw® in law school. And if you know how to use Westlaw, you know how to use West km.”

#### TECHNOLOGY APPLIED TO BEST THINKING

West km is a knowledge management solution that leverages Westlaw indexing and search technologies to a firm’s best thinking and expertise, represented in the firm’s content collection. It is designed to further knowledge sharing by combining access to a firm’s work product collection with Westlaw research. Installed on-site and safely behind the organization’s firewall, West km integrates with the organization’s DMS or stand-alone document collection. Users quickly find relevant documents and gain insight and understanding from both internal and external knowledge and expertise. Just over two million of Baker Donelson’s 10 million documents are tagged for use with West km, which the product does automatically.

“West km is the base of our knowledge management system,” Williams explained. “It takes our volumes of documents – our intellectual capital – and unlocks the value of our work product and knowledge. It sits within our intranet and is highly integrated with our systems.”

So integrated is the service, in fact, that it has its own brand – BakerKM. With a background in accounting and law, Williams sought expertise and collaboration from the marketing and business development group to develop the brand as well as a plan for adoption of all Baker Donelson knowledge management products.

“We understood the value of West km and its ease of use,” Williams explained, “but we needed to identify the best ways to integrate the service. We knew we had to ensure adoption by our attorney and paralegal teams in all of our offices to reap the ultimate benefit of West km – improved client service. The way we do it is to market BakerKM – every single day, all day long.”

#### A BRAND WITH A PLAN

With just one other full-time attorney, a full-time legal secretary and a part-time paralegal, Williams and her team of three put the marketing plan into action, and with enthusiasm keep it alive.

In addition to promoting the BakerKM brand, the logo of which is printed on everything from pens and notepads to mugs and thumb drives, the plan calls for an extensive rollout to all 16 offices for any new knowledge management initiative. Williams travels to each of the offices at least once a year, and she and her team conduct ongoing training through the use of webinars as well as site visits for events and trainings as requested.

The rollout plan was implemented for the launch of West km for Transactions at the firm, as well as for subsequent upgrades and enhancements to West km services. “If you don’t have a successful rollout, you’ll never get the adoption you are looking for,” noted Williams. “For us, it starts with prerollout communications from the top and a great deal of support from the practice management.”

Staggered email communications from the chief executive officer, chief information officer and office managing shareholder begin three weeks prior to Williams’ arrival at each office before a launch. Posters around the office – of course branded with BakerKM –

tout fixes for current pain points and hot new features. Practice chairs and office administrators serve as training advocates, promoting the launch meetings and encouraging attendance to attorneys in casual conversations and formal meetings.

“The practice chairs and administrators help to drive home the importance of the classes,” said Williams. “They emphasize that the classes will teach the attorneys, paralegals and staff how to be more efficient, which saves the attorneys time and the clients money,” she added.

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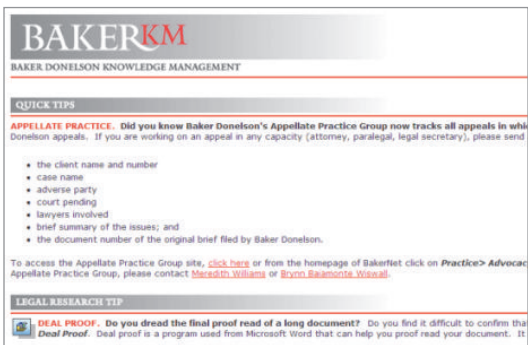
During the rollout or training week at an office, 45-minute classes are held throughout each day, including over breakfast, lunch and dinner. “We know they have to eat, so they might as well come listen to a class to make the most of their time,” Williams said. “We also modify the classes based on team member focus. Each group – attorneys, paralegals and staff – needs to know primarily about specific material and features that are most relevant to their jobs, so the trainings are tailored accordingly.”

The training features giveaways and contests with prizes (like free Westlaw for a day) for increased engagement, and short one- or two-sided handouts, such as Top 10 Money-Saving Legal Research Tips, for takeaways. According to Williams, the attorneys appreciate the brevity of the handouts. “If they were any longer,” she said, “they simply wouldn’t read them”.

Following the training, Williams and her staff return to the same office for a few days in the subsequent weeks for follow-up. “We hold a lot of one-on-one meetings and use promotional materials and games to incent the staff to continue to use the product,” she said. “In general, we make ourselves available in case anyone has a question.” With passion and the help of technology, Williams and her team, based in the firm’s Memphis, Tenn., office, continue to support 16 offices on an ongoing basis throughout the year, averaging upwards of 10 hours of training a week. They train continually, and that, said Williams, is a key element of adoption.

“A successful rollout of any kind needs to be followed by ongoing training,” she emphasized. “Not everyone can take 45 minutes to an hour to participate in a training class. I get that. I’ve billed time before. I can completely respect the billable hour. But if they can’t give me an hour, they can give me five minutes. I can walk around and say, give me five minutes and let me show you how this can help you. And it’s just a really pinpointed five minutes. You have to do that. If you don’t, you’ve lost a lot of your audience.”

### BAKERKM TRAINING DELIVERS VALUE



The ongoing BakerKM training sessions conducted throughout the year by Meredith Williams, director of knowledge management, and her team at Baker Donelson, include:

- Firm-wide orientations during the first two weeks of employment to learn efficient use of intranet, legal research and BakerKM
- Weekly two-hour online West km orientations
- Recorded five-minute webinars on a range of topics for viewing anytime
- Weekly *Quick Classes* on topics such as Advanced Searching, West km for Litigation, West km for Transactions, Client Matter Information (how to serve the client using the client service team intranet site), How Not to Charge Your Client for Research, and more
- Demonstrations at practice and industry team meetings, attorney or staff luncheons, and paralegal certification programs
- Continuing legal education (clients' in-house counsel are invited)
- *BakerKM Tip & Trick* emails every three weeks, which promote a practice tip, an administration tip and a legal research tip, delivered in three brief paragraphs

### TEACHING KEY ELEMENTS OF WEST KM

When it comes to the actual training content for West km, Williams again keeps it concise and relevant. Her team demonstrates the traditional litigation Westlaw integration, but quickly moves to showcasing the other workflow interfaces available, such as West km in Microsoft® Word and West km's integration into the firm's intranet.

In demonstrating West km for Litigation, the emphasis again moves from the traditional Westlaw approach to the KeySearch® and KeyCite® advantages. Each night, West km automatically classifies Baker Donelson's internal knowledge management candidate documents into the West KeySearch taxonomy, allowing for more precise results when searching for material on a particular legal topic. The KeyCite functionality allows users to search internal documents by cited reference and then, further, to determine whether a case, statute, administrative decision or federal regulation is good law. (Williams noted that as long as the user is searching the firm's internal DMS documents, Westlaw charges are not accrued.) Additionally, the West km Litigation Toolbar in Word, installed by the firm's IT department, allows users to insert, update, hide and delete KeyCite flags from documents as they are being drafted with the click of a button.



“Tagging the documents each night is an automatic process,” Williams explained. “As new documents are created by the firm and profiled in our DMS, West km will crawl through those documents, using the West km Vetting Toolkit, to retrieve only those documents that truly qualify for knowledge management.”

West km then automatically processes these documents for full-text and KeyCite searches. The indexing further categorizes the document using a proprietary engine developed by West, so that the category chosen by the document creator isn't critical to the accuracy of the indexing.

When training on West km for Transactions, Williams stresses the user's ability to search an internal work product during the document-drafting process. “Coming from a transactional background, I really focus on this type of searching within our clauses and defined-terms libraries,” she said. “If I am creating a document, and I want to find an example of good-faith clauses, all I have to do is click on the Transaction Toolbar in Word, type

'good faith' in the search box, and it delivers the results directly in my Word window. I can drag and drop any of the text directly into my document, and it even automatically formats the typeface to match my document."



Another use of West km in Word on which users are trained is the Information Bridge Framework (IBF) system, developed by Baker Donelson with a third-party vendor (Handshake Software). The system essentially keys certain words as a document is being created. A search automatically is generated for the key words that are then highlighted. If a user clicks on a highlighted word, search results appear in a West km window, providing other samples and forms that may be essential or helpful in creating the document.

### INTRANET INTEGRATION

The enhanced value Baker Donelson derives from West km becomes even more evident when considering the service's further integration with the firm's intranet and features that make it an even greater part of a user's daily practice. "The three most important things at Baker Donelson are reading email, drafting and saving documents, and accessing the intranet," Williams explained. "These three tasks touch all of our daily practices. We have to constantly integrate new tools and processes like West km into the daily practice so that it's virtually seamless.

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*"It is actually thinking ahead for you,"*

*Williams said, "anticipating and predicting what you might need. That's when services are most valued."*

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"What we've done over the past few years is break apart West km as we have given more thought to how we can best utilize it at the firm," she added. "The one flavor of searching through our intranet didn't please everyone. There were certain pieces we wanted to pull out and provide to our users at very base levels."

Williams explained that each practice and industry team within the firm has its own intranet site. The sites offer a balance of internal and external information important to that group, such as clients, financials, current media coverage and more. Specific KeySearch topics relevant to the practice or industry are built into the team's intranet site. Attorneys and paralegals, who often are members of one or more practice or industry teams, have access to the topics directly from the respective intranet sites for automatic and easy searching.

"We actually go in and extract the URL strings for the key search topics," she said, "and embed them directly into the site. When the topic is searched, internal documents are pulled quickly and easily into that site. Again, we are anticipating the user's need."

In addition to the practice and industry team sites, the firm's intranet is home to client service team sites. Since every client at Baker Donelson is supported by a team, the intranet site provides a central location for sharing all information related to a particular client. Similar to key topics on the practice and industry sites, on the client service team sites, KeySearch is limited by client matter number, so results are relevant only to that client.

"West km uses the same terms and connectors learned in law school to search internal client documents. We narrow the search by client-related documents, and the user further limits it by KeySearch term. It makes it very simple for them," Williams said, noting that the knowledge management team supports more than 250 client service teams. "Client sites can contain everything from financials, all cases, depositions, caselaw, research, blogs, calendars and more. Some are more in-depth than others, depending on client and team needs."

The screenshot displays the BakerDonelson.com website interface for the Marine & Energy Industry Service Team. The page is organized into several sections:

- Navigation:** Includes "Practice & Industries", "Firm", "Personal", "Library", "Client Center", and "Search Center".
- Left Sidebar:** Contains "View All Site Content", "Team Blog", "Team Calendar", "Team Flatters", "Team Tasks", "Who Are We?", "Members", "Team Bios", "Electronic Services", "American Maritime Cases", "Marketing Materials", "Business Plan", "Client Proposals", "Contacts", "Resources", "Experts & Consultants", "Marine & Energy Publications", "Meeting Minutes & Agenda", "Presentations", "Seminar Materials", "Industry Info", and "WATER TRANSPORTATION".
- Main Content Area:**
  - Maritime Cases (From Westlaw):** Lists cases such as "Baker: Maritime Monitor", "Messina v. White, (C.A.2 (N.Y.))", "Francis Realty Corp. v. Town of East Hampton, (E.D.N.Y.)", "Cooper v. Meridian Yachts, Ltd., (C.A.11 (Fla.))", "Van Yalin v. Lodie, (D.D.C.)", "A.M.C. Liftboats, Inc. v. Apache Corp., (E.D.La.)", "Beetge-Hall v. American Overseas Marine Corp., (D.Mass.)", "Kuebel v. Department of Wildlife and Fisheries, (L.A.App. 4 Cr.)", "Mission Bay Jet Sports, LLC v. Colombo, (C.A.9 (Cal.))", "Thomas v. Carnival Corp., (C.A.11 (Fla.))", and "Atlantic Sounding Co., Inc. v. Townsend, (S.S.)".
  - Forms Bank:** Includes "Name", "Arrest Pleadings", "Instructions", "Removal Documents", and "Add new document".
  - Internal Work Product Searches (WestKM):** Lists "URL", "Search ALL Work Product for Maritime Law", "Search ALL Work Product for Collision", "Search ALL Work Product for Jones Act", "Search ALL Work Product for Salvage", and "Search ALL Work Product for Shipping".
- Right Sidebar:**
  - News from Journals & Publications:** Features a "Click here for the latest Marine & Energy" link and a "NEWS" icon.
  - Conference Opportunities:** Includes a table with columns for "Title", "Location", and "Start Time", listing a "Marine Insurance Seminar" in Houston on 9/20/2009 at 12:00 AM.
  - Speaking & Writing Opportunities:** States "There are currently no favorite links to display. To add a new link, click 'Add new link' below."

## IT'S ALL ABOUT THE CLIENT

Baker Donelson and Williams' customization of West km is done with a single goal in mind – bringing greater value to the client. "In a firm, being an attorney is all about the client and client service," she points out. "If you're not delivering that, if you're not giving them the best client service possible, you might as well go home."

*"More and more, knowledge management is a requirement of new clients," Williams said. "It's a differentiating factor."*

To that end, Williams and her team are in a continual dialogue with attorneys, paralegals and staff who use the tools to assess their needs and learn how they can be improved. They not only meet with each new client service team and practice and industry teams to discuss their needs, but she more often than not sits at the table with C-level executives of prospective clients to demonstrate the firm's knowledge management capabilities.

For more information, visit [west.thomson.com/westkm](http://west.thomson.com/westkm) or contact your West representative.

