

The Opportunity for Firms, Librarians, and Knowledge Management

WHITE PAPER

Implementing a Successful Knowledge Management Strategy

Librarians can play a key role in helping their firms and organizations effectively use knowledge management (KM) to create greater efficiency and deliver greater value to clients. Knowledge management can help firms by leveraging existing work product and providing an additional source of pertinent information.

In discussions with librarians across the country, Thomson Reuters gathered its best thinking on why librarians are uniquely positioned to help firms get the most out of their knowledge management systems. This white paper presents their thoughts and best practices on improving efficiency, creating quality work product and delivering value through knowledge management.

INTRODUCTION

Carol Bannen
Director of Information Resources
Reinhart Boerner Van Deuren s.c.

Law firm librarians have an opportunity waiting for them in knowledge management. They can help their firms develop effective KM strategies to streamline workflows, increase efficiency and deliver greater value to clients.

Librarians have a unique skill set that makes them a natural fit to be valuable contributors, if not leaders, of KM in their firms. They understand information and the importance of its structure and retrieval. Librarians are the search experts. They interface with attorneys and are often the interpreter between attorneys and IT. Librarians can visualize how connections can be made between pieces of information and “connect the dots.” A firm can have all the KM applications in the world, but it won’t improve workflows unless people are aware of them and know how to use them effectively. Since librarians work closely with summer associates, paralegals, IT staff, partners and associates, they can evangelize the value and use of KM to people throughout the entire firm in the language of their business.

In today’s economy, now more than ever, the business of law is all about increasing efficiencies. That is also the essence of KM: it allows leveraging and repurposing of existing work product. Librarians can help in intranet content development, legal project management, current awareness and connecting lawyers to the best resources, whether internal or external. IT is the plumbing, and KM is managing the information flowing through the plumbing. The organization of this information can add more value to the firm than the information alone. This is where the skills of a librarian really shine, and the experience they have working with everyone in the firm makes them invaluable.

Librarians connect people to information. They also connect people to people by identifying experts and relationships. An essential part of librarians’ jobs is also helping increase productivity by identifying, developing and promoting more efficient ways to get tasks done.

According to the 2012 ALM Law Librarian Survey, 67% of head librarians are responsible for knowledge management in their firms, up from 59% in 2011. Don’t miss out on this opportunity to expand and evolve the librarians’ role. In discussions facilitated by Thomson Reuters, here is what other librarians had to say about the important role that librarians play in knowledge management:

Cynthia Jones
Director, Library and Information Services
Phelps Dunbar LLC

Knowledge management makes so much sense for librarians because it goes hand-in-hand with our role as reference resources. Attorneys will say, “I have this issue. Here are my facts. I need to find supporting law.” They can certainly do the original research, but often the answer – more importantly, the way the firm would approach the answer – is in the firm’s own work product.



Karen Helde
 Director of Library, Research and Records Services
 Lane Powell Spears Lubersky LLP

Knowledge management is a very natural next step for us to move into as librarians. Things are constantly changing in terms of information and technology. Knowledge management is an opportunity for us to not only evolve our role, but also expand our role and bring additional value to the firm.

Despite the many benefits and advantages of knowledge management, adopting a knowledge management system is seldom easy. It often requires a significant commitment of capital and personnel. It adds new roles for librarians and other information professionals. And it faces many of the same obstacles as other technology projects that are also vying for attention: competition for budget dollars, limited IT capabilities, user adoption, etc.

Librarians are positioned precisely at the crossroads where attorneys, legal research, IT, and marketing and business development intersect. Librarians are experts at finding the right information and thoroughly understand a firm's unique information flows and workflows. As a result, they may be first to recognize the need for knowledge management in a firm, as well as know how and where knowledge management can fit to enhance those workflows.

YOUR FIRM IS ALREADY DOING KNOWLEDGE MANAGEMENT (WHETHER IT KNOWS IT OR NOT)

Nearly every firm is engaging in some form of knowledge management – although it may not realize it or define it as such. This type of “knowledge management” often takes places informally. It is usually neither organized nor automated. Nor is it the most efficient means of conducting effective research.

It is essentially an “underground” knowledge sharing that naturally takes place, and is embedded in attorneys’ existing workflows, even without the presence of an official knowledge management strategy, or even a KM system.

Cynthia Jones:

When someone wants to know if anyone in the firm has experience working on a particular subject, they will often go and ask a colleague. It happens all the time. The only problem is that we have more than 200 attorneys. You might not ask the right question to the right attorney. Not everyone knows what everyone else has worked on. People are constantly turning over at the firm. So you may or may not find the right answer. There are considerable gaps and inefficiencies.

Karen Helde:

An attorney might know that someone in the firm is an expert on a particular subject. So the attorney will just walk down the hall, talk to that person, and ask if he or she has ever handled a certain issue.

YOU DON'T HAVE TO CALL IT “KNOWLEDGE MANAGEMENT”

Even starting a discussion in a firm on knowledge management, let alone setting a knowledge management strategy, can sometimes be tricky. Curiously, many of the librarians that we have had discussions with expressed that the term “knowledge management” itself can be an impediment.

There are several potential factors involved. “Knowledge Management” as a concept is not always well understood by attorneys. Librarians are often in the position of having to explain what knowledge management is before they can even begin to discuss how it works and how it benefits attorneys. In addition, the knowledge management concept is sometimes mistakenly confused with brief banks and other previous attempts to organize in-house work product and make it accessible. Many of those efforts faltered because of lack of automation, outdated information, etc.

Librarians with whom we talked said it is often advantageous to avoid the term “knowledge management.” Instead, it may be more advantageous to focus on how the process works and how it fits in with other, more familiar, knowledge flows around the firm.

Carol Bannen:

We do not really use the “KM” word. I prefer to call it “information resources” and that gives a lot of room to talk about knowledge management applications and how they are additional tools that can help attorneys find the information they need.

Cynthia Jones:

At my previous firm, we worked very closely with a client – a government agency – that had its own knowledge management system. The client told our attorneys, “Before you do original research, we want you to reference this.” But the client did not call it knowledge or knowledge management; they called it work product or research.

Karen Helde:

The term “KM” can be somewhat of a stumbling block; for years I felt like I had to explain what I meant every time I mentioned it to attorneys. And I still do. I prefer to use the term “know-how.” I think that captures the concept in a more intuitive way.

Instead of focusing on the label of “knowledge management,” focus on what it does and how it meshes with the firm’s needs and values.

Karen Helde:

People must be careful of focusing on the words “knowledge management” and should instead talk about it in a way the firm will understand. It needs to tie into the firm’s values. If the firm values collaboration, use that word. Or if the firm values cost savings, use terms that emphasize the efficiency and the bottom-line savings of knowledge management. Define a way to talk to your firm about knowledge management that stresses the firm’s values. Use words that resonate with those values.

Tony Chan

Librarian

Cohen & Grigsby, P.C.

Knowledge management can be a nebulous term. Even KM professionals do not always agree on what it means. When speaking with attorneys, IT and firm leadership, I instead focus on the business issues that it addresses.

FOCUS ON THINGS FROM A BUSINESS PERSPECTIVE

Tony Chan:

Look at KM from a business perspective. When people think of knowledge management, they often focus on search. It is a very helpful function; however, it is only a small piece of the puzzle in helping organize information. The end game for knowledge management should be helping the firm promote business, retain clients and increase profitability. If we focus knowledge management efforts around business objectives, knowledge management becomes clearer and more meaningful, and everything falls into place.

Karen Helde:

You must gain buy-in at a fairly high level in the firm. You need someone who has the authority to say, “Go ahead and spend the money.” It is not a small investment, so you need to sell it.

Tony Chan:

Focusing on business objectives helps foster discussions with managing partners, the CFO and other C-level executives who believe in moving the firm forward but are not necessarily sure of the best way to do it. When it comes to technology, I estimate 95 percent of the firm is perfectly happy with the status quo. To make inroads, I have to work with the CFO and the managing partner and look at the business side. A lot of details are technical, but I try to keep the focus on the big picture: information must be more transparent in order to make more effective business decisions.

BE THE BRIDGE BETWEEN ATTORNEYS AND IT STAFF

Librarians interface with both attorneys and IT and understand the unique needs and workflows of both. They often function as interpreters for the distinctive “languages” spoken on the two different sides of the firm. That understanding can help ensure that knowledge management is implemented smoothly and works well for all parties.

Cynthia Jones:

Librarians are well suited to be the face of IT to attorneys. We can speak to attorneys. We understand them and the requirements of their work.

Karen Helde:

Our knowledge management initiative was a joint effort between the law library and IT. Cooperation between our two departments and being on the same page was a huge step forward. And if I were to do it again, I would integrate the effort with the marketing department. It works in reverse as well. At other firms, I have seen the effort driven mostly by one department or another. Generally, if you do not have buy-in from IT, you are in deep water.

START SMALL – TAKE SMALL BITES IF NEEDED

Many firms lack a knowledge management strategy. The possible reasons are numerous. Knowledge management can seem like a daunting project, but it does not have to be. It can be initiated as a series of smaller projects. Or it can be done in stages; for example, start with organizing firm documents and add analytics later. What is important is to prioritize needs and set achievable goals.

Karen Helde:

Knowledge management initiatives can be challenging; I have to factor in everything from our needs to budgets to firm dynamics and personalities when I think about which knowledge management projects to pursue. Is it worth it to make that happen? Is the way the firm is currently accomplishing this objective good enough or can it be improved?

Knowledge management does not have to be a huge initiative. You can take on something smaller. Because even the thing you think is small is probably going to turn out to be big.

Tony Chan:

We are looking at different KM applications and the various possibilities. But sometimes it is not practical to do all the things you want to right out of the gate. We may start by piecemealing some things together. But you have to start somewhere.

Karen Helde:

Establish yourself as the person who knows how to accomplish KM projects with something that is smaller and readily adopted. You can do something that is a discrete set of information that you feel you can manage a little better than the entire work product of the firm; for example, a judge database or a witness database.

Find something that attorneys identify as a problem and a need, rather than something that you as a librarian or knowledge manager think is a problem. If you have success and solve a problem, even a small one, you have bought yourself a lot of credibility. You can go from there and build on that success.

BECOME THE IN-HOUSE EXPERT FOR KNOW-HOW

Cynthia Jones:

My strategy is that the proof is in the pudding. Push actionable information to the lawyers. Marketing strategies. Business development opportunities. Not only show them the information, but also get face time and show them how you gathered the information. An attorney will come to me and say, "I need this particular group of documents because it is important to my project." I then show the way to do that. When the attorney gets to see how this works, he or she becomes more supportive.

Leading or at least being heavily involved in the firm intranet can often be a path that lays the groundwork for future knowledge management initiatives.

Carol Bannen:

Our group was assigned to set up and run the firm's intranet. The IT department did not have the bandwidth, so we managed the project and brought in outside support. This helped evolve our position within the firm. So now, whenever anyone is looking for information or help organizing it, I have become the go-to person.

PROMOTING USER ADOPTION IS AN ONGOING CHALLENGE

Implementing a knowledge management system is often only half the battle. Another critical step is getting attorneys to use the knowledge management system and incorporate it into their workflows. User adoption can be the key to a successful knowledge management strategy, particularly when it comes to business development.

No matter how beneficial the change, old work habits can die hard, and new work habits can be slow to adopt.

Karen Helde:

We run into that with some of the other products that we have spent so much money on. Oftentimes you show the attorneys a new technology and they say, "That is really useful; it's really great!" But they may never look at it again. When they are actually doing their work and are in "the zone," they do the work the way they always have. It is not necessarily a bad thing because they are successful; however, it can be frustrating when trying to bring something potentially useful to the table.

Tony Chan:

I strongly feel that for knowledge management to happen at any level, in any organization, it has to be more transparent from the top down. I am talking about knowledge sharing across the organization. Even if one little component within the firm is closed off, then you cannot really develop a true knowledge management system for business purposes.

Driving usage of knowledge management requires constant, ongoing efforts to promote the initiative and remind people whenever possible that the knowledge management tool is available – and it can help.

Carol Bannen:

We are constantly promoting West km with the attorneys. We regularly attend practice department lunches and remind them that West km is out there and what it can do for them. I keep track of usage statistics by department. We may see that some departments have not used it in a while, or maybe they are not using it as much as they had previously. So we will go back and talk to them again. We make it a point to have constant reminding.

Karen Helde:

We try to take advantage of natural opportunities to do events and promotions; for example, when we have West km upgrades, we have an event within the firm.

We have also had our Westlaw account manager come in and present to the big litigation groups at practice group meetings. She is an amazing trainer, and the events go very well. We point out to attorneys that there are many places in the firm where they can access West km. They sometimes do not realize that they are using it. They have access when they are on Westlaw. We have a significant e-library for state jurisdictional primary materials that gets a ton of usage, and West km is integrated within that.

LOOK FOR ONE-ON-ONE OPPORTUNITIES TO ENGAGE, DEMONSTRATE, REMIND AND ENCOURAGE USAGE

While it can be useful to tell attorneys about the benefits of knowledge management, it is often far more effective to find opportunities to demonstrate knowledge management and how it can solve real problems.

Carol Bannen:

I received an email from an attorney who had asked, "Who is the office expert on this particular kind of law? Who has written the most memos? Do they have anything on this subject in their bio?" I did a search in West km to find out not only who has written the most memos on the subject, but also who has written those that are most current. I sent him the information along with memos I pulled that might be applicable. If I do these types of things a few times, eventually they remember to check West km first.

Karen Helde:

We try to promote West km whenever possible at someone's point of need. Whenever I see an attorney sending an email around the firm asking if someone knows something about a particular subject, I try to use it as an opportunity to promote knowledge management and show them how it works.

I sometimes run the search myself in West km and tell the attorneys that someone had previously written memos on the subject, or so-and-so had a similar case and here is the research they did. Or if the terms the person is looking for are not entirely clear, I might contact the sender and ask if he or she has checked West km. I get them to think about incorporating West km into their workflow.

USE FAMILIAR TECHNOLOGIES AS TEACHING TOUCH POINTS

As mentioned earlier, some attorneys may be reluctant or even resistant to utilize new technologies or adopt new processes. Yet the move to a knowledge management system may not be as big of a stretch as they fear. Librarians can reference familiar technologies that practitioners may be more comfortable with as a way to lead them toward knowledge management.

Carol Bannen:

Attorneys were frustrated trying to search for documents in our document management system. But at the same time, they definitely understood Westlaw and its search engine. And the ability to insert KeyCite flags into documents from West km is really popular. An attorney can look at an old memo and simply press the button to see if it is still good law. That feature in West km is very attractive to them, which led them to purchase West km. Since I deal with the attorneys regarding Westlaw, it was a natural progression to set up with West km, and I became the face of knowledge management in the firm.

Tony Chan:

When I introduce new associates or laterals to West km, I always compare it with Amazon.com. Everyone has used Amazon and is familiar with how to use it to find products. You can do a broad search and then filter down to what you are looking for. I tell them that there are a lot of similarities with West km and Amazon, except that West km is a way to find documents rather than products. West km can help find work product that can be reused or repurposed. In that way, people can make a connection between the two and understand what knowledge management can do for them. That is much better than telling them, "This is West km and this is how to use it." They need some sort of comparison, so I use examples that everyone understands: Google, Amazon, Apple products, etc.

USE WEST KM TO HELP ONBOARD NEW ATTORNEYS

An additional benefit of knowledge management, beyond its assistance in workflows with case work and business development, is in on-boarding new associates and lateral hires. Knowledge management can greatly accelerate and enhance the learning curve for new attorneys.

Cynthia Jones:

We give our summer associates a fairly deep immersion in West km and show them different ways to use it; for example, they may want to start their research in West km before they begin online research in order to see how the firm has handled similar issues. Because our firm practices across several different states and jurisdictions, I always mention that they may want to see what the firm's position on a particular issue has been not only in the past six months, but also over the past six to 10 years so that the firm does not take opposing positions on behalf of different clients.

I had a new associate who told me, "I am in West km all the time." She starts by studying the attorneys' previous work product and then updates her research from there and applies the unique aspects of the particular case she is working on.

Increasing efficiency is something we are really focused on, especially in the economic climate today. One of the reasons we are stressing West km is the proverbial "Don't reinvent the wheel." Every issue is different and you need to do your research, but start in West km and educate yourself on what already exists in the firm.

Karen Helde:

Introducing new attorneys to West km is a significant part of our library orientation, and we spend a lot of time showing attorneys how to use it. When we do, we get a lot of positive feedback. Oftentimes when we show West km to them, especially if they have never seen knowledge management in action, their eyes light up and they get excited and say, "Tell me more!"

The new associates coming in that need every bit of help are huge beneficiaries of West km. To see the writing style of the partners they are working for and examples of the types of documents they are being asked to draft is tremendously beneficial.

CONCLUSION

Kimberly Stein
National Manager, Knowledge Management
Thomson Reuters

In my position, I serve as an informal "national ambassador" for West km, meeting with firms of all sizes across the country. Recently, I have had numerous discussions with firms about striving for greater efficiency and delivering greater value to clients. I discuss with them how knowledge management can help firms reach their goals by leveraging existing work product and providing an additional source of pertinent information.

Because of their skill set and experience, librarians are uniquely positioned to help firms successfully implement and get the most out of their knowledge management systems. They understand how to find and organize information, as well as a firm's unique workflow and information flows, its training methods, and its IT infrastructure.

Knowledge management provides an opportunity to expand and evolve the role of the librarian while helping the firm improve the information resources it provides its attorneys and staff.

In the end, it is about placing the right information into the user's hands at the right time and in the right format. Librarians know how to do this better than anyone, and those skills can make the difference in helping their firms realize the full benefits of knowledge management.

ABOUT THE AUTHORS

Carol Bannen
 Director of Information Resources
 Reinhart Boerner Van Deuren s.c.

Carol Bannen has been at Reinhart Boerner Van Deuren s.c. as head librarian and now Director of Information Resources for over 30 years. She is responsible for the firm's research, records and knowledge management operations.

Carol joined the firm after working for an international accounting firm where she also gained expertise in tax research. She was instrumental in creating the firm's knowledge management applications and has developed an extensive training program for both staff and attorneys on legal issues, business resources and Internet searching techniques. Along with her staff of experienced information specialists, she offers legal and business research capabilities to both Reinhart attorneys and clients.

Tony Chan
 Librarian
 Cohen & Grigsby, P.C.

Tony Chan is a Librarian and member of the Knowledge Management Team at Cohen & Grigsby P.C. He has 25+ years of experience in the information industry (public and private sectors) and specializes in commercial litigation research and support, public records, law firm marketing and business intelligence research, MS SharePoint and KM portal development.

Tony was a CLE research and technology instructor for the State Bar of Wisconsin and the National Business Institute. He has also served as a Reviser of the Martindale-Hubbell Law Digest (Wisconsin section).

Karen Helde
 Director of Library, Research and Records Services
 Lane Powell Spears Lubersky LLP

Karen Helde is the Director of Library, Research & Records Services at Lane Powell PC in Seattle, Washington. In addition to knowledge management, her professional interests include iPad usage in law firms, database design and the role of technology in libraries. An active member of the Law Librarians of Puget Sound (LLOPS), Karen has served as the organization's president and chaired several of its committees. She has been with Lane Powell for 19 years.

Cynthia Jones
 Director of Library and Information Services
 Phelps Dunbar, LLP

Cynthia Jones is the Director of Information Services at Phelps Dunbar LLP. She has been a law librarian for 28 years. She did her undergraduate and graduate work at Louisiana State University, Baton Rouge, Louisiana. During her tenure at Phelps Dunbar, she has focused on delivering practice services which have included traditional information resources, knowledge management, intranet and extranet development and delivery, and litigation support.

Kimberly Stein
 National Manager, Knowledge Management
 Thomson Reuters

Kimberly Stein has been part of the knowledge management community for ten years. Prior to working at Thomson Reuters, Kim held a number of positions in the legal technology space. She welcomes the opportunity to meet with Librarians nationwide to discuss best practices as well as, Portal Technology, Enterprise Search and Workflow Tools.