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KM Overview and Menu

The concept of Knowledge Management (KM) means different things to different people. Some KM initiatives have universal appeal, while others naturally lend themselves to benefit specific groups. This menu of KM options will expose the world of possibilities within Knowledge Management. Through our process, we will identify projects that are of interest to a practice group, prioritize the various initiatives and build a KM Project Plan for the firm. This menu is not meant to be encompassing of every conceivable option within KM, but provide a starting point in the process.

The menu below briefly lists core functional areas of Knowledge Management, the types of systems that can be implemented to address each functional area and the relative level of competitive advantage associated with each initiative. The next page has a listing of law firms engaging in each type of KM project. After that, there is a detailed description of each initiative, the features, benefits and effort required to implement and maintain each one.

Before deciding on a particular KM initiative, it is important to understand the level of resources required to implement **and maintain** the system. The more you elect initiatives of Superior competitive advantage, the more costly, complex and resource intensive the system is.

Function	Level of Competitive Advantage		
	Moderate	Significant	Superior
<u>Collaboration Areas</u>	<ul style="list-style-type: none"> •Document management/collaboration •Instant messaging •Forums or discussion threads 	<ul style="list-style-type: none"> •Deal rooms •Litigation/discovery sites •Contract management •On-line financial reporting 	<ul style="list-style-type: none"> •Matter-management extranets
<u>Practice Support/Efficiency Tools</u>	<ul style="list-style-type: none"> •Form libraries •Research repository and retrieval •Expertise Finder (participatory) •After action review •Form/template builders •Best practice libraries •Content aggregator •Resource allocation support •Intranet/Portal 	<ul style="list-style-type: none"> •Workflow/checklist support •Electronic whiteboard •Electronic application sharing (Webex) •Community based forums •Expertise location (automated) •Brand, trademark & domain monitoring •Work product/research retrieval systems 	<ul style="list-style-type: none"> •Know-how systems
<u>Business Development</u>	<ul style="list-style-type: none"> •Proposal development support •Daily news feeds on various clients, industries and topics 	<ul style="list-style-type: none"> •On the fly, auto creation of 'Smart-packs' •CRM 	<ul style="list-style-type: none"> •Business Intelligence on demand •Predictive cross selling •Auto-listing of who knows whom between company's executives and attorneys
<u>Virtual Lawyer</u>	<ul style="list-style-type: none"> •FAQs •Legal Updates 	<ul style="list-style-type: none"> •Decision tree systems 	<ul style="list-style-type: none"> •On-line legal guidance
<u>Professional Development & Client Training</u>	<ul style="list-style-type: none"> •Web-based systems training •Webex 	<ul style="list-style-type: none"> •Training tracking system •Legal resources •Legal alerts •On-line compliance training and 	<ul style="list-style-type: none"> •Professional development guidance system

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Firms currently engaged in these KM initiatives

For our purposes, the listing of firms with moderate systems in place was both too long and not the focus for comparison, so we only selected 'Significant' and 'Superior' systems. This list is not meant to be comprehensive of all law firms globally and was mostly taken from the following web-site, <http://mywebpages.comcast.net/ronfriedmann/ExamplesLegalGuidanceOnTheWeb.htm>.

Function	Level of Competitive Advantage	
	Significant	Superior
Collaboration Areas	Allen & Overy Baker & McKenzie Ballard Spahr Andrews & Ingersoll Eversheds Gilbert and Tobin Hammonds Mayer Brown Rowe & Maw Morgan Lewis Shaw Pittman Simmons & Simmons	Clifford Chance Foley & Lardner Linklaters
Practice Support/Efficiency Tools	Allen & Overy Bond Pearce Denton Wilde Sapte Eversheds Fried Frank Foley & Lardner Gilbert and Tobin Lovells Mallesons Stephen Jaques Mayer Brown Rowe & Maw Morgan Lewis Shaw Pittman Simmons & Simmons Stroock & Stroock & Lavan, LLP Wilson Sonsini	Addleshaw Booth Baker & McKenzie Ballard Spahr Andrews & Ingersoll Clifford Chance Dykema Gossett Hammonds Linklaters
Business Development (firms using CRM not included)	Appleby Spurling & Kempe Baker & McKenzie	
Virtual Lawyer	Beauchamps Solicitors Denton Wilde Sapte Mallesons Stephen Jaques	Bryan Cave Davis Polk Blake Dawson
Client Training/ Professional Development	Clifford Chance Foley & Lardner Mallesons Stephen Jaques ReedSmith Weil Gotshal Simmons & Simmons	Bryan Cave Eversheds Gilbert and Tobin Linklaters Littler Mendelson Morris, Manning & Martin, LLP Orrick, Herrington & Sutcliffe Proskauer Rose Seyfarth Shaw

Extranets or Collaboration Areas (back to the top)

The main purpose of an extranet or collaboration area is to pull together, from a single location, all or most of the information that is relevant to a project, matter, deal, or case. This information can be shared internally or with clients as needed. The key differentiator in these systems is the features or tools that support that information and the types of information that is housed.

a. Document Management/Collaboration

Document Management and Collaboration systems are used to give multiple individuals access to the same document. Unlike iManage, these systems can allow two individuals simultaneous editing of the document.

Business Needs:

- Two attorneys need to work on the same document at the same time
- Real-time access to a document
- Audit log of changes to a document
- Restricted access to portions of a document
- Centralized storage of a document

Problems that currently are encountered:

- Attorneys send the same documents to multiple individuals and have to merge the documents back themselves
- Difficult to find the most current version of a document not in iManage
- Documents are stored on a user's laptop

Possible Services or Features:

- **Moderate:**
 - Document Versioning
 - Online Access
 - Off-Line Access
 - Section Level Security
 - Document Comparison

Links: www.workshare.net

Advantage	Attorney Cost	Technical Complexity
Moderate	M = Learning curve may be extensive.	L = Systems that do this can be bought.

b. Instant Messaging

Tied to the intranet, collaboration systems, and expertise locators, instant messaging is a way to send text messages to remote users via the internet. The key thing to these systems is that they have to be secure.

Business Needs:

- Real-time collaboration
- Secure, private communication

Problems that currently are encountered:

- Email is not instantaneous
- Phone calls can be expensive
- No indication if the user is actively online

Possible Services or Features:

- **Moderate:**
 - Presence information
 - Messaging
 - Send files
 - Encryption
 - Multi-user chat
 - Client and server side logging

- Secure, private network
- **Significant:**
 - Whiteboard
 - Application sharing
- **Superior:**
 - Integration of multiple IM services
 - Secure IM over standard IM services
 - Integration with office suites

Links:

- Live Communications Server 2003:
<http://www.microsoft.com/office/livecomm/prodinfo/default.msp>
- Jabber Messenger: http://www.jabber.com/index.cgi?CONTENT_ID=118
- IBM Lotus Instant Messaging and Web Conferencing:
<http://www.lotus.com/products/lotussametime.nsf/wdocs/homepage>
- Trillian: <http://www.trillian.cc>

Advantage	Attorney Cost	Technical Complexity
Moderate	L – Can become a distraction if abused.	L – if bought H – Difficult to build
Significant	See above	See above
Superior	See Above	See above

c. Forums and Discussion Threads

Again, associated to intranets, collaboration systems, and expertise locators, forums are where ideas can be posted and information shared. These are usually pull based systems.

Business Needs:

- Share and discuss information with a group at any time (unlike teleconferencing, IM, or a live meeting, where being available at the right time is necessary)
- Search for relevant information or how a question has been answered
- Get multiple points of view on an idea or question
- Share information or ideas that are not document based
- Classify ideas
- Community based idea support

Problems that currently are encountered:

- Conf call, IM, meetings, etc are not logged, time dependent, and may not provide for easy sharing of documents, etc
- Need more static information that can be reused

Possible Services or Features:

- **Moderate:**
 - Threaded messages
 - Email notification
 - Search
 - User profiles
 - Post reporting
 - Moderators
 - Rating of posts
- **Significant:**
 - Calendaring
 - Spell checking
 - Integration with IM, other collaboration solutions
 - File posting
- **Superior:**
 - Offline support

Links:

- vBulletin: <http://www.vbulletin.com/features.php>

- WebSite Toolbox Message Board:
http://www.websitetoolbox.com/tools/message_board.html
- Akiva WebBoard Collaboration Server:
<http://www.akiva.com/products/webboard/index.cfm?pid=wbgoogle>se=GOOG>k w=message+board>
- Ezboard: <http://www.ezboard.com/>
- DiscusWare: <http://www.discusware.com/>
- Rebol: <http://www.rebol.com/index-ios.html>
- Monogram.org: <http://www.monogram.org/>
- Postnuke: <http://news.postnuke.com/>
- Gamesbiz: <http://www.gamesbiz.net/default.asp>

Advantage	Attorney Cost	Technical Complexity
Moderate	M – Only useful if attorneys actually use the system	L – if bought H –not easy to do well
Significant	See above	See above
Superior	See Above	See above

d. Deal Rooms

The main purpose of a deal room is to have a centralized location for sharing and collaborating on the information about a deal. This information can be shared internally or with clients as needed allowing for a single source or location to find the most up to date information.

Business Needs:

- Single location to find real-time information about a current project, matter, deal, or case
- Assignment of responsibilities to individuals
- Track current status of a project, matter, deal, or case
- Understand what is hampering progress
- Advanced searching of extranets, internal repositories, and outside sources
- Knowing who did what and when it was done
- Workflow guidance at the client or Practice level
- Just-in-Time information
- Archive past information
- Reduce costs

Problems that currently are encountered:

- No centralized place to get information
- Documents in scattered e-mails
- No place to track status of a project
- Information is only about documents
- Overwhelming volume of information
- Need information while away from the office and email

Possible Services or Features:

- **Moderate:**
 - Share contacts, documents, and notes.
 - A document history of who did what to a document - when and what is the most recent version
 - Role based views of information
 - Share select information with internal or client groups
 - Search the current collaboration room
- **Significant:**
 - Create and assign tasks to ensure completion
 - Track and assign Issues that prevent completion
 - Build checklists and assign individual list items
 - Calendar of events with alert capabilities

- Search past collaboration rooms, doc repositories, or research sites
- Information level audit so that who, what, where, and how is known
- Discussion Areas
- **Superior:**
 - Workflow support, guidance, or enforcement
 - Practice templates that provide Tasks, Issues, and Checklists
 - Document Assembly technologies
 - Interrelationships shown between all information
 - Client process and form support

Advantage	Attorney Cost	Technical Complexity
Moderate	L = Attorneys have to learn how to use the system, but they do not have to pre-feed the system.	L = A simple system to build. The area of greatest complexity would be around how versioning is handled and expected integration of contacts to other systems.
Significant	M = Slightly more complex system for most users. Higher cost for controllers of the deal room since they will have to systematically manage projects.	M = The base system is simple to build. The complexity would come from the level of task management tools that are expected and integrations with other systems needed.
Superior	H = The cost for this is high since there is care and feeding of the system so that information is available to draw from.	H = The level of know-how the system would need to support or enforce drives the complexity of this system.

e. Litigation/Discovery Sites

Litigation/Discovery Sites provide a central repository of litigation work product, allowing people across multiple offices the ability to work jointly on a litigation matter. Typically, these are 3rd party ASP hosted sites used for major litigation cases.

Business Needs:

- Single location to find real-time information about a litigation matters
- Tracking of the current status of a project, matter, deal, or case
- Advanced full-text searching of extranets, internal repositories, and outside sources
- Managing discovery
- Just-in-Time information
- Archival of past information
- Reduced costs for combing through discovery

Problems that currently are encountered:

- No centralized place to go get information
- Documents scattered in e-mails
- No place to track status of a project
- Manual searching of discovery is time intensive and costly to the client
- Information is documents, nothing else
- Overwhelming volume of information
- Need information while away from the office and email

Possible Services or Features:

- **Moderate:**
 - Share contacts, documents, and notes
 - A document history of who did what to a document when and what is the most recent version
 - Role based views of information
 - Share select information with internal or client groups