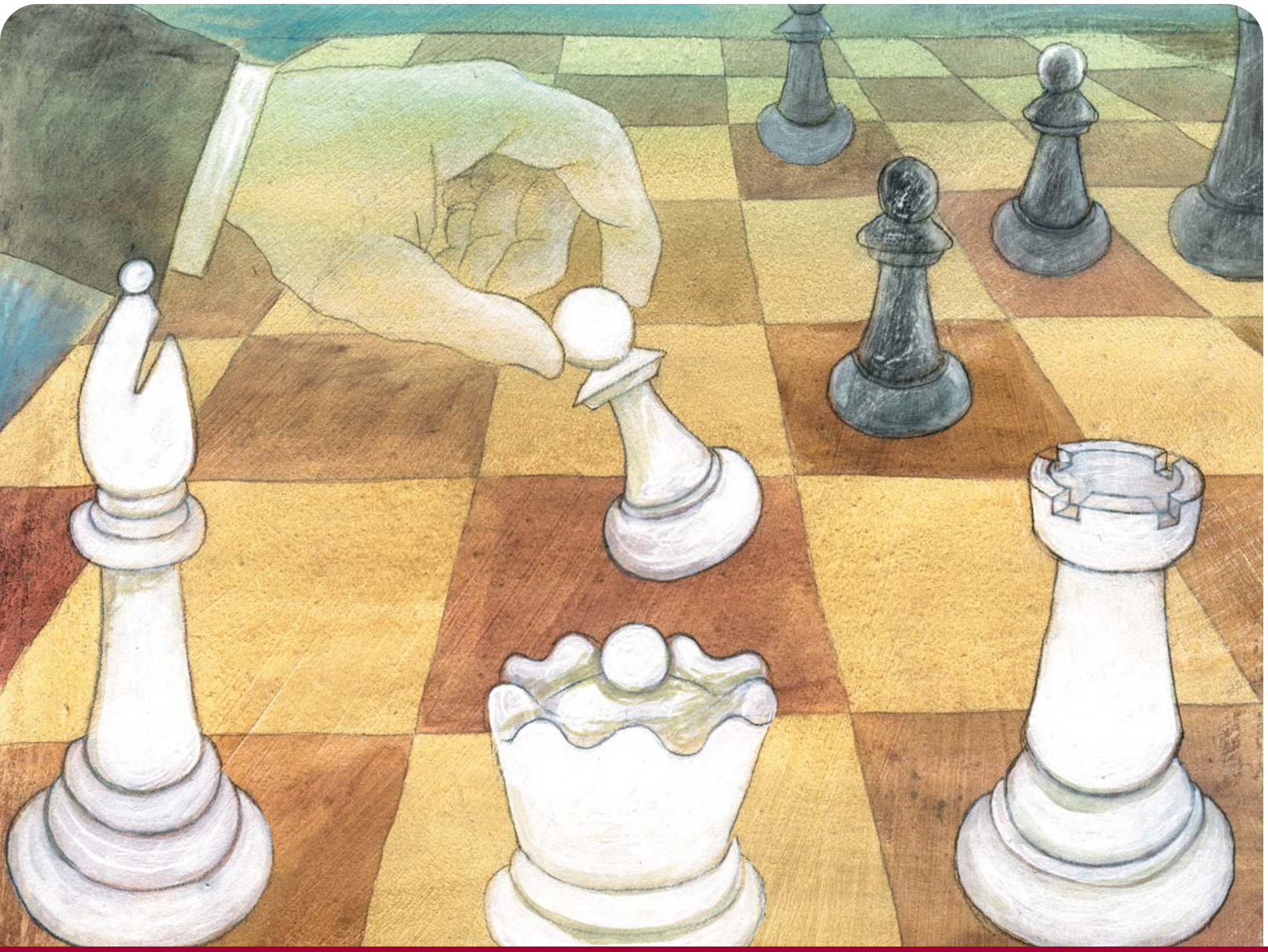
International Legal Technology Association



June 2008

Knowledge Management

It's Your Move!

A Publication of ILTA

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EDITOR'S NOTE

With current collaboration technologies, nearly everyone in a firm is involved in the knowledge management process. By engaging in new social networking tools or utilizing document assembly tools, or by using wikis to streamline collaboration, everyone is contributing to the firm's most valuable asset, knowledge.

Knowledge management departments have the enormous task of determining what information needs to be included, where the expertise lies, and what tools are best for maximizing this knowledge-share.

We gratefully thank our authors for sharing their knowledge through tips, techniques and technologies to help us manage (or at least wrangle, not mangle) our knowledge.

In addition, we're very excited to offer the results of ILTA's knowledge management survey, and we extend our thanks to all who participated.

Ken Hansen, Editor

ABOUT ILTA

Providing technology solutions to law firms and legal departments gets more complex every day. Connecting with your peers to exchange ideas with those who have "been there done that" has never been more valuable.

For over three decades, the International Legal Technology Association has led the way in sharing knowledge and experience for those faced with challenges in their firms and legal departments. ILTA members come from firms of all sizes and all areas of practice, all sharing a common need to have access to the latest information about products and support services that impact the legal profession.

Statement of Purpose: ILTA is the premier peer networking organization, providing information to members to maximize the value of technology in support of the legal profession.

International Legal Technology Association

With this people-centric approach, firms can now have both highly structured enterprise workflows and custom team and departmental workflows, adapted to specific needs and quickly deployed at low cost.

Measuring Knowledge Utilization

Productivity gains from collaboration have always been difficult to quantify. But by centralizing knowledge infrastructure, firms will not only gain from the benefits of efficient search, they will also have the ability to observe and measure patterns of search, collaboration, contribution and workflow performance to see what is working. In short, it will be possible to get the metrics needed to demonstrate the value of a firm's knowledge investments.

Rewarding Innovation

For any knowledge management system to work, people need to actively contribute. Because firms typically emphasize the billable hour as the primary success metric, most law firms do not have the incentives in place to encourage associates and partners to contribute. Creating the right incentive and reward programs (*e.g.*, having knowledge contributions as part of the annual review and expecting a certain number of contribution hours per year) can send a powerful message that the firm expects and encourages its lawyers to share.

The platform for enabling this contribution culture will be a firm's Web-based portal. Inevitably, over time, the portal interface will become the true attorney desktop from which all work is done and managed. It will be a place where lawyers can collaborate, exchange thoughts, create plans, capture meeting notes, track projects and create documents. This new way of working, which is just starting to emerge, has been called both the "writable intranet" and Enterprise 2.0.

Fundamentally, the concept outlined in this article is simple: leverage human sociability and turn practitioners into users and contributors that use the Intranet on a daily basis to get their work done.

But we have to be realistic about the application of this concept; this is a transition that will take many years to complete. Young lawyers just out of law school who have been on Facebook for years are used to this new way of working, but it is still an alien approach to most practitioners, especially partners. Just as earlier generations of partners resisted using computers and e-mail for years, older generations may haltingly use the latest generation of tools because they simply are not familiar or as comfortable with them. However, investments in new technologies and new approaches must be made if firms are to remain competitive and attract and keep younger talent that now demands these kinds of tools.

::Wiki While You Work

by Doug Cornelius of Goodwin Procter LLP

If you are looking for a better way to organize your projects, highlight useful forms and precedents, create a procedures manual or publish substantive legal content, consider using a wiki. With the rise of Enterprise 2.0 technologies and their alignment with knowledge management, questions are emerging as to the best use of these new technologies and how they best enhance existing technologies. One of the most promising Enterprise 2.0 technologies for knowledge management is the wiki.

Wikis are attractive as a knowledge management tool because they make it very easy to contribute to and find content. A wiki can provide a common workspace for people to create, organize and share knowledge. You can install a wiki platform inside your firewall to limit it to members of your firm. You can also use a wiki as a replacement for an intranet or add a wiki as part of an existing intranet.

Wiki Defined

A wiki is a collection of easy-to-edit Web pages. Each time a wiki page is edited and saved, a new version of the wiki page is created. When a wiki page is saved, the wiki platform sends out a notification of the changes to subscribers. The wiki platform also allows you to compare changes among versions of a wiki page.

A wiki combines the features of a word processing program, a document management system, a document comparison program and an e-mail program all into one package. A wiki has the basic features of a word processing program, with a simple editor for creating and editing content. It acts as a simple document management system for wiki pages by maintaining a library of pages within the wiki platform, including all of the versions of each wiki page. It also acts as a basic document comparison program by giving users the ability to compare changes among versions of a wiki page. The wiki also has a notification process that alerts subscribers of changes or additions occurring to a wiki page, giving users a basic communications tool. Of course, a wiki does not have all of the bells and whistles of the full-featured versions of these programs, but a wiki will allow you to create and distribute content directly from the wiki without having to leave the platform to access other applications. A wiki compresses most of the steps of the document production process into a single process.

Most wikis offer an easy-to-use WYSIWYG page editor that works as a simple word processing program. You don't have to know HTML to create a wiki page. Since the wiki content is in the form of a Web page, most search engines can easily index and search the content. In addition, because a wiki page is a Web page, it is easy to insert links to other content in the wiki, on your intranet, on the Internet or anywhere else you can create a URL.

My firm developed a tool in our document management system that can generate a URL for a document, so we can highlight the best content from our document management system on our wiki pages.

Wikipedia

Wikipedia is the most famous wiki and what most people think of when they think about a wiki. Wikipedia.org is a free, Web-based encyclopedia. The site is based on a wiki platform and is open for anyone to add or edit existing content. With over nine million articles in more than 250 languages, and over 2.2 million articles in English alone, Wikipedia is several times larger than the *Encyclopedia Britannica*. Wikipedia removed one barrier for contribution by eliminating contributor registration requirements. You do not need to register with Wikipedia to begin adding to the content, and anyone can anonymously edit any wiki page in Wikipedia. However, Wikipedia does require you to register to create a new wiki page.

Rarely would a firm allow for anonymous editing of a wiki used within the firm. Most wiki platforms deployed inside a firm's firewall will allow a single sign-on, so the editor is recognized from their initial sign-on to the network. The wiki page will display the date and time it was last edited and the identity of the editor.

Nupedia

Before Wikipedia, there was Nupedia. The Nupedia project was started to create an online encyclopedia with articles written by experts and licensed as free content. Experts were encouraged to write articles which would then be subject to a peer review process. Nupedia officially went online on March 9, 2000. By November 2000, only two full-length articles had been published. In January 2001, Nupedia started Wikipedia as a side project to allow collaboration on articles before they entered the peer review process. By providing a less bureaucratic structure, Wikipedia quickly grew and attracted contributors. Wikipedia rapidly developed a life of its own and began to function largely independent of Nupedia, leading to Nupedia's gradual demise.

Enterprise 2.0 and SharePoint

Perhaps Nupedia reminds you of some of your knowledge management projects. Wikipedia is a powerful illustration of how removing barriers and bureaucracy can increase contribution and utility. Wikis are a change in knowledge management strategy by adopting Web 2.0 technologies inside the firm: Enterprise 2.0, or as I call it, Knowledge Management 2.0. With the addition of Enterprise 2.0 tools, knowledge management moves from a collect-and-control approach to a connect-and-collaborate approach. Comparing Wikipedia and Nupedia reveals the potential benefits of opening up systems.

Over the past year, my firm has been planning and implementing an upgrade of its intranet to Microsoft's SharePoint 2007 platform. Wikis, blogs and other Enterprise 2.0 tools are included as part of the SharePoint 2007 platform. At the outset of planning for our upgrade, we decided to actively use some of these tools to see how they worked. In particular, wikis caught our attention as a great tool for knowledge management within the firm.

Using the free test version of *PBwiki*, our knowledge management department created a wiki to host the notes and status reports for our projects. Instead of sending e-mail messages to each other, team members added notes and comments to the wiki page. Over the course of nine months, our wiki grew to contain over 100 pages. After we implemented SharePoint 2007, we imported that wiki into SharePoint.

I have also used free, hosted versions of wikis for a variety of other projects to include co-authoring an article on social networking, planning a conference, managing transactions for a client, preparing and gathering the results of a survey of law firm knowledge management leaders and gathering definitions of knowledge management. Instead of trading information by e-mail, my collaborators and I were able to share information in the wiki. The wiki provided a common place to find information, and we were all notified as new information was added.

To Wiki or Not To Wiki

The question is "what content should a law firm *wikify*?" A wiki is an exceptional platform for collaborative treatment of documents. Ownership of the document becomes less important than the collection of the content in one synthesized place.

One great project is to wikify a practices and procedures manual. Rather than using a long, static word processing document, create a more dynamic manual by putting it into a wiki format, with each section of the manual as a separate wiki page. On each wiki page, you can easily cross reference and link to other sections of the manual/wiki pages. You can also easily link to other information internally or externally. When I suggest that a group create a practices and procedures manual, one of the first questions I hear is: "How will I know when it changes?" Typically, a manual is drafted using a word processing program, saved to the document management system and then distributed by e-mail each time it is revised. The recipient then prints it out or refers back to the e-mail message when using the manual. With the manual in a wiki, the notification of changes happens as soon as a change is made. Wikifying the manual results in the active flow of information so the group is not stuck with a document that may quickly become stale or obsolete.

I have also had great success using a wiki to manage the transactions and internal closing agendas for a client. I created a new wiki page for each transaction. Each wiki page included some basic information about the transaction and the internal closing agenda. Instead of one person controlling the edits, the entire client team could update any closing agenda at any time. When viewing the wiki page, it always contained the most up-to-date information. As changes were made to an agenda, the wiki platform sent out a notification of the change to the entire internal client team. Without a wiki, the process would have been to maintain the closing agenda in a word processing document with a single person responsible for keeping it up to date. After an edit or a group of edits, the author would have e-mailed the updated agenda to the client team, who would then have had to find the changes or digest a version full of the marked changes. The use of a wiki collapses the traditional document process into a shorter series of steps, thereby providing a richer flow of information and keeping the client team better informed.

We have also moved the agenda for our weekly knowledge management department meetings to a wiki. Any member of the department can add an item to the agenda. We also keep notes about individual projects in the wiki. The wiki provides an easy-to-use platform for each member of the department to take notes; after all, a wiki is just another type of document. At the same time, however, the notes are also being added to a central repository where they are shared with everyone in the department. It takes no more effort to take notes in the wiki than with any other tools, and, because all of our notes and comments are

compiled in the wiki, we are moving toward the point of not having to communicate by e-mail. I know that when I add content to the wiki, everyone in the department will get a notification of the new content. And because we are using a wiki, the content is easier to find, and we can all feel confident that everyone is looking at the most current content and not an outdated version that has been sitting in someone's e-mail inbox.

We have also begun moving substantive legal content into wikis. One of my first *wikification* projects was to convert my firm's 50-state real estate survey manual into a wiki. The first generation of the manual was a collection of folders in our document management system. Anyone could add content by adding a document to the folder. But there was little context for a document, and none of the information was linked together. The second generation was a collection of HTML Web pages. That version allowed us to add more context and link to content, but it was difficult to edit, and nobody except the author knew when new content was added. In our latest version of the manual, we converted the Web pages into wiki pages. It is now much easier to create new pages and link them together. In addition, we have divided the substantive content into smaller pieces so that we now have a main wiki page for each state with multiple pages linked to its specific content. There are separate pages for transfer tax issues in each state, mortgage taxes, closing customs and forms and precedent documents. By dividing the information into smaller chunks, we get better search results, and it makes the information easier to find and easier to digest.

This article is the fourth I have written using a wiki. First, I set up a private, externally-hosted wiki. Then I was able to access the article any time I had an Internet connection. By using a wiki, I could easily bring co-authors, editors and readers into the drafting process.

ILTA's Core Values

:: Maximize the value of technology in support of the legal profession

:: Provide quality, independent, unbiased and accurate information to our members about technology and the practice of law

:: Maintain vendor independence

:: Provide quality educational opportunities for our members and ongoing learning for navigating through change

:: Foster, rely on and celebrate volunteers for their real-world experience and their value as a resource for colleagues

:: Recruit and retain the highest caliber of professional staff

:: Act as a vehicle for meaningful peer networking

:: Respect our colleagues

:: Commit to the highest standard of professionalism

:: Maintain a financially sound organization that provides full value for the members' investments

:: Promote member advocacy with vendors regarding product development and support

:: Recognize that ILTA is a volunteer-governed organization managed by a professional staff

The Challenges of a Wiki

A wiki requires a different way of working. We have become accustomed to the iterative process of drafting a document and e-mailing it to interested parties. With a wiki, the drafting process is more open and public. Since the content is more open, the group owns the content, rather than one individual.

I have seen none of the bad behavior in Wikipedia happening to wikis inside law firms. Since authorship is directly attributable to a person in the firm, there is none of the obnoxious behavior of vandalizing sites or making defamatory statements. You can easily and quickly see who took the bad actions, restore the prior version and discipline the offender accordingly.

In researching the use of wikis by law firms, I found one firm with hundreds of pages that encountered some organizational issues when different people wanted the wiki pages and information organized in different ways. Eventually, certain contributors were forced to bow to the collective will and come to agreement on some structures. One downside of a wiki is that it cannot be customized for each individual person. But a significant upside is that everyone is looking at the same information in the same way.

Wiki While You Work

I have found that wikis dramatically simplify workflow. The creation, distribution and review of content all happen in one easy-to-use, easy-to-deploy and easy-to-train platform. As law firms begin implementing wikis, they will need to identify the best way to use this new tool. Wikis can simplify the production of content and the steps needed to produce the content. Although a wiki is not appropriate for all types of content, it can be a powerful addition to your knowledge management toolbox.

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