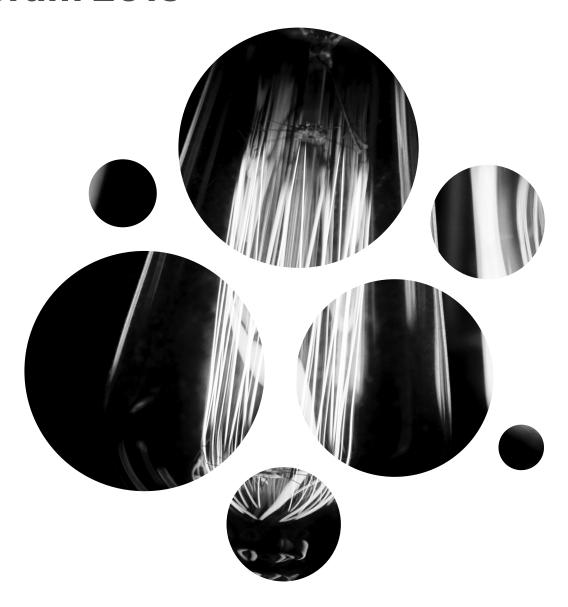
POST EVENT REPORT

Knowledge Management Forum 2018





Knowledge Management Forum 2018



Sponsors







Thank you for attending



Simon Smith
Senior Portfolio Producer
Thomson Reuters Legal UK&I

Dear delegate,

Thank you once again for attending the 2018 Knowledge Management forum. The following report offers key take-aways from the day, including insights from our speakers and results from the audience polls.

It's worth noting that the purpose of the audience polling was to act as a catalyst for discussion rather than providing an accurate representation of the conference delegation, but I do hope that the results offer value and helped make the day more enjoyable and interactive.

We continue to seek feedback for improvement, so feel free to contact me at S.Smith@Thomsonreuters.com to make suggestions for new topics, formats and speakers.

If you have any questions regarding market insights, please contact Samantha Steer, Director of Large Law, Thomson Reuters Legal UK&I at Samantha.Steer@Thomsonreuters.com.

Thank you again for your support of this event. I look forward to meeting you all again soon.

Best wishes,

Simon Smith

Chair's welcome.



CHAIR Lucy Dillon
Chief Knowledge Officer, Reed Smith

SURVEYS

2017: What is your main reason for attending today?



2018: What is your main reason for attending today?



Keynote speech: Emerging technology.



Joseph Raczynski Technology Manager, *Thomson Reuters*

KEY TAKEAWAYS



The Exponential effect of technology will impact the legal industry dramatically in time



Firms need to test and fail and try new things and be open to innovation



Blockchain could have an impact on KM – so we need to wrap our heads around this transformative technology



Tweets from the day

What should my KM roadmap look like?



Emily FogesCEO, *Luminance*



CHAIR Lucy DillonChief Knowledge Officer, *Reed Smith*



Dan KayneGeneral Counsel (Routes),
Network Rail Infrastructure



Rob MartinHead of Software Solutions, *Thomson Reuters Legal UK&I*

- What technology should I be looking at now, and why?
- Ensuring you are mapping your people roadmap too

KEY TAKEAWAYS

- 1. Put your Know How to better use by putting it in the hands of your lawyers and your clients push know how to where and when it is needed and don't wait to be asked for it.
 - Client retention: Clients get more value and better access to know how and are less likely to move or change firms.
 - Lawyer engagement: Junior lawyers get exposure to more sophisticated information and know how and can better appreciate how this is used to support different matters.
 - Improved efficiency: Senior lawyers share expertise and improve engagement from junior staff but also free up time for higher value activities, including business development.

2. Cloud vs On Premise

I would advise most firms to take a serious look at cloud based solutions for knowledge management. These provide greater flexibility when it comes to sharing know how with clients and addressing issues when firms merge. It can also help address specific issues such as data security (we have seen data breaches on systems that have been on premise in a number of firms) and compliance with regulation. Keeping pace with this on internal systems is an increasingly expensive issue. Going down this route might also lead to a wider strategic review of systems such as Document Management.

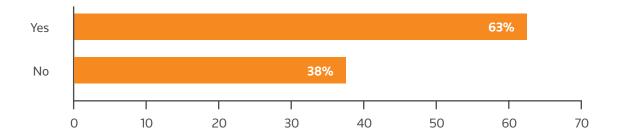
3. Blockchain and Smart Contracts

This is an area that cannot be avoided and there is a real opportunity for firms to get out in front and establish themselves as leaders in this space – both as advisors on legal issues and as producers of Smart Contract solutions.

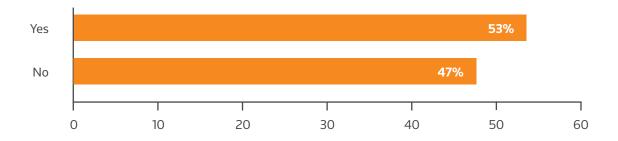
Build a case for your Board for investment in knowledge by showing the value to the clients – get data to make this case and be resilient if and when there is push back.

SURVEYS

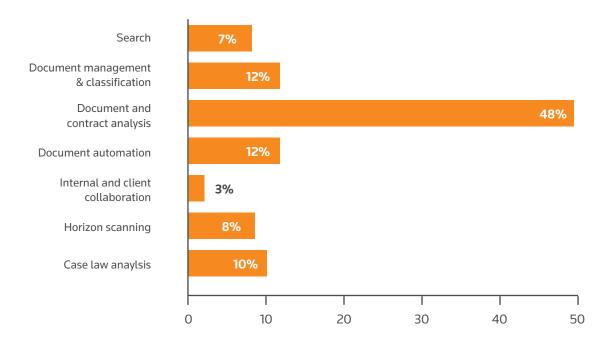
Who has a roadmap for specific KM initiatives that they are focused on in the next 12 months?



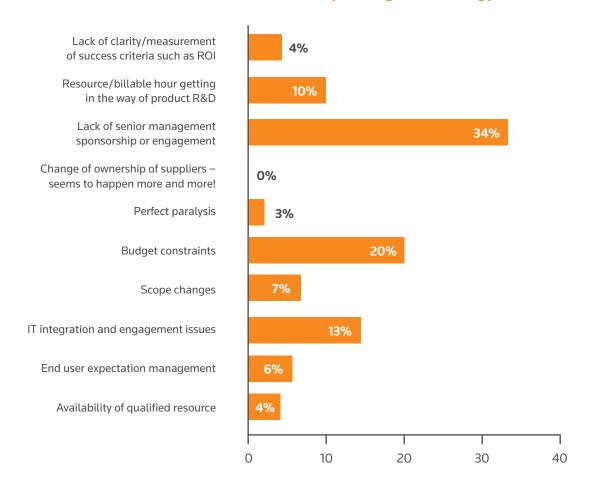
Who has a firm-wide KM strategy in place that is looking beyond the current year and into the 1–3+ year timeframe?



Which of these could benefit the most from adoption of new AI technologies?



What is the most common/serious roadblock to planning a KM strategy?



Knowledge is power!



Rebecca RogersGlobal Legal Knowledge
and Training Lawyer, *HSBC*



Zoë Huckle
Head of Knowledge Management,
HMRC Solicitor's Office
and Legal Services



Kathy JacobHead of Knowledge and
Information, *Financial Ombudsman*

- The importance of engaging with people
- Leavers, starters, retirement and the wisdom of strangers
- · Succession planning
- Preventing knowledge loss
- Are you a KM role model?

Interactive:

· Spheres of influence and stakeholder mapping

KEY TAKEAWAYS



It's important to focus on knowledge retained by both people and systems.

Try and leverage relationship links as well as retaining knowledge when someone is leaving a role.



If you want others to follow you must lead the way.

Actively demonstrate how you are using KM in your own team to benefit the organisation you work in.



Making knowledge transfer part of how teams work together.

Especially to share why the preferred approach to a solution is chosen over other options.

Example map: Spheres of influence

High Influence / Low Interest	High Influence / High Interes
Directors Partners	People and Professionalism team
General Counsel IT (Meet their needs /keep happy) Wider HMRC External clients	Associate Partners KM Champions Team Leaders (Key players – work closely) Review Teams Lit Teams Legal Ops New Starters Para Legals PSL's Internal movers returners from leave
Comms People	
Engagement Champions	
Building Reception Tax Academy	HR
Low Influence / Low Interest	Low Influence / High Intere

INTEREST —

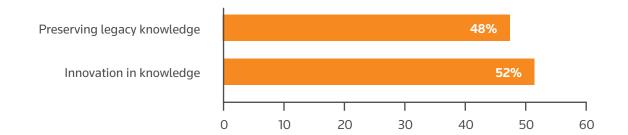
INFLUENCE / POWER

This table can be found here:

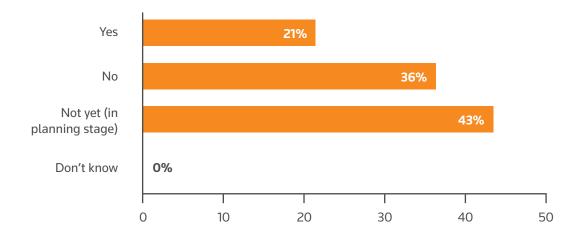
influence.cipr.co.uk/2016/01/19/4-steps-creating-stakeholder-map

POSITION	AIM
High Influence / Low Interest	Communicate and engage enough so they are satisfied their voices are being heard on key issues. Avoid low value contact so they do not lose interest in the project (KEEP SATISFIED)
High Influence / High Interest	These need to be fully engaged and lots of effort made to satisfy their concerns and requirements for information. These will be valuable advocates. (KEEP ENGAGED)
Low Influence / Low Interest	Monitor these stakeholders closely and keep them informed, with minimal effort. Do not overload with excessive communications or needless information (KEEP INFORMED)
Low Influence / High Interest	Keep these stakeholders regularly informed to maintain their interest. Monitor any issues or concerns that may arise and respond (KEEP INTERESTED)

What's more important to you and your organisation as a priority?



Have you got strategies in place to manage knowledge loss?



The impact of technology on roles.



Catherine CadmanGlobal Head of Knowledge, *Mourant Ozannes*



Chris HowardQualified Solicitor, Senior
Lecturer and Fellow, *Higher Education Academy*



Dr Adam SanittHead of Disputes Knowledge,
London, *Norton Rose Fulbright*



Adam CurpheyHead of Innovation Technology, *BPP University Law School*

- · What does the increasing use of technology, automation, and data mean for knowledge professionals?
- How will we recruit for the necessary skills in the future?
- What new jobs will be created from automation and what training will be required?
- Is there an upcoming reinvention of PSL and knowledge roles?
- · How will further education respond to incoming technology and skill needs?

KEY TAKEAWAYS



Real appetite for change and adaptation among KM professionals.

Adaptability is the greatest skill you possess. We cannot pretend to know every change that new innovations and new technology will bring, but we can be prepared for such changes, and be willing to embrace them.



Tweets from the day

SURVEYS

What knowledge/skills will knowledge professionals need in the future?



Upgrading and developing your intranet and knowledge portal.



Catherine Jackson Knowledge Manager, Content & Systems, *Eversheds Sutherland*



Kate Stanfield Group Head of Knowledge Management, Pricing and Profitability, *Collas Crill*

• Satisfying multiple requirements and understanding your user story

KEY TAKEAWAYS



When designing an intranet, try to tie everything into a business need. There is no point in creating a wonderful site if that site does not help the business with day to day problems. Think of the purpose of everything that you create, and ensure that it is a living, breathing site that reflects the changing needs of every area of your organisation.

If the site is hard to maintain and is out of date, that could be because the data provided is not valued by anyone in the business and so not worth the effort to update.

Working with a geographically dispersed knowledge function.



Kate Stanfield Group Head of Knowledge Management, Pricing and Profitability, *Collas Crill*



Michelle BramleyGlobal Head of Knowledge, *Freshfields Bruckhaus Deringer*

- Communication
- Systems and Process
- Training
- Benefits

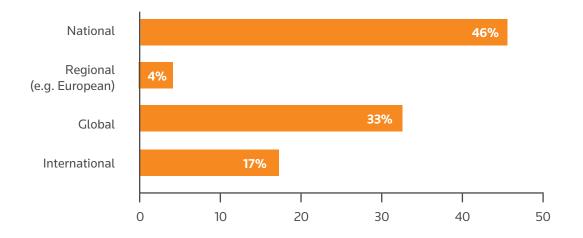
KEY TAKEAWAYS

Communication. Always think of your team as one team, do not forget that people working remotely are part of your team and need to be kept up to date, involved in conversations and meetings, developed and motivated.

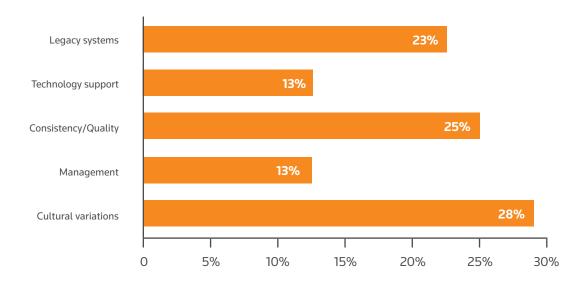
Systems can help you to keep in touch and improve quality, but behaviour day to day is the key thing. Don't forget to add a dial up or conference call into meeting invitations – and never forget to join the meeting room to that conference call or VC; there is nothing more frustrating and demotivating than waiting in a conference call when the main group and team leader do not join! Remember that your team is made up of people, not robots.

SURVEYS

What is the geographical spread of your knowledge function?



What is your biggest challenge to delivering a geographically dispersed knowledge function?





Tweets from the day

Making sense of matter data.



Alicia HardyDirector of Professional
Support, *White & Case*



April Brousseau Information and Innovation Architect, *Norton Rose Fulbright*



James Pilgrim Knowledge Systems Manager, *Linklaters*

- · Matter profiling, tracking and analytics
- Extracting knowledge from information
- · Possible use cases for AI

KEY TAKEAWAYS

The attendees seemed to agree with the "buckets" of issues we had identified and that solutions to some of them were really hard to find. It was more of a problem identification than a problem solving session but some good suggestions were made.

In bucket 1, firms are really struggling with the cloud issue – private clouds are what are used in the Litigation eDiscovery space – and now even more with the forthcoming GDPP and obligations as regards personal data which exist even if we get client consent. I suggested that firms should work together to try and identify solutions particularly the implications of personal data in data rooms.

In terms of trying to secure buy-in to collaborating in bucket 2, I suggested attendees looked into Design Thinking, which is actually a mindset as opposed to technique, that really focuses on the pain and gain points of the people you are trying to bring with you and how working together can reduce their pain and increase their gain.

SURVEYS

Team activity

- 1. Challenges and suggested solutions around Confidentiality & security versus vendors in the cloud and sharing
- 2. Challenges and suggested solutions around Aligning People and Systems, addressing taxonomy and language
- 3. Challenges and suggested solutions around The role of AI and finding the competitive advantage through leveraging our data

1.

Cloud / Private cloud

GDPR - Data cleaning

Chinese walls / Ethical screens

2.

Challenges

- understanding inter-relationships of systems and data flows
- Agreeing taxonomy among business functions
- understanding different use cases between disparate global officers
- timing projects with continual change
- Making projects accessible to senior management and stakeholders

Solutions

- Diagrams
- Experts (External)
- · Monetise it!
- Better partnering between teams
- Standardisation across offices
- Make it 'outcome-based' focus on 'tech' afterwards

3a.

Data submitted by users but for specific projects/practice groups therefore incomplete or non-standardised

Volume of data needed for AI to be valuable/reliable

Getting users to input data

- · how to incentivise?
- what is value/output to user?

How to weigh data

Some data should be weighted more for certain applications

What AI? Is it legally relevant?

• If it is good for diligence, how to leverage for different applications

3b.

Expectations for AI

What is realistic?

What is hype?

Data quality issues

• must clean data/normalise for AI

What's the end game for all the data?

• Efficiency, institutional knowledge, internal market intelligence?

Private data/documents like banking deals

In-house and legal operations.



Helen Barker Counsel for Knowledge Management, *Diageo*



Jessica Magnusson Global Head of Legal Knowledge, *HSBC*



Christine Astaniou
Technical Specialist /
Knowledge & Learning /
Enforcement & Market
Oversight Division, FCA



Anthony FaircloughHead of Legal Support
Service, *Matrix Chambers*

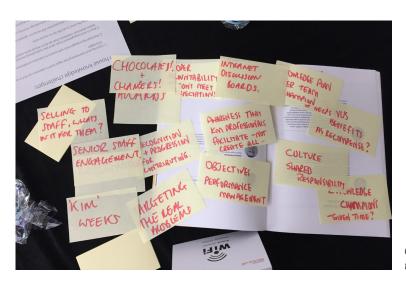
- Making K work without the £ to support your legal function
- Using what you've got to make life easier for your lawyers
- What are good IH teams doing?
- How can IH make use of technology and build the business case for procurement

KEY TAKEAWAYS

Everyone faced the same challenge of building knowledge-sharing culture. The solution was felt to be recognition by senior management of the value, coupled with highlighting the direct benefit to those involved.

Putting a spotlight on knowledge sharing activity during performance management discussions, is a weighty way to develop a culture where knowledge flows. Investing time in gaining senior management support will pay dividends, although change from the bottom up can also be a powerful force.

SURVEYS



Cryptic post-its from the in-house session!

Client Expectations.



Alison Devlin Head of Knowledge, **Eversheds Sutherland**



Adam Turner
Associate Director –
Knowledge Development
Lawyer, Berwin Leighton
Paisner



Kate StanfieldGroup Head of Knowledge
Management, Pricing and
Profitability, *Collas Crill*



Nancy Jones Professional Support Lawyer, *Sky*

- What are people requesting?
- · Value add service requests
- · KM to increase efficiency
- · Collaboration with clients on knowledge projects

KEY TAKEAWAYS

Consider whether you can work collaboratively with the client's other legal representatives to deliver value added services, for example breaking things down by legal topic area or matching services by geographical spread. This will reduce the burden on individual firms but offer a broader end-service to the client.

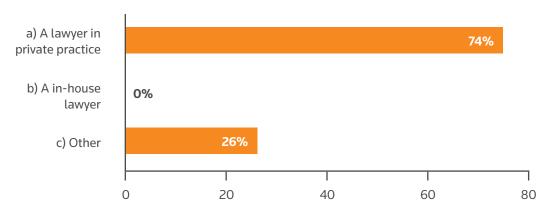
For lawyers in private practice: take time to understand a client's actual 'value add' wants and needs – don't make assumptions. Often the best solutions need not be super whizzy or high cost.

Clients are unlikely to have large budgets for training so bespoke training is a valued add on. For in-house lawyers trying to keep up with legal market practice, private practice insight is very useful. If you have an innovation team experienced in choosing and using new tech see if in-house GCs/Legal Ops directors would like to meet them.

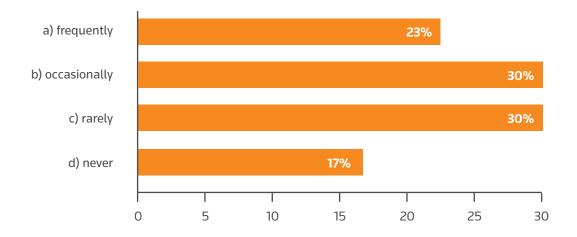
Stay in touch with your BD team and the client partner and legal team within your firm for that client. Quite often you can gain insights into how KM could help the client and be better informed about what might be of use to them going forward. As well as keeping the BD team and lawyers up to date with news and developments of use to that client.

SURVEYS

Are you either:



Do you make/receive client KM requests?



What are the common areas covered by knowledge/KM requests?



Is there anything new or innovative that has come up in KM requests in the past 12 months?



KM working with legal tech and start-ups.



Jane Bradbury
Director of Knowledge
& Information,
Slaughter and May



Ruth WardHead of Knowledge &
Collaboration Technologies, *Allen & Overy*



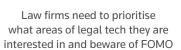
Tetiana Bersheda Founder, *LexSnap*

- Too much of a good thing? How to make sense of a crowded technology market.
- When tech goes bad! Common challenges in selecting and implementing technology for your lawyers.
- The case for collaboration leveraging KM partnering techniques to deliver success.

KEY TAKEAWAYS











Law firms should see legal tech companies as a complimentary resource and useful tool in making attorney-client work more efficient.



Tweets from the day

What is the role of KM in your innovation agenda?



Judy Mackenzie Stuart Knowledge Strategy Director, *Berwin Leighton Paisner*



Michelle BramleyGlobal Head of Knowledge,
Freshfields Bruckhaus Deringer

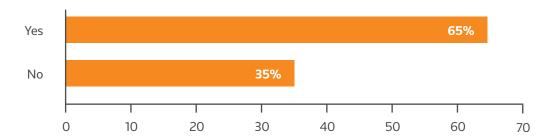
- How involved do you feel in innovation?
- What do we actually mean by innovation?
- How is it handled in firms today?
- · What's overlap between collaboration and innovation?
- What is KM's role in innovation agenda?
- · What does it mean for PSLs?
- Call to actions

TAKEAWAY

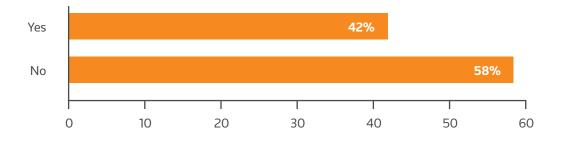
"Innovation is everyone's business in a law firm and KM needs to sit at the heart of it."

SURVEYS

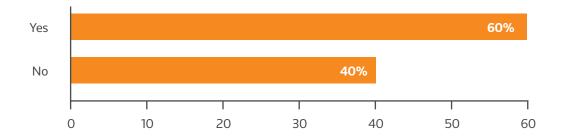
Are knowledge lawyers/KM functions actively involved in innovation?



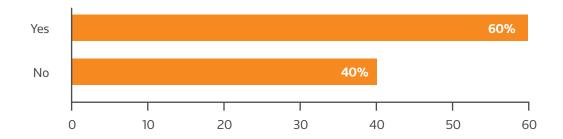
Is there a dedicated innovation function at your firm?



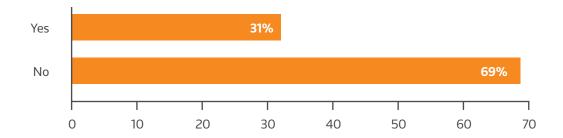
Does your role today involve introducing and promoting matter management/ efficiency technology in groups?



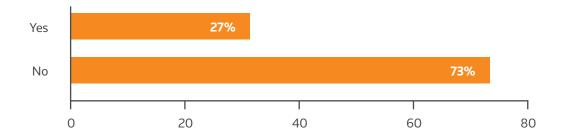
Does your role today involve educating your lawyers on new technology?



Does your role today involve helping to develop expert systems, e.g. guided decision making tools, apps?



Does your role today involve talking to clients about innovation?





Tweets from the day

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