

Ten tips for actionable KM

By Joanna Goodman in association with Thomson Reuters

Legal advice is applied knowledge: lawyers apply their legal knowledge to commercial and contractual agreements and disputes. Law firms' specialist knowledge and expertise is what differentiates them from others in the legal services marketplace. Actionable knowledge management (KM) is therefore a critical success factor for every law firm and in-house legal department.

What is knowledge management (KM)? Linklaters' 2014 'Knowledge to Action' report includes the following definition from KM and organisational learning specialist and author Chris Collison: KM is "...a toolkit of different methods, techniques, approaches, ways of working and behaviours that are all designed to enable and increase organisational efficiency. It is about the 'know how' and the 'know who' and how you put these to work more diligently."

This definition, and the report itself, underline the importance of making knowledge and KM actionable. Actionable KM firmly positions knowledge and KM at the heart of the business by developing dynamic systems, processes and behaviours designed to maximise the contribution of a firm's (or corporate legal department's) collective knowledge and expertise to its business and its clients.

This means putting knowledge into context. In his presentation at Ark Group's KM Legal conference, 'Knowledge to Action' co-author Ian Rodwell, Linklaters' Head of Client Knowledge and Learning, referred to the commercial, organisational and situational context for actionable knowledge.

Commercial knowledge:

Law firm clients want lawyers who understand their business. External knowledge includes specific company and sector knowledge, and relevant statutes and cases. Internal knowledge includes past advice and deals handled for that client, and similar work undertaken for others as well as relevant expertise within the firm – identifying who has worked with the same client or on similar assignments.

Organisational knowledge:

Client data, professional networks and lessons learnt from previous experience; knowledge and collaboration that transcends project, departmental and geographical boundaries.

Situational knowledge:

Legal and regulatory developments; guidance and articles; organisational processes and best practice.

Dr Viktor Dörfler, senior lecturer in information and knowledge management at Strathclyde Business School, explained in his keynote at Janders Dean Legal Knowledge Management & Innovation Conference in London that actionable knowledge is heavily rooted in experience, requires a high level of expertise and integrates various knowledge types. Actionable KM is about leveraging those qualities across the firm.

Technology-enabled actionable KM

Making KM actionable depends, among other factors, on deploying the right IT tools. The following ten tips are drawn from practical experience in major law firms.

1. Aligned to the business – and centre stage

Actionable KM needs to be aligned to the firm's and its clients' business objectives. It's about knowing your business and, crucially, understanding your clients' business and identifying their requirements.

This means establishing a KM strategy that is connected to the firm's strategy in order to provide the knowledge resources (information, know-how and expertise) that lawyers require in order to deliver the best legal advice. It means setting goals and priorities and measuring the results. It means facilitating information flow, communication and collaboration.

Making KM actionable means making it central to the firm's activities. This means deploying KM tools, introducing activities and embedding behaviours to make sure everyone in the business can contribute to, access and utilise its collective knowledge.

2. Leadership and support

Actionable KM requires leadership and top-level support. A senior decision-maker has to have an official and recognised KM role—for a law firm this may mean a KM partner, or a KM director. It also requires sponsors and supporters on management committees and within practice areas to secure a position in the business planning process.

3. Integrated information and know-how

The legal sector has always been information heavy, as all lawyers need to keep up to date with cases, statutes and regulations. Although, a firm's internal knowledge and know-how – precedents, opinions, insights and expertise – are what differentiate it in the marketplace, knowledge is not just information. It also includes best practices: finding the best way of applying experience and insight to each matter.

Technology, and particularly sophisticated search software is the glue that brings this together to deliver relevant, timely information and know-how to lawyers across the firm, enabling them to work together to deliver prompt advice that is relevant to the client's legal and business requirements. Law firms generally have multiple data repositories – including practice management systems (PMS), client relationship management (CRM) systems, document management systems (DMS) – and subscribe to numerous information resources, including subscription services like Practical Law and Westlaw UK and government websites.

Solcara Legal Search from Thomson Reuters, uses federated search technology to cover all a firm's internal and external resources. For example searching for a particular topic could identify an important paper written by someone within the firm, along with links to related internal precedents and external resources and information such as new legal developments and recent cases.

4. Sophisticated, user-friendly search

Lawyers require relevant, up-to-date information at their fingertips when they need it, sometimes to meet short deadlines. Federated search technology helps them to pluck actionable insights from a growing and constantly shifting mass of information. Management information and other information relating to productivity and outcomes are also critical to actionable KM in order to identify and apply the most effective methods of service delivery.

Search capability needs to be sophisticated and scalable – information is constantly changing and links get out of date. It needs to be straightforward to change content sources and connect new ones.

User experience is a critical success factor. A straightforward intuitive user interface that requires minimal training and IT involvement makes Solcara Legal Search a go-to resource, even for lawyers who are less tech-savvy. For example, it offers a single log-in so that users can access password-protected subscription sites as well as public sites without having to remember multiple passwords. Searches can be saved and embedded into internal systems, and search results can be tagged and bookmarked by practice area and resource.

5. Processes and workflows

If knowledge is aligned with process it will boost operational efficiency. Actionable KM brings knowledge and know-how into process and project management, so that lawyers can immediately access the information and know-how they need for specific types of work. Some firms create process maps for different types of transaction, whereby some elements of the workflow are automated and others include links to internal and external information and guidance, harnessing the firm's knowledge and anchoring it in its business processes. These links could include suggested searches. As well as maintaining a consistent approach and spreading best practice across the firm, KM supports effective compliance and risk management by including appropriate elements and links in process maps and workflows. These can include saved searches and search results.

6. Systems and platforms

Actionable KM requires technology to connect people and enable them to share knowledge in a simple, informal way. It's also about providing the ability to locate expertise across the firm and cross-sell services across practice areas and locations. Multiple overlapping systems can lead to inconsistencies and increased risk. Streamlining information access and reuse helps to minimise both duplication and the risk of something important 'falling through the cracks' between different systems. Straightforward firm-wide systems drive consistency and avoid information asymmetry as well as facilitating collaboration.

Federated search speeds up the search for relevant content. Solcara's Legal Search and Know How configurable software enables cross-practice sector and project groups as well as teams working on specific matters to search only the resources they need and organise search results into virtual folders that can be shared with colleagues or uploaded to the firm's intranet.

Solcara Legal Search and Know How searches information at source, so that it doesn't have to be indexed. This speeds up implementation and means new resources can be added simply and quickly. It can search any external resource that is searchable via a web browser. It integrates with popular document management systems and can profile and classify the documents that reside within them.

7. Conversation drives collaboration

Conversation leads to action. If you get people talking, they will work together and share their knowledge. Knowledge is sticky and leaky, said Dr Dörfler, it sticks to the practice, but has no respect for organisational (or departmental) boundaries. Conversation stops knowledge sticking to practice areas and helps it spread around the firm – and leak into client organisations too. This is a good thing – clients that benefit from the (legal, sector, commercial) knowledge of the firms they instruct are likely to

retain them/instruct them again. Technology helps foster collaboration. If people can easily find sources of expertise within the firm, they will connect and collaborate. It is also about designing office spaces to encourage conversation.

8. Communication and engagement

This includes talking about KM. This means establishing KM champions across the business – not just in the KM function – to make sure everyone is aware of the firm’s resources and to share the benefits with colleagues. Actionable KM is also about designing the workspace to facilitate conversation – physically positioning KM roles within practice, sector and project groups and encouraging face-to-face as well as online collaboration.

9. Making KM count: Key performance indicators

Management guru Peter Drucker famously said, “If you can’t measure it, you can’t manage it.” This cannot be applied to everything, but establishing key performance indicators (KPIs) and measuring results helps to drive KM activities and make it actionable. Solcara’s reporting functionality identifies which applications are popular with users and highlights which practice areas have been using them successfully to increase productivity and save time. It also highlights under-utilised resources and gaps in awareness or training. An effective expertise finder also identifies gaps in a firm’s expertise, which can then be addressed.

10. Incentives and rewards

Notwithstanding a general shift away from time-based billing to alternative fee arrangements (AFAs), many firms still focus on chargeable time. It is important to incentivise KM activities too, by recognising and rewarding their contribution to the business. This means that lawyers will not consider KM activities as ‘non-chargeable’ and therefore less valuable time.

Actionable KM adds value

Actionable KM – dynamic systems, processes and behaviours that actively turn information and know-how into knowledge and turn knowledge into results is bringing KM out of the law firm library and onto the balance sheet. It’s no longer about searching for information; it’s about identifying, accessing and applying the right knowledge resources and developing the best processes to deliver quicker, more effective legal services that create value for law firms and their clients. [ENDS]

For more information about Solcara Legal Search and Know How:

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