Gaining Efficiency with Matter-Centricity

Moderator: Ken Jones
Panelists: Joe Fousek, Gerard Haubrich, Bob Blacksberg, Monroe Horn

ILTA Autonomy
iManage Peer Group

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This is a panel discussion on how some firms have made efficiency gains through implementing matter-centricity in their WorkSite environment, and the tools and innovations that helped them get there.
Panelists

**Joe Fousek**, Associate Director - Customer Support
Kirkland & Ellis LLP

**Gerard F. Haubrich**, Chief Information Officer
Drinker Biddle & Reath LLP

**Bob Blacksberg** - Director, Practice & Project Services
Drinker Biddle & Reath LLP

**Monroe Horn**, Chief Technology Officer
Bromberg & Sunstein LLP
What is Matter-Centricity?

- **Productivity:** Matter-centricity promotes collaboration across the entire organization because everyone working on a matter can see and use all relevant data.

- **Familiarity:** Matter-centric data structures are digital versions of the physical “Redweld” and are widely understood across the enterprise.

- **Efficiency:** Matter-centric environments are more easily maintained as all documents are put into one data structure, resulting in benefits ranging from increased billable hours to facilitating e-discovery.

- **Accountability:** Matter-centricity allows for comprehensive control over, and compliance with, security policies both organization-wide and on an individual user basis.

*These benefits have a positive impact on profitability!*
Joe Fousek is the Associate Director of Customer Support at Kirkland & Ellis. He has been strategically managing IT departments in large law firms for over 15 years. He has lead departments spanning Infrastructure, Support, Training, Telecommunications, Records, Applications, and Practice Support, and lead initiatives covering document lifecycle management, law firm mergers, time and billing system conversions, DMS implementations, Email system conversions, and data center relocations.
Doing More With Less

• Going Matter-Centric Is An Easy Target In Tough Economy
  – Already Own DMS Software
  – Low Cash Investment, Lots of Work, High End-User Impact
“He Who Fails to Plan, Plans to Fail!”
Perspective

- Matter Centricity Is Not a Revolution!
  - Folder Structure Just Like Paper
  - Encourages Navigation Rather Than Searching the Large DMS Pool
The Electronic File

Matter Workspaces

Matter Workspace Folders

Document

Filename: Example Document
The Worlds of Document Management and Records Management are Merging

Information Will Flow from DMS to RM, “records” in DMS Will Be Controlled by RM Policy
The Big Picture / Future

- Electronic and Paper Structures Need to Align
- Initial Design Team
  - DMS Experts
  - RM Experts
  - KM Experts
Fine Tune

- Drafting Process Calls Out Perspectives
- Educational For All Involved
- Leads to Productive Discussions with Practice Groups
  - Fine Tuning
Consider Audiences

• Different Needs for Different Groups
  – Transactional vs. Litigation
  – Legal vs. Administrative
  – Partners / Associates / Legal Staff
Plan to Plan

• Count on 70% Project Time for Planning
• Critical to Create Buy-In
• Critical for Ultimate Success!
Gerard Haubrich, Chief Information Officer, has been leading the information services department at Drinker Biddle & Reath LLP for almost 20 years. He has coordinated numerous technology integrations due to firm mergers as well as many technology upgrade projects. In 2008, the firm merged two document management systems, moved to a matter-centric approach, started a PC refresh project, and deployed VOIP technology.
Bob Blacksberg is Director, Practice and Project Services at Drinker Biddle & Reath LLP. As technology liaison to several of the firm’s practice groups, his responsibilities include identifying and defining technology solutions and techniques helpful to their practice. He also has led major technology projects for the firm, including its Plumtree and SharePoint portals and the design and adoption of iManage.

Prior to joining Drinker Biddle in 2001, Bob was Director, Practice Services at TechLaw, Inc. For several years, he wrote the column, “Word of Law”, published online at Woody’s Office Watch. Earlier in his career, he practiced law, concentrating in municipal and commercial finance at Wolf, Block, Schorr and Solis-Cohen, then at Cohen, Shapiro, Polisher, Shiekman and Cohen.
Efficiency, Matter Centricity

• General Observations

• Tactical Efficiency
Efficiency, Matter Centricity

- Individual
- Lawyer/Secretary
- Matter Team
- Practice Group
- Office/Firm
Monroe Horn is the Chief Technology Officer for the Boston law firm of Bromberg & Sunstein LLP. In addition to managing the firm’s information technology and litigation support, he serves as a consultant to the firm’s clients in the areas of litigation readiness and electronic discovery.

Monroe has extensive experience with legal technology. He has published articles on the subject and has been a featured speaker at technology seminars in the United States and Europe. Monroe has also held leadership positions in ILTA and has presented at their annual conference.
Our Matter-Centric Design

• Early Adopters—Deployed Matter-Centricity in 2005
  – Decided WorkSite was to be the repository for the electronic file
  – Driven by increased load of e-mail filing

• Design Reflects the Firm’s History with DM
  – Long history of profiling documents
  – Limited number of profile fields and choices
  – Document types mostly equal to paper folders
  – Users do a lot of searching on profile data

• Design Mirrors Paper File (with some improvements)
  – Uniformity in paper file system=Uniformity in Workspaces
  – Very simple folder structure
  – Subfolders locked down

• Developed Concise “WorkSite Rules”
Sample Folder Structures

All Mail Folders

- My Matters
  - 00001-00001 General
    - A - Correspondence
    - B - Agreements
    - C - Notes and Memos
    - D - Legal Research and Notes
    - E - Investigation
    - F - Instruments
    - G - Government
    - H - Corporate Records
    - Other
  - 00001-00504 General Collection
    - A - Correspondence
    - B - Pleadings
    - C - Notes and Memos
    - D - Legal Research and Notes
    - E - Investigation
    - Other
  - 00430-00100 General Patent Matters
    - A - Correspondence
    - B - PTO Proceedings
    - D - Publications
    - D - Published Patent and Applications
    - E - Legal Research
    - Other
Maintaining the Electronic File with Workspace Manager

• Making Searching ⇔ Browsing
  – All client docs must be in only one client folder
  – That folder must match the doc’s profile data (client, matter, type)
  – Changing the profile should move the document—Opposite of FileSite model
  – Makes it much easier for people to move documents
  – Saves time in moving and increases accuracy of the electronic file

• Locking Down Folder Structure
  – Critical to enforcing the rule above
  – Establishes uniformity and ease of use—Yields efficiency
Maintaining the Electronic File with Custom Tools

• Auditing
  – Verifying all docs are profiled to the correct folder
  – Almost impossible to do with the paper file
  – Developed custom application that “auto-checks” around 85% to determine if they are in the right place
  – Secretaries do the remainder
  – Saved each secretary over ½ hour per-day
• “File Date” and Record Declaration
  – Had the concept of a “File Date” since 2002
  – Integrated it with record declaration in FileSite 8.2
  – No need for records manager
  – Native Function + SQL trigger key record feature on our File Date
  – Allows for accurate File Dates (which are not necessarily record dates)
  – Keeps electronic file accurate while also locking docs more effectively
• Retrospective Auditing
  – Developed custom application to allow for quick retrospective auditing of documents
  – Auditing is easy, fixing is hard
  – A tool for better times
Other Benefits and ROI

- **Attorney Efficiency**
  - Convenience
  - Better client service—more efficient interactions
  - Remote accessibility
  - Really extends to the entire firm
- **Electronic File Available Outside of Filesite in Custom Applications**
- **BC/DR Benefits**
  - Easier to plan for disasters
  - IT is maintaining and backing up only one system
- **Paper Filing Benefits**
  - Reduced file space needs—Lower rent
  - Reduced paper filing—~$880 per-cabinet per-year (Intl. Records Management Trust)
  - Streamlined paper filing—~$10 per-document (Intl. Records Management Trust)
Questions
Questions from the Moderator

• What were the top one or two efficiencies that you were planning on obtaining in your matter-centric rollout?

• Were there any efficiencies you obtained that were a surprise?

• What software, training, or implementation strategies did you find essential to gaining these efficiencies?

• Did the matter-centric implementation cause any new problems or hindrances to efficiency that you had to fix?

• What would you do differently now if you had to do it all over again?
Questions from the Audience