

# KM In Support of Firm Operations

Shy Alter, ii3

Felicity Badcock, King & Wood Mallesons

Ginevra Saylor, Dentons Canada LLP

David Hobbie, Goodwin Procter LLP, Moderator

#kmpg3



# Key Takeaways

- ◆ Approaches adopted from KM work that can have great benefit in improving firm operations include:
  - ◆ Process improvement
  - ◆ Change management
  - ◆ Legal information management
  - ◆ Collaborative technology
  - ◆ Communication/Information flow
  - ◆ Transparency
  - ◆ Experimentation/Risk taking

# Key Takeaways 2

- ◆ KM staff operate smoothly between lawyers and a range of operational functions; ideally situated to increase intra-firm collaboration, communication, and understanding
- ◆ Some KM programs have worked on operations for some time, but business conditions are now ripe for more extensive applications of KM to firm operations; arguably critical to keeping operational teams relevant and law firms profitable

# Key Questions

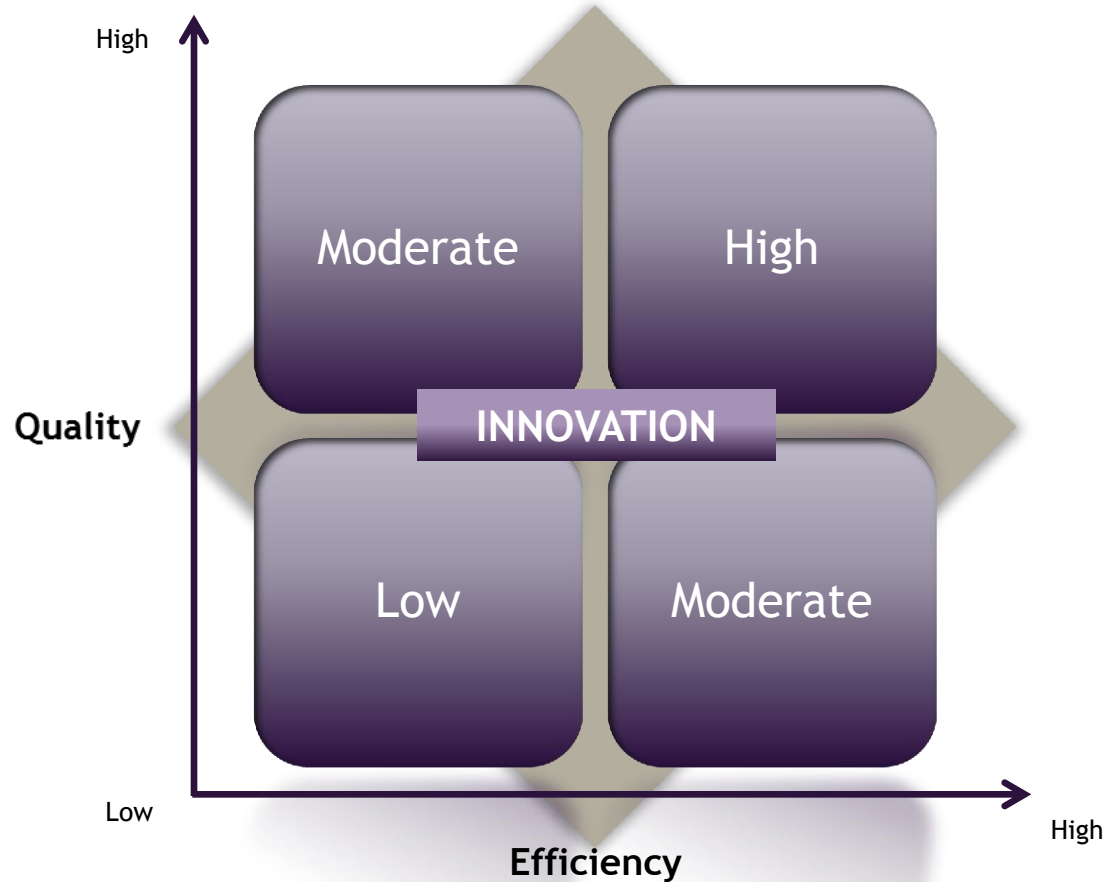
- ◆ Why now? What business and legal pressures are driving increased KM involvement in firm operations?
- ◆ Where can KM assist? Which type of firm operations issues are amenable to KM help?
- ◆ What KM techniques have been successfully applied to firm operations?
- ◆ How does working with firm operations contrast with working with lawyers?

# Principles

KM as a **catalyst** for

- ◆ driving change
- ◆ making connections
- ◆ promoting collaboration
- ◆ stimulating communication
- ◆ sparking/harnessing innovation

# Process Improvement Evaluation Matrix



# Process Improvement Projects

| Project  | Groups   | Role of KM  | Skills Used  | Project Outcomes  |
|--|--|---|--|---|
| Language translation services<br><br><i>Aug 2013</i> | <ul style="list-style-type: none"> <li>• KM</li> <li>• Business Services (Risk)</li> <li>• Procurement</li> <li>• General Counsel</li> <li>• HR</li> </ul> | Lead role in <ul style="list-style-type: none"> <li>• project coordination</li> <li>• policy review</li> <li>• supplier/vendor selection</li> </ul> | Skills and expertise in <ul style="list-style-type: none"> <li>• project coordination</li> <li>• product/service evaluation</li> <li>• information management</li> </ul> | Reduced risk <ul style="list-style-type: none"> <li>• established a quality assured panel of external translation service providers</li> <li>• improved awareness of the risks associated with use of the firm's legal staff for translation services</li> </ul> Improved quality of service <ul style="list-style-type: none"> <li>• established a flexible policy supporting the use of internal and external translation providers</li> <li>• systemised the up-dating of information about employee/attorney language skills</li> </ul> |


## Translation services


---

**Care!**

Please ensure you have the client's consent before you send confidential information to another member firm, e.g. from Australia to Hong Kong and vice versa.

There is occasional demand across the firm for documents to be translated. This page is designed as a starting point to assist you if you have a translation query.



**Felicity Badcock**   
Head of Knowledge

# Process Improvement Projects

| Project   | Groups   | Role of KM  | Skills Used  | Project Outcomes  |
|---|--|---|--|---|
| Developing and supporting the firm's external blogs<br><br><i>first blog launched in 2009</i> | <ul style="list-style-type: none"> <li>• KM</li> <li>• BD/Marketing</li> <li>• Technology</li> </ul> | Lead role in <ul style="list-style-type: none"> <li>• product evaluation and selection</li> <li>• product configuration and support</li> <li>• workflow design</li> <li>• style guide design (including editorial guidelines)</li> </ul><br><i>ongoing editorial and technical support provided by KM</i> | Skills and expertise in <ul style="list-style-type: none"> <li>• information systems</li> <li>• social media channels</li> <li>• product evaluation</li> <li>• curating and editing news services</li> </ul> | Innovation <ul style="list-style-type: none"> <li>• established a new communication channel to showcase thought leadership</li> <li>• developed a lighter and more playful tone of voice for firm communications</li> </ul> |





# Process Improvement Projects

| Project                                   | Groups   | Role of KM   | Skills Used  | Project Outcomes  |
|---|--|--|--|---|
| Seasonal clerk program<br><i>Jan 2013</i> | <ul style="list-style-type: none"> <li>• KM</li> <li>• HR</li> <li>• BD/Marketing</li> </ul> | Lead role in <ul style="list-style-type: none"> <li>• promoting and supporting a social communication and information sharing platform for use by seasonal clerks</li> </ul> | Skills and expertise in <ul style="list-style-type: none"> <li>• information systems</li> <li>• social media channels</li> <li>• project coordination</li> </ul> | Improved quality of experience <ul style="list-style-type: none"> <li>• increased engagement</li> <li>• increased sense of community</li> </ul> Improved knowledge transfer <ul style="list-style-type: none"> <li>• greater firm insight into the clerks' experience at KWM</li> </ul> |

## Sydney Summer Clerks 2012-2013 community


 Jason Watts posted to [Sydney Summer Clerks 2012-2013](#):  
 What **#iLearnt** @KWM Sydney Summer Clerks Competition.

9 January 2013



# Process Improvement Projects

| Project  | Groups   | Role of KM   | Skills Used  | Project Outcomes  |
|--|--|--|--|---|
| Standard documents, eg <ul style="list-style-type: none"> <li>• HR templates and standard letters</li> <li>• client advice templates</li> <li>• client engagement letter</li> </ul> <i>Ongoing</i> | <ul style="list-style-type: none"> <li>• KM</li> <li>• HR</li> <li>• BD</li> </ul> | Lead role in <ul style="list-style-type: none"> <li>• formatting documents in firm style</li> <li>• organising and publishing documents</li> <li>• applying document automation</li> </ul> | Skills and expertise in <ul style="list-style-type: none"> <li>• firm style</li> <li>• information systems</li> <li>• document automation</li> </ul> | Improved quality of product <ul style="list-style-type: none"> <li>• consistent format and style applied to the firm's documents</li> <li>• reduced risk of incorrect data input (<i>document automation</i>)</li> </ul> Improved efficiency <ul style="list-style-type: none"> <li>• reduced drafting time (<i>document automation</i>)</li> </ul> |

## Estimate letter (Australia)

### FastTrack Options

This precedent includes the following options and sub options. To select the options and sub options you require:

- click the FastTrack button in the Precedent Processing Tools group on the Precedents ribbon; or
- print out this table and mark up, or dictate, the appropriate options and sub options for your secretary or WP to process.

|                 |               |                   |                  |                          |
|-----------------|---------------|-------------------|------------------|--------------------------|
| <b>Option 1</b> | Other options | <b>Sub option</b> | Premium charge   | <input type="checkbox"/> |
|                 |               | <b>Sub option</b> | Litigious matter | <input type="checkbox"/> |

# Process Improvement Projects

| Project     | Groups   | Role of KM  | Skills Used  | Project Outcomes  |
|-------------|--|---|--|---|
| Secondments | <ul style="list-style-type: none"> <li>• KM</li> <li>• BD/Marketing</li> </ul> | <ul style="list-style-type: none"> <li>• Secondment of KM Knowledge Consultants to the Business Development team</li> </ul> | <ul style="list-style-type: none"> <li>• Business and industry research</li> <li>• Social media expertise</li> </ul> | <ul style="list-style-type: none"> <li>• Knowledge transfer</li> <li>• Stronger relationships</li> <li>• Improved quality of service</li> </ul> |

## Business research - How to:

- use social media for business and industry research
- profile an industry
- profile government business
- profile a company
- find the top 20 shareholders of a public company
- locate the share price history of Australian and foreign listed companies
- find a credit rating
- locate executive profiles (memberships of boards, etc)
- find analyst reports
- profile a deal
- find deal advisors
- find league tables
- find news on companies and industries



# Process Improvement Projects

| Project             | Groups   | Role of KM   | Skills Used   | Project Outcomes  |
|---------------------|--|--|---|---|
| On-Boarding Process | <ul style="list-style-type: none"> <li>• KM</li> <li>• HR/Professional Resources</li> <li>• IT</li> <li>• Office Services</li> <li>• Finance</li> <li>• PD</li> <li>• Library</li> </ul> | <ul style="list-style-type: none"> <li>• Map as-is process</li> <li>• Identify gaps/inefficiencies</li> <li>• Map improved process</li> <li>• Communicate benefits to secure buy-in</li> </ul> | <ul style="list-style-type: none"> <li>• Process mapping</li> <li>• Understanding work-flow and critical touch-points</li> <li>• Change management</li> </ul> | <ul style="list-style-type: none"> <li>• Fewer errors</li> <li>• Smoother, complete process</li> <li>• Efficiency</li> <li>• New member well-oriented, ready to work, and welcomed</li> </ul> |

**SLP ONBOARDING CHECKLIST**

Name of New Hire: [Redacted] Start Date: 09/10/2012 Employee Eligible G-WL:  Yes  No Department Completion: 

Role Title: Enterprise Infrastructure Specialist End Date: - Reporting Manager's Name: [Redacted] Office Locat: 200-52

Employee Number: 5395 Department Name: Information Technology Department Head Name: [Redacted]

Regular Working: 35 Per Week Work Day:  Mon  Tue  Wed  Thu  Fri  Sat  Sun Shift Comment:

| Function  | Complete                                | Initials | Responsibility | Backup     | Fellow Up MM/DD/YY | Timeline |
|---|---|----------|----------------|------------|--------------------|----------|
| <b>HUMAN RESOURCES</b>  |   |          |                |            |                    |          |
| <b>PRE-START DATE REQUIREMENTS COMPLETION DATE: 5-Oct-12</b>  |   |          |                |            |                    |          |
| Offer Letter Signed Back and HR has an original;  | <input checked="" type="checkbox"/> Yes | CS       | [Redacted]     | [Redacted] | -                  |          |
| Initiate the onboarding checklist   | <input checked="" type="checkbox"/> Yes | CS       | [Redacted]     | [Redacted] | -                  |          |
| Copy of offer letter to Benefits & Payroll Coordinator and original to file   | <input checked="" type="checkbox"/> Yes | CS       | [Redacted]     | [Redacted] | -                  |          |
| Email Edmonton about new employee via payroll spreadsheet, include Start Date Annual Salary Participation in "Carval Fridays" | <input checked="" type="checkbox"/> Yes | MJ       | [Redacted]     | [Redacted] | -                  |          |
| Confirm work office location with employee's manager and Facilitator  | <input checked="" type="checkbox"/> Yes | CS       | [Redacted]     | [Redacted] | -                  |          |

# Process Improvement Projects

| Project                   | Groups  | Role of KM   | Skills Used  | Project Outcomes   |
|---------------------------|---|--|--|--|
| RFP Builder and Work-flow | <ul style="list-style-type: none"> <li>• KM</li> <li>• Marketing</li> <li>• IT</li> </ul> | <ul style="list-style-type: none"> <li>• Map as-is process</li> <li>• Identify gaps/inefficiencies</li> <li>• Map improved process</li> <li>• Create taxonomy</li> <li>• Design Database</li> <li>• Evaluate/select software</li> <li>• Design document assembly</li> <li>• Create and code documents</li> <li>• Create and deliver training to Marketing</li> </ul> | <ul style="list-style-type: none"> <li>• Process mapping</li> <li>• Understanding work-flow and critical touch-points</li> <li>• Change management</li> <li>• Software design</li> <li>• Document assembly principles and coding</li> <li>• Writing and editing</li> <li>• Creating useful taxonomies</li> </ul> | <ul style="list-style-type: none"> <li>• Better, more tailored content</li> <li>• Smoother, complete process</li> <li>• Efficiency</li> <li>• Better communication between lawyers and Marketing</li> <li>• Improved accuracy and quality</li> <li>• Systematic approach replaced inconsistent, at times chaotic approach</li> </ul> |

# Process Improvement Projects

| Project                                   | Groups   | Role of KM   | Skills Used   | Project Outcomes  |
|---|--|--|---|---|
| Digital Closing Books Process and Library | <ul style="list-style-type: none"> <li>• KM</li> <li>• Office Services</li> <li>• Marketing</li> <li>• IT</li> <li>• Director of Paralegals</li> <li>• Professional Resources</li> </ul> | <ul style="list-style-type: none"> <li>• Map as-is process</li> <li>• Identify gaps/inefficiencies</li> <li>• Map improved process</li> <li>• Identify interview all stakeholders</li> <li>• Identify requirements</li> <li>• Design functionality</li> <li>• Evaluate/select software</li> <li>• Evaluate in-house v. outsourcing options</li> <li>• Define/describe new roles</li> <li>• Secure leadership support</li> <li>• Create and deliver training to lawyers, paralegals, imaging, and document services people</li> </ul> | <ul style="list-style-type: none"> <li>• Process mapping</li> <li>• Understanding work-flow and critical touch-points</li> <li>• Change management</li> </ul> | <ul style="list-style-type: none"> <li>• Smoother, complete process</li> <li>• Efficiency</li> <li>• Relevant skills development</li> <li>• More useful, less expensive end-product for clients</li> <li>• Remote and multiple access for lawyers</li> <li>• Excellent learning resource for junior lawyers</li> <li>• Cost savings</li> <li>• Space savings</li> </ul> |

# Process Improvement Projects

| Project  | Groups  | Role of KM   | Skills Used   | Project Outcomes  |
|--|---|--|---|---|
| Conference Request, Registration and Tracking System | <ul style="list-style-type: none"> <li>• KM</li> <li>• Professional Development</li> <li>• IT</li> <li>• Finance</li> <li>• Practice Group Leaders</li> </ul> | <ul style="list-style-type: none"> <li>• Map as-is process</li> <li>• Identify gaps/inefficiencies</li> <li>• Map improved process</li> <li>• Interview all stakeholders</li> <li>• Identify requirements</li> <li>• Design functionality</li> <li>• Design user interface</li> <li>• Create and deliver training</li> </ul> | <ul style="list-style-type: none"> <li>• Process mapping</li> <li>• Understanding work-flow and critical touch-points</li> <li>• Change management</li> </ul> | <ul style="list-style-type: none"> <li>• Enhanced access to information</li> <li>• Smoother, complete process</li> <li>• Efficiency</li> <li>• Cost savings</li> <li>• Accurate and easier reporting</li> </ul> |

# Evaluation Matrix

