

# Enterprise Content Management: Integrating KM, RM, and DM

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# Agenda

- ❑ Why ECM?
- ❑ Building Tridges
- ❑ Tools
- ❑ Case Studies
- ❑ Takeaways

# Why ECM?



# Let's take a poll

Do you have an ECM strategy in place?

- Yes
- In discussions
- In thoughts
- No

# Why ECM?

## The Back End...

- Proliferation of data and the break-neck speed at which it is generated
  - E-mail (quickly becoming de facto DMS and KM system)
  - DMS
  - KM Systems
  - Records Management Systems
  - Another flavor of the month
- Challenges of managing different databases that have no relation to the other
- The myth of “cheap storage”

# Why ECM?

## The Front End...

- Risk Management
  - Enterprise information management policies
  - Electronic discovery
  - Retention issues
- Client-Side Challenges
  - User frustration with data living in many places
    - Time consuming to get answers
    - Decreased productivity
    - Do not want to Re-invent the wheel for clients
    - Difficult to get the “Big Picture”

# Building Tridges

i/+∞ 2010  
strategic  
unity



# Building Tridges

- The “Tridge” concept
- Getting there
  - Cultural changes
  - Top-level champion
  - Highlighting common and WIFM goals
- Strategic Unity
  - It will better your organization
  - It will better your relationships
  - It will better your projects



# The Tools



## Poll #2

What tools do you use to manage content?

- DMS (e.g. OpenText, iManage)
- Records System (e.g. FileSurf)
- Portal (e.g. SharePoint)
- Local Drives
- Combination (of the above & others)
- Nothing

# The Tools

- Are there tools in the market that enable ECM? Or, do they perpetuate the problem?
  - Fact: There isn't a single product out there that can enable true ECM
  - The market sees this gap, but it will take time to develop and create true ECM tools
- We can aim to minimize the tools that we use
  - Use DMS as a central repository (ie. file e-mails in DMS)
  - SharePoint
  - Extranets

# The Tools

- Addressing end-user concerns
  - Will I be able to find “my stuff”? Retrieval
    - Enterprise Search. When users start to see advantages, they will want their stuff to come up in searches
  - What’s in it for me? Motivation

# Case Studies



# Case Study: Littler

- **Ayelette Robinson, Esq.**
  - Lawyer, plus technologist
  - Knowledge Management Counsel, plus Manager of KM Technology
  - Oversee knowledge management systems
- **Littler Mendelson Overview**
  - 49 Offices (All U.S.)
  - 750 Attorneys (350 Partners)
  - 1300 Users
  - 1 Practice Group (Employment & Labor)
  - 20 Sub-groups (practice-based and industry-based)

# Case Study: Littler

- The Driver: KM (and a new Portal)
- The Process:
  - Define our objectives
  - Redefine the processes
  - Understand how close the technology can get
  - Understand how close the humans can get
  - Communicate communicate communicate
  - Accept and accommodate the delta
- The Solution: In process...

# Case Study: Sheppard

- **Rachelle Rennagel, Esq.**
  - “Recovering” lawyer
  - Chief Knowledge Officer
  - Oversee library, litigation support, knowledge management and marketing technologies
- **Sheppard Mullin Overview**
  - Eleven Offices (1 International)
  - 1000+ users
  - 20 + Practice Groups



# Case Study: Sheppard

- “Aha” Moment #1: Risk Management
  - Receiving litigation hold notices and client destruction notices. Quickly realized it wasn’t as simple as DMS.
    - File Shares
    - Sharepoint indexes
    - E-mail
    - Litigation support data
    - Extranet data

# Case Study: Sheppard

- “Aha” Moment #2: Information Management Policy
  - CIO, CKO, Records Manager locked in a room for 1 week
  - Very eye opening – insight into each other’s goals, priorities, initiatives.

# Case Study: Sheppard

- RM, KM and DM are differently motivated but each of them are important to meet the needs of the organization.
  - KM wants to retain as much as possible and treat business records differently than RM and DM
  - RM focused on disposition of records, retention and eventual destruction of records

# Case Study: Sheppard

- Realization that our goals were not mutually exclusive – how could we draft a policy that would meet everyone's needs

# Case Study: Sheppard

- “Aha” Moment #3: Retrieval
  - Significant end-user frustration over information retrieval. Not just DMS search.
  - Significant IT frustration over how to handle data for both incoming and outgoing partners.

# Case Study: Sheppard

- What did we do?
  - Communication, communication, communication
    - I know my CIO's budget and she knows mine
    - I know my CIO's projects and she knows mine
      - Identify dependencies, synergistic opportunities and timing issues for roll-out, training etc.
  - Spirit of Cooperation
    - We are all in this together and we are all on the same team
    - Flexibility with project deadlines.
      - Interaction upgrade must be completed before Exchange upgrade
      - Universal search implementation in conjunction with DMS upgrade.
  - Software purchases not made in a silo
    - CKO, CIO and records manager attended vendor pitches for records software, e-mail management software
    - We all had a say in the software that was eventually purchased

# Case Study: Sheppard

- We are still learning and growing – we don't expect perfection
- Identify “Source” databases and “Feeder” databases and have this be a part of your strategy
- Always think about the big picture. For example, even if marketing puts up a website, find out what they want to eventually do with the website data. Most likely, this data can (and should) be integrated with other internal systems

# Takeaways





# Takeaways

- **Accept**  
...the state of historical data
- **Simplify**  
...your go-forward plan
- **Collaborate**  
...with your cohorts
- **Expect imperfection**  
...and do your best

# Thank You

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