I Still Haven't Found What I'm Searching For…

#APP4

Presenter:

Dana C. Moore, IGP

*Manager of Records and
Information Compliance,
Vedder Price P.C.*

Thank you for being here today

August 18, 2014

Presenter:

Howard Russell

Co-CEO, RBRO Solutions Inc.

Thank you for being here today

August 18, 2014

Presenter:

Dwight Maloney
Practice Manager,
Kraft & Kennedy, Inc.

Thank you for being here today

August 18, 2014

Go to http://ilta.cnf.io
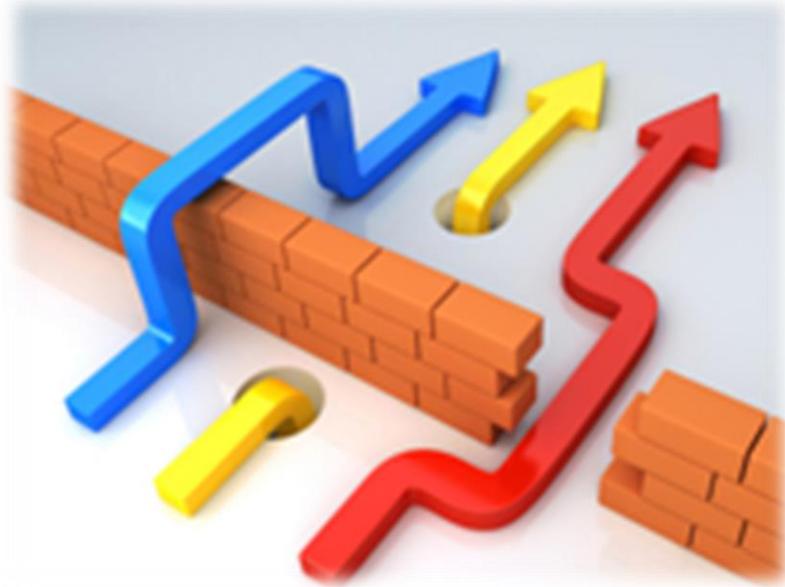
on your mobile device or laptop

WHAT AM I SEARCHING FOR?

- Search is common in one form or another to all organizations

- Organizations have differing needs for search
  - Kinds of data
  - Scope of the data
  - Organization of the data

WHY CAN'T I FIND WHAT I'M SEARCHING FOR?

- No matter what you are looking for, one key is to remove the barriers…
- There are several

THREE MAJOR BARRIERS

The Haystack

Too Much Clutter
Data not well-organized,
Users just don't know
where to start

Invisibility

Lost Content
Leaving the hidden
gems behind,
Image-based content
Invites failure

Stability

It Worked Yesterday!
Insufficient Infrastructure,
Poorly configured,
HA/DR Considerations

GIGO (garbage in, garbage out) is often applied, but is it the only problem?

- Most end users would argue that their contributions to the system are not garbage

- HOW we add content and organize it may be a bigger problem

  - Is it easy? Is it intuitive? Does it promote accuracy?

- Security - An important factor when the need to manage access to confidential matters or to setup information barriers around ethical issues

  - Sometimes overused and results in a lack of quality example content being available to the broader team

- Not knowing what and how to search

GIGO (garbage in, garbage out) is often applied, but is it the only problem?

- How is your data organized?

    - Purely by client/matter?

    - What about key filtering agents like document classes/types?

    - When users search, are they looking specifically for a "document" or for a group of documents based on a topic or action?

"I searched 'ad nauseum,' over a thousand documents appeared"

- Depending on the type of organization you are in, some terms are quite unique and focused, others aren't

- Full text searching can be quite powerful. However, legal content is quite homogeneous; keyword searching with single terms usually results in failure

- Metadata searching across broad categories is even less beneficial

- Browsing is not necessarily a bad thing but can be quite time consuming in a poorly-organized environment

"I searched 'ad nauseum,' over a thousand documents appeared"

- In some environments, the maximum number of returned items is increased in order to ensure "My document is in the Mix"
    - Drives down the performance of the system
    - Forces users to scroll through long lists of items, which increases the chance that they may "glaze over" prior to finding the desired content
- Users don't have a solid understanding of the search tools available to them in the form of Boolean operators and other filtering agents

"The @!%!! system keeps timing out on me! I give up!"

- Poor infrastructure = frustrated, angry and ineffective users
    - Search on-the-cheap equates to lost time, poor adoption and dissatisfied clients
    - Ensure that the system is well maintained to ensure search is always available and always responsive
- Poor configuration reduces the effectiveness of the solution and potentially excludes options that could really increase data value
- Systems that enable only general keyword or metadata searches can be helpful but miss out on the value that can come from weighting

"The @!%!! system keeps timing out on me! I give up!"

- Lack of Data Aggregation

    - DMS Based content is not always properly tied to content from other line of business or PM systems.

- Facilitating the user

    - Different users access information differently. Some organizations that are not highly regulated, straight jacket their users into only one method of locating and accessing content. This is done at the risk of offending the 'individuality' of the user and reducing their adoption of the chosen solution

THERE IS HOPE…

It's possible to do better

POTENTIAL SOLUTIONS

All is not lost! Get the most out of the content you care about!

- Work to understand the data that you are managing
  - Image-based PDFs? Solutions exist that use Optical Character Recognition (OCR) technologies to expose the text content to search
  - Content beyond the DMS? Consider enterprise search facilities or more descriptive metadata
  - Weighting - Systems that allow for weighting based on how recently data has been modified or based on the value of specific fields can be helpful in elevating the right documents for less capable searchers
- Archiving
  - Move low value content from closed matters/projects to separate repositories and encourage users not to search these repositories except for precedent or historical content

POTENTIAL SOLUTIONS

All is not lost! Get the most out of the content you care about!

- Ask the question – "What are we searching for?"
  - Research, Opinions, WIP?
  - Search methods are different for each
- Make the inclusion of metadata easy
  - In context - based on work in progress
- Tie systems together to drive data uniqueness
  - Data aggregation can provide a powerful way of differentiating content
- Remove old or low value data or ensure exclusion of such content is easily achieved without expert user knowledge
- It's not always about search – how does your organization push best practices?

Getting the most out of Search

Systems aren't the only thing that can be improved.
Searchers can be improved too!

- Contribute to a highly searchable environment by ensuring that content is saved with the correct metadata including valuable tags in comment fields and good naming schemes

- Know your syntax (Boolean, xNEAR, excluding characters)

- Use date ranges if known to ensure legal relevance for things like regulations

- Save common searches to avoid reinventing the wheel

Getting the most out of Search

More is not less... It really is more!

- The more targeted words you use in the search query, the better (except conjunctions)
- Inclusion of things like *Class* and *Practice Area* can significantly reduce false positives
- Where is the really valuable metadata, *i.e.* description, doc body, comments? Restrict your search to the appropriate fields
- Use search technologies to drive result quality through aggregation of expert authors
- Centralized libraries
- Ensure accuracy and trust in search by making sure facilities are always functioning in top shape

TEEING UP THE MAGIC INGREDIENTS
Leadership, Training, Adoption

Leadership

- Work with team members to identify best practices
- Ensure that leadership is 100% on board
- Ensure that leadership participates in training and works within policies
- Demonstrate commitment to quality in infrastructure and organization

Training

Educated users make all the difference

- Educated users will require quality because they know what can be achieved through it.
- Training on Syntax will empower users to more effectively parse through the maze of data
- Where and How…
    - By ensuring users have a good understanding of where information is maintained and how best to search for it, firms can reduce the time spent searching.
    - Less time locating data means more time producing quality output
- Training promotes awareness, awareness leads to better practices

Adoption

If only people would just follow the rules ☹

- Adoption is very important to any type of system that involves people
- Higher adoption comes from cognitive buy-in, leadership, training and enablement
- Enforcement is better than Imposition
  - Find common ground with and between users
  - Encourage input into best practices such as naming conventions, categorization and content location
  - Consistently enforce the accepted practices
  - Avoid imposing structures and steps that don't have broad acceptance
- Ongoing communication about content, value and benefits is important to keep the issue top of mind

Questions

We'll now open it up for questions

Thank You