

# If At First You Succeed...Try Again!

John Gillies  
Director of Practice Support  
Cassells Brock LLP

## My background

- Banking and secured lending lawyer
- Four years in Paris after my call to the bar (1977-81)
  - Two years of French corporate & commercial and EC law at Sorbonne
  - Two years working at a French law firm
- Banking law associate at large Toronto firm (1981-85)
- In-house counsel at large Canadian bank (1985-2000)
- Director of KM at large Canadian firm (2000-2007)
- Director of Practice Support at Cassels Brock (2007 – present)
- Team:
  - Two Practice Support lawyers
  - Litigation support manager
  - Library

## Cassels, Brock & Blackwell LLP: Who are we?

- Toronto-based law firm of approximately 200 lawyers
  - Most in Toronto; 10 lawyers in new Vancouver office
- Full service firm
  - General corporate & commercial practice, with emphasis on securities work
- iManage matter-centric DMS since 2004
- Three DMS repositories
  - “Legal” for client/matter workspaces and KM content
  - “Support” for admin functions
  - “Admin” for personal workspaces of each firm member
- Also have Elite; InterAction; InMagic (no Canadian equivalent to WestLaw)

## Search history at Cassels Brock

- Business drivers that led to the implementation of enterprise search:
  - no KM repository
  - no firm precedents
  - native DMS search did not work
- IUS 6 launched in March 2009
  - Indexed only the Legal database
- IUS launched in October 2010, but retracted six weeks later
- Recommind Decisiv 7 launched June 2012

## Adoption of IUS 6

- Series of well-attended focus group sessions in fall 2007 identified series of pain points
  - Inability to find work product one of most frequently mentioned issues
- Business requirements document drove development of weighted list of search features to compare two “contenders” (IUS and Recommind)
  - Could compare overall score and score on “Must Have” features
- Both engines scored well; final decision turned on more non-quantifiable factors
- Clean up of “sensitive documents”
  - “Security through obscurity”
- Pilot testing: left to pilot testers to “kick the tires”; no formal process
- Branding: “SearchWell”

## Launch of IUS 6

- Staged rollout: one floor per hour to reduce load
- Launch party at 5:00 p.m.: everyone invited
- Very strong positive reaction: people could actually find what they were looking for!



# CASSELS BROCK SEARCHWELL

**Legal DB**

Search:

[Advanced](#)

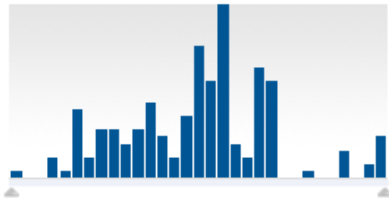
All Legal DB **CBBSupport DB** Admin DB

Search: engagement letter

Go  Filter E-mail [Advanced](#)

Refine Results by

Date



Selected: 3/4/2008 - 6/22/2012

Client

\* **PRACTICESUPPORT - Practice Support Group** (182)

Matter

GENERAL - General Documents (179)  
KORBITEC ACL3 - Korbitec ACL3 (3)

Author

JGILLIES - Gillies, John (163)  
KHOGAN - Hogan, Kathleen (9)  
TGRAY - Gray, Tilly (7)  
GGOODMAN - Goodman, Gordon P. (1)  
SENGLISH - English, Stuart (1)  
SGONZALE - Gonzalez, Shelly (1)

E-mail to

Alan Bass (2)  
Ahmed, Talha (1)

Sort by: **Relevance** Last Modified Refinements: Client: **PRACTICESUPPORT - Practice Support Group** x

Results 1-10 of about 149

page 1 of 15

1. [WSComparison\\_#5145206v2 - CBB Standard Engagement Letter-#439036v1 - Standard Engagement Letter - Umbrella format: multiple matters](#) [preview](#) [workspace](#)

**Doc#:** 439114 **Class:** DOG **Type:** WORDX **Author:** Gillies, John **Created:** Aug-23-2010 **Modified:** Aug-23-2010  
**Client:** PRACTICESUPPORT - Practice Support Group **Matter:** GENERAL - General Documents  
**Practice Group:** SPECIAL & RETIREES **Size:** 36 KB

ius-worksite-DB-CBBSupport-source

2. [WS BinaryComparison\\_#268940v1 - CBB - Model Non-Engagement Letter-#268940v2 - CBB - Model Non-Engagement Letter](#) [preview](#) [workspace](#)

**Doc#:** 269229 **Class:** DOG **Type:** ACROBAT **Author:** Hogan, Kathleen **Created:** Dec-03-2008 **Modified:** Dec-03-2008  
**Client:** PRACTICESUPPORT - Practice Support Group **Matter:** GENERAL - General Documents  
**Practice Group:** SPECIAL & RETIREES **Size:** 152 KB

ius-worksite-DB-CBBSupport-source

3. [Engagement letter \[IWOV-CBBSupport.FID41978\]](#) [preview](#) [workspace](#)

**Doc#:** 502686 **Class:** CORR **Type:** MIME **Author:** Gillies, John **Created:** Feb-25-2011 **Modified:** Feb-25-2011  
**Client:** PRACTICESUPPORT - Practice Support Group **Matter:** GENERAL - General Documents **Size:** 106 KB

**Sent:** Feb-17-2011 02:55PM - ius-worksite-DB-CBBSupport-source

4. [FW: Standard firm engagement letter \(and related letters\) \[IWOV-CBBSupport.FID31779\]](#) [preview](#) [workspace](#)

**Doc#:** 439062 **Class:** CORR **Type:** MIME **Author:** Gillies, John **Created:** Aug-23-2010 **Modified:** Aug-23-2010  
**Client:** PRACTICESUPPORT - Practice Support Group **Matter:** GENERAL - General Documents **Size:** 137 KB

**Sent:** Aug-23-2010 03:46PM - ius-worksite-DB-CBBSupport-source



## Moving on

- Spring/summer 2010, decision to upgrade to IUS 7
  - Autonomy would no longer support Vivissimo
  - No charge to upgrade (other than consultation costs)
  - Promising new features
- What we did not do:
  - No use cases
    - Pilot testers not given specific tasks to carry out
  - Outcomes not recorded so as to compare once we launched
- Launched in October 2010, but retracted six weeks later because relevance not nearly as good as with Vivissimo engine
  - Relevance is very difficult to test for!
- Decision in August 2011 to move to the Recommind Decisiv 7 engine

## Recommend Decision 7

- More rigorous testing
  - Use cases; results captures
- Staged rollout
  - First to articling students for two weeks
  - Next to my floor (for immediate physical availability) for two weeks
  - Thereafter one floor per week
- Unanticipated benefits of enterprise search
  - Accounting department
  - Mailroom

**Search**

Exact match

[Advanced Search](#)

Exact match  Search within results

[Advanced Search](#)

### Search Criteria

- Search** "blocked account agreement" ✕
- Author** Gillies, John ✕
- Collection** cbbsupport ✕
- Document Last Edited** Within 2 years ✕
- File Type** Word ✕

### Narrow results by

- Collection ▼
- Blackline ▼
- File Type ▼
- [Authors, Senders, Recipients](#) ▲
- Author ▼
- Email From ▼
- Email Recipient ▼

### Results 1 - 19 of 19

Order by Relevance ▼

#### 1. [Old SearchWell search against "Blocked account agreement"](#)

**Doc#** 462387 v1 **Type** Word **Collection** cbbsupport  
**Author** Gillies, John **Created** Fri Oct 29 2010 **Modified** Fri Oct 29 2010  
**Client** PRACTICESUPPORT - Practice Support Group **Matter** GENERAL - General Documents  
**Folder** Practice Support General Documents » Private » Documents » Projects » Search » IUS

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... first 14 results for "blocked account agreement" in IUS 6... » ... 5077922v3 - **BLOCKED ACCOUNT AGREEMENT** - RBC-JP Morgan... » ... 6 - **BLOCKED ACCOUNT AGREEMENT** - Cleaver-Brooks and RBC (from Lender)-#5077922v1 - **BLOCKED ACCOUNT AGREEMENT** - RBC-JPMorgan-Cleaver... » ... **Agreement** (Canada) - MATL-#4521832v5 - **Blocked Account Agreement** ... (

#### 2. [SearchWell 7.1 searches - January 10, 2011](#)

**Doc#** 483858 v2 **Type** Word **Collection** cbbsupport  
**Author** Gillies, John **Created** Mon Jan 10 2011 **Modified** Mon Jan 10 2011  
**Client** PRACTICESUPPORT - Practice Support Group **Matter** GENERAL - General Documents  
**Folder** Practice Support General Documents » Private » Documents » Projects » Search » IUS

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... 1 results – search term: "blocked account agreement" DocID # and name 10 4 2608855 - **Blocked Account Agreement** - STANDARD (from A. ... » ... 2313566v2 - **Blocked Account Agreement** Revised 2006-0... » Faucher - Amendment to **Blocked Account Agreement** 7 7 5583398 ... - 9 9 4843343 - **Blocked Account Agreement** - Norbord 2010 9

#### 3. [Search comparisons](#)

**Doc#** 462196 v1 **Type** Word **Collection** cbbsupport  
**Author** Gillies, John **Created** Fri Oct 29 2010 **Modified** Fri Oct 29 2010  
**Client** PRACTICESUPPORT - Practice Support Group **Matter** GENERAL - General Documents  
**Folder** Practice Support General Documents » Private » Documents » Projects » Search » IUS

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## Where do we go from here?

- Matters and expertise module
- Tagging and commenting
- Elite and InterAction
- Free legal research sites on the Web (plus subscription sites?)
- Other two DMS repositories
- Electronic matter file
  - Presenting DMS work product in a way that reflect how lawyers actually work and not how the DMS vendor wants to present its product