

Leveraging WorkSite for Matter Life Cycle Management - KM, RM and IT Perspectives



Speakers:

Elizabeth Ellis, Torys LLP

Ken Jones, Butler, Snow, O'Mara, Stevens & Cannada

John Kruse, Cadwalader, Wickersham & Taft LLP

Bob Dolinsky, eSentio Technologies (Moderator)

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Agenda



- Introduction
- Speaker/Firm Background
- Panel Discussion
- Q&A

John Kruse

Cadwalader, Wickersham & Taft LLP



❖❖ Firm Role and Position

- ❖❖ Responsible for firm-wide records and document management, new business intake, conflicts administration and risk management as it relates to business process development and compliance
- ❖❖ Primary report to the Executive Director
- ❖❖ Secondary report to the General Counsel

❖❖ Firm size/geography

- ❖❖ 650 total lawyers/ NY office headquarters with regional offices in Washington DC, Charlotte, London and Beijing.

John Kruse

Cadwalader, Wickersham & Taft LLP



❖ RM/DM/KM environment

❖ LegalKEY for RM and new business intake

❖ FileSite for DM and KM

❖ IntApp for integration between LegalKEY and FileSite

❖ Matter centric filing of email into FileSite was introduced in August 2006; it is considered a work-in-process as the degree of adoption varies by practice department and working groups.

Ken Jones

Butler, Snow, O'Mara, Stevens & Cannada



❖❖ Firm Role and Position

❖❖ Director of Information Technology

❖❖ Reports to the Executive Director. DM and KM are under IT responsibility. Records is a separate department but quickly coming under IT due to move to electronic record storage.

❖❖ Firm size/geography

❖❖ 170 Attorneys located in Mississippi and Tennessee

Ken Jones

Butler, Snow, O'Mara, Stevens & Cannada



- ❖ RM/DM/KM environment

- ❖ Use Interwoven for DMS

- ❖ West KM

- ❖ ProLaw for records (currently evaluating Interwoven Records Manager)

- ❖ Have moved to full electronic records storage and all processes are under review

Elizabeth Ellis
Torys LLP



❖❖ Firm Role and Position

- ❖❖ Partner in charge of knowledge management - also responsible for the Library
- ❖❖ Oversees continuing development of technology and internal processes that support the practice
- ❖❖ Reports to the Managing Partner

❖❖ Firm size/geography

- ❖❖ Approx 300 legal professionals in Toronto (250) and New York City (50)

Elizabeth Ellis

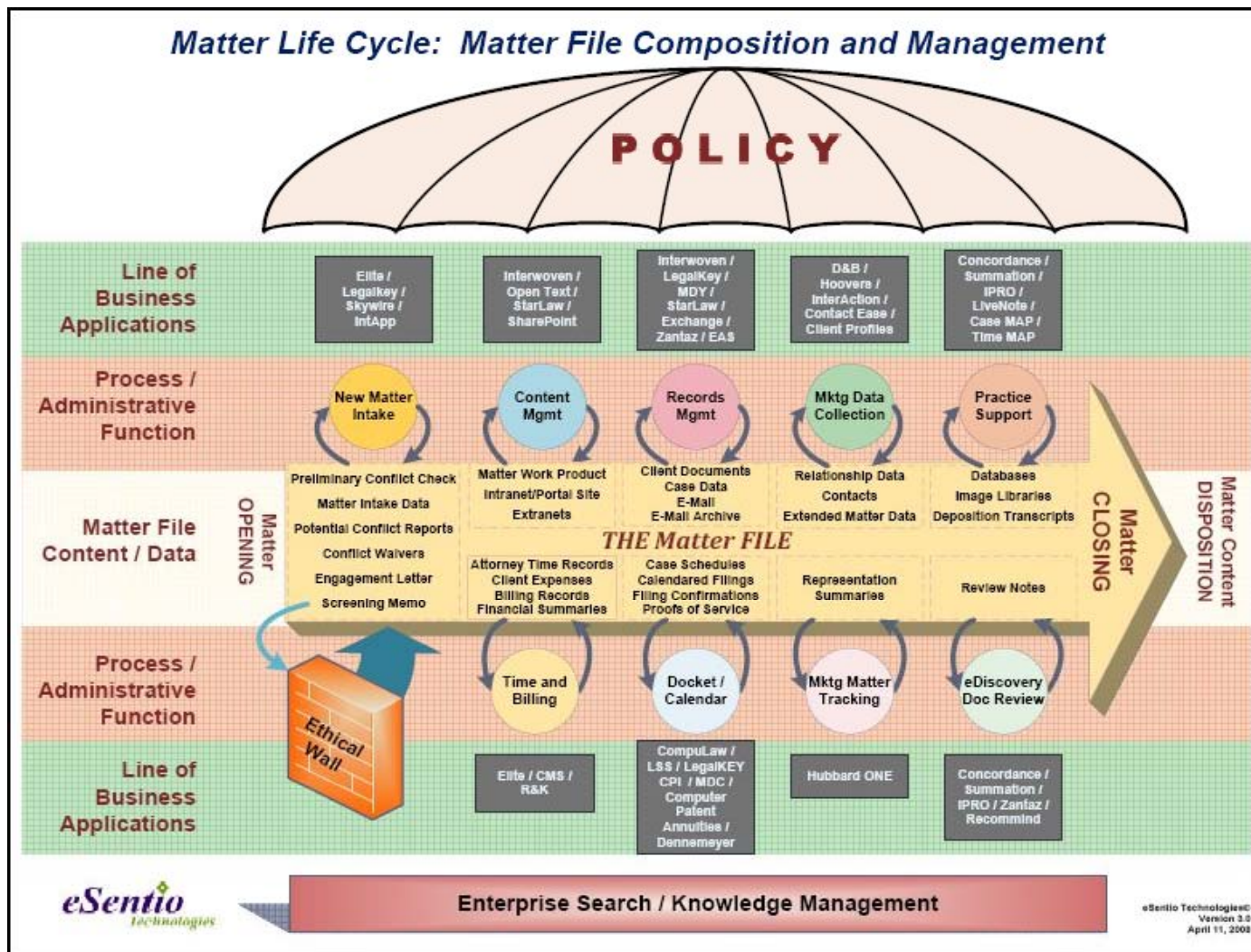
Torys LLP



- ❖ RM/DM/KM environment
 - ❖ Interwoven DMS fully integrated with MOSS 2007
 - ❖ Elite Records Manager
 - ❖ Matter centricity introduced in 2004 - email management processes and matter centric design being revised and re-marketed



Matter Life Cycle Management – An Overview



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- ❖ Do you have a formal structure to bring RM, KM and IS interests to the table or do you collaborate on an ad hoc basis?
- ❖ Who has responsibility at the partner level for policies regarding KM and RM?

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- ❖ In the context of designing the “matter life cycle” process, why should you, in your role as RM, KM or IS professional, be present at the discussion?
- ❖ As you worked with the other stakeholders to develop your matter management processes, what issues surfaced that you might not have thought of if you had been working on your own?

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- ❖ What changes have you implemented to your RM, DM and/or KM environments? For example, have you tackled personal or practice information management? What about administrative department information management?
- ❖ How do you identify and implement best practices within your areas of responsibility?

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Lessons learned & what lies ahead:

- What would you do differently if you had the opportunity?
- What are your challenges in the next 6 months?
- How do you see your roles evolving in the next 2-3 years?

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❖ Questions and Discussion

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❖ Thank You!