

KING & SPALDING LLP



How to Successfully Move to a Matter Centric Environment With a High User Adoption Rate

Thomas Gaines, Chief Information Officer, King & Spalding LLP

Yvonne Dornic, President, eSentio Technologies

Dan DePuy, Director, eSentio Technologies

Bob Dolinsky, Director, eSentio Technologies

August 22, 2006

Agenda

- Project Background
- Matter Centricity – The Basics
- Critical Success Factors for Moving to a Matter Centric Environment
- Highlights of the Project at King & Spalding
- Lessons Learned
- Measuring Success and Current Project Status

Background – Who We Are

- King & Spalding LLP
 - International Law Firm
 - Five Offices
 - 2000 Users
 - Substantial Corporate Litigation and Transactional Practices
 - Survey of Fortune 1000 Clients Reveals King & Spalding To Be One of the "BTI Power Elite"

Background – Who We Are

■ eSentio Technologies

- Technology Consulting and Implementation Services for AmLaw 200 Law Firms, including
 - Strategic Technology Planning
 - Records Management Consulting
 - Business Continuation Planning and Consulting
- Leader in DM Systems Design and Implementation, Including Matter Centric Environments
- Technology Advisor to King & Spalding LLP

Background – The Project Defined

- Applications
 - Interwoven Worksite 8.0 (Upgrade from 7.x to 8.0)
 - Mailsite
 - E-mail Management
 - Windows XP
 - Office 2003 (includes Outlook 2003)
 - Assessment and upgrade of the entire desktop
 - Core applications
 - Specialized applications
- 2000+ Desktops (5 offices / 1 International)

Matter Centricity – The Basics

Matter Centricity

Easy to grasp intellectually
Hard to implement operationally

- *Thomas Gaines*

Matter Centricity – The Basics

- *What is matter centricity?*
- *What are the key elements to making it successful?*
- *Is it really about technology, business processes, or both?*
- *What are the key design elements?*
- *Why is matter centricity important?*

Matter Centricity – The Basics

■ Design Issues

- De-Centralized vs. Centralized Libraries
 - How (whether?) attorneys collaborate
 - Inter-office vs. intra-office
 - How matters are assigned
 - Business Process (70%) and Technology (30%)
 - Infrastructure Impact
 - WAN Design, Bandwidth, Latency, etc.
 - Library Design
 - Dealing with Existing Matters (open and closed)
 - Dealing with Future Matters
- Integration with Records System / Policy
- Email Management
 - Using the right products for the right reasons

Matter Centricity – The Basics

- Design Issues continued
 - Workspaces
 - Folder Organization
 - Document Types
 - Folder Naming Conventions
 - Templates
 - Litigation vs. Transactional vs. Intellectual Property
 - Populating Data
 - Matter Life Cycle Management
 - Matter Opening Workspace Creation
 - Workspace Maintenance
 - Matter Closing / Archiving
 - Desktop Changes
 - Searching for workspaces vs. exploring for workspaces

Matter Centricity – The Basics

- Staff Considerations
 - Applications Team
 - Matter Centric Concepts
 - New DM Software
 - Other New Software
 - Business Process Analysis
 - Focus Groups
 - Training & End User Support
 - What is required and your team's ability to deliver
 - Project Management
 - End User Focus

Matter Centricity – The Basics

- Approach to the Rollout
 - Big Bang
 - Best for keeping consistency
 - Slow Roll
 - Best for ensuring end user adoption
 - Mandatory or Voluntary Usage
 - Business Process
 - The details – what the configuration is – Focus on Lawyers - what their perspective is and needs are
 - Matter File vs. Working File

Successfully Moving to a Matter Centric Environment – Success Factors

Identify Business Drivers

■ Risk Management

- Support for the firm's records management policy
 - Electronic and paper
- Better organization, management, retrieval and disposition of all matter and firm-related materials

■ Client Service

- Faster response to queries
- Single place for all information regarding a matter
- Easier to Collaborate

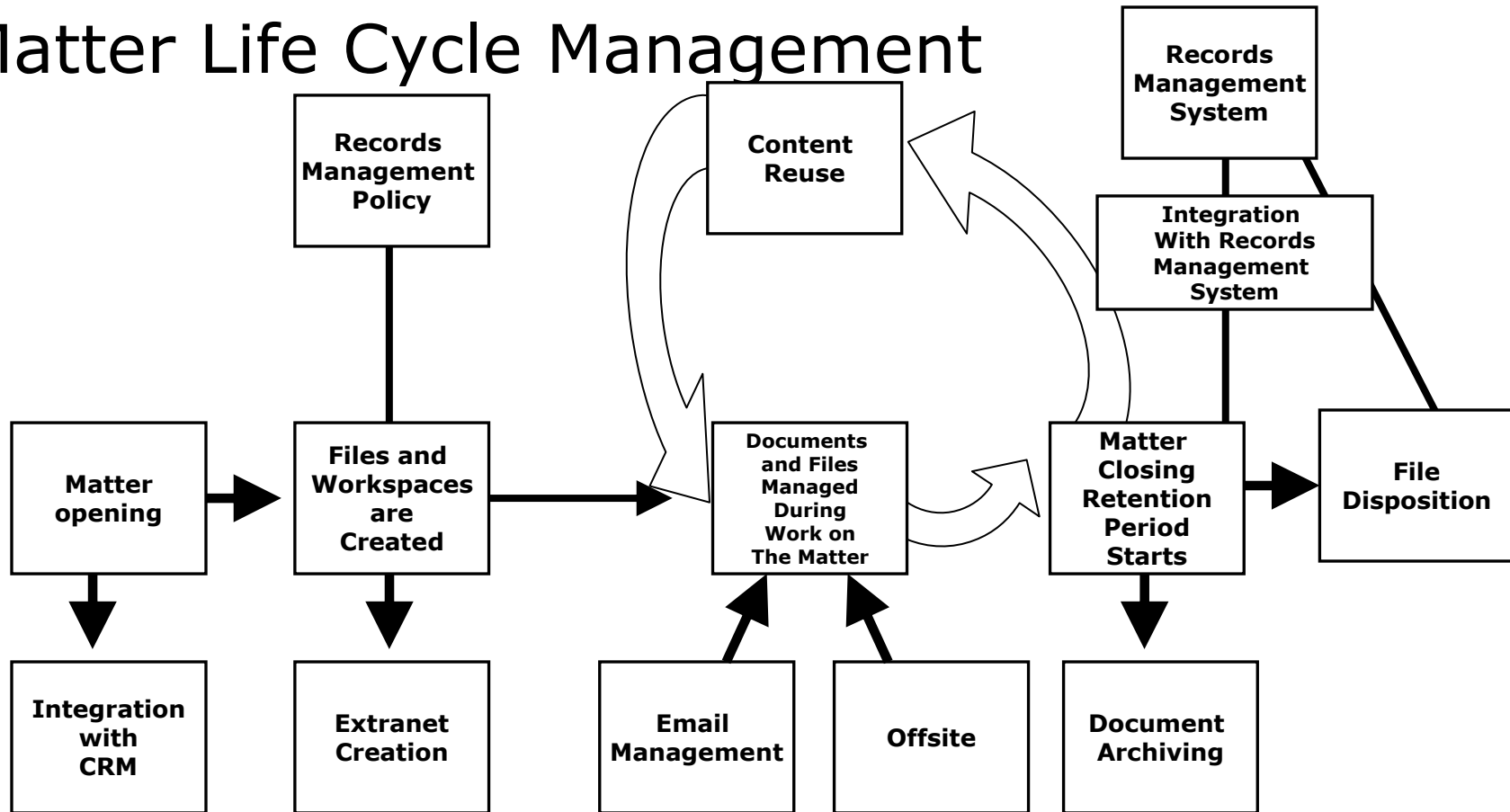
Successfully Moving to a Matter Centric Environment – Success Factors

- Day-to-Day Management and Operations - Ease of Working
 - Personal organization
 - Collaboration facilitation among work teams
 - E-mail management
 - Improved searching

Successfully Moving to a Matter Centric Environment – Success Factors

Have a Vision

Matter Life Cycle Management



Successfully Moving to a Matter Centric Environment – Success Factors

- **Involve Attorneys**
 - Focus Groups
 - Demos
- **Consider all Practice Areas**
- **Involve Firm Senior Management**
- **Set Expectations**
- **Sell The Benefits of the Move to Matter Centricity**

Successfully Moving to a Matter Centric Environment – Success Factors

- **Training is critical**
 - Training should focus on how attorneys work, not features
 - Pilot the training and re-pilot it
- **Carefully Consider Communication Planning**
 - What's New and What's Different
 - Project Timing and status

Leadership Approach – Policy Development and Design

- Records Management Steering Committee
 - Appointed by Operating Committee
 - Staff and Attorneys – Litigation and Transactional
 - Retention was an important component
 - Ensure consistency with the Records Management Policy and Attorney Acceptance
 - Participated in focus groups on workspace design and configuration decisions

Leadership Approach – Key Responsibilities

- Knowledge Management Department
 - Business Analysts
 - Taxonomy
- Practice Services Department
 - Training
 - Litigation Support
- IT Department
 - Project Management
 - Infrastructure
 - Design
 - Implementation
 - Support

Leadership Approach - Implementation

- Steering Committee
- Focus Groups
- Technology Advisory Group
- Pilot
- Communication
 - Setting Expectations
 - Communicating “What’s Different”

Current Project Status

- New Records Management Policy has been adopted
- All Offices, Practice Groups and Administrative Departments Rolled Out
- Content Reuse
- Workspace creation procedures incorporated into matter intake process
- Workspaces centrally created
- Revisiting all practice groups

Current Project Status – Key Statistics

- Approximately 3,000 active workspaces created and in use in only two months
- 55% of the documents filed in workspaces are emails
- 18% - the percentage of documents in workspaces that are classified as miscellaneous or form – prior to implementing matter centricity the number was approximately 40%
- 75% of active workspaces are matter related

Current Project Status – Key Statistics

- 77% of the documents in workspaces are matter related
- 1,653 – the average number of documents in the top 10 of the most active matter oriented workspaces
- The top five practice groups using workspaces are
 - Tort Litigation/Environmental
 - Corporate
 - IP
 - Real Estate
 - Business Litigation

Questions & Answers

Thank You For Joining Us!