

Intranets and Extranets in Law Firms

As law firms begin to develop extranet links for clients, support collaborative working, enhance practice management systems and exploit intranet and document management applications, it will be increasingly important to develop a content management strategy within which all these individual systems can be managed, and integrated as appropriate. Martin White sets out some of the issues that need to be considered in developing a content management strategy, and highlights the factors that lead to an effective intranet.

1 Introduction

In early 2002, *Legal Week*, in conjunction with PA Consulting Group, published a survey of how the major law firms in the UK are using IT as a management and competitive weapon. The survey, targeted at both managing partners and IT directors of the top 100 law firms in the UK, was carried out during the latter part of 2001. An article highlighting the main results of the survey was published in *Legal IT* (www.legalit.net) and reported that law firms currently spend between 2% and 10% of their turnover on IT each year, the average being 5.5%. Client portal and knowledge management (KM) are the two areas of greatest activity in the near future (cited by 27% and 30% of the survey sample respectively).

In terms of client-facing systems, some clients are already demanding secure internet-enabled collaborative working areas in order to have real time access to documents and information. In response, a number of leading firms have invested heavily in developing electronic dealrooms and portals for their clients. In January 2002 Halliwell Landau rolled out an externally hosted virtual dealroom facility to clients of its corporate department. This facility enables team members to share documents and files, schedule meetings, carry out project scheduling with to-do items and time charts and hold online discussions. The survey reveals that such systems have generally been developed in a 'bespoke' fashion. The development of these

non-standard systems may become unacceptable to clients who use several firms and are unwilling to use different systems with each firm.

Although strategic direction is clear to the leaders of the firm, the survey indicated that few firms have driven this through into working practices. Currently 73% of firms have no firm-wide standard operating procedures and 53% have no firm-wide management information system. Although the survey shows that most law firms recognise the fundamental need for some kind of KM initiative to collate and share all the company's intellectual capital, most firms appear to have difficulty 'bringing it all together'. Only 31% of business respondents (and only 21% of IT respondents) think that their KM investments are bearing fruit.

In this article, some particular issues that need to be addressed by law firms are set out. There are still many firms with only a pilot intranet, or no intranet at all. In these cases there is often an urgency driven by the need to maintain a competitive position that can lead to unrealistic targets being set for the deployment.

2 Content management strategy

Law firms already have a number of database applications, such as a document management system, a personnel system and a practice management system. They also make extensive use of external database services, such as Factiva, Moreover, Westlaw and LexisNexis. In addition, e-mail is an

important means of communication. Considerable care then needs to be given to the role of an intranet in this situation. The role of the document management system in relation to content that is to be published on the intranet about (for example) staff meetings, news of clients, new appointments etc, needs careful consideration, as the system may well be too complex to use for content of this type, especially when it is created directly in HTML format.

A content management strategy therefore needs to be developed, based on an information audit that identifies the use made of information. This strategy should explicitly address the relationship between the intranet and other information handling systems, and also any knowledge management initiatives. Objectives for the intranet should be stated so that some (albeit often notional) return on investment can be set and performance monitored. The strategy should also set out the management structure of the intranet in relation to other management structures in the organisation. Another issue to be considered is the extent to which intranet content (such as position papers) can be posted direct to the organisation's Web site, reducing staff time and the possibility of errors in converting internal content.

3 Content management software applications

Many organisations wish to distribute the creation and publication of content across the entire staff, rather than have a dedicated core intranet content team. To do this effectively requires the deployment of a content management software application. These applications can be built in-house using a database such as SQLServer or Oracle (Access is rarely suitable) but the development timescales can be considerable unless the organisation has expertise in Web database design and management.

A case can be made for intranet content to be handled within an intranet content management system, and not be included in the document management system, but the strategy has to be decided on an organisation-specific basis and at the outset of an intranet project. Integration at a later date can be costly and complex to achieve.

Content management software has a number of key elements. These include the provision of templates to enable staff to contribute content quickly and effectively even if they only do so on a very occasional basis. This content needs to have metatags applied, and the development of consistent metadata is crucial to content being correctly published and retrieved in due course. The CMS also converts documents in formats such as Word to HTML format for ease of display on a Web desktop, but this raises issues about version control and the functionality to convert Word documents with page breaks into Web documents.

Another important role of the CMS is to provide very rich administrative functions to manage authorisation to publish, track content awaiting approval or revision, and report on content that is due to reach an expiry date.

Creating a CMS internally requires very considerable knowledge and resources, and should only be attempted by organisations with extensive IT resources. Increasingly organisations are purchasing content management software from vendors that have either developed Web-based versions of document management systems, or have adapted Web site management tools. The main document management systems in use in UK law firms are Hummingbird, iManage and Documentum, all of which offer good content management functionality, but the technical and workflow implications of extending these document

management systems to handle more informal intranet content does need to be considered very carefully. There are over 40 Web content management vendors in the UK market, and selecting a vendor is not straightforward, as there are many different approaches, and many different licence models. Some vendors use a per-seat licence, others a per-server licence, and there are other models. The selection is highly dependent on the development of a formal content management strategy. The extent to which these vendors are able to offer the level of version control and security of a large-scale document management system also varies widely. Some of the factors that need to be considered in selecting a CMS application include:

- Administration management
- Authoring functionality
- Conversion features
- Corporate past and future
- Development environment
- Implementation management
- Integration with other systems
- Licensing and support costs
- Metadata development
- Technical support
- Templates development
- Training
- Storage and performance
- Version control
- Workflow

4 Search functionality

Highly effective search of an intranet is essential. Users must feel that they have either found all relevant information, or that no relevant information is present in the intranet. This requires a careful balance of taxonomic searching (through indexes etc), browsing between documents using hyperlinks, and text search. Text search requires

a more powerful search engine than would be applicable to a Web site. It also requires the content management system to be linked to the search engine in a way that preserves security at a document level. Otherwise a search may list out titles of documents where, despite access to the document being barred, the title alone may impart sensitive information.

Decisions also have to be made as to whether an intranet search engine will also search across the document management system and the e-mail servers, for example. It must also use consistent search terms/metadata when searching Lexis or Factiva so that the search results can be integrated with documents identified from internal searches.

As with content management software, it is important to develop selection criteria for a search engine, recognising that licence costs can range from £10,000 to over £300,000 depending on the functionality required. The integration of the CMS and of third-party databases also needs to be taken into account

5 Client extranets

The ability of clients to use an extranet to gain access to their files and to check on progress of projects and cases is well recognised. Providing this access involves making some complex security decisions, as the client may well be coming in through an extranet gateway to the intranet but then may need access to material from the document management system. There is a danger that a link to 'public' information on an intranet may inadvertently provide a gateway for a client inadvertently to gain access to confidential information. This is especially the case with search functions, as indicated above.

Even if the provision of a client extranet is not a short-term requirement, it is essential that the content management and security issues are identified at the outset so that complex and possibly insecure changes are not made to the intranet at a later date. It is also advisable to work closely with clients to ensure that their own systems requirements can be accommodated within the proposed extranet infrastructure. If they are unable to do so, this may result in the loss of a client if they have concerns about access and security.

6 Content contribution resourcing

In a distributed intranet, staff may be creating content that is of primary benefit to departments and offices other than their own. For example, a regional office may be required to list on the corporate intranet meetings that are taking place in their office. Staff in the regional office probably have other local means of being alerted to these meetings, and may regard formatting this information in a consistent manner in case someone elsewhere in the organisation wishes to attend as not a good use of time.

In professional service companies, not only are staff billed out on a time basis but the partnership basis of these companies means that there can be understandable differences of opinion as to where the costs of this content preparation should be accrued.

Where content creation becomes a significant part of the role and responsibility of a member of staff then the work needs to be included in that person's job description. This is because conflicts of interest may arise from the need to spend time on content creation that cannot be directly justified within the context of the current role and responsibility, and there needs to be a mechanism, such as the employee appraisal process, for these conflicts to be resolved and for training and development needs to be addressed.

One factor that is often overlooked in the resource situation is the work involved in authorising content for publication on the intranet. Some organisations do not put any restrictions in place. However, in a professional services environment there is usually a considerable amount of 'work in progress', much of which could be of value to the organisation. Procedures need to be put in place for managers to approve certain types of content; this could not only add to their work load, but if they are away from the office for extended periods a significant backlog of content may build up. Alternates then need to be agreed.

The importance of content contribution and approval needs to be recognised in the content management strategy so that decisions can be made on an organisation-wide basis. It is important to involve the partner/director with personnel responsibilities in the discussions as new staff positions may need to be established which do not fit easily within existing organisational structures.

7 Intranet deployment

Intranets differ from Web sites in a number of ways. Among them are the fact that intranets need to evolve on an almost continuous basis to reflect the changing business needs of the organisation. In comparison, Web site structures change only on an infrequent basis. This constant change needs careful management, and can be resource-intensive in the early stages of an intranet. Another difference is that once launched they cannot easily be closed down, or radically revised. Staff may have become more dependent on an intranet than might be initially obvious to senior managers and radical changes may be highly disruptive.

The need to accommodate change also means that the information architecture needs to be very flexible, and not based around an organisational structure which may change over a period of time. This has the ancillary problem that if sections of an intranet do not conform to a department then there can be issues over the 'ownership' of a section of the intranet.

Another problem that needs to be considered is the roll-out strategy. On the basis that it is virtually impossible to create an intranet from scratch with all required content,

a decision has to be made as to whether the roll-out is across all offices, but with only limited content and functionality, or whether a pilot is developed for a particular department or office and then rolled out across the rest of the organisation.

Whatever route is taken there will be training requirements to be addressed. You also need to recognise that intranets are not intuitive, so there will need to be an ongoing programme that highlights new content and functionality through e-mail alerts and other internal communications channels.

The intranet will be on every desktop, and will potentially be available to many clients. This means that considerable attention to detail is required, whilst at the same time maintaining forward progress. A formal project management process is highly desirable, and the evidence is that it is very difficult for a busy manager to accommodate this work in the early stages of deployment. Either a suitable manager has to be seconded for a period of time (perhaps six months) or a project manager should be appointed.

8 Key success factors

There is now a sufficient body of evidence to enable a set of critical success factors to be identified that need to be taken into account if an intranet/extranet is going to have any chance of meeting objectives and expectations. Above all staff have to trust the intranet 100%. That does not mean to say that every single piece of information they need is on the intranet. What it does mean is that it is easy for someone to find out whether or not the information is on the intranet. If it is, they must have the reassurance that the information is complete, current and accurate. The other factors, in alphabetical order, include:

- *Clear objectives.* All too often an intranet is launched just because 'we ought to have an intranet'. There should be a documented statement of what the intranet is going to achieve. This could be by reducing staff induction time, by enhancing the sharing of information between project teams, or a customer service initiative. A concise statement of the short-term and long-term objectives and how the success of the intranet will be measured is essential.
- *Content architecture.* A content architecture that is based on organisational structure, or the Web site of the organisation, will always fail. This is because it is usually not at all obvious what department is responsible for certain information, and in addition organisational changes cause havoc with both design and information retrieval.
- *Content management.* Because an intranet is in a state of constant development it is essential that suitable content management software is installed so that changes to the content can be divorced from the design and structure. If the structure changes, global reallocation of content can be accomplished without

the need to tackle the task on a page-by-page or file-by-file basis.

- *Continuous development.* An intranet never stops being developed. Each week or each month there will be new content to be added, new applications to meet emerging business needs, and new software solutions that could be introduced to improve efficiency and effectiveness. This process has to be resourced and managed with care.
- *Job descriptions.* If the intranet is important to the organisation, then anyone involved with the management of the intranet, or content contribution, should have these roles reflected in their job descriptions. This will ensure that staff can have constructive discussions with their manager about the need for training, and the priority that should be given to intranet-related roles given all the other business pressures.
- *Organised feedback.* Just putting a box on the home page asking for comments about the intranet is useless. There need to be multiple feedback channels through regular departmental meetings, surveys, focus groups to look at a particular problem or opportunity, and context specific feedback boxes.
- *Personalisation.* The more that an individual member of staff is able to customise his or her view of the intranet the more impact it will have on productivity and job satisfaction. This does require an effective content management system, and a clear view, based on staff input, about what content and functionality would be best delivered on a personalised basis.
- *Senior sponsor.* It is essential that the intranet has a active sponsor at the most senior level possible in the organisation. This sponsor has to be an active sponsor, attending relevant meetings and providing input into the design and content of the intranet. In addition, this sponsor will be able to indicate changes in the organisation's activities or structure that need to be taken into account in the ongoing development of the intranet.
- *Staff resources.* Intranets often have no budget. The costs of the hardware and software are 'lost' in other budgets, until of course the need for adequate content management is recognised. The real cost of an intranet is associated with the staff who run the intranet on a daily basis, and the staff who contribute content to the intranet. In the excitement of an intranet launch the need to find the time to update content every day or every week is often not fully considered.

9 Conclusion

Many intranets start off with little conscious thought about the impact that they are going to have on the firm. They tend to develop incrementally, usually through staff with a commitment to communication and the technical skills to create content. The time then comes when the benefits and effectiveness of an intranet start to be questioned as the amount of staff effort becomes rather visible on time sheets!

The problem with an intranet is that the genie cannot be put back into the bottle. The problems of integration with other systems should be considered at the earliest opportunity and certainly at partner level in the practice.

Without doubt, corporate sector clients will be looking to develop highly efficient interfaces between their own intranets and document management systems and those of their corporate advisors. The *Legal Week* survey referred to above indicated that some clients are already demanding secure internet-enabled collaborative working areas in order to have real-time access to documents and information. In response, a number of leading firms have invested heavily in developing electronic dealrooms and portals for

their clients. The survey also revealed that such systems have generally been developed in a 'bespoke' fashion and that the development of these non-standard systems may become unacceptable to clients who use several firms and

are unwilling to use different systems with each firm. Unless there is some form of standardisation, more clients will develop their own dealrooms, which they will expect their law firm of choice to use.

Without an effective practice-level content management strategy that takes into account the needs of staff and

clients for effective access to documents, information and knowledge, many firms may find that their IT investment is not providing the competitive advantage that was expected.

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