

What Lawyers Want:

Giving lawyers what they need to know about themselves and their clients

If a tree fell in a forest and nobody heard it, would it still make a sound? Or, more importantly, would anyone care that it had been there in the first place?

In many law firms, information systems and knowledge management tools are doomed to suffer the fate of the proverbial tree: unheard, unheeded, virtually unknown, and thus ineffective. Recognizing the importance of the new technologies in doing business today, law firms invest huge sums of money in Intranets, KM tools, and other information systems. Unfortunately, most of these tools remain little more than unused icons on lawyers' desktops.

When Keesal Young & Logan (KYL) started planning the firm's Intranet, they had no intention of letting it languish on the desktop. They wanted a single, powerful information system that would enhance the firm's success. "Our Intranet has the same purpose as every other project we undertake," says Samuel A. ("Skip") Keesal Jr., KYL's Founding Partner. "To allow us as a firm to more quickly and effectively serve our clients." To get an Intranet that would amplify the firm's client service, KYL turned to PensEra Knowledge Technologies, a leading developer of law firm portals, and immediately found a kindred spirit.

"Many firms approach the creation of their Intranet with the attitude, 'If you build it they will come,'" says PensEra's Peter Zver. "That simply isn't true. If you want lawyers to use the site, you have to lure them with something they really need and will use." With the shared recognition that generating traffic was an important part of the Intranet design process, KYL and PensEra set out to create an Intranet that everyone at the law firm could use, would use—and would *want* to use.

"We wanted the Intranet to be a real portal—a central place of business for everyone," explains Marilyn Whitcomb, KYL's executive director. "And we wanted everyone to use and leverage this information in all aspects of their daily practice, as well as in business development and client relations."

An Intranet that functioned as everyone's central business portal had to have significant daily operational relevance. Building on more than a dozen years of working on technology solutions for lawyers, the team at PensEra recognized that this relevance would be different for each person at KYL.

"The most pertinent information is personalized information," explains Zver. "For most lawyers, there are two burning questions—how am *I* doing, and how are *our clients* doing? Provide instant answers to these two questions and you can significantly increase the lawyer's—and the firm's—effectiveness. For some firms, this can eliminate 90 percent of calls to the accounting department." As a result of their experience with law firms, the people at PensEra also understood that different groups within KYL—partners, associates, and staff—would need access to different types of information.

The solution was an Intranet that was personalized for everyone, both by role and by specific log-in. “Everyone’s Portal is unique,” says Whitcomb. “It’s local, personal information and knowledge management. The Portal knows who you are and what information you need. It’s where you do your business your way.”

One of the key anchors of this local Portal is an instant snapshot of lawyer and client financial status. In contrast to most accounting system reports, the PensEra financial views turn arcane accounting data into a few key pieces of information relevant to each KYL lawyer.

PensEra integrated KYL’s existing billing and accounting information into the new Intranet. But rather than dumping all the data on screens, the information is presented just the way lawyers like to see it. In a one-screen snapshot, a lawyer sees his/her hours worked, billable hours, fees billed, effective rate—everything. Click on a client or matter and get an instant financial snapshot of WIP, A/R, trust, and receipts. Hover over totals to get a more detailed breakdown, or ‘drill down’ for in-depth information on specific matters.

“The financial aspect is particularly important to partners,” notes KYL attorney Dave Bartholomew. “Already, I am much better able to respond to clients about bills and A/R. Day to day, I use it to pull up financial information on a case when speaking with a client.” At the click of a button, Bartholomew, and every other lawyer at KYL, can e-mail a formatted account summary to his client. He can also monitor the financial statistics, rates and hours of junior lawyers with whom he’s working.

The Intranet has proven to be a particular boon to KYL’s satellite offices. KYL’s Portal Manager Justin Hectus launched the Hong Kong site via a 45-minute telephone conversation with Hong Kong managing partner John Zinke. “John said he had never felt more connected to the organization,” Hectus recalls.

“My initial reaction was, ‘Wow!’” confirms Zinke. “It really places a tremendous amount of information at my fingertips that, in the past, I would have had to ask someone at the firm to dig out and either e-mail or fax to me. Now, I can pull that information up in a minute and get back to the client right away.”

The instant personalized financials attracted the lawyers to the Intranet. Integrating time entry, a key operational function, got them to use it daily.

“Since every lawyer has to record or review time entries on a regular basis, online time entry acts like a magnet to draw everyone to the Portal,” says Whitcomb. “We wanted something simple enough that most lawyers could enter their own time. PensEra’s TimeKM system was the obvious solution, as it offered the kind of simplicity and flow that fit the way our lawyers worked.” The fact that partners browse time records whenever they like provides an added impetus for all lawyers to keep their information up to date.

Easy time entry and personalized financial information are the principal hooks that sold KYL lawyers on the usefulness of the site. But they are just part of a much larger Portal, all parts of which are heavily trafficked.

“Now that everyone strolls through the Portal regularly, we can save e-mail irritation by posting news and upcoming events on the Home Page,” says Hectus. “Lawyers and staff can register for events or respond to surveys from within the Portal, without jamming up e-mail in-boxes. All responses automatically feed into a database for easy tabulation and administration.” For the five-

office firm, this function is particularly useful in planning firm-wide events that involve planning flights, booking hotels, and tracking individual preferences.

The site also contains an internal directory of all firm personnel, complete with pictures and professional particulars. A flexible search function allows users to locate colleagues by their relationships within the firm, such as who works with whom, who works in what practice area, and who is on what committee. Like every other aspect of the site, the directory reflects the firm's unique needs and culture, as well as the "ground-up" approach to delivering information that people really use.

Once lawyers at KYL saw the power of the Portal as a central meeting place, they realized they could use it to improve some other processes, such as collections.

"With the collections process now integrated into the site, the lawyer who knows most about the client situation can work with the collections manager without exchanging paper memos," explains Whitcomb. "The collections manager posts five to 10 collections enquiries a month on an individual lawyer's page. The lawyer then clicks on a response, such as call this person, don't call, contact person has changed, or whatever he feels the appropriate action is."

The firm has also moved its conference room booking process, business development materials, and human resources forms and information to the Portal. With each addition, the Intranet becomes a more integrated and indispensable way of doing business at the firm.

The project went so well, says Hectus, if he had to do it all over again, "I wouldn't change a thing. It was useful and engaging for everyone. This was not a technology project—it was a business project with a technology component to it."

Approaching the Intranet as a business rather than a technology project has paid off for both KYL and PensEra.

"KYL has had vendors come in, look at the system, and say, 'No one is doing this,'" says Zver. "The main appeal is the smooth integration of the site with the way KYL does business." A phone call to PensEra frequently follows. "We've had law firms say, 'We want to buy it. Just change the name from Keesal Young & Logan to ours.'" But the reason KYL's Intranet is such a success is just that: it's KYL's site. Throughout the planning, design, and implementation process, and beyond, PensEra listened to the client and designed the system to support KYL's way of working.

"PensEra was terrific at playing out potential pitfalls," says Hectus. "They kept a strong focus on simplicity and on our objectives. They told us what *not* to do. They helped us focus on deriving value. They didn't impose a new way to work—instead, they designed tools that fit our natural work processes."

"The mandate for this project was, whatever you need, whatever it takes to serve our clients better—*do it*," says Whitcomb. They did it, and as a result the KYL Intranet Portal is a valuable business tool - and not a falling tree.

For More Information

For more information about the products or services of PensEra Knowledge Technologies, you may contact PensEra by telephone at (800) 620-8881 or by e-mail:

info@pensera.com

www.pensera.com