

# **Law Firm KM:**

Driving Practice Innovation and  
Redefining Service Delivery



Edited by LAURA SLATER

**Head of legal publishing**

Fiona Fleming

**Publisher**

Helen Donegan

**Managing editor**

Emma Reitano

**Editor**

Laura Slater

Published by ARK Group:

UK, Europe and Asia office  
6–14 Underwood Street  
London, N1 7JQ  
United Kingdom  
Tel: +44(0) 207 566 5792  
publishing@ark-group.com

North America office  
4408 N. Rockwood Drive, Suite 150  
Peoria IL 61614  
United States  
Tel: +1 (309) 495 2853  
publishingna@ark-group.com

www.ark-group.com

Layout by Paul Barrett Book Production, Cambridge

Printed by Canon (UK) Ltd, Cockshot Hill, Reigate, RH2 8BF, United Kingdom

ISBN: 978-1-78358-229-7

A catalogue record for this book is available from the British Library

© 2016 ARK Group

All rights reserved. No part of this publication may be reproduced or transmitted in any form or by any means, except in accordance with the provisions of the Copyright, Designs and Patents Act 1988 or under terms of a licence issued by the Copyright Licensing Agency in respect of photocopying and/or reprographic reproduction. Application for permission for other use of copyright material, including permission to reproduce extracts in other published works, should be made in writing to the publishers. Full acknowledgement of author, publisher, and source must be given.

**DISCLAIMER**

This publication is intended as a general guide only. The information and opinions it contains are not intended to provide legal advice. The publishers bear no responsibility for any errors or omissions contained herein.

ARK Group is a division of Wilmington plc.

The company is registered in England & Wales with company number 2931372 GB.

Registered office: 6–14 Underwood Street, London N1 7JQ. VAT Number: GB 899 3725 51.

# Contents

Executive summary . . . . .	vii
About the authors . . . . .	xi
Part One: Insights and practice	
Chapter 1: Taking knowledge management to a strategic level . . . . .	3
<i>By Keith Lipman, progenitor of Matter Centricity and co-founder of Prospereware, and Toby Brown, chief practice officer at Akin Gump</i>	
What you need to know about the state of the industry . . . . .	3
What you need to know about basic firm economics . . . . .	4
What you need to know about system components . . . . .	8
Netting it out . . . . .	15
Chapter 2: Utilizing KM to inform the pricing of legal services . . . . .	17
<i>By Matt Laws, senior director, practice management at Crowell &amp; Moring LLP</i>	
Chapter 3: Measuring the success of law firm knowledge management . .	21
<i>By Mark Gould, founder of Mark Gould Consulting</i>	
The value of keeping up to date . . . . .	21
Improving law firm efficiency . . . . .	23
Law firm comparisons . . . . .	25
Efficacy rather than efficiency . . . . .	26
Chapter 4: How KM can give clients more value . . . . .	29
<i>By Harriet Creamer, director at Outer Circle</i>	
Engaging KM . . . . .	31
KM driving BD . . . . .	32
Work delivery support . . . . .	33
Holistic approach . . . . .	34
Engaging KM professionals with your business strategy . . . . .	37

<b>Chapter 5: Legal document drafting – Tools and practices that enhance a firm’s competitive edge</b> . . . . .	<b>39</b>
<i>By Patrick Dundas, associate, Schulte Roth &amp; Zabel LLP</i>	
Custom drafting . . . . .	41
Precedent management and location. . . . .	44
Forms . . . . .	49
Document automation. . . . .	56
Conclusion . . . . .	60
<b>Chapter 6: Data-driven knowledge management – Matter lifecycle management</b> . . . . .	<b>61</b>
<i>By Chad Ergun, director, global practice services and business intelligence at Gibson, Dunn &amp; Crutcher LLP</i>	
Knowledge management and big data . . . . .	63
Law firm adoption . . . . .	64
Matter lifecycle management . . . . .	65
Pitch phase . . . . .	66
Opening phase . . . . .	68
Work in progress . . . . .	69
Closing . . . . .	69
The value of MLM . . . . .	70
<b>Chapter 7: Blockchain technology can inform the legal profession</b> . . . . .	<b>73</b>
<i>By Michael Dov Nogroski, director of practice innovations, Chapman and Cutler LLP</i>	
Blockchain – A basic explanation . . . . .	74
A new database . . . . .	75
As a platform for “smart contracts” . . . . .	76
Knowledge management . . . . .	77
Legal issues and other challenges. . . . .	77

**Part Two: Case studies**

**Case study 1: Innovation as a business development strategy . . . . . 83**  
*By Scott Rechtschaffen, chief knowledge officer, and James Durham, chief marketing and business development officer, at Littler Mendelson*

- Law firm marketing approaches have evolved . . . . . 83
- Why innovation is relevant for today’s corporate legal clients . . . . . 84
- Innovation at Littler. . . . . 85
- The beginnings of innovation at Littler – Knowledge management. . . . . 85
- Knowledge management as the foundation of a comprehensive content marketing strategy . . . . . 86
- How do we do it? . . . . . 88
- Innovative legal service solutions as a brand differentiator for Littler . . . . 89
- Conclusion . . . . . 90

**Case study 2: Changing the way knowledge is used to support clients . . . 93**  
*Fiona Parkinson, head of knowledge management at BLM*

- The starting point. . . . . 94
- People. . . . . 94
- The role of technology and process. . . . . 95
- Communications . . . . . 96
- External information. . . . . 97
- What I’ve learned from other sectors . . . . . 97

**Case study 3: Weaving KM into the strategic fabric of today’s law firm – Five keys to success. . . . . 99**  
*By Jennifer P. Keller, president and chief operating officer at Baker, Donelson, Bearman, Caldwell & Berkowitz*

- Understand the psychology of the attorney of 2015. . . . . 100
- Have a seat at the table. . . . . 101
- Focus on client value . . . . . 101
- Do not forget the importance of support staff and other administrative departments. . . . . 102
- Identify and help remove obstacles. . . . . 103

**Case study 4: Harnessing social channels to spread content. . . . . 105**  
*By David Laud, chief executive at Samuel Phillips Law Firm*

- Social media and Samuel Phillips . . . . . 105
- And there’s more. . . . . 107
- Summary. . . . . 107