

## Goodwin Procter LLP

Goodwin Procter is one of the nation's leading law firms, with a team of 500 attorneys serving clients through offices in Boston, New York, New Jersey and Washington, D.C. Our lawyers view their work through a matter-centric lens. Experience and expertise, which are leveraged to win new clients and staff cases, are developed and shaped by working on client matters. Strategic relationships can frequently be identified and defined by the roles lawyers play in a given matter. And the documents created while working on matters represent the most important repository of reusable knowledge outside of their heads.

### GOODWIN | PROCTER

“The ability to quickly find firm experience and expertise is especially useful when pitching the firm’s services, in responding to inquiries of prospective clients regarding our capabilities, or in determining new markets the firm would like to pursue.”

TRUDY A. ERNST, ESQ.,  
DIRECTOR OF  
KNOWLEDGE  
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As Goodwin Procter moved away from the old-model law firm that was essentially a collection of independent individuals to the new-model law firm marked by teamwork and collaboration, we needed to find a knowledge management tool that could provide us with a matter-centric perspective on our universe. The challenge was that matter information was scattered on multiple systems throughout the firm, yet we needed an environment simple enough for lawyers to use as a one-stop shop for all matter information.

We run standard core business applications — Microsoft Exchange Server for e-mail, Microsoft Office, Solution 6’s CMS Open for time and billing, Interwoven’s iManage for document management and LexisNexis® InterAction® (formerly Interface Software) for CRM.

We had a homegrown intranet that had been serving the firm well, but we were running into its limits. For instance, the old system could not support our concept of Matters Pages, below. There was no way for practice groups to edit their intranet pages without using a limited team of technicians, which frustrated our collaborative model. Its search engine and data categorization tools were not powerful enough for our purposes. And the ongoing maintenance of a bespoke system taxed our resources.

We decided to replace our intranet with a firm portal that could transparently consolidate disparate information and provide a lawyer-friendly environment. We looked at a few products and narrowed our search to Microsoft’s SharePoint portal and two other candidates: Plumtree’s portal and Lawport. After extensive debate, we ultimately decided upon Microsoft’s SharePoint portal. Lawport’s product in particular was very tempting, but our past experience with our lawyers’ often strident demands for customization steered us away from it. Ease of integration with our core business applications weighed heavily in our decision in favor of Microsoft, as did our use of other Microsoft applications and our Web development team’s familiarity with their products.

### Matters Pages

The idea behind our Matters Pages is simple: while a matter was ongoing, we wanted one site where lawyers could go to obtain a complete perspective — including billing information, documents, contacts,

relationships and notes. Having this convenience would result in increased productivity, efficiency and timesaving, which we could then pass on to the client. After a matter was closed, we wanted Matters Pages to provide additional value as a searchable matters database. By adding matter profiles and full-text descriptions coupled with a robust search engine, we could use these pages as a resource for finding precedential matters.

For instance, a lawyer might be working on a matter that requires drafting a buyer-side retail purchase and sale agreement. Previously, finding an analogous matter for which a similar document had been prepared could be a time-intensive task. Using our new Matters Pages, we were able to find four similar transactions in about a minute.

Data integration into SharePoint would be critical for Matters Pages’ success. We needed to bring in fields from CMS such as client and matter number, responsible attorney, billing information, etc. Because of the level of detail of the data stored in CMS and usage load on the CMS system, we could not query the data directly. Therefore, nightly and weekly processes were designed using SQL Server Data Transformation Services (DTS) to bring the data over into an SQL Server data store used by our intranet. New matters and codes are brought over nightly, and a full refresh is done weekly. Billing data is consolidated into monthly buckets by matter and employee and reported on Matters Pages.

We also needed to access InterAction data via SharePoint, such as matter contact information, relationship details, and the like. InterAction 5.x and the new Matters modules are built on open platforms. This made it easy to insert InterAction data “nuggets” (views of matter data) directly into the portal environment without manual programming. By using these nuggets we provide views of matter data on Matters Pages directly from InterAction. The Matters module also provided a lot of value behind the scenes. For instance, when viewing a contact, users can see all matters that the contact is involved in and their specific role(s), and they can search for contacts based on involvement on matters.

In addition to CMS and InterAction data, Matters Pages display lists of and links to matter documents from iManage. We use the search application programming interface (API) provided by iManage to return to a Matter Page all documents profiled to a given client and matter number, organized by category and sub-category, displayed by means of third-party controls in an expandable/collapsible folder tree view. The search is run automatically when a tab on a given Matter Page is clicked, providing a client and matter number to the search API.

We also display lists of documents in a folder navigation view when lawyers have organized documents by a folder hierarchy in iManage. We use API's provided by iManage to query the database and return the folder content, as it exists in iManage. Custom Web parts were designed in SharePoint to call these API's that return the desired folder hierarchy and documents as well as some meta-data about the documents. The data is then displayed using third-party controls in a folder navigation view.

All the custom code that was developed to integrate the CMS, InterAction and iManage systems into SharePoint Portal Server was created using the latest version of Microsoft's .Net framework and Visual Studio 2003.

The first group to get full value from Matters Pages was our real estate group. Previously, they had been storing matter-specific data within an SQL database. We were able to get a head start with this group by importing this data and integrating it with the other information discussed above.

We provide essentially four different views of Matters Pages, depending upon what the lawyer is looking for. The first is the contact view, which pulls in information from InterAction and CMS. It provides basic business card information for all people associated with a matter, including the responsible attorney and other lawyers from the firm who are billing time to the case. Additional contacts can also be associated with a matter here, which is helpful in creating and maintaining players lists, working party lists, distribution lists, etc. Because these lists are created dynamically, they are easy to maintain and keep up-to-date. Anyone needing to send e-mail, letters, notices, filings or any other communication to people associated with a matter can do so with a current list that can be exported into a Word document with one mouse click.

The second view of Matters Pages is the document view. This provides easy access to all documents created in connection with the matter. The document view provides two methods for accessing iManage documents, discussed above. The right side of the screen organizes information by document category and type, as profiled in iManage, in an expandable/collapsible folder tree view. The left side of the screen allows the lawyer to

link to an iManage document folder that was manually created for the matter. Both views allow a lawyer to work directly on documents in Word.

Some litigation cases also have online pleadings. Our Matters Pages provide a pleadings view to make it easier for lawyers to track and manage pleadings associated with a matter. We store online a PDF of each pleading filed in a case, which includes time stamps and signatures. These documents are full-text searchable, making it easy for lawyers to find a specific pleading.

We also include a calendar on Matters Pages. It provides lawyers with a quick snapshot of calendared appointments and deadlines critical to the smooth administration of a matter. This function is partially integrated with Microsoft Outlook's calendar function, making it easy for lawyers to schedule meetings and get reminders. Finally, we provide a profile/notes section on our Matters Pages. This information is sourced primarily in InterAction Matters and brought into SharePoint via an InterAction nugget. In this section, we create a profile description of a matter, which can then be searched by lawyers looking for specific matter, experience or expertise information. Common notes on matters can also be kept here, making it easy for anyone involved in the matter to quickly get a history of what has been done by other members of the client team.

Here we also pull in matter-related codes, which are sourced in CMS. These are required fields in the time and billing system and include information such as whether a matter is open or closed, the client industry code, matter codes, and so on. We have added custom profile fields not available in CMS, and we also encourage our various practice groups to formulate key words that we can include in the database to make it easier to access information. The profile fields and notes are searchable. We also provide some time and billing information from CMS, to give lawyers an even fuller view of the matter.

While we are still in the early stages of rolling out our Matters Pages, we are already seeing significant benefits of providing a matter-centric view through SharePoint. Lawyers can serve their clients more efficiently and cost-effectively when they can quickly locate precedential matters and analogous cases rather than having to reinvent the wheel.

The ability to quickly find firm experience and expertise is especially useful when pitching the firm's services, in responding to inquiries of prospective clients regarding our capabilities, or in determining new markets the firm would like to pursue. Access to this intelligence is also key when staffing matters to ensure that lawyers are assigned to matters that most closely match their skill sets.