Paul, Hastings, Janofsky and Walker LLP

Paul, Hastings, Janofsky & Walker LLP understands the competitive advantages that portal technology can deliver. This international law firm employs over 800 professionals located in nine offices throughout the U.S., U.K. and Japan. The information technology (IT) staff at Paul Hastings is committed to providing its growing team of professionals the information they need to service their clients, whenever and wherever they need it.

PaulHastings

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CHIEF INFORMATION
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Portals and Relationship Intelligence

Increasingly, professional services firms are discovering that knowledge management portals provide a fast, and effective means to deliver information to users. Portals offer some distinct advantages over traditional, Windows-based applications.

First and foremost, virtually everyone is familiar with navigating information via Web browsers. Because portals employ browsers as their common interface, they are easy for nontechnical users, such as professionals, to master with little or no training.

Moreover, portals are much more efficient and cost effective to administer. Except for the Web browser, they require virtually no software to be installed on individual PCs. As a result, system upgrades and enhancements can be managed centrally and with little effort.

Finally, portals bring together information that comes from a variety of different sources. For instance, e-mail messages, stock quotes, documents and research data are all derived from different applications within the firm and over the Internet. But through the magic of knowledge management portals, all of this content can be accessed at once from a single interface.

Facing the complicated task of keeping everyone connected and in the know in an increasingly decentralized, mobile world, was a challenge for the IT folks at Paul Hastings. They knew that a firmwide portal made sense so they chose Microsoft's Digital Dashboard technology. "It's an easy way for us to display information without having to visit every desktop and add a piece of software," says Mary Odson, chief information officer at Paul Hastings. "It's also a very quick administrative tool. If someone needs to modify the system, you make the change once and it's done."

Content is King

The IT staff was insightful enough to realize that good portal technology would not be enough if it didn't deliver content that professionals needed. For without good content, even the best systems can fall into disuse.

According to Odson, the next critical step in their knowledge management strategy was to aggregate the firm's disparate data systems. "We had been using a variety of different systems, like Microsoft Access, PC Docs, a marketing database, etc. From a knowledge management perspective, it was just too cumbersome for our professionals to mine that information. So we wanted to establish one common content management system that was robust enough to give us access from all our locations as well as wireless devices, like a BlackBerry."

Odson adds that in addition to providing a single, centralized database, the solution they sought would have to be compatible with leading portal technology, such as the Digital Dashboard. "We were determined to keep all the information in the portal, because we didn't want to have 'thick' client software sitting on everyone's desktop."

After conducting a search for the right solution, Paul Hastings selected LexisNexis® InterAction®, a client relationship management (CRM) suite (formerly developed by Interface Software). InterAction is an end-to-end solution that aggregates and centralizes information a firm possesses about people, companies, relationships, experience, and expertise — and turns this information into Relationship Intelligence.

The InterAction suite addresses four primary needs. The first, Relationship Discovery, enables firms to leverage automated processes to aggregate existing firm data from different databases, cleanse it, and pull it into InterAction's centralized knowledge base. The Relationship Management component provides CRM functionality, allowing users to enhance, add to, and manage internal Relationship Intelligence, transforming it into an intellectual capital asset. InterAction's Knowledge Delivery tools empower firms to deliver Relationship Intelligence to any platform including the Windows desktop, Web browsers, palm computing devices, Microsoft Outlook/Exchange, portals and wireless devices.

According to Odson, "InterAction was the one solution that could manage the type of content Paul Hastings' professionals demanded. InterAction's ability to aggregate content and manage it made it the clear choice."

Odson adds that InterAction's ability to aggregate internal Relationship Intelligence was critical to the overall success of Paul Hastings' knowledge management strategy. "A component of our knowledge management vision is capturing and managing our intellectual property. This is a core component, just like e-mail or document management. In order to meet the needs of our clients we need to understand our internal client information. Before InterAction, everyone kept data in different places, like their Outlook/Exchange databases. But no one was able to mine the wealth of information that was in all these different systems. There was nothing to bring it together."

Delivering Relationship Intelligence to the Knowledge Management Portal

With the assistance of an outside consultant certified on InterAction implementations, the first project the IT staff delivered with the system was a firmwide personnel directory. "Everything about anyone in the firm will be found here. With nine locations and a new employee starting every day, office assignments, telephone extensions and secretarial changes occur on a daily basis. We found that information about our people changes too quickly and it is impossible to rely on our human resources system to provide us with the data to create a 'real-time' personnel directory. Data was exported from a variety of sources — the HR system, attorney tracking system and local office databases — and imported into InterAction."

"The personnel directory is the foundation of many of our other knowledge systems and contains additional information regarding attorneys which includes bar numbers, date admitted, language and law school. We're standardizing our practice areas and specialties on the Martindale-Hubbell standards and developing a Web interface so our professionals can edit their own professional data, and update their practice areas and specialties. They will then validate this information with financial information. So for instance, if my practice area is administrative law, I can view all the matters I have worked on pertaining to that specialization. With 800 attorneys, it's a great challenge for people to know each other and what everyone does. Soon, a professional in Atlanta will be able to get a call from a client who asks, 'I have a hearing before this public commission, so I need an administrative lawyer. Do you have somebody?' With InterAction, they'll be able to immediately find the information and say, 'Yes we do and this person has worked for these clients.' It gives the client a feeling of comfort."

Odson says using InterAction through the firm's portal makes it simple for professionals to access the information they need. "The system automatically logs the user in. Then they simply point and click to select the resource they're looking for. For instance, if they're searching for a foreign lawyer, they will search by first name, last name, country or area of expertise. If I'm looking for someone in Belgium, I select that country in the drop-down menu, click 'Find' and InterAction retrieves ten records with complete contact information about those individuals. By clicking on the individual person's name, InterAction drills down further and displays who within the firm recommends this person, the person's area of expertise, what type of work we've done with them in the past, where they went to school, etc."

Moreover, Odson says that the InterAction Web client — the component of InterAction that delivers information to the portal — made it easy for them to Web-enable their centralized database. "It allowed us to quickly get a Web front-end on this data and make it available. To users it's a great interface, and for us, it leaves us with a lot of flexibility going forward."

Ensuring the Success of Knowledge Management

Implementing a knowledge management strategy is a massive undertaking for any firm. Given the time, effort and resources professional services organizations are now devoting to this promising technology, there is little room for error. Odson says that InterAction will be a critical factor in the success of Paul Hastings' implementation. "The knowledge management vision within this firm is to organize and present information in a user-friendly format to enable professionals to acquire knowledge and synthesize data faster and easier. InterAction provides us with a single user interface for all of our 'people' knowledge. It's a one-stop shop for all information, which is relied upon by many different applications."

Odson says the IT staff would not be able to deliver this knowledge management vision without a tool of InterAction's quality and robustness. "The core product — the database structure — is very well thought out. You can see that LexisNexis InterAction has listened to its customers in determining what they need. The product has great vision."

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