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Law Firm Extranets: Some Different Approaches

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Autonomy iManage

Topics We Will Cover

- Extranet Drivers
- Considerations for an Extranet
 - To cloud or not to cloud
 - Security
 - Records management
 - (De)Centralization?
- Parting Tips and Tricks



Extranet Drivers

- **Client-specific Extranets: Deepen Client Relationship**
- **Matter-specific Extranets: Communication and Collaboration**
- **Knowledge Management Extranets: Exemplars, best practice and other communications**

Client-Specific Extranet: Solidify Client Relationship

- Generally setup for large clients and/or prospect
- Cross-Selling: biographies for the attorneys and staff working with the client and those that may be of interest
- Operational Data:
 - Billing information and history
 - Contact information
- Targeted client-interest information:
 - firm publications, news and firm events (ie. blogs, newsletters etc.)
 - Web-based sources
- Past sales presentations
- General firm information to deepen a client's knowledge of the firm

Matter-Specific Data

- Deal Rooms, Due Diligence, Litigation
- Matter dashboard:
 - All Matter-Related Documents (pleadings, contracts, diligent materials etc.)
 - Matter Contacts
 - Calendaring, Tasking and Reminders
 - Matter Status Updates, E-mails, Daily Digests
 - Billing Information

Knowledge Management Extranets

- Black letter legal advice (careful)
- Online CLE programs or other training programs
- Model forms or other basic documents
 - Knowledge bases
 - Access to a firm's news feeds or in-house databases.

Considerations for Extranets



Consideration #1: Security

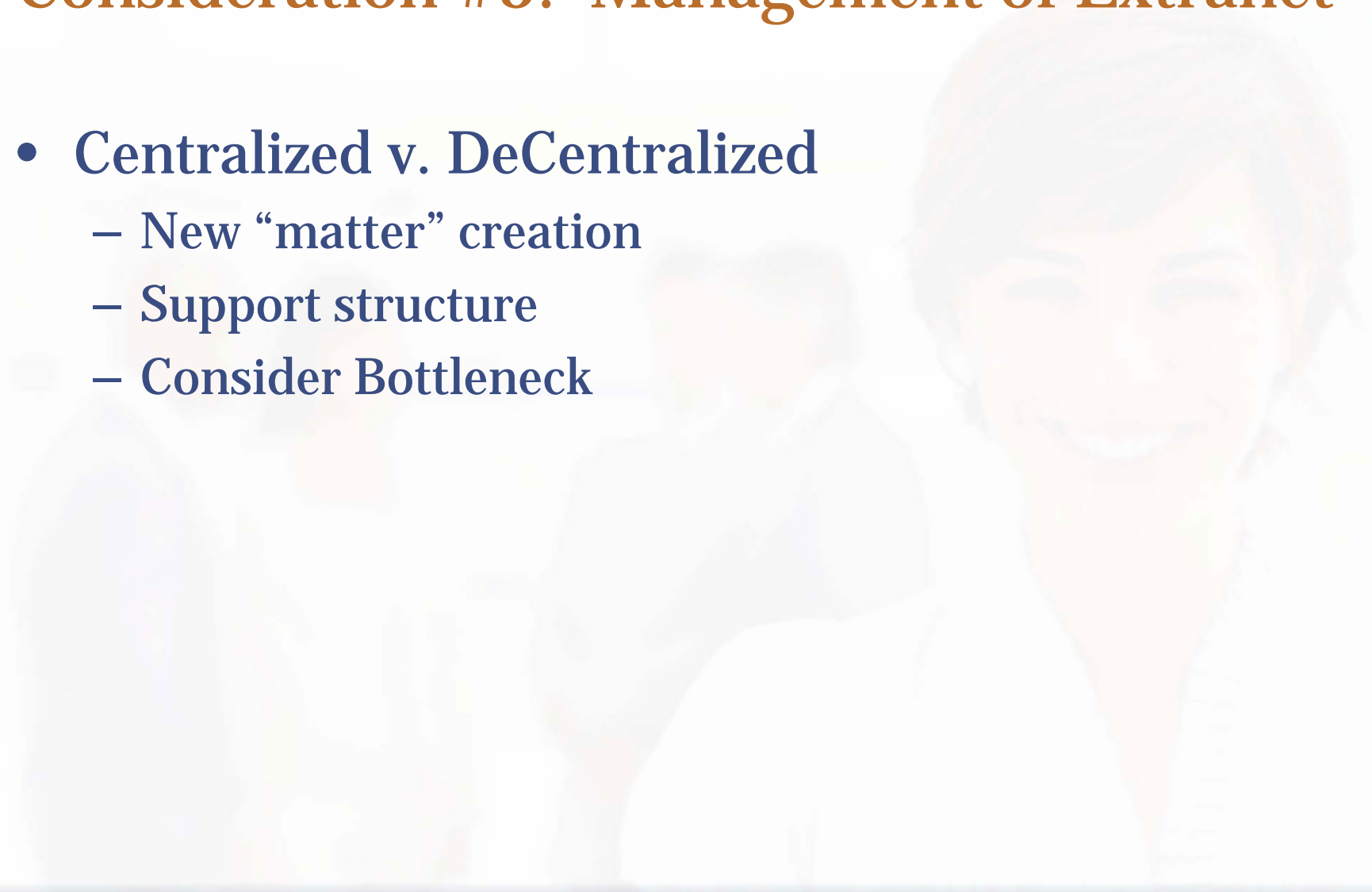
- Basics
 - Password Protected
 - Encrypted
 - Redundant systems
- Intrusion Detection/Stress Test
- Flexible security model:
 - User level security
 - Document/Folder level security
 - Granular Security
 - Highly relevant to a centralized or decentralized management model

Consideration #2: In-house v. ASP

- Control and Support issues
- Customization Requirements
- Home-grown v. Software purchase
- Infrastructure Requirements
 - In-house
 - Protect firm assets: DMZ
 - Necessary Redundant systems and backups
 - ASP
 - Separate from firm assets
 - Potentially higher availability for redundant systems and hardware

Consideration #3: Management of Extranet

- Centralized v. DeCentralized
 - New “matter” creation
 - Support structure
 - Consider Bottleneck



General Considerations

- Keep in mind Records and Risk Management requirements
- Customization: Ability to firm and client-brand
- Search Engine: Test, test and test again
- Importing/exporting/archiving capabilities
- Potential integration with firm systems (ex. DMS)
- Ability to create Practice Templates
- Value add or a billable service?

Available Technology Solutions

- AMS Legal
- WorkSite Web
- SharePoint
- eRoom
- and many more
- Not one size fits all: find the solution that works for your firm and your clients

Parting Tips and Tricks



Parting Tips and Tricks

- This is not just about technology - its about process
- Client relationship as a main driver
 - Deepen relationship
 - Firm as extension of client's legal department
 - Firm as delivering a service



Questions?