Faster is Better:
Building an Experience Database

MKTG 2

Marketing Technology
Peer Group

leading technology | optimizing value

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EXPERIENCE DATABASE – REQUIREMENTS DEFINITION

Planning:

- Identify how experience is tracked currently to determine if that needs to be re-engineered, then identify the technology solution that supports business process.
- Why capture the data
  - Depends on how data will be used. Is purpose for full knowledge management or marketing/business development needs?
- How to capture the data
  - Start with everything (import from matter database with criteria?) or only those pieces of experience that have already been vetted/approved?
- Where to capture the data
  - Build or buy?
- Resources
  - Financial
  - Technology
  - Staff resources
  - Attorney/paralegal support
- On-going maintenance
  - Do you include all open matters?
  - Do you add experience record when matter reaches defined critical mass (i.e. hours/billed fees? Include as part of associate review?)

Identify Current Sources

- Current documents in Excel
- Transactions
- Brochures
- Specific client transactions database
- Attorney bios
- Proposals
- Specific RFPs/proposal responses (including select emails)
- Collateral
- Website
- Mini Sites
- Chambers and other directory submissions

Formatting of Data:

- Information currently in narrative format would need resources to break into components of database and to categorize appropriately by case type, area of law, etc.
- Data may need to be normalized/standardized to improve accuracy of data and consistency of searches. (e.g., FL or Florida?, etc.)

Search/Query Types

- Sort and query by defined categories
  - Query type may vary by practice groups
- Identify field types that would need to allow multi-select (e.g. industry type, case type, area of law, jurisdiction, attorney(s), etc.)

Report Types/Output Formats

- What is your end product - Determine how you want to use the output
- Ability to copy/paste query results into presentation format, which could include:
  - Excel
  - Word
- Nice to have:
  - Branded format for final presentation
  - Ability to select key fields for export from the query results (versus all fields in query)
  - Experience description types would include:
    - Full experience description
    - Abbreviated description
    - Generic description
    - NOTE: tracking client permissions to use the experience recrod is key – how will this be managed?

Specific Considerations:

- Some data exists in multiple sources for same piece of experience.
  - Would need to consolidate into single source of record for cases/matters and ability to update in one place.
- Database needs to include inventory of where experience is used (in what materials) so updates can be made as needed
- Database should have audit trail or "last updated" field so changes could be tracked
- Database needs ability to add fields as needed and re-populate on demand

Experience Manager Implementation Questions

I. OBJECTIVES

- What are the firm's objectives for the experience management program?
- Is the Experience Management program tied to any broader firm initiatives?
- What is the expected result of the program and how will the results be measured?
- Is the program being driven from a marketing and business development standpoint to improve proposals and other marketing collateral?
- Have you identified any "questions" or use cases that the system must help you respond to?
- Are there knowledge management and resource management objectives?
- Is there a current system that is being replaced?
- Are there timing expectations for the start and launch of the program?

II. SPONSORSHIP & STAFFING

Building Buy-In

- Who at the firm is driving the EM initiative?
- Has a business case been presented to firm management? How did that go?

Staffing

- How will the firm staff the project (e.g. what IT, marketing or other firm resources have been assigned to the project)? How much of these individuals' time has been committed?
- Who will manage and maintain the application ongoing?

III. CULTURE & PROCESS

- What current processes are in place for capturing experience information? How do these processes relate to your matter opening process?
- Are there individuals partners or practices who are especially committed to collecting and maintaining experience information?

IV. DATA & CONTENT

Sources

- Do you have existing sources of experience data? Some examples of these sources are:
    - Time & billing systems
    - Proposals
    - Deal tracking spreadsheets
    - Custom-developed experience databases
    - Attorney resumes
    - Websites
    - Contact management/CRM systems
- How would you categorize the quality of the information in these sources?
- Will any of these sources be retired after the launch of EM, and if so, will an automated migration of the data be required?
- Will any ongoing integration between systems need to be built?
- Do the data sources all have reference to a unique identifier (e.g. a client-matter number)?

Access/Security

- Are there data elements that need to be restricted to certain users?
- Have you identified the security model (i.e. user groups and roles)?

Reporting & Output

- How do you currently use experience data? Are there any standard/regular reports that are run?
- What reporting requirements will you have for the new system?

V. ROLL-OUT

Scope

- What groups at the firm will use the Experience Management system? Please be specific about types, number and locations of users

Process

- Have you given any thought to a roll-out process? For instance, will marketing and business development be first? When rolling out to the firm, is there a logical pilot group (e.g. a certain practice)?
- Do you have the resources to support the roll-out process you have in mind?

Communication & Training

- How will you communicate to the various user groups about the Experience Management program? Advanced and ongoing communication is important to build a culture around your experience program. Hubbard One can assist you in planning and executing communication strategies.
- Who will need to be trained and what types of training will be required? Typically, Hubbard One will provide administrators and key user training, but can also be involved in planning and executing firm-wide training programs.

Support

- How will you support the application post-launch? Have resources been identified and allocated?

Hosting

- Where will the application be hosted?

Best Practices for Implementing an Experience Management Solution

By John Harris

It is no secret that in a tight market, law firms must be able to clearly demonstrate specific, recent and relevant experience to compete for new business. An experience management solution enables firms to fully utilize their experience to obtain optimum success in strategic planning, marketing, business development, and client service. Yet, the most advanced technology solution is insufficient without careful attention to effective implementation.

What follows are the recommended law firm best practices for implementing an experience management solution. Much of the perspective provided is applicable to any experience management program.

Preparing for Implementation Service and Targeted Interaction with Clients

Building Buy-In

Successfully implementing an experience management solution involves much more than simply getting the new software up and running. If firm leadership hopes for widespread acceptance and use of the new program, it must weave the commitment to the new program through its culture and business processes. In order to achieve this, vocal and active support from managing partners, executive directors and the chief marketing officer are imperative.

Communication to the firm from these individuals will build awareness of the program and underscore the importance of participation and cooperation in the process. In addition to saying the right things, firm management must be willing to commit resources from a range of departments and practice areas, including IT, finance, and practice leadership. Even if marketing originated the project and has the budget and resources to fund and staff it from its own ranks, an experience management solution requires firm wide involvement — particularly from attorneys — if it is going to be successful. Ideally, one way for management to gain support and buy-in among all staff is to offer incentives that that tie to successful implementations.

Staffing and Key Responsibilities

The appropriate staffing level for experience management projects will vary considerably by the size of the firm, scope of the rollout and quality of initial data set. That said, we recommend the following staffing guidelines for optimal success: First, a practice leader or business development manager should be selected and empowered to make decisions on behalf of each practice. Second, a marketer or other staff member should assigned as a "data steward" to capture experience and credentials for each practice. It is critical that a representative from the practice, typically the practice leader, work with the marketing manager to identify the information that will be tracked. This is a key to gaining the practice leader's buy-in and ensuring that the program accomplishes the goals of that practice. This attorney also should be responsible for communicating the importance of experience management to the rest of the practice group. This can be achieved though a practice-wide webinar to introduce the initiative, or by devoting time at scheduled practice group meetings to the solution. Since the marketing managers need to rely on the attorneys to provide much of the experience information, achieving attorney buy-in across the firm is particularly critical.

Once the program is fully operational, the marketing manager for each practice group should expect to spend approximately 25 percent of his/her time managing credentials and experience for the practice group. This typically includes monitoring the matter open and close process for new or closed deals, then following up with the originating attorney to capture the relevant details of matters.

Timeline

Experience management projects vary in length depending on the scope of rollout, i.e. the number of practices and users, amount of data, and the level of technology kick-off to pilot launch for a specific practice. Additional practices typically can be phased in at 3 - 4 week intervals.

Culture & Process

Building a Culture of Experience

The entire firm — or at least those practices that will use the system — must believe that experience can differentiate the firm, practices and attorneys. Building this belief system will take some time. If it's done right, in short order attorneys will want to keep their experience profiles up to date because they know it matters to their personal and collective success. A good way to begin generating interest is to demonstrate how competing firms use experience to win business. Jones Day, for instance, has more than 10,000 experience records available for search on its public web site. This is more than most firms have profiled internally. This means that the public can find out more about Jones Day's experience than most attorneys can find out about their own firm.

Another way to gain traction internally is to foster a little friendly competition among practices or attorneys. By displaying experience either publicly on the firm's web site or internally on an Intranet or experience database, attorneys can see how they stack -up against one another.

Workflow

Once the firm understands the importance of experience, marketing and technology professionals should make it as easy as possible for attorneys and staff to keep experience data current. The best way to do this is to integrate the collection of experience information into existing workflow processes at the firm.

Typically, this means tying the collection process to the opening and closing of matters. At the time a matter opens, many key experience variables are already known, including the open date, who the client is, what attorneys are leading the project, where the work will occur, the type of work that will be involved, perhaps even other parties involved in the case or transaction.

These items form the basis of the experience record. It is not typically until much later in the matter lifecycle that the more valuable experience information can be collected, including outcome, transaction value, issues involved, all other parties and representation, other attorneys involved, etc.

We recommend the following best practice for incorporating an experience management program in the opening and closing of matters workflow:

- When a matter is opened (in a matter open workflow system or billing system) a record is created in the experience management system with as much information as is available at the time. The record is given a "pending" and "unpublished" status.

- Business development managers (BDMs) run reports of all pending matters in their respective practice areas, sorted by partner.

- On a monthly basis, the BDMs use the reports to query the partners in their practice for status updates on pending matters. When the work on a matter is materially complete, or for larger cases or transactions that have experience value while in progress, the BDM briefly interviews the attorney using a standard form to collect experience information relevant to the case. (This form should incorporate the fields used in the experience management system). Also at this stage, the BDM requests the marketing approvals needed to use the experience in proposals, the web site and other materials.

- The BDM or staff enters the experience information as it is collected.

- Once the matter is ready for consumption, it is given a status of "published," thus making the record available for searching and use in marketing activities (given appropriate permissions).

- When the matter is closed, the final experience information is updated and the status changed to "complete," removing it from the pending report.

Once a workflow process has been established, firms should look for additional opportunities to integrate experience management with other systems to alleviate redundant data entry. If this is done carefully, integration can save the firm significant data entry and management efforts.

Data & Content

Sources

To seed experience management with content, experience data typically is mined from existing sources. These sources vary by firm, but typically include time and billing systems, proposals, deal tracking spreadsheets, attorney resumes, web sites, and contact management/CRM systems. Normalized, clean data can be systematically loaded into an experience management system, however, all data should be verified for accuracy and quality in advance of this step. We caution against blindly loading data for the sake of reducing content entry effort as it can cause problems if it does not offer meaningful information.

Quantity vs. Quality

Striking the right balance of quantity of matter records with the quality of each individual matter is an issue firms will need to address initially. For instance, it can be tempting to load all client matter numbers from the time and billing system so that when lawyers search for their experience they see all matter numbers they have worked on. That said, most firms have tens- or hundreds of thousands of matter records in their time and billing systems.

Many of these were matters that did not amount to much work or codes opened for miscellaneous work. These records would not be useful in an experience management system. One firm, which brought all client matters into their experience management system, cautioned that this approach created "a lot of data but no information." The goal is to maximize the amount of information while minimizing the amount of unnecessary data.

Similarly, the data in an experience management database should comprise the important matters that testify to the experience of the firm and attorneys. A smaller subset of these matters should be of high enough quality to include in proposals and to list as representative experience on a web site.

Firms often choose to filter further to identify the most compelling experience records to serve as the basis of editorialized case studies, press releases or to feature most prominently on the web site.

Migration

Quality data sources, such as spreadsheets and Access databases, should be mapped to fields tracked in an experience management solution. It is important that these records be identified by a unique ID or key, such as the client-matter number, to prevent duplication.

It is important to define the scope and process for rolling out an experience management solution early in the project because it impacts the specific requirements for content, communication, training and support for the new system. The following aspects of the rollout should be considered: Who will be using the system and in what capacity? Which practices? Which departments? Which offices? How many total users?

One key consideration is how to balance resource constraints with the need to quickly realize return on investment. Generally speaking, we recommend that most firms introduce an experience management program by practice area, beginning with a practice area that already has a system in place — even a rudimentary one — to track experience.

Often this is a corporate/transactional practice. Some firms prefer to launch with a big bang, firm-wide rollout. While this approach may help the firm more quickly recognize the full value of the system, the risks of poor adoption and overwhelming resource demands are higher than a practice-by-practice launch.

Rolling out the new system office-by-office is an additional option, but may present similar challenges to a big bang launch since multiple practices will be included.

Content

The rollout process chosen will dictate the content requirements for launch. Big bang or other cross-practice process, such as office-by-office rollout, will require data to be loaded and cleaned for all practice areas prior to launch. Roll-out by practice or industry group requires only matters related to the targeted practice be prepared for launch.

Communication & Training

The rollout strategy will also determine the needs for training and communication with the firm about the new system. Broad, fast rollouts require generalized training and mass communication, such as webinars or e-mail communications Phased rollouts can accommodate more personalized training and communication, which may facilitate quicker acceptance in certain firm cultures.

Support

User support processes and infrastructure must be established before launch. Similar to communication and training, these are driven by the rollout scope and process. Supporting 30 users is much different than 300 or 2000. Often firms have a help desk that can provide primary support while secondary support is shared by IT and marketing staff.

Conclusion

An experience management program can help firms leverage their experience to optimize strategic planning, marketing, business development and even client service, but this involves more than simply loading data into a new software program.

Effective implementation requires carefully obtaining leadership and attorney buy-in the process, the commitment of firm wide resources, and adequate staffing support. Firms will want to foster a culture that values experience as a means to success — and logical, easy workflow processes that support that culture. Finally, firms need to ensure that they create a rich database of experience and develop a rollout strategy and process that supports their objectives. By following these recommended best practices, law firms can help ensure a successful implementation of an experience management solution. More importantly, they can successfully differentiate their attorneys, practices and firm through effective experience management.

About the Author

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John Harris brings more than 10 years of technology consulting experience to his current role as a product manager at Hubbard One. In his role, John oversees the development of all Hubbard One Marketing Center solutions. He previously served as practice director for Hubbard One's marketing initiatives and held consulting positions with PriceWaterHouseCoopers and Ernst & Young. John earned his bachelor's degree at Northwestern University and his MBA from Northwestern's Kellogg School of Management.

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About Hubbard One

Hubbard One is the premier provider of marketing and business development solutions for law firms and professional services organizations. From web communications, SharePoint intranets, and market analytics to relationship management, experience management and proposal generation, Hubbard On focuses on bringing the right tools together to help marketers and business developers succeed.

Today, more than 300 organizations globally leverage Hubbard One's solutions. For more information, please visit www.hubbardone.com.

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Managing Expertise and Experience (Law Firm Version)

InterAction 5.6 • Updated 3/21/08

Overview of Managing Expertise and Experience 1
Integrating Human Resources Information with InterAction 2
Manually Capturing Expertise Information 7
Integrating Experience Information via Matters 8
Building Objectives, Processes, and Organizational Support 13
Success Factors and Potential Issues 14

Overview of Managing Expertise and Experience

This document reflects the functionality for InterAction 5.6. The links to the InterAction documentation provided display the 5.6 materials.

Managing expertise and experience gives your firm a valuable tool for presenting your firm to clients. Tracking this information makes it easy to determine which lawyers have particular expertise and which have experience working on particular types of matters in the past.

For example, a partner might be dealing with a client in an acquisition. The client mentions they are looking for assistance in a real estate matter with some special environmental issues. The partner can use a simple search to find other lawyers in your firm with this exact expertise.

Benefits

The key benefit to the firm is to ensure that as business is presented, an accurate and quick assessment can be made to determine what knowledge the firm has in that particular area. This allows as much business as possible to stay within the firm and reduces unnecessary rejection of work. Benefits can also be derived when developing biographical information to respond to RFPs, allowing the firm to present the most experienced lawyers to prospective clients.

Finally, managing expertise and experience in InterAction gives your firm's lawyers quick access to the resources who may be able to answer their questions. This can help your lawyers provide better client service.

Overview of Approach

To effectively manage expertise and experience, your firm should invest in the following areas:

1. Integrating information from a Human Resources system with InterAction. This provides data for searching for lawyers with particular expertise.

   For details, see "Integrating Human Resources Information with InterAction" on page 2.

2. Manually capturing expertise information with InterAction, either in addition to the HR System integration, or in its place if your firm does not use such a system. Again, this information can be used in expertise searches.

   For details, see "Manually Capturing Expertise Information" on page 7.

3. Integrating matter information with InterAction. This connects lawyers with the specific work they have done for clients and the external parties involved in those matters. This provides valuable data when searching for experience within your firm.

   For details, see "Integrating Experience Information via Matters" on page 8.

4. Building objectives, processes, and reward structures. For details, see "Building Objectives, Processes, and Organizational Support" on page 13.
5. Measuring results and showing value to the firm. For details, see "Success Factors and Potential Issues" on page 14.

Integrating Human Resources Information with InterAction

Often, information about expertise is captured in a Human Resources system. When lawyers are hired, background information is captured and stored in this system. This data might include information such as the following:

- Areas of expertise relevant to your firm's lines of business
- Languages known
- Schools attended
- Detailed biography for use in RFPs
- Other details about the lawyer

This information is typically not easily available to lawyers who need to quickly find out whether the firm has any expertise in a particular area.

By integrating this data from the Human Resources system with the data in InterAction, this valuable expertise information becomes much more widely available.

In most cases, this integration can be completed with InterAction Application Collaboration, allowing the data to be kept up-to-date over time with very little manual oversight.

Before you can set up this integration, you should review and update the out-of-the-box structures provided for capturing personnel information.

See the following topics:

- InterAction Structures for Organizing and Displaying Personnel Data 3
- Setting up Ongoing Integration with Your Human Resources System 5

InterAction Structures for Organizing and Displaying Personnel Data

Note that these same structures are also used when manually capturing expertise information in InterAction. Also, remember that you can use a combination of methods if necessary - integrate some fields with the Human Resources system, and also capture additional information manually. For more about manually capturing the data, see “Manually Capturing Expertise Information” on page 7.

InterAction provides several out-of-the-box contact types, folders, and fields for classifying your firm’s personnel and storing the relevant expertise information (illustrated in Figure 1 and Figure 2):

- The *Our Personnel* contact type is used to identify all active lawyers and employees of your firm.
- The *Personnel Information* folder is used to store information about the partners and employees, such as Area of Expertise, Language (All), and Professional Certifications. You can update the set of fields to correspond to the data that will be useful when mining InterAction for expertise information.
- The *Personnel Profile* displays the relevant field values from the *Personnel Information* folder for each partner or employee in the Web Client.
- The *Education Profile* displays the list of schools the lawyer has attended in the Web Client. These are tracked in InterAction by defining a relationship between the person and the school he or she attended. You can include schools in InterAction to use for these relationships – schools should be assigned the *College / University* contact type.
- The *Personnel* search form provides a way for lawyers to quickly find individuals in your firm with particular expertise.
- Other relationships can also provide useful expertise information – for example, you can define a *Member* relationship between an individual and a professional organization. Similar to schools, professional organizations need to be in InterAction for this purpose and should be assigned the *Professional Organization* contact type.

Contact searching lets lawyers quickly and easily find other lawyers in your firm with particular expertise.

This form finds contacts that have been classified with the Our Personnel contact type that also meet the specified criteria.

Your firm can customize the search to reflect the fields your lawyers need to specify as criteria.

Figure 1: Searching for Internal People with Particular Expertise

[A] The Personnel profile displays detailed information about the person

Your firm should analyze the provided fields and determine what information should be in InterAction. This data can be very useful when searching for people based on their expertise.

[B] The Education profile displays the list of schools the person has attended. You track this information using relationships in InterAction.

[C] Users can easily add to the educational history for a contact. You can also bring this data into InterAction from your Human Resources system.

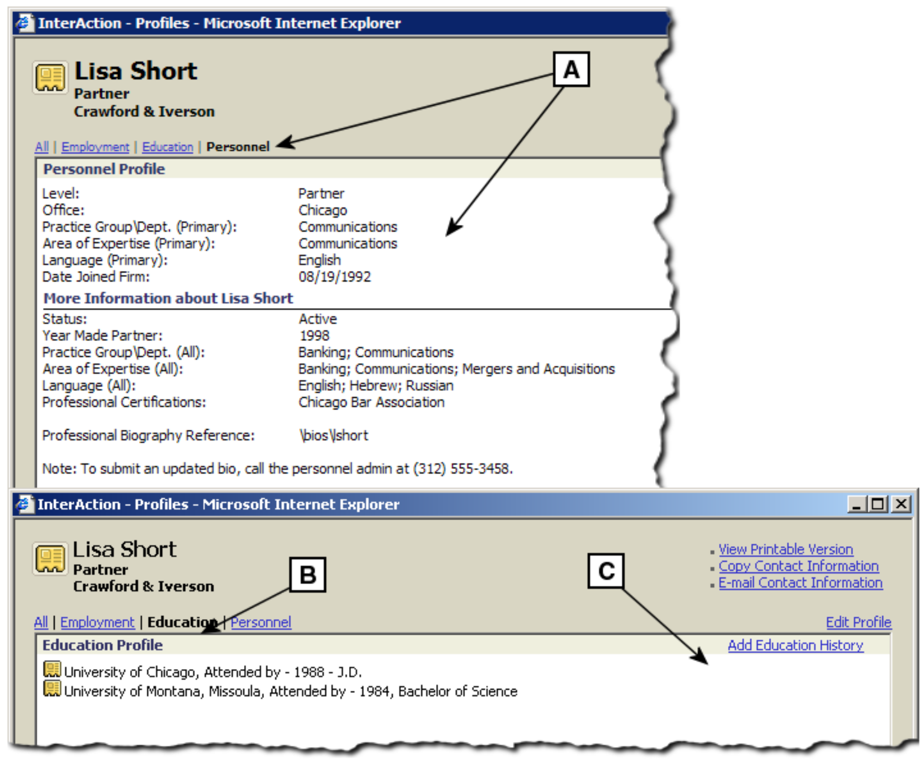


Figure 2: Viewing Profile Information About a Lawyer in the Firm

When implementing an expertise solution in InterAction, it is important to review these out-of-the-box components and update them to reflect your firm. The following checklist outlines the major review and configuration tasks you should perform prior to integrating InterAction with a Human Resources system.

Configuring InterAction for Tracking Personnel Expertise

See the specified guides for details about these topics. If you are reviewing this document electronically, you can use the links in the steps below to open specific topics in this guide on the LexisNexis InterAction Support Center Web site.

Step

❑ Review the out-of-the-box fields in the Personnel Information folders. Modify the set of fields as needed for your firm. Typically, these fields correspond to the fields available in your Human Resources system. However, in some cases you may want to track information beyond the HR system in InterAction; you can do so by configuring the fields, then manually capturing that information in InterAction (see “Manually Capturing Expertise Information” on page 7).

See the following topics in the *Configuring InterAction* guide:

- Personnel Information Additional Fields.
- Overview of Additional Fields and Classifications.
- Creating and Editing Additional Field Definitions.

❑ Review the out-of-the-box *Personnel Profile* and update it as needed. This is especially necessary if you added new fields in the earlier step.

See the following topics in the *Configuring InterAction* guide:

- Out-of-the-Box Web Profiles > Personnel Profile.
- Overview of Web Client Profiles.
- Creating and Editing Web Client Profiles.

Configuring InterAction for Tracking Personnel Expertise (Continued) See the specified guides for details about these topics. If you are reviewing this document electronically, you can use the links in the steps below to open specific topics in this guide on the LexisNexis InterAction Support Center Web site. **Step**	
❑	Review the out-of-the-box *Personnel* search form and update it as needed. See the following topics in the *Configuring InterAction* guide: • Out-of-the-Box Web Searches > Personnel Search. • Overview of Web Client Searches. • Creating and Editing Web Client Searches.
❑	If you plan to track education information about your lawyers, your InterAction database needs to include colleges and universities. LexisNexis InterAction provides an import package you can use for seeding InterAction with college and university contacts. You can download this package from the LexisNexis InterAction Support Center.

Setting up Ongoing Integration with Your Human Resources System

You use InterAction Application Collaboration to establish ongoing integration between your Human Resources system and InterAction. Application Collaboration can both add contacts representing your firm’s personnel to the system and update them on an ongoing basis. For example, if an employee’s status is changed in the Human Resources system, Application Collaboration updates the corresponding contact in InterAction with the change.

To use Application Collaboration, you configure Application Collaboration for the data you want to import on a regular basis, then set up a “harvesting” routine. This routine needs to extract the relevant data from the other system and place it in tables within the InterAction database. Application Collaboration then “transforms” the harvested data into InterAction contacts. The harvesting routine should be repeatable so that it can be scheduled to run on a regular basis to refresh InterAction with updated information.

In addition to creating contacts, Application Collaboration updates your contacts with changes from the Human Resources system by matching the contacts from the other system with contacts in InterAction. This requires establishing unique identifiers for the contacts in both systems. Application Collaboration can use a variety of methods to match the contacts.

The following checklist outlines the major tasks you should perform to integrate your Human Resources system.

Establishing Ongoing Integration With a Human Resources System See the specified guides for details about these topics. If you are reviewing this document electronically, you can use the links in the steps below to open specific topics in this guide on the LexisNexis InterAction Support Center Web site. **Step**	
❑	Review the topics describing how Application Collaboration works in the *Loading Data into InterAction* guide. See the following topics in the *Loading Data into InterAction* guide: • Tools for Loading Data Into InterAction. • Getting Started with Application Collaboration. • Adding Human Resources Data to InterAction.
❑	Determine how your data is structured in the Human Resources system and decide which fields you want available in InterAction. If necessary, update the additional fields in the Personnel Information folder (refer back to “Setting up Ongoing Integration with Your Human Resources System” on page 5).

Establishing Ongoing Integration With a Human Resources System (Continued)

See the specified guides for details about these topics. If you are reviewing this document electronically, you can use the links in the steps below to open specific topics in this guide on the LexisNexis InterAction Support Center Web site.

Step
❑ Configure a *data source* in Application Collaboration for your Human Resources system. See the following topics in the *Loading Data into InterAction* guide: • Overview of Data Sources. • Creating and Editing Data Sources.
❑ Set up data sets for the data you want to bring into InterAction. For Human Resources integration, you typically need the following: • A person data set to add partners and employees entered in the Human Resources system to InterAction. This data set is also used to update person names on an ongoing basis. • An additional field data set to populate the fields in the *Personnel Information* folder. • If your Human Resources system stores information about the educational background of personnel, a related contacts data set to create relationships between partners and employees and the schools they attended. See the following topics in the *Loading Data into InterAction* guide: • Overview of Data Sets. • Company and Person Data Sets. • Additional Field Data Sets. • Related Contact Data Sets.
❑ Develop and test harvesting routines to extract information from the Human Resources system and place it in the InterAction staging tables. See the following topic in the *Loading Data into InterAction* guide: • Harvesting the Data for Application Collaboration.
❑ Set up Application Collaboration to transform the harvested data on a regular basis. See the following topic in the *Loading Data into InterAction* guide: • Transforming the Data.

Manually Capturing Expertise Information

If your firm does not use a Human Resources system, you can still use InterAction to store and track information about personnel expertise. Even if you *do* integrate with a Human Resources system, there may be additional information you want to track that is not stored in the other system.

The InterAction structures for storing the expertise information are the same as when integrating with a Human Resources system; see “InterAction Structures for Organizing and Displaying Personnel Data” on page 3 for details.

Also, you need to include steps to load the contacts representing your employees into InterAction as part of your overall data load process. If you have any profile information available, you can include it during this import as well.

For the most part, manually capturing the detailed profile information that is useful to expertise searches information requires your firm to edit contacts manually using either the Web Client or the Windows Client. Depending on the number of employees and the number of fields being tracked, manually making the updates will take more data entry and maintenance resources than using Application Collaboration to automate the process.

There are strategies and processes you can use to lessen this burden. You may want to use any combination of the following:

- Include profiling information in your “Employee Joins the Firm” process.
- Request that users review and update their own information periodically.

Include Profiling Information in Your “Employee Joins the Firm” Process

As part of your overall implementation, your firm needs to establish a process for handling new employees you have hired. This process should include adding the person to InterAction and setting up a user account for the person. The process should also include updating the key fields representing the person’s expertise, such as the following:

- Areas of Expertise
- Status
- Level
- Professional Biography Reference
- Practice Group
- Schools Attended (tracked with relationships)
- Former employment (also tracked with relationships)

Getting this useful information into InterAction right away reduces the need to edit contacts later.

For more about the best way to manage new employees, see the document *InterAction Recommendations for when an Employee Joins Your Organization*. This document is available at the Support Center web site: http://support.interaction.com/doc/doc_bestpractices.cfm.

Request that Users Review and Update their Own Information

Individuals are the best source for getting updated information about themselves into InterAction. Asking users to review and update their own profiles occasionally can be a useful way to keep the data up-to-date. The time investment for the user is minimal since he or she only needs to update a single contact. Assistants or secretaries can also fill in the information to lessen the burden on lawyers.

When using this strategy, it is important that you have InterAction properly configured to grant the users access rights to edit the information. Also, communications should clearly indicate the fields the users are to check and update. This can be an effective way of gathering educational and professional organization membership information that might not be available in other lists.

Your communications to the lawyers should emphasize the benefits of keeping their profile information up-to-date. The largest benefit is that making your expertise easily available to others in the firm can bring you potential business that otherwise might have been referred outside the firm.

Integrating Experience Information via Matters

Most firms want to expand beyond basic expertise management and want to effectively manage experience as well. They want to understand the experience lawyers have based upon recent work. The matters a lawyer has worked on can provide this information.

LexisNexis InterAction offers the InterAction® Matters™ module to bring the work (matters) into InterAction and connect it with your lawyers. This allows data about the type of matter to be part of the expertise repository for the lawyers. This gives users access to valuable information and powerful searches.

For example, a lawyer could find contacts by searching for them using matter attributes. For example, find firm attorneys who worked on recent intellectual property litigation matters for clients in a particular industry.

There are two main costs associated with integrating matter information with InterAction:

- The technical integration between the time and billing system and InterAction. This is a straight-forward process assuming the data in the time and billing system is in order. InterAction Application Collaboration can create the matters in InterAction and update them on an ongoing basis.
- Capturing accurate information about the matters. This requires accurate recording of information about the work that has been done.

  For most firms, this is already done effectively in the time and billing system. In others, general categories are used to classify the type of work done for the client. Where this is the case, an investment in updating the business process will need to be made to ensure success of the experience-tracking project.

See the following topics:

- InterAction Structures for Storing Matters and Connecting them to Lawyers 8
- Loading and Updating Matters from a Time and Billing System 10

Identifying a useful set of types to classify your matters is very important to the overall success of tracking experience in InterAction. The types need to accurately reflect the work performed for the client. Although they may be tied to your practices groups, they should be at a more granular level. For recommendations for identifying types, see the following topic in the *InterAction Matters* guide: Identifying the Matter Types.

InterAction Structures for Storing Matters and Connecting them to Lawyers

The InterAction Matters module provides several structures for storing matters and connecting them to lawyers (illustrated in Figure 3 and Figure 4):

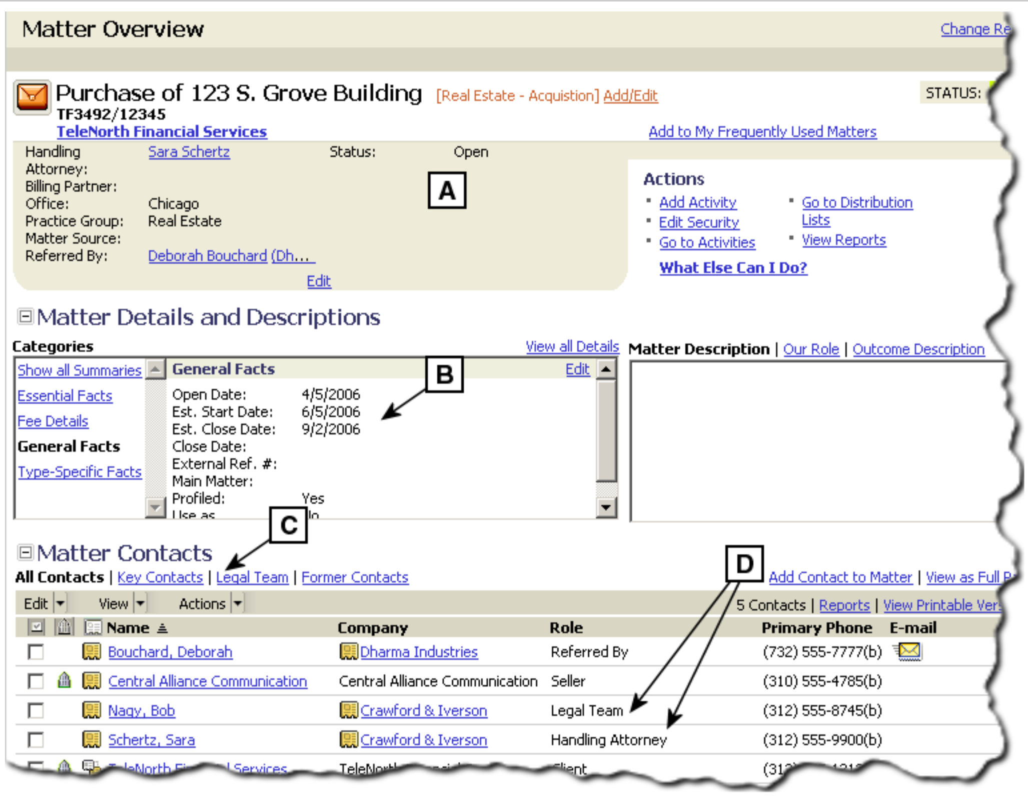
- *Matter types* identify the type of work done for the client. Matter types frequently match the service areas your firm offers. Because matter types are normally firm-specific, InterAction does not include any out-of-the-box types.
- Each matter can have a list of *contacts involved on the matter*. These contacts are assigned matter roles to identify how each individual was

involved. These contacts are typically both internal people and external people and companies.

Combining the matter types with roles provides “intelligence” about people with specific matter experience.

- *Matter fields* store additional details about each matter, such as size, source, and practice group. These details can be useful for narrowing matter searches.
- *Matter searches* provide search forms for finding matters and the contacts involved with matters. When implementing a solution for managing firm experience, the most commonly used search is the Experience of Firm Personnel search (Figure 4). This search finds internal people based on matter criteria.
- *Documents* can also be attached to matters, contacts, and activities. This can be a useful way to make materials produced while working on the matter available to others in the firm.

  Note that documents in InterAction may not be useful to your firm if you already have a document management system. There is no integration between InterAction’s documents and document management system.



The Matter Overview page displays information about the matter. Web Client users can view and update the matter details and the contacts involved in the matter.

[A] This area displays essential details about a matter.

[B] This area displays more information about the matter. This is usually information stored in matter fields.

[C] A matter can have a list of people and companies involved. Lawyers can easily update this while working on the matter.

[D] Each contact can be assigned one or more roles. These define the sort of work the person did on the matter and are very useful when searching for internal experience.

Figure 3: The Matter Overview Page in the Web Client

The Experience of Firm Personnel search finds contacts based on both contact and matter criteria.

[A] This section collects information about the contacts.

[B] This section collects information about the matters.

When you run this search, InterAction finds all the contacts that meet the contact criteria and are involved on matters that meet the matter criteria.

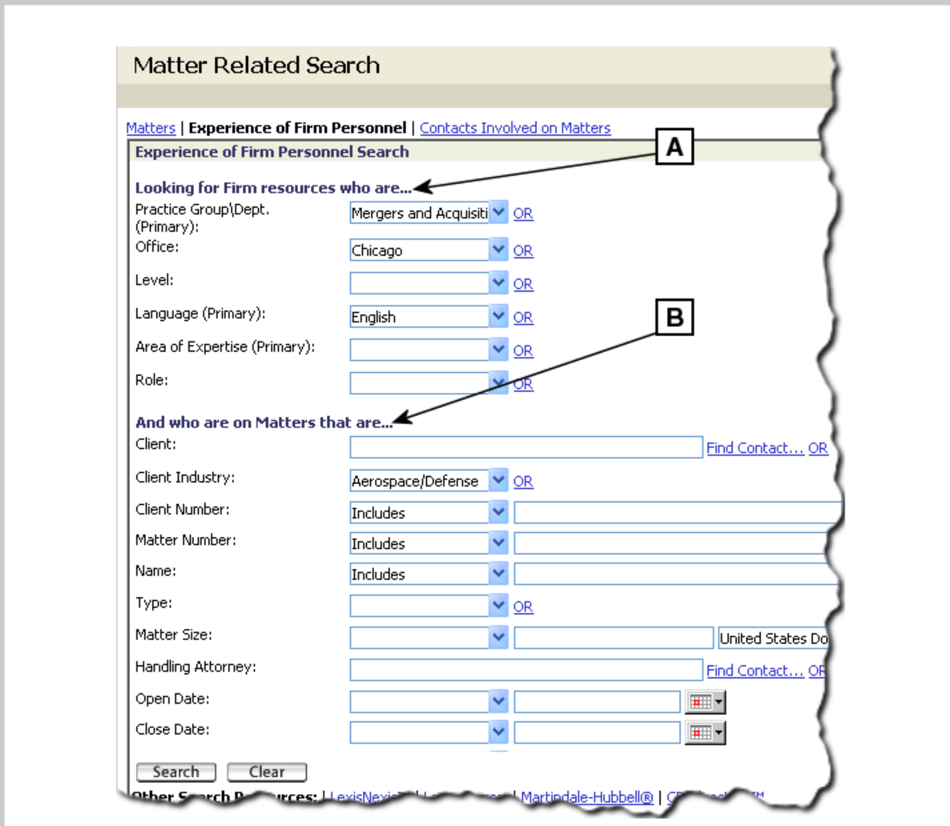


Figure 4: Searching for Experience

Loading and Updating Matters from a Time and Billing System

Although you can manually create matters in InterAction using the Web Client, it is more efficient to integrate with your time and billing system.

You use InterAction Application Collaboration to establish ongoing integration between your time and billing system and InterAction. Application Collaboration can both add matters and update them on an ongoing basis.

To use Application Collaboration, you configure Application Collaboration for the data you want to import on a regular basis, then set up a “harvesting” routine. This routine needs to extract the relevant data from the other system and place it in tables within the InterAction database. Application Collaboration then “transforms” the harvested data into InterAction matters. The harvesting routine should be repeatable so that it can be scheduled to run on a regular basis to refresh InterAction with updated information.

In addition to adding matters, Application Collaboration can also assign contacts and their roles to the matters. This is useful for adding the internal people who have billed time to the matter, since this represents the internal people who worked on the matter.

Updating Business Processes to Support Matter Integration

Application Collaboration can bring your matter information into InterAction and make it easily accessible to lawyers through the Web Client. The value of this integration depends heavily on the quality of the data coming from the other system. This data is often driven by your firm's matter intake process and ongoing matter management processes.

For example, if you currently use very general categories to classify matters, the data in InterAction will be much less effective when performing experience searches. This is because a lawyer searching for someone in your firm with particular work experience needs to be able to describe that work experience in the context of an objective search form. Generic categorization of matters makes this much more difficult and less useful.

Similarly, you may currently only collect a small amount of information about each new matter. This lack of comprehensive profile information again reduces the precision when searching based on matter criteria.

The following recommendations can improve this situation:

- Categorize your firm's matters at a sufficiently granular level and use these categories as matter types. These categories should be set as part of the matter intake process and used in your time and billing system to insure that the information flowing into InterAction has useful matter types applied.
  - At a minimum, the matters should be grouped by practice area. Using more granular types can make searching based on matter criteria more precise.
  - Also note that these categories need to be useful within the time and billing system and for the marketing or business development group.
- Collect as much useful profile information for matters as part of the matter intake process as possible.
- Fully profile your matters with detailed information useful for experience searches. The specific fields that will be the most useful depend on your firm. You can customize InterAction Matters with the appropriate fields as needed.
- Add the contacts involved to each matter. This information can be very useful both for searching and for managing communications while working on the matter.
  - Some of these contacts are typically available in the time and billing system – for example, the *internal* people who have billed time to the matter. You can bring these into InterAction using Application Collaboration.
  - The remaining contacts – particularly *external* people and companies – need to be added manually in InterAction. You can encourage users to enter this data in InterAction by emphasizing the benefits of using InterAction for matter communications. For example, secretaries and administrative assistants can easily create mailings based on the list of contacts for a matter.

> If needed, you can start by profiling only the most important matters, then expand the scope of the project as time allows.

> Including the external contacts on matters is a good way to gain "matter intelligence" about judges, local counsel, experts, etc.

Checklist for Setting Up Matter Integration

The following checklist outlines the major tasks you should perform to integrate your time and billing system with InterAction.

Establishing Ongoing Integration With a Time and Billing System

See the specified guides for details about these topics. If you are reviewing this document electronically, you can use the links in the steps below to open specific topics in the documentation provided on the LexisNexis InterAction Support Center Web site.

Step

- ❑ Review the out-of-the-box fields and role types provided with InterAction Matters.

  See the following topics in the *InterAction Matters* guide:
  - Out-of-the-Box Fields.
  - Out-of-the-Box Role Types.
  - Out-of-the-Box Categories.
  - Out-of-the-Box Layouts.
  - Out-of-the-Box Access Rights.

- ❑ Configure InterAction Matters to collect data appropriate for tracking experience for your firm. This includes configuring the following:
  - Matter types
  - Matter fields
  - Matter role types
  - Categories and layouts for displaying the data in the Web Client
  - Reports that display matter information (both matter reports and contact reports that include matter information)

  For a checklist of all tasks, see the following topic in the InterAction Matters guide: Steps to Configure the InterAction Matters Module.

- ❑ If you want users to be able to attach documents to the matters and matter-related activities, you need to set up document repositories and configure the feature. This is normally done as part of your overall InterAction implementation.

  For details, see the following topics in the *Configuring InterAction* guide:
  - InterAction Documents.
  - Setting Up Document Repositories.

- ❑ Review the topics describing how Application Collaboration works in the *Loading Data into InterAction* guide. These describe the basics of Application Collaboration.

  See the following topics in the *Loading Data into InterAction* guide:
  - Tools for Loading Data Into InterAction.
  - Getting Started with Application Collaboration.

- ❑ Complete the required prerequisites to loading matters. See the following topics in the *InterAction Matters* guide:
  - Overview of Populating InterAction with Matters.
  - Matter Data Load and Ongoing Integration with an External System.
  - Prerequisites to Loading Matters Into InterAction.

- ❑ Develop and test harvesting routines to extract matter information from the time and billing system and place it in the InterAction staging tables.

  See the following topic in the *InterAction Matters* guide: Harvesting the Data.

  For general information about harvesting, see the following topic in the *Loading Data into InterAction* guide: Harvesting the Data for Application Collaboration.

Establishing Ongoing Integration With a Time and Billing System (Continued) See the specified guides for details about these topics. If you are reviewing this document electronically, you can use the links in the steps below to open specific topics in the documentation provided on the LexisNexis InterAction Support Center Web site. **Step**	
❑	Set up Application Collaboration to transform the harvested data on a regular basis. See the following topic in the *InterAction Matters* guide: Transforming the Data. Fro general information about transforming data in Application Collaboration, see the following topic in the *Loading Data into InterAction* guide: Transforming the Data.
❑	As needed, further update the matters with profile data in InterAction. This allows you to add information that is often not available in the time and billing system, such as detailed descriptions and the external contacts involved. See the following topics in the *InterAction Matters* guide: • Correct Data Problems and Profile the Most Important Matters. • Cleaning and Profiling Matter Data.

Building Objectives, Processes, and Organizational Support

Focusing on clear communication of objectives, processes, and reward structures can improve the success of your firm's experience and expertise solution.

Objectives

Your firm needs to clearly identify your overall objectives for managing your expertise and experience in InterAction and communicate these to lawyers and support staff. Your objectives might be similar to the following:

- Make all lawyer expertise information available across the firm.
- Increase the number of matters that can be used for experience tracking.
- Improve the efficiency of generating biographies for use in RFPs.
- Increase the number of internal referrals.
- Increase the speed with which your firm can provide potential clients respond with experienced personnel.

Processes

Your firm needs to define and communicate processes for working with the experience and expertise data in InterAction. Possible areas you should address include the following:

- Processes for collecting information about employees when they join your firm.
- Processes for keeping personnel information in InterAction up-to-date. The specifics may vary depending on whether you are integrating with a Human Resources system or maintaining the data manually in InterAction.
- Matter intake processes. These should ensure that the matters are categorized and profiled at an appropriately granular level. Refer back to "Updating Business Processes to Support Matter Integration" on page 11 for more details.
- Matter management processes. These should ensure that lawyers update matters appropriately to reflect the work performed.
- Processes for updating matters with all of the contact involved. You can encourage users to enter this data in InterAction by emphasizing the benefits

of using InterAction for matter communications. For example, secretaries and administrative assistants can easily create mailings based on the list of contacts for a matter.

Organizational Support

The LexisNexis InterAction Support Center Web site includes several resources to help you create effective communications regarding InterAction. These include sample letters, presentations, and a detailed list of benefits for the lawyer.

See the Internal Marketing Rollout Kit, User Rollout Communication, and Implementation Tools.

Your firm needs to provide support to the lawyers and support staff to participate in the identified processes. You can use the following examples as a starting point, although the specifics will depend on the culture of your firm.

Identify Roles and Responsibilities

- Assign responsibility for executing the identified processes.
- Modify job descriptions as needed to include this work.

Communication

- Communications tailored to each user group explaining the initiative and the benefits to each respective group.
- Lunch and learn sessions designed to underscore the benefits lawyers can expect. These sessions should also emphasize the minimal effort required of the lawyers.
- Memos from senior management outlining the top clients initiative and its importance to the firm.

Rewards and Incentives

- Contests, prizes and other incentives designed to encourage use
- Required use of the system for matter-related communications

Success Factors and Potential Issues

Potential Issues

Your firm should identify the issues you may encounter and create plans for addressing them. Some possible issues include the following:

- The data in the time and billing system does not accurately reflect experience. In this case, searching for experience based on matters probably won't yield useful results.

  Modifying your firm's matter intake processes and profiling the matters can help mitigate this issue. Refer back to "Updating Business Processes to Support Matter Integration" on page 11.

  You can also dedicate resources to manually updating a select group of matters with profile data. Typically, this responsibility falls within the business development team.
- The data in the Human Resources system is not currently being managed effectively. This process will need to be reviewed and updated as part of the deployment.
- Fully profiling the matters would require too much time and/or resources. This can be solved by doing the profiling gradually. Start with the most important or most recent matters and work from there.

How do you measure success?

Success can be measured in a number of ways, including tactical/technical improvements and business/strategic improvements.

- Tactical/Technical Improvements
    - Profile all lawyer expertise
    - Increase the number of matters that can be used for experience tracking by x
    - Improve the efficiency of biography generation by x%
- Business/Strategic Improvements
    - Increase the number of internal referrals from x to y
    - Improve the response time in new initiatives from x to y (as new initiatives are presented to the firm, respond with experienced personnel in a more timely manner)

Corporate & Business Department

CLOSED DEAL PROFILE

1. CLIENT & MATTER		Closing Date:	
Client Name:			
Matter Name:			
Client Number:		Matter Number:	
Can we use on website?	☐ Yes ☐ No	Can we use client name?	☐ Yes ☐ No
Can we use in pitch materials?	☐ Yes ☐ No		
Can we disclose matter amount?	☐ Yes ☐ No		
Was this matter completed at the firm?	☐ Yes ☐ No		

2. REPRESENTATIVE MATTER SUMMARY

Title/Type of Matter:	
Web Description *(2-3 sentence overview)*:	
Proposal Description:	

Industry *(check all that apply):*

- ☐ Agriculture/Vineyard
- ☐ Art/Antiquities
- ☐ Automotive
- ☐ Aviation & Aerospace
- ☐ Banking & Finance
- ☐ Beverage & Tobacco
- ☐ Biotechnology/Life Sciences
- ☐ Business Services
- ☐ Chemicals
- ☐ Commercial Real Estate
- ☐ Computer Hardware
- ☐ Construction & Building Materials
- ☐ Consumer Products
- ☐ Education
- ☐ Electronics & Other Technologies
- ☐ Energy
- ☐ Environmental
- ☐ Family
- ☐ Food
- ☐ Gaming
- ☐ Government & Public Agencies
- ☐ Hospitality & Leisure
- ☐ Hotels
- ☐ Housing/Residential
- ☐ Individuals & Estates
- ☐ Industrial Supplies or Services
- ☐ Insurance
- ☐ Internet & e-Commerce
- ☐ Logistics & Transportation
- ☐ Maritime
- ☐ Media & Information
- ☐ Metals & Mining
- ☐ Non-Profit
- ☐ Organizations/Charitable
- ☐ Pharmaceutical, Medical & Healthcare
- ☐ Professional Services
- ☐ Real Estate
- ☐ Renewable/Alternative Energy
- ☐ Retail
- ☐ Software & Services
- ☐ Sports & Entertainment
- ☐ Telecommunications
- ☐ Utilities & Natural Resources
- ☐ Water
- ☐ Wholesale
- ☐ Other:

Lead Attorney:	
Additional Attorneys *(by seniority)*:	
Legal Assistants:	

3. CORPORATE & SECURITIES DETAILS

Practice Focus *(check all that apply):*

- ☐ Bankruptcy & Restructuring
- ☐ Business & Corporate Advisory
- ☐ Distressed Asset Advisory
- ☐ Employment
- ☐ ERISA & Employee Benefits
- ☐ Gaming Law
- ☐ Intellectual Property & Technology
- ☐ Lending
- ☐ Mergers & Acquisitions
- ☐ Private Equity
- ☐ Public Company Advisory
- ☐ Public Finance
- ☐ Real Estate
- ☐ REITs
- ☐ Securities
- ☐ Tax
- ☐ Trusts & Estates
- ☐ Other:

Type of Deal *(check all that apply)***:**

☐ Asset-Backed Securities	☐ IP Trademark	☐ Private Equity Fund Formation
☐ Asset Purchase	☐ IPO	☐ Private Placement
☐ Bank Debt	☐ Land Purchase	☐ Project Finance
☐ Debtor-In-Possession	☐ Loan Payment	☐ Public Securities Offering
☐ Equity	☐ Mergers & Acquisitions	☐ Recapitalization
☐ Going Private Transaction	☐ Mortgage-Backed Securities	☐ Service Contract
☐ High Yield Debt	☐ Municipal Bonds	☐ Stock Purchase
☐ Investment Grade Debt	☐ Patent	☐ Tax-Exempt Certification
☐ IP Copyright	☐ PIPE	☐ Tax-Exempt Loan Facility
☐ IP License	☐ Private Equity Buyout	☐ Other:

Client Role *(check all that apply)***:**

☐ Borrower	☐ IRB Beneficiary	☐ Real Estate Developer
☐ Commercial Bank	☐ Issuer	☐ Securitization Lender
☐ Commercial Lender	☐ Letter of Credit Bank	☐ Seller
☐ Debtor (Chapter 11)	☐ Mezzanine Lender	☐ Service Provider
☐ Equity Investor	☐ Parent Company	☐ Target
☐ Institutional Lender	☐ Principal	☐ Underwriter/Placement Agent
☐ Insurance Company	☐ Private Equity Fund	☐ White Knight
☐ Investment Advisor	☐ Purchaser	☐ Other:
☐ Investment Bank		

Services Provided *(check all that apply)***:**

☐ Auditors' Comfort Letter	☐ Formal Auction	☐ Reorganization
☐ Bankruptcy	☐ Forward Merger	☐ Reverse Merger
☐ Bond Counsel	☐ Fund Formation	☐ SEC No-Action
☐ Borrower Loan Representation	☐ Holding Company Reorganization	☐ Securities Compliance
☐ Borrower Sale	☐ IP Licensing	☐ Securities Offering
☐ Cash and Stock Merger	☐ IRS Ruling Letter	☐ Services Agreement
☐ Cash Tender Offer	☐ Joint Venture	☐ Short-Form Merger
☐ Change of Domicile Merger	☐ Lender Representation	☐ Special Committee Representation
☐ Client Acquisition	☐ Loan Repayment & Remediation	☐ Special Counsel
☐ Client Sale	☐ Local Counsel	☐ Stock Options
☐ Development	☐ Management Buyout	☐ Stock-For-Stock Merger
☐ Earn Out	☐ Merger of Equals	☐ Tax Counsel
☐ Election Content	☐ Non-Taxable/IRS Code Action	☐ Tender Offer
☐ ERISA Plans	☐ Out-Of-Court Asset Sales	☐ Target Shareholders' Rights Plan
☐ Escrow or Holdback	☐ Patent Application	☐ Underwriter's Counsel
☐ Exchange Offer	☐ Proxy Solicitation	☐ Venture Capital Finance/ Equity (Company Counsel)
☐ Form 15	☐ Public/Private Transactions	☐ Other:
☐ Form S-4	☐ Purchaser Stockholder Approval	

Transaction Amount:	$

Form of Consideration *(check all that apply)***:**

☐ Cash	☐ Equity	☐ Debt	☐ Earn Out	☐ Assumption of Note Liability
☐ Promissory Note	☐ Financing Extension	☐ Self-Purchase IRB	☐ Other:	

Firm Opinion Delivered:	☐ Yes	☐ No
Other Party's Counsel Opinion Delivered:	☐ Yes	☐ No

Other Party:	
Other Party's Counsel (name and firm):	
Other Deal Principals (e.g., lender, private equity, etc.):	

Other Deal Principals' Counsel:			
Intermediaries Involved (e.g., sales agent, underwriter, finder, etc.):			
Basic Deal Document(s) (e.g., purchase agreement):			
Basic Deal Document(s) Prepared by our us:	☐ Yes	☐ No	
Unique Deal Features & Provisions (e.g., ESOP involvement, extraordinary indemnification provisions, etc.):			
Notes:			
Person Completing this Form:		**Date Completed:**	

FOR ADMINISTRATIVE USE ONLY	
Final Form Approved by:	Date:
Form Uploaded by:	Date: