



ilta09

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Harnessing Matter Centricity To Maximize Knowledge Sharing

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Agenda

- Matter-centric Experience Search Strategies
- Opportunities for expanding matter-centric knowledge
- Reporting strategies to tune knowledge for specific practices

Format: Mini-case studies each followed by Q/A

Firm Profile

Winston & Strawn LLP

- ~ 900 attorneys
- 12 Offices in the U.S., Europe and Asia
Charlotte ♦ Chicago ♦ Geneva ♦ Hong Kong ♦ London ♦ Los Angeles ♦ Moscow ♦ New York ♦ Newark ♦ Paris ♦ San Francisco ♦ Washington, D.C.
- 13 primary Practice Areas
Corporate ♦ Employee Benefits & Executive Compensation ♦ Energy & Infrastructure ♦ Environmental ♦ Government Relations & Regulatory Affairs ♦ Healthcare ♦ Intellectual Property ♦ Labor & Employment ♦ Litigation ♦ Maritime ♦ Real Estate ♦ Tax ♦ Trusts & Estates
- Largest Practice Areas include Concentration sub-groups
Corporate: Finance ♦ Financial Services ♦ Private Equity ♦ Securities/M&A ♦ Restructuring
Litigation: Appellate & Critical Motions ♦ EDiscovery ♦ General Litigation ♦ Intellectual Property

Experience Search Strategies

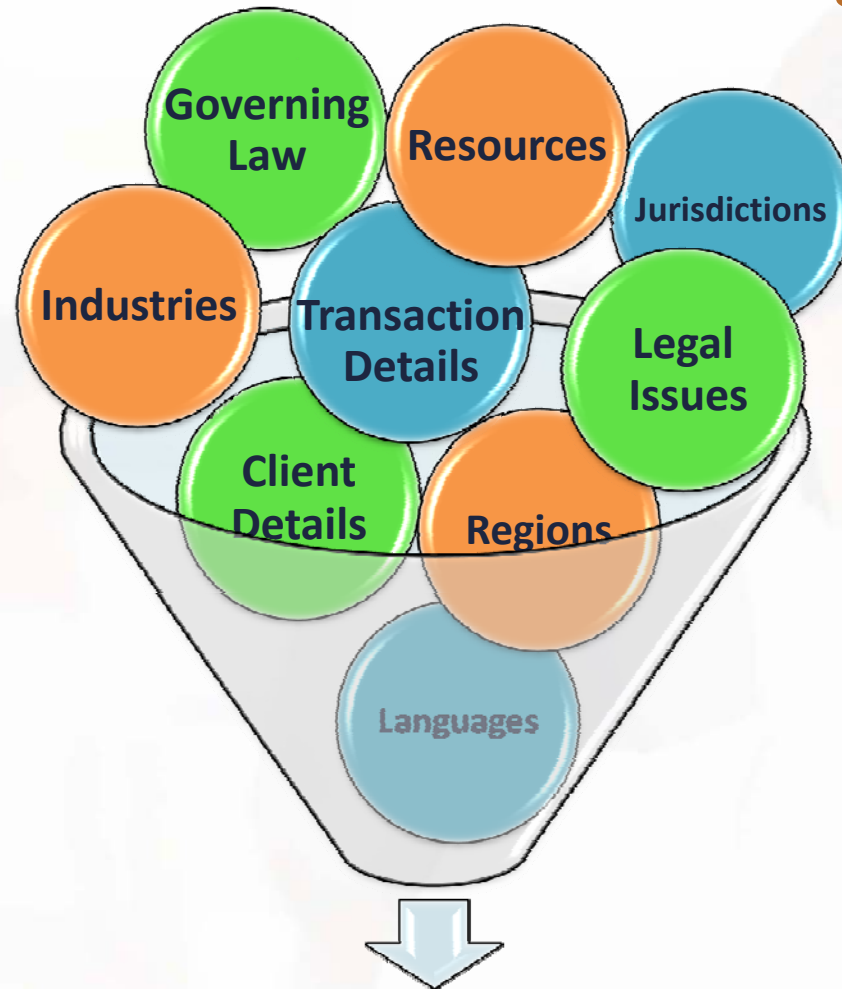
Traditional “search” strategies:

- Document management system
- Intranet
- Blast email

Issues and challenges:

- Little context regarding overall engagement
- Unreliable responses– if any!
- Inconsistent with how attorneys “think” about experience

Experience Search Strategies



Case / Deal

Experience Search Strategies

Experience Search Platform

- PRAXIS: Structured SQL database
- Fast ESP
- SharePoint sites / web parts
- Matter Search
Locate matters with selected characteristics weighted by both quality and frequency of hits
- Timekeeper Search
Locate timekeepers who worked on matters meeting search criteria weighted by the number of engagements

Experience Search Strategies

Example: Matter Search

RFP requires list of representative matters from the past 5 years:

- Project financing deal
- Energy & Utilities sector
- Appearance before the U.S. Federal Energy Regulatory Commission

Experience Search Strategies

SilasNet People Attorney Bios **Matter Experience** Timekeeper Experience

Search Matter Experience

energy project Activity in Past 2 Years Activity in Past 5 Years All

You searched for: energy project

Results 1 - 30 of about 3763. Your search took 0.0310 seconds. 1 2 3 4 5 6 Next>

<ul style="list-style-type: none"> <input type="checkbox"/> Practice Concentration <input type="checkbox"/> Primary Matter Type <input type="checkbox"/> Matter Details <input type="checkbox"/> Parties <input type="checkbox"/> Industries <input type="checkbox"/> Jurisdiction Type <input type="checkbox"/> Jurisdiction Category <input type="checkbox"/> Agencies / Arbitral Forums <input type="checkbox"/> U.S. Federal Courts <input type="checkbox"/> U.S. State Courts <input type="checkbox"/> Governing Law <input type="checkbox"/> International Regions <input type="checkbox"/> U.S. Regions <input type="checkbox"/> Countries <input type="checkbox"/> U.S. States <input type="checkbox"/> U.S. Municipalities <input type="checkbox"/> Client <input type="checkbox"/> Timekeeper Name 	<p>Sunfun Inc. / Renewable Energy Project (200546.1)</p> <p>Primary Type: Regulatory Last Time Entry: 2009-07-02 Timekeepers: 66 SilasNet PRAXIS Summary</p> <p>Auna Inc. / Solar Energy Project (200542.1)</p> <p>Primary Type: Project Development Last Time Entry: 2009-07-15 Timekeepers: 36 SilasNet PRAXIS Summary</p> <p>Solid Inc. / Solar Energy Project (200515.1)</p> <p>Primary Type: Project Finance Last Time Entry: 2009-06-30 Timekeepers: 20 SilasNet PRAXIS Summary</p> <p>SunPeak Solar LLC / Solar Energy Project (200605.1)</p> <p>Primary Type: Project Development Last Time Entry: 2008-11-18 Timekeepers: 13 SilasNet PRAXIS Summary</p> <p>Gongra Energy / Alaska Project (7831.16)</p> <p>Primary Type: Project Finance Last Time Entry: 2005-05-31 Timekeepers: 15 SilasNet PRAXIS Summary</p> <p>OGE Energy Company / Nuclear Licensing Matters (10398.4)</p> <p>Primary Type: Project Development Last Time Entry: 2009-07-13 Timekeepers: 6 SilasNet PRAXIS Summary</p> <p>Constellation Energy Group / UniStar Calvert Cliffs 3 (10398.4)</p> <p>Primary Type: Regulatory Last Time Entry: 2009-07-14 Timekeepers: 7 SilasNet PRAXIS Summary</p> <p>BrightSource Energy / Labor Relations (250570.2)</p> <p>Primary Type: Last Time Entry: 2009-07-07 Timekeepers: 7 SilasNet PRAXIS Summary</p>
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Example Matter Search

Representative matters from past 5 years:

- Project financing
- Energy & Utilities sector
- Appearance before the U.S. FERC

Experience Search Strategies

SilasNet
People
Attorney Bios
Matter Experience
Timekeeper Experience

Search Matter Experience

Activity in Past 2 Years
 Activity in Past 5 Years
 All

Search

You searched for: Energy Project > **x** Matter Details: Project Finance > **x** Agencies / Arbitral Forums: U.S. Federal Energy Regulatory Commission > **x** Industries: Energy & Utilities

Practice Concentration

Primary Matter Type

Matter Details

x Project Finance

Partnership Taxation

Energy Project- Private

Equity Financing

Regulatory - Compliance

Regulatory

[See More...](#)

Industries

x Energy & Utilities

Consumer Products

Consumer Services

Investment Funds

Jurisdiction Type

Jurisdiction Category

Agencies / Arbitral Forums

x U.S. Federal Energy Regulatory Commission

U.S. Internal Revenue Service

CA Local Tax Authority

CA Public Utilities Commission

Results 1 - 7 of about 7. Your search took 0.1110 seconds. 1

SunRun Inc. / Renewable Energy Project (200546.1)				
Primary Type: Regulatory Last Time Entry: 2009-07-02 Timekeepers: 66	SilasNet	PRAXIS Summary		
E.ON Climate & Renewables / Citizens Energy (8836.8)				
Primary Type: Project Finance Last Time Entry: 2008-08-20 Timekeepers: 17	SilasNet	PRAXIS Summary		
Holland Cogeneration Venture Ltd. Partner / General (102837.0)				
Primary Type: Project Finance Last Time Entry: 2009-06-25 Timekeepers: 52	SilasNet	PRAXIS Summary		
Niagen Electric Transmission Company / Sale (104983.2)				
Primary Type: Divestiture Last Time Entry: 2006-11-30 Timekeepers: 15	SilasNet	PRAXIS Summary		
E.ON Climate & Renewables / Project Finance (8836.1)				
Primary Type: Cross Border Tax Planning Last Time Entry: 2009-07-13 Timekeepers: 37	SilasNet	PRAXIS Summary		
EDF Nexaselles, S.A./enron, Inc. / Wind Power (7207.1)				
Primary Type: Project Finance Last Time Entry: 2009-06-30 Timekeepers: 15	SilasNet	PRAXIS Summary		
EDF Nexaselles, S.A./enron, Inc. / Fenton (7207.5)				
Primary Type: Tax Planning Last Time Entry: 2008-10-31 Timekeepers: 15	SilasNet	PRAXIS Summary		

Example Matter Search

Representative matters from past 5 years:

- Project financing
- Energy & Utilities sector
- Appearance before the U.S. FERC

Experience Search Strategies

Example: Timekeeper Search

Long-time Labor client calls relationship partner asking for advice on strategies for leveraging energy tax credits

- Identify the best partner to meet with the client
- Experienced in the energy and utilities industry
- Client is an investment fund sponsor with presence in U.S. and Ireland

Experience Search Strategies

SilasNet People Attorney Bios Matter Experience **Timekeeper Experience**

Search Timekeeper Experience

tax credit Activity in Past 2 Years Activity in Past 5 Years All Search

You searched for: tax credit

Timekeeper Rank

Timekeeper Practice Area

Practice Concentration

Timekeeper Office

Primary Matter Type

Matter Details

Industries

Jurisdiction Type

Jurisdiction Category

Agencies / Arbitral Forums

U.S. Federal Courts

U.S. State Courts

Governing Law

International Regions

U.S. Regions








Countries

U.S. States

U.S. Municipalities

Client

Email Selected Results 1 - 30 of 695. Your search took 0.0470 seconds.

<input type="checkbox"/>		<p>Ratts, Andrew W. Partner Tax</p>	<p>Chicago ARatts@winston.com</p>	<p>Approx. Count: 681 Search Matters</p>
<input type="checkbox"/>		<p>Lucas, Roger S. Partner Tax</p>	<p>Chicago RLucas@winston.com</p>	<p>Approx. Count: 681 Search Matters</p>
<input type="checkbox"/>		<p>Kelly, Dennis J. Partner Tax</p>	<p>Chicago DKelly@winston.com</p>	<p>Approx. Count: 396 Search Matters</p>
<input type="checkbox"/>		<p>Weber, Louis J. Partner Tax</p>	<p>Chicago LWeber@winston.com</p>	<p>Approx. Count: 328 Search Matters</p>
<input type="checkbox"/>		<p>Burau, Dean M. Partner Tax</p>	<p>Chicago DBurau@winston.com</p>	<p>Approx. Count: 323</p>
<input type="checkbox"/>		<p>Kalra, Amit Partner Tax</p>	<p>Chicago AKalra@winston.com</p>	
<input type="checkbox"/>		<p>Klein, Susan F. Partner Tax</p>	<p>New York SKlein@winston.com</p>	

Example Timekeeper Search

Find best partner to introduce to client:

- Energy tax credits
- Energy & Utilities sector
- Fund sponsor
- U.S. and Ireland

Experience Search Strategies










SilasNet People Attorney Bios Matter Experience **Timekeeper Experience**

Search Timekeeper Experience

tax credits Activity in Past 2 Years Activity in Past 5 Years All

You searched for: tax credits > **x Attorney Level: Partner** > **x Parties: Fund / Sponsor** > **x Industries: Energy & Utilities** > **x Countries: Ireland**

Results 1 - 3 of 3. Your search took 0.0310 seconds.

<p><input type="checkbox"/> Timekeeper Rank</p> <p>x Partner</p> <p><input type="checkbox"/> Timekeeper Practice Area</p> <p><input type="checkbox"/> Practice Concentration</p> <p><input type="checkbox"/> Timekeeper Office</p> <p><input type="checkbox"/> Primary Matter Type</p> <p><input type="checkbox"/> Matter Details</p> <p><input type="checkbox"/> Parties</p> <p>x Fund / Sponsor Corporation</p> <p><input type="checkbox"/> Industries</p> <p>x Energy & Utilities</p> <p><input type="checkbox"/> Jurisdiction Type</p> <p><input type="checkbox"/> Jurisdiction Category</p> <p><input type="checkbox"/> Agencies / Arbitral Forums</p> <p><input type="checkbox"/> International Regions</p> <p><input type="checkbox"/> U.S. Regions</p> <p><input type="checkbox"/> Countries</p> <p>x Ireland</p> <p><input type="checkbox"/> U.S. States</p> <p><input type="checkbox"/> Client</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<table border="0"> <tr> <td style="text-align: center;"></td> <td>Wuslich, Raymond B. Partner Energy Group</td> <td style="text-align: center;">Washington, DC RWuslich@winston.com</td> <td style="text-align: right;">Approx. Count: 1 Search Matters</td> </tr> <tr> <td style="text-align: center;"></td> <td>Lorentzen, John C. Partner Tax</td> <td style="text-align: center;">Chicago JLorentzen@winston.com</td> <td style="text-align: right;">Approx. Count: 1 Search Matters</td> </tr> <tr> <td style="text-align: center;"></td> <td>Ratts, Andrew W. Partner Tax</td> <td style="text-align: center;">Chicago ARatts@winston.com</td> <td style="text-align: right;">Approx. Count: 1 Search Matters</td> </tr> </table>		Wuslich, Raymond B. Partner Energy Group	Washington, DC RWuslich@winston.com	Approx. Count: 1 Search Matters		Lorentzen, John C. Partner Tax	Chicago JLorentzen@winston.com	Approx. Count: 1 Search Matters		Ratts, Andrew W. Partner Tax	Chicago ARatts@winston.com	Approx. Count: 1 Search Matters
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Example Timekeeper Search

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- Energy tax credits
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Experience Search Strategies

Experience Search Platform– *coming soon*

- Experience reports
- Unstructured data like biographies and publications
- Document concept extraction
- Action features for search results
 - Export hit lists
 - Integration with analytics reporting
- *Whatever else comes to mind...*



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Experience Search Strategies

Questions / Answers