Integrating Information & Knowledge Management Architectures in the Legal Profession

Strategies for Integrating Your Firm's Organizational, Technical & Information Resources to Leverage or Create Complimentary Information & Knowledge Management Architectures

June 13 –14, 2006
Toronto, Ontario

This conference was designed to help you:

- Determine whether or not Information Management can generate the context and relevance that has eluded many KM practitioners

- Integrate organizational, technical & information resources to more effectively leverage your firm's collective intelligence and develop a true knowledge management architecture

- Best position your legal library in the process of developing or implementing KM initiatives at your firm

- Contend with the cultural and institutional barriers that law firms place before KM lawyers - including the often unspoken assumptions, signals, misconceptions and cultural traits that have to be dealt with before KM can happen

EXPERT CONTRIBUTIONS & CASE STUDIES FROM:

- BP America INC
- Stikeman Elliott LLP
- Blake, Cassels & Graydon LLP
- Miller Thomson LLP
- Fasken Martineau Dumoulin LLP
- Mccarthy Tetrault
- Borden Ladner Gervais LLP
- Torys LLP
- Goodmans, LLP
- Mcmillan Binch Mendelsohn LLP
- Osler, Hoskin & Harcourt LLP
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- Weirfoulds LLP
- And Many More...

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Integrating Information & Knowledge Management Architectures in the Legal Profession

Strategies for Integrating Your Firm's Organizational, Technical & Information Resources to Leverage or Create Complimentary Information & Knowledge Management Architectures

June 13 –14, 2006
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Is information management just politically correct KM? The disciplines of Information Management and Knowledge Management have different roots and typically are managed differently within organizations. Yet these two disciplines seem to be juxtapositioned, if not complimentary in theory. In many organizations, these two areas are in conflict - not harmony.

Based on continued feedback from past delegates, Ark Group and Managing Partner Magazine have developed a two-day KM conference set in Toronto this coming June 13-14, 2006. This program, researched with and developed for those involved in knowledge and information resource management, will focus more on how the legal practice integrates with the rest of the firm and why breaking down various silos within your firm is critical to successful KM implementation.

Information management seems to be gathering more attention in law firms - with or without existing KM programs. Should KM champions be concerned about the emergence of IM? Is IM just disciplined data mining, or is it generating context in ways that overlap with traditional KM goals? These are just a few of the questions we plan to answer in the course of this two-day program.

Few will argue that successful Knowledge Management in the legal profession offers the potential for significant business benefit – including higher and more secure revenues, lower internal costs and accelerated professional development. Despite the obvious upside, the concept of integrating information and knowledge management still seems vague to many law firm thought leaders.

We know that when properly organized, data becomes information - and when placed in an actionable context this information becomes "knowledge." But knowledge suggests an understanding gained from experience – and tapping this experience requires mechanisms to somehow extract know-how embedded within social structures and culture. Difficult as it may be to manage the knowledge itself, we can manage the processes, content, and quality by managing the conditions in the environment surrounding the people engaged in knowledge activities.

This program is your opportunity to learn how some of today's leading law firms are integrating their organizational, technical and information resources to more effectively leverage collective intelligence - and begin to develop a true knowledge management architecture— improving the efficiency and effectiveness of individual and collaborative knowledge-sharing activities.

Hope to see you in Toronto this June!

Best Regards,

The Ark Group Team

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8.30AM **Registration & Refreshments**

9:00AM **Opening Remarks, Chairperson Day One**
Joshua Fireman, VP Market Development & General Counsel, ii3

9:15AM
A Contrarian Lawyer's View of Knowledge Management
To set the stage for this in-depth, two-day advanced session on current and developing topics on knowledge and information management, an experienced KM advocate and in-house legal practitioner offers his thoughts on:

- What is knowledge management?
- The business case for knowledge management
- Hurdles in adopting and implementing KM within Legal environments
- How to successfully implement KM within a law practice, and how to go about creating, collecting, and sharing knowledge

Christian Liipfert, Managing Attorney, HSE, Crisis Management & Technology, **BP America Inc.**

10:15AM
Creating the Conditions for KM Success (And Ideas That Must Be Vanquished To Avoid Failure)
A discussion of the cultural and institutional barriers that law firms place before KM lawyers - including the often unspoken assumptions, signals, misconceptions and cultural traits that have to be dealt with before KM can happen. Such problems and challenges will be present in all law firms to varying degrees, and include:

- The idea that successful KM is about technology
- The failure to appreciate that taken to its highest, KM is not just about knowledge management, it's about knowledge creation
- The assertion that direct ROI can and should be measured
- The problems involved in getting lawyers to share and participate

Graeme Coffin, National KM Lawyer, **Miller Thomson LLP**

11:00AM *Morning Coffee Break*

11:30AM Case Study
Information Management vs. Knowledge Management
The disciplines of Information Management and KM have different roots and typically are managed differently within organizations. Yet these seem to be juxtapositioned, if not complimentary disciplines. In some organizations, these two areas are in conflict and not harmony. This case study session, will examine the relationship between Information Management and Knowledge Management within a single firm.

- Two points on the same spectrum?
- How information and knowledge resources work better together?
- How can law firms organize to leverage these resources?
- How can you avoid the finger pointing and harness the knowledge from these disciplines?

Joel S. Alleyne, CMC, CIO/CKO, **Borden Ladner Gervais LLP**

12:15PM *Networking Lunch Break*

1:15PM **PANEL DISCUSSION**
Information Management vs. Knowledge Management
Walk like a duck, quack like a duck: Is information management just politically correct KM? Information management seems to be gathering attention in firms - with and without existing KM programs. Should KM champions be concerned about the emergence of IM? Is IM just disciplined data mining, or is it generating context in ways that overlap with traditional KM goals? Are IM champions just looking for the path of least resistance - slapping together matter-centric information just because they can? This panel discussion will illustrate the critical expertise needed for either to be successful and whether or not IM can generate the context and relevance that has eluded many KM practitioners.
Panel:
Joel S. Alleyne, Chief Information & Knowledge Officer, **Borden Ladner Gervais LLP***, Louis Mirando, Director, Library Services,* **Torys LLP***, Andrea Alliston, Director of Knowledge Management & Senior KM Lawyer,* **Stikeman Elliott LLP**

2:15PM
PANEL DISCUSSION:
The Evolving Role of the Law Librarian and its Intersection with KM
Law libraries and KM programs occasionally intersect, but just as often exist in parallel universes - aware of each other, but not able to communicate or collaborate. Why is this, and what does the future hold for libraries and KM? How do you best position your legal library in the process of developing or implementing KM initiatives at your firm? This panel will examine:

- How library expertise can improve KM: Training, organization and the creation of knowledge repositories
- Resourcing: Do we expect libraries to do more with the same people - or less?
- Repositioning the library: Auditing, assessing and rationalizing services
- Practice group integration and meeting evolving lawyer business needs

Panel:
Stéphanie A. Grenier, Library Director, **Fasken Martineau DuMoulin, LLP**, Connie Crosby, Library Manager, **WeirFoulds LLP,** Mary Saulig, Director, Library Services, **Goodmans, LLP**

3:00PM *Afternoon Coffee Break*

3:30PM
The Role Of Portals In KM Integration Processes: If You Build It, Will They Still Go Elsewhere?
What is a KM Integration Process and why would a portal help? This session is designed for those who already think that KM is a state of mind. KM in a law firm should embrace everything and everyone (not just lawyers and precedents). Questions to be considered in the session include:

- How do you decide how much change your organization can endure at one time – treating change management as a separate "project"?
- How important is it for a portal to "take over" the desktop?
- Why should you consider applications rather than just information or knowledge stores when building a portal?
- Internal vs. external collaboration – when to do what?
- Being forced into taxonomy analysis (whether you're ready or not)
- Understanding how the legal practice integrates with the rest of the firm and why breaking down these silos is critical to a successful KM implementation
- Does good portal design require well established culture of collaboration and sharing?

Ginevra Saylor, Director, Knowledge Management, **McMillan Binch Mendelsohn LLP***, Elizabeth A. Ellis, Chief Knowledge Officer & Director of Research,* **Goodman and Carr**

4:15PM Closing Remarks

4:30PM End of Day One

8.30AM **Registration & Refreshments**

9:00AM **Opening Remarks, Chairperson Day Two**
Joshua Fireman, VP Market Development & General Counsel, ii3

9:15AM
PANEL DISCUSSION:
The Creation and Cultivation of a Knowledge-Sharing Culture
One of the challenges of knowledge management in the legal domain is that of getting people (i.e. lawyers) to share their knowledge freely. After all, why should people give up their hard-won knowledge when it is one of their key sources of personal advantage? In this panel discussion attendees will be asked a series of questions helping to characterize the culture at their own firm and whether or not your firm is adequately addressing the human factors or motivational aspects that can either short-circuit or help cultivate a knowledge-sharing culture.
Facilitated by:
Eugene A. G. Cipparone, Acting Director, Knowledge Management, **Goodmans LLP**
Peter Nagy, Director of KM, **Fasken Martineau DuMoulin, LLP**

10:00AM
KM for Professional & Organizational Development
KM can play a strong role in helping lawyers become better at what they do and deliver more value to clients. This session will explore practical and achievable ways that a firm's KM team can partner with their counterparts in training, recruiting and other staff to better attract, develop and retain lawyers, and thereby increase KM's contribution and value to the organization. Learn about:

- Making the leap from law school to practice – how KM and PD can meet the demands of today's recruits who want a firm that will support them and develop their talents

- How KM and PD can help meet the client imperatives of quality, efficiency and understanding your client

- Professional Development as a knowledge transfer initiative

- KM tools, discussion forums, blogs, wikis, webinars, to take learning out of the classroom and into the lawyers' offices

- Creating and supporting a continuous learning environment
Mara Nickerson , Director, Professional Development , **Osler, Hoskin & Harcourt LLP**

11:00AM *Morning Coffee Break*

11:30AM
PANEL DISCUSSION:
The role of CRM in KM: Just another database or a driving force in the KM strategy?
To date, most law firm CRM projects have failed to get traction. How can this be when the legal business is entirely dependent on having clients and well-managed relationships with them? At a time when clients are demanding more 'service' and responsiveness to their needs, a CRM strategy that sees a sharing of knowledge about relationships and client needs is vital to address this disconnect. Sounds like a call for KM doesn't it? Starting off with a 'lessons learned' perspective, our panelists will offer some candid answers to why CRM has floundered and will then share their insights into how CRM can become a success story in a law firm by examining the following questions:

- How can we make CRM work in a law firm?

- What is CRM and where is the KM in CRM?

- What are the key elements to a successful initiative?

- Who should drive the CRM initiative? KM, marketing, IT?

- Does business intelligence come into play here?

Facilitated by:
Karen K.H. Bell, LLB, Principal, Karen Bell Consulting
Panel:
Marcia Cooper, Director of Knowledge Management, **Blake Cassels & Graydon LLP**
Other panelists: TBA

12:15PM *Networking Lunch Break*

1:15PM
PANEL DISCUSSION:
Lawyer/Client Collaboration: Reality Check- What Your Clients Really Want
How do law firms and their clients collaborate? Do lawyers really want to collaborate with their clients? What are client expectations as to creating work product? This panel will look at:

- Lawyer-client workflow and the impediments to genuine collaboration

- Performing a reality-check: Do clients want to collaborate, or just review work product? Why hire outside counsel in the first place?

- Lawyer attitudes toward collaboration - does it lead to delays or better deliverables?

- Using technology to improve collaboration - what works and what does not

- Law firm and client workflow - can these be reconciled and leveraged?

Panel:
Christian Liipfert, Managing Attorney, HSE, Crisis Management & Technology, **BP America Inc,** *John Loosemore, Knowledge Management Consultant,* **Blake Cassels & Graydon LLP,** *Other panelists: TBA*

2:15PM *Afternoon Coffee Break*

2:45PM
PANEL DISCUSSION:
The KM Client-Facing Focus- How to Put This into Action
In the beginning, law firms wanted to stop reinventing the wheel. They focused on their internal needs, often forgetting that their clients could benefit from law firm KM resources. Meanwhile, legal services became fungible services and clients saw diminishing returns on law firm loyalty. Can KM create internal and client-facing benefits? Will KM help to re-establish loyalty by introducing switching costs into firm-client relationships? This panel will look at:

- Leveraging KM workflow and creating client services

- Access to knowledge - how we can leverage CLE, Library and other departments

- Reality check: The tension between client access and client files - who has the time to keep information current?

- What clients really want - how well do firms understand their clients' needs?

Panel:
John Gillies, Knowledge Manager, McCarthy Tetrault
Other panelists: TBA

3:45PM Closing Remarks

4:00PM End of Conference

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June 13-14, in Toronto, Ontario.

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