

Emerging Approaches to Information Services



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Executive Summary

Over recent years we have been witnessing a shift in the role of information services and research staff in law firms. These functions are in a period of transition, fueled by new disruptive technologies, increasingly competitive pricing, and building budgetary pressures. As law firms continually push to stay relevant in the digital age, the information functions will become less shackled to a physical library space and more widely implemented throughout the firm.

As law firms shift their work streams and cultures to align themselves with the digital world librarians, research staff, and knowledge managers will become more integrated in the firm's day to day functions, with more robust and powerful technology supporting them. With the wealth of data and new research potential this will open up, information services can now, more than ever, leverage a strong competitive advantage for law firms.

Emerging Approaches to Information Services aims to shed light on the shifting role of the information services function. With input from industry leaders from the libraries, research, and knowledge management fronts this title explores the best methods of optimizing the functions strategically to leverage the best competitive advantage for the firm. A range of methods for effectively utilizing a firm's resources are discussed; including integrating knowledge management and business development functions with library staff, realigning research models to avoid losses through unbilled associate hours, and the disruptive technology coming in to play (including upcoming independent research providers, awareness aggregation tools, and predictive analysis).

In Chapter 1 Constance Ard, information professional and consultant at Answer Maven, highlights how information resources and personnel can continue to prove themselves as valuable assets in a resource-constrained legal landscape. Addressing the need for library functions to translate their projects into solutions to leverage a competitive advantage, Ard explains that these functions need to shift to be a proactive, rather than reactive, service model.

Moving into Chapter 2 Mark Gediman, director of research services at Best Best & Krieger LLP, explores how a law firm library can effectively utilize knowledge management to help deal with partner requests. Using a real-world example of a request for a specialized repository of documents, Gediman runs through the key areas of information that KM has to offer, and how they can be leveraged to effectively respond to the partner's request.

Lance Sapsford, director of business development and marketing at Ince and Co, discusses how law firm libraries and information services can now play a role in driving growth and revenues in Chapter 3. By combining three strategic elements, identified as knowledge, data, and digital resources, Sapsford highlights how capitalizing on these elements with an information services function can drive decision making and deliver revenues in the scenario of a change in legislation.

In Chapter 4 Michael Carrillo, business development and marketing manager, and Oz Benamram, chief knowledge officer at White and Case LLP discuss re-aligning a firm's research models to avoid losses that occur through unbilled associates hours spent on research. They suggest this can be done through a model involving embedded researchers – specialist information professionals who support lawyers in research tasks, freeing up billable hours. An embedded researcher model can be tailored to the firm's needs, to ensure that there is a best fit for the maximum impact.

Chapter 5 sees Annie Youngblood, manager of business intelligence for Pillsbury Winthrop Shaw Pittman, tackling an issue which is now critical for many law firms: how to capitalize on the shift towards CI with a limited set of resources. The chapter outlines all the steps needed to launch an effective CI department: calculating the demand; finding appropriate staff; and pitching it to the workforce.

In Chapter 6 Marlene Gebauer, director of knowledge solutions at Greenberg Traurig, looks at the challenges that the traditional information services model faces, and how the system can be improved with the technological advancements in workflow automation. The benefits of mapping matters, identifying common request types, and creating delivery templates for great ease of automation are discussed with examples ranging from litigation to onboard lateral attorneys.

In Chapter 7 Steve Lastres, director of knowledge management services at Debevoise and Plimpton LLP, discusses the next step in content aggregation – content intelligence. Explaining how simply using content aggregation tools are not enough, Lastres delves into how firms can utilize their existing technology and professional expertise to move

towards content intelligence to leverage large amounts of unstructured data to make informed strategic decisions.

In Chapter 8 Jennifer Mendez, senior manager of KM firm solutions at Ogletree Deakins, discusses how artificial intelligence is transforming the way information professionals conduct research. The chapter is framed by a definition of AI and its upcoming role in law firms, then moves to explore how research giants Lexis and Westlaw are applying AI to create more efficient methods of research, along with smaller start-ups that are looking to disrupt the market.

In Chapter 9 Marica Burris, research and information services consultant at HBR Consulting, explores the evolving landscape of legal research providers – an aspect of law firm’s information resources that are facing scrutiny from a budgeting and legal spend angle. With the shifting value propositions that law firms are looking for, new entrants in the legal research providers have managed to gain traction – offering law firms a potential alternative to the standard, expensive platforms.

About the authors

Constance Ard is an information professional with nearly 20 years of library experience. She offers business information and content management solutions through her consulting practice Answer Maven. Before launching the consulting practice, Constance served as a law librarian for 12 years. She received her MSLIS from the University of Kentucky in 1995. Throughout her career, Constance has worked to develop a strong background in management and research as well as project management. She specializes in working with organizations to assess information problems, user needs, and expectations, and offers solutions to improve and leverage company expertise to solve those problems. This specialty includes working closely with management, end-users, and information technology. Technology and information are irrevocably intertwined and, in order to meet user requirements, information and content managers must work collaboratively with IT to ensure organizations meet their business goals. Constance is an expert at facilitating those relations. As a respected information professional, she has spoken on topics from legal research for non-legal researchers to e-Discovery preparation and big data text analytics. Constance served as the conference planning chair for the 2013 Association of Independent Information Professionals. She received the Outstanding Chapter Member Award from the Kentucky Chapter of Special Libraries Association in 2006 and the Professional Member Award in 2008. She also received the Kentucky Libraries Special Librarian of the Year Award in 2007.

Oz Benamram is the chief knowledge officer at White & Case LLP. Oz provides the firm with strategic direction on the use of KM and technology, and leads the knowledge department in developing and implementing the systems and processes that enable the firm to use its collective knowledge to benefit clients worldwide. Oz is a globally-recognized thought leader and a frequent speaker on legal IT and KM subjects. He has won numerous awards for leading innovation in legal KM, including the creation of an enterprise search system.

Marcia Burris is a research and information services consultant at HBR Consulting.

Michael Carrillo is the business development and marketing manager for the Silicon Valley Office of White & Case LLP, where he helps to connect clients with beneficial legal services across practices and industries. His experience at White & Case includes working as a research and information services manager in the firm's knowledge department, a role that allowed him to develop needs based approaches to functions such as competitive intelligence and legal analytics. A native of Northern California, Michael holds a Master's of Library & Information Science from San Jose State University, and a BA in History from the University of California, Santa Cruz.

Marlene Gebauer is director of knowledge solutions at Greenberg Traurig.

Mark Gediman is the director of information services for Best Best & Krieger, LLP and has been with BB&K since 2000, managing the research needs of more than 200 attorneys and paralegals in nine offices from DC to California. He is a past-president of the Southern California Association of Law Libraries (SCALL) and the co-founder and co-chair of the Competitive Intelligence Caucus of the Private Law Libraries-Information Professionals (PLL-IP) of the American Association of Law Libraries (AALL). He has over 25 years of experience in law library management and writes regularly on competitive intelligence, research, and library management issues. He presents frequently for AALL and the Inland Counties Association of Paralegals as well as for SCALL, NoCALL, ACI and HALL. He has authored Chapter 8 of *Business Intelligence for Law Firms* (ARK Group, 2012) and articles in *AALL Spectrum*, *Practicing Law Management Week*, *Paralegal Today*, and *Facts & Findings* – the magazine of the National Assoc. of Legal Assistants (NALA). He is a graduate of the University of California, Riverside.

Steve Lastres is director of knowledge management services for Debevoise & Plimpton LLP. He manages the firm's information and knowledge management initiatives with the assistance of a dedicated team of research, knowledge management, and technical services analysts. Steve works with a KM Task Force in charge of the firm's KM effort to develop and implement an effective KM strategy for the firm. He joined the firm in May 2005. Steve received a J.D. degree from New York

Law School in 2003 where he received the Daniel Finkelstein Writing Award. He is a member of the Bars of New Jersey and New York. He received a Masters in Library Science with a Distinguished Achievement Award in Information and Library Science from Pratt Institute in 1996, and a undergraduate degree in Business Administration from Pace University. Prior to joining the firm, he was previously employed by the law firms of Arnold & Porter LLP and Fulbright & Jaworski LLP as a librarian and information and knowledge management professional.

Steve is active professionally having served as president of the Law Library Association of Greater NY (LLAGNY) and ARMA Metropolitan NY Chapter. He is past chair of the Private Law Libraries Special Interest Section (PLL SIS), member of the American Association of Law Libraries (AALL) Leadership and Nominations Committee and the ILTA Education Planning Committee, and former manager of the ARMA Northeast Region. Steve is also a prolific writer and speaker on the topics of KM and law librarianship. He was recognized as a FastCase 50 award winner which recognizes the top 50 innovators, techies, visionaries, and leaders. He was also an ILTA 2013 Publication Award Winner for Best Member-Contributed White Paper entitled “Knowledge Management: A Strategic Role Change for Legal Information Professionals” (<http://epubs.iltanet.org/i/87421/32>) and was recently awarded ILTA’s 2014 Knowledge Management Professional of the Year Award.

Steve can be found on Twitter: @lastrst, and @privatelawLibs and LinkedIn: <http://www.linkedin.com/in/salastres>.

Jennifer Mendez is senior manager of KM firm solutions at Ogletree Deakins.

Lance Sapsford is the director of business development and marketing at Ince and Co. Lance is responsible for all aspects of strategic and operational business development and marketing for Ince and Co globally. Lance has spent over two decades working in professional services, in corporate finance, consulting, and legal, with a focus on business development, sales, and strategic marketing.

Annie Youngblood is the manager of business intelligence for Pillsbury Winthrop Shaw Pittman. At Pillsbury, Annie is responsible for maintaining and growing the firm’s business intelligence structure.

Prior to joining Pillsbury, Annie spent nearly a decade covering business and public policy on the local, state, and national levels for various news organizations. At the *Nashville Business Journal*, where she covered

economic development and legal affairs, Annie was instrumental in spurring public debate about tax-payer money and corporate incentives. Previously a congressional reporter in Washington DC, Annie reported on the intricacies of the legislative and budgetary process. A native of Virginia, Annie also worked at various news outlets including the *Charlottesville Daily Progress*, *The Roanoke Times*, and the *Blue Ridge Business Journal*. In Roanoke, she was a weekly guest on an NPR affiliate where she hosted *Business Talk with Annie*.

In 2007, Annie was a stringer for *Time* magazine during the Virginia Tech shootings. She is a magna cum laude graduate of Randolph-Macon Woman's College in Lynchburg, VA, where she holds a bachelor's degree in economics.