



The Changing State of the Legal Industry: Implications & Opportunities for Librarians

NOCALL 2011 Spring Institute

**April 8, 2011
Presented By
Camille Reynolds
Kathy Skinner**

What We'll Cover

- Some changes in our libraries
- Spotting & creating opportunities
- Reporting up



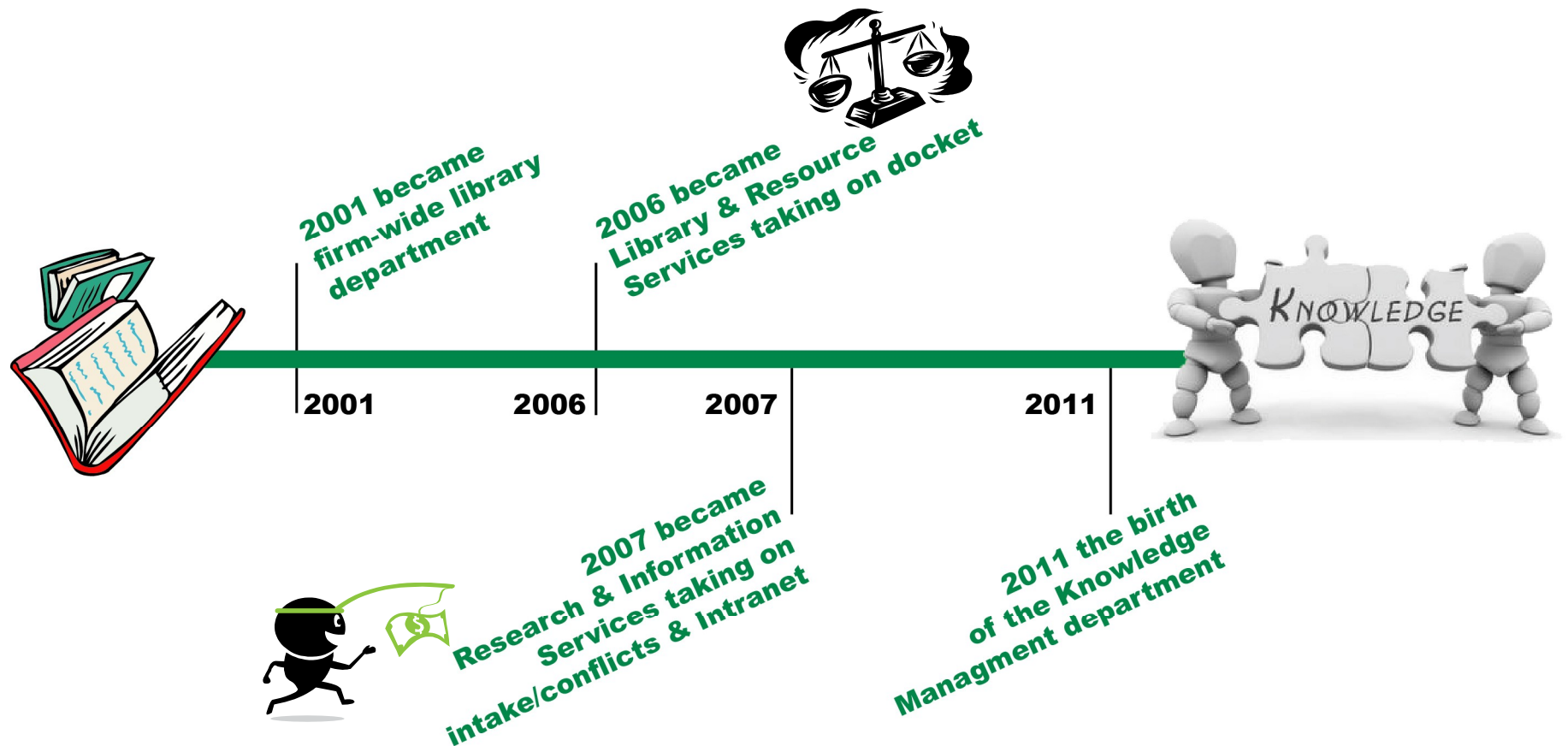
So, how do we really feel about change?

- new, innovative, leading, open, edge
- experience, do-it-like-we've-always-done-it, know
- younger
- elder, dues
- exciting, risk-taking, eager
- worry, impatience, problems, cautious

What change looks like in our libraries

- MoFo:
 - Research@mofo.com
 - Marketing/Library integration – new name!
 - Competitive Intelligence
- Nossaman:
 - **KM/CRM/DMS/Intranet (aka the library morphing into KM)**
 - Firmwide Library Inbox
 - Competitive Intelligence
 - Conflicts Intake Research

What change looks like in Nossaman's Library



MAKING IT HAPPEN.

Nossaman's Librarians



A word cloud featuring various services and terms associated with Nossaman's Librarians. The words are arranged in a cluster, with some appearing vertically and others horizontally. The words include: Intake, LibraryInbox, KM, Intranet, Library, Training, Conflicts, DMS, Research, Embedded, MCLE, Docket, and CRM. The words are in different shades of gray and black, with varying font sizes and orientations.

MAKING IT HAPPEN.

How to get started – building a case for change for Research@mofo.com

- **We have outgrown Outlook**
 - 1300 research requests per month
 - Current system is inefficient
 - Workload is distributed unevenly
- **We need to leverage our workforce and strengths**
 - Larger audience – work across offices like practice groups do
 - Leverage our talents, serve a larger audience
 - Expand our hours of service
- **We need to use our data to improve services**
 - Use data to cross-train, spot trends
 - Focus on high-value, complex, or specialized research

Research@mofo.com Home Page

MORRISON | FOERSTER

Welcome: Jessica Trenary

Type filter text: [A A ↺ ↻]

Self-Service

- Homepage
- Help the Help Desk
- My Profile

Reports

- View / Run
- Scheduled Reports

Research Request

- Research Staff Member
- Create New Request
- My Work
- Unclaimed
- In Progress
- Completed
- All

Research Staff Members

[Refresh](#)

Digital World Clocks

Local Time	Denver	New York	London	Brussels	Hong Kong	Tokyo
4:37:05 PM	5:37 PM	7:37 PM	12:37 AM	1:37 AM	7:37 AM	8:37 AM

WORLD CLOCKS

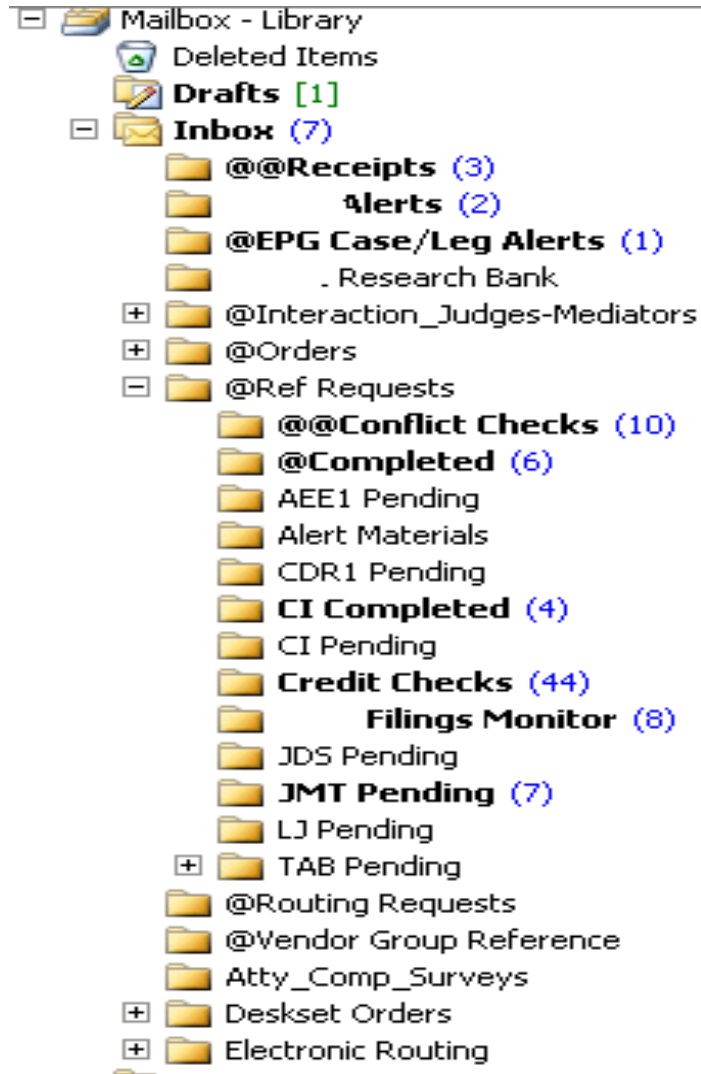
Unclaimed

Number	Requestor Name	Opened	Job Status	Priority	Claimed By	Office	Short description	Job Type
RESEARCH81915	Dinah Ortiz	2011-03-29 16:34:58	Unclaimed	Normal		Palo Alto	RESEARCH REQUEST: [REDACTED]	Research and Analysis
RESEARCH81913	David Brown	2011-03-29 16:32:58	Unclaimed	Normal		New York	RESEARCH REQUEST: [REDACTED]	Library Technical Services

My work

Number	Requestor Name	Opened	Job Status	Priority	Claimed By	Office	Short description	Job Type
RESEARCH81899	Colette Verkuil	2011-03-29 15:48:54	Completed	Normal	Jessica Trenary	Palo Alto	RESEARCH REQUEST: [REDACTED]	Library Technical Services
RESEARCH81871	C. J. McCall	2011-03-29 14:27:29	Completed	Normal	Jessica Trenary	San Francisco	RESEARCH REQUEST: [REDACTED]	Document Research and Retrieval

Centralized Library InBox



MAKING IT HAPPEN.

The River...

grab a paddle and jump in



- Managing the flow of knowledge & change
 - CRM InterAction
 - DMS
 - NERD
 - Service inboxes
 - Conversations
 - Relationships
 - Email

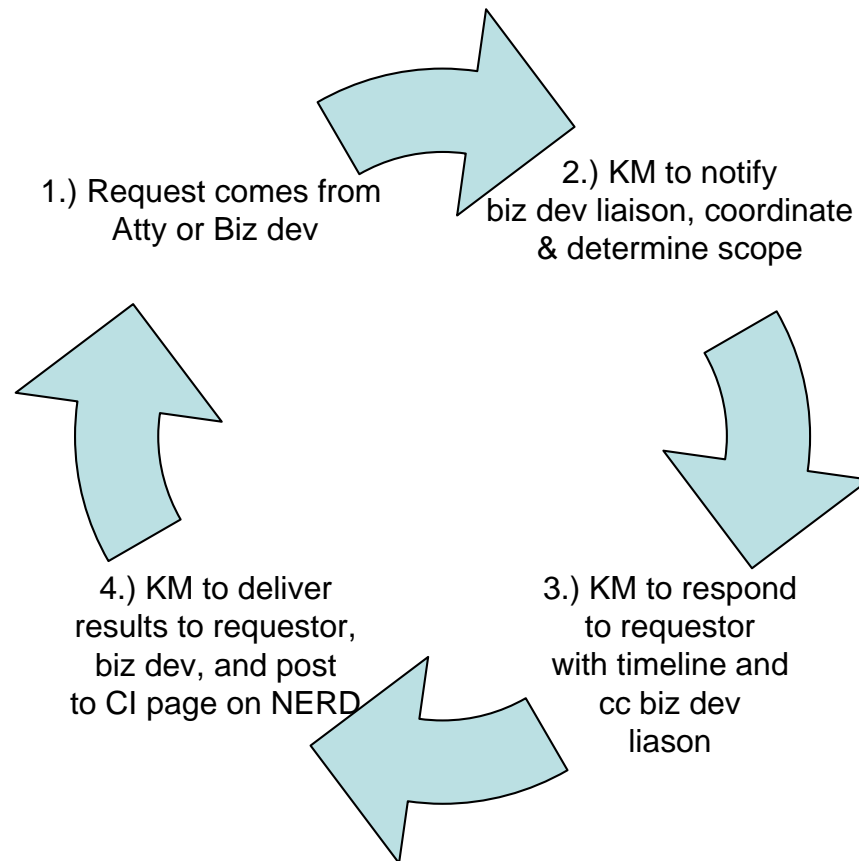
MAKING IT HAPPEN.

Spotting opportunities

- Opportunities come in strange packages...
- Even if you don't actively seek them, be open to them
 - Some examples...
 - MCLE
 - KM
 - United Way
- But trade up when you are given a better or different opportunity
 - MCLE for CRM
 - Intake/Conflicts for DMS (Enterprise Content Management)



Opportunity in Process Improvement



MAKING IT HAPPEN.

Reporting Up to Management

Why not to do it:

- It takes time and you have real work to do
- It's hard and can be nervous-making
- You are going out on a limb and you don't know how it will be received

Why do it:

- It's not really a choice

Just Do It!



Service Now – Library Implementation

As of: 03/18/10

STATUS

LAST THIS
PERIOD PERIOD

Overall Status:



Overall Summary:

The following teams have been formed to work on the library implementation of Service-now which is scheduled to go live to the firm on 8/1/2010:

- 1) process team
- 2) change plan team
- 3) workflow team
- 4) metrics team
- 5) steering committee
- 6) training and communications team.

All teams are on track to complete their assignments by their designated due dates.

Functional requirements and business summary have been compiled jointly by IT and library and have been submitted to developers.

Key Milestones

	Date	Comments
Complete Process Flow Charts	2/17	Done
Finalize Change Plan	3/17	Done
Functional Requirements & Business Summary to IT	3/17	Done
Complete detailed Training and Communications Plan	5/11	
Complete development phase	5/11	
Begin library staff UAT	6/1	
Go live to subset of attorneys	7/1	
Go live to remainder of firm	8/1	

Key Issues (with actions):

- Delay of development of hook into Carpe Diem which will streamline the process of time entry and improve realization of billable time. (IT has confirmed that it will be completed by the rollout of our UAT on 6/1. We will continue to address this with xxxxx and monitor progress.)



Numbers tell the story

A	B	C	D	E	F	G	H	I	J	K	L	M
RIS Request Tracking												
	Feb	March	April	May	June	July	August	Sept	Oct	Nov	Dec	TOTALS
Docket Requests	55	155	114	36	168	234	269	341	274	280	323	2249
Conflict Checks	55	151	113	1	12	108	114	161	192	117	110	1134
Matter Maintenance	136	718	435	1	9	307	292	151	273	174	176	2674
Research Requests	33	206	161	96	145	98	152	203	207	186	171	1658
CI Requests	2	12	1	1	6	4	27	15	13	5	7	93
NMM Review	0	0	0	0	0	0	2	0	20	102	20	211
Credit Checks Backgrounds	0	0	0	0	0	0	10	37	66	55	68	236
Intranet Requests	22	29	31	1	18	6	15	27	26	25	10	220
ID/PW Requests	5	6	16	0	5	2	7	8	13	9	4	75
Records Requests	0	0	0	0	0	0	0	1	0	0	0	1
TOTALS	308	1277	871	136	363	761	886	964	1178	871	936	8551

MAKING IT HAPPEN.

The rest of the story

By Matter Practice Group YTD February 2011

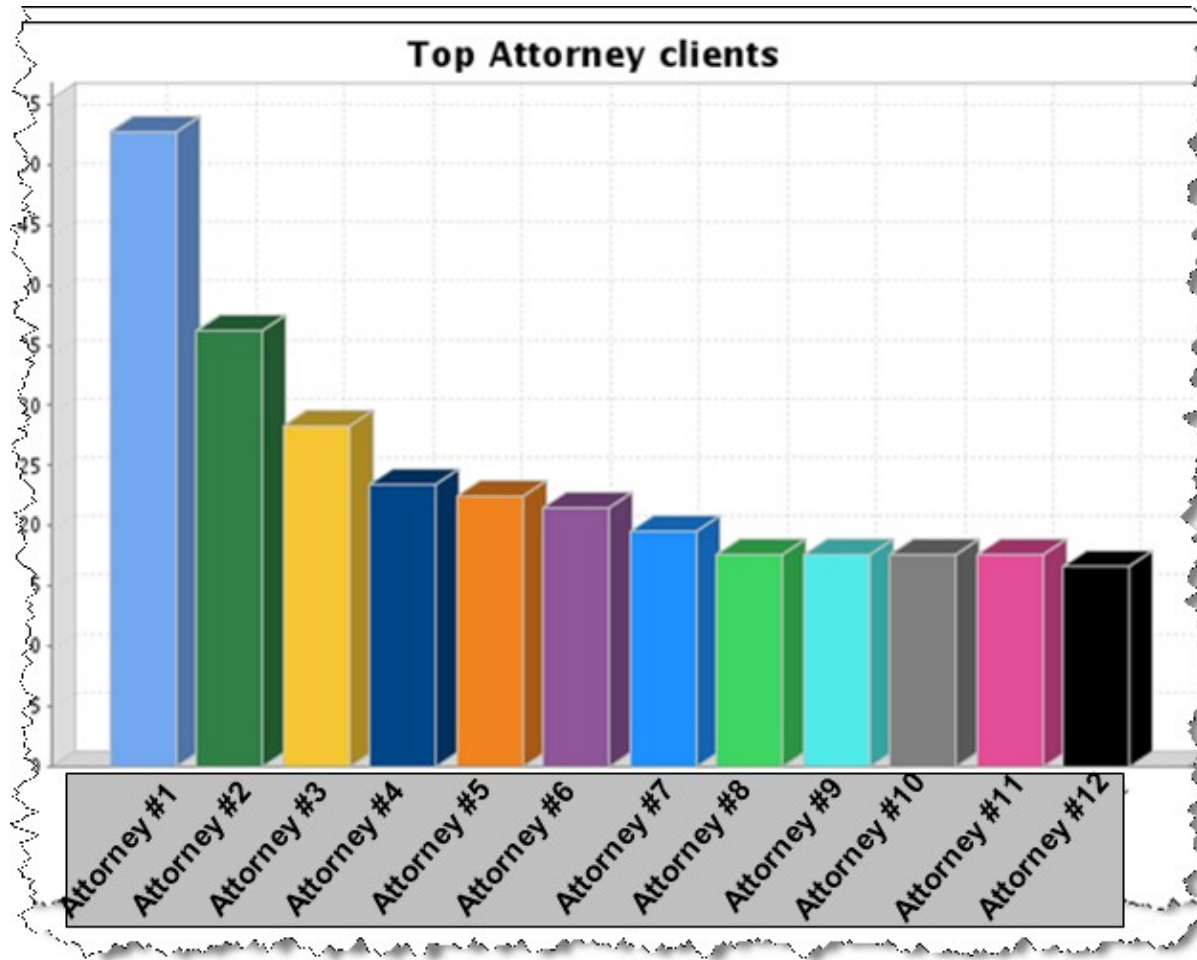
Practice Group	Jan	Feb	YTD Hours	% of Total
Library	428.9	294.4	723.2	31.1%
Records	191.1	362.5	553.5	23.8%
KM	158.0	272.8	430.8	18.5%
Docket	164.3	186.8	351.0	15.1%
Firm (General)	128.6	81.6	210.1	9.0%
Risk Management	5.4	16.8	22.2	1.0%
MCLE	7.3	3.8	11.0	0.5%
Infrastructure	6.4	2.3	8.6	0.4%
Marketing	4.1	3.2	7.3	0.3%
Financial Services	0.0	3.8	3.8	0.2%
Conflicts	1.6	0.0	1.6	0.1%
Land Use	0.0	1.5	1.5	0.1%
Public Policy	0.4	0.8	1.2	0.1%
Healthcare	0.4	0.0	0.4	0.0%
YTD Hours	1,096.2	1,230.0	2,326.2	100.0%

Knowledge Management Time Tracking Report By Activity Code YTD February 2011

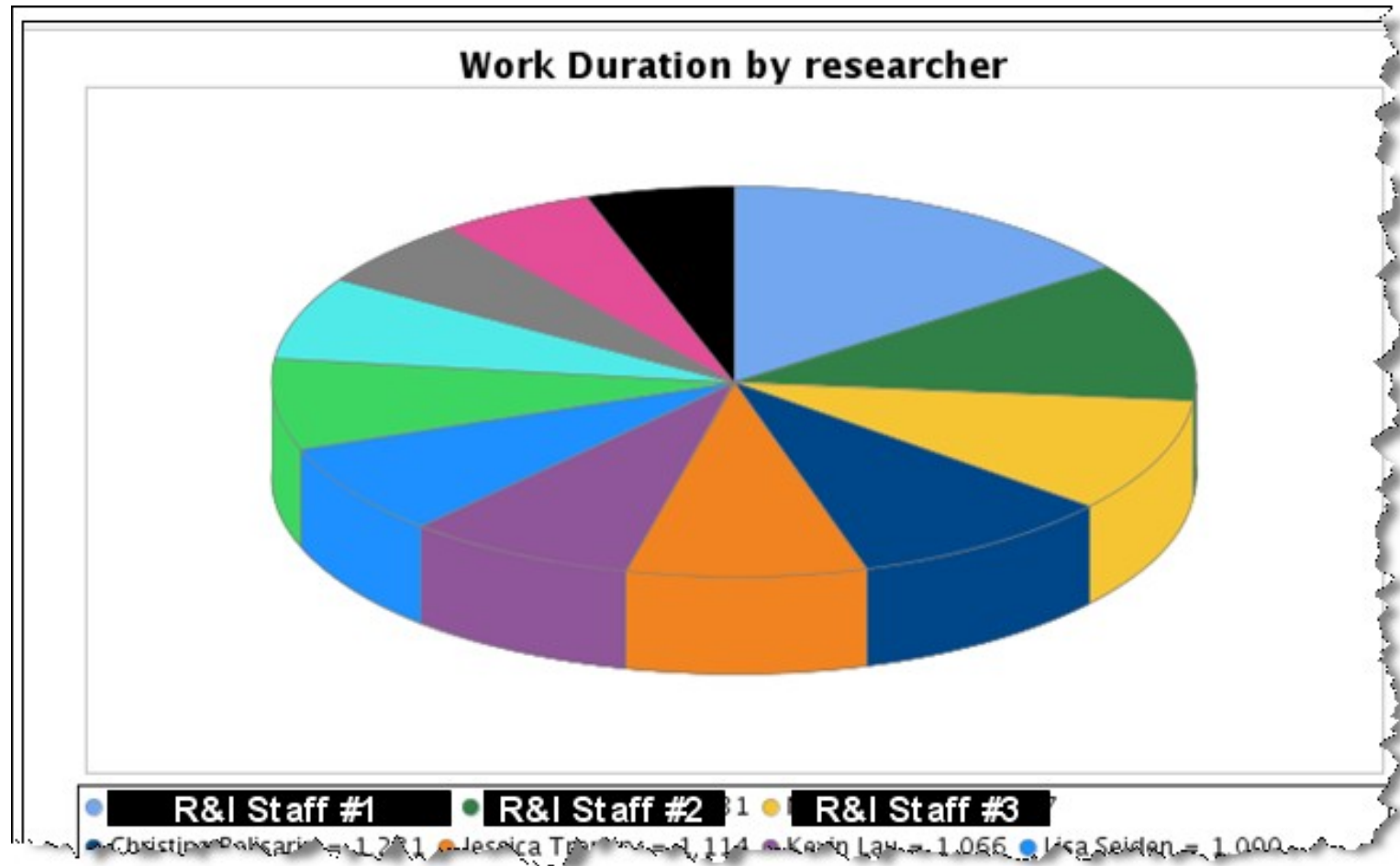
Activity Description	Jan	Feb	YTD Hours	% of Total
Administrative duties, review email and respond, answering questions not covered	186.5	195.4	381.9	16.4%
Docket calendar entries, portals, reports & responding to questions.	134.8	148.3	283.0	12.2%
Meetings: one on one's, non-training staff meetings, other meetings	120.3	155.3	275.6	11.8%
Rsch, non-billable & mktg non-billable. Mktg Bus Dev, Interaction rsch requests.	116.3	93.6	209.9	9.0%
Orientations, Tutorials, Training users on RIS services etc	129.2	23.1	152.3	6.5%
Management tasks: preparation of department reports for firm management, develop	83.0	44.3	127.3	5.5%
(blank)	4.0	113.7	117.7	5.1%
Library Maintenance, check-in, routing, reshelving, carrel tidying.	45.4	60.9	106.3	4.6%
Professional development, training sessions internal & external.	46.9	42.0	88.9	3.8%
Records General (create new folders, answer questions, pickup boxes for storage)	10.5	62.7	73.2	3.1%
Knowledge management tasks, developing taxonomies, working on KM strategies and	23.0	40.5	63.5	2.7%
Intranet development, documentation & training.	15.4	39.8	55.2	2.4%
Records Handling of boxes offsite (index box contents, update IMConnect, prepare	4.8	45.5	50.3	2.2%
Alerts, compile, setup/distribute news, dckt/rsrch alerts for attys/staff/mgmt	22.0	21.0	42.9	1.8%
Vendor contact & follow-up.	21.8	14.4	36.3	1.6%
Office/IT non-departmental duties (DC IT coverage, LA admin coverage	17.2	18.1	35.3	1.5%
Invoice processing, approval, research.	17.4	14.6	32.0	1.4%
Cataloging new titles, labeling new editions, updating LW records.	10.0	18.8	28.8	1.2%
Records Filing & Indexing.	14.5	13.0	27.5	1.2%
MCLE compliance & provider duties, locate materials in collctn, chkout MCLE mat.	22.2	3.8	26.0	1.1%
Competitive intelligence research and report compilation bill to PG Client matte	7.0	18.6	25.6	1.1%
Proposals & Interviews	14.5	9.5	24.0	1.0%
Interaction data entry and maintenance	6.5	14.0	20.5	0.9%
Budgeting, cancellations, cost recover analysis & reporting.	4.0	4.5	8.5	0.4%
Policy and Procedure development: creating, writing, editing, and revising polic	1.0	7.3	8.3	0.4%
Acquisition, book or library ordering, collection development.	3.3	3.5	6.8	0.3%
Records Input data into Records Database	6.5	0.3	6.8	0.3%
Interlibrary loan (both external & internal borrowing).	2.9	1.6	4.4	0.2%
Billable Research	1.6	2.1	3.7	0.2%
New Matter Review, Approvals and following-up and reviewing paperwork	2.0	0.0	2.0	0.1%
Conflict checking.	1.2	0.0	1.2	0.0%
Docket Research.	0.5	0.0	0.5	0.0%
Records Inventory folders remaining onsite (eventually will become periodical up	0.0	0.3	0.3	0.0%
YTD Hours	1,096.2	1,230.0	2,326.2	100.0%

MAKING IT HAPPEN.

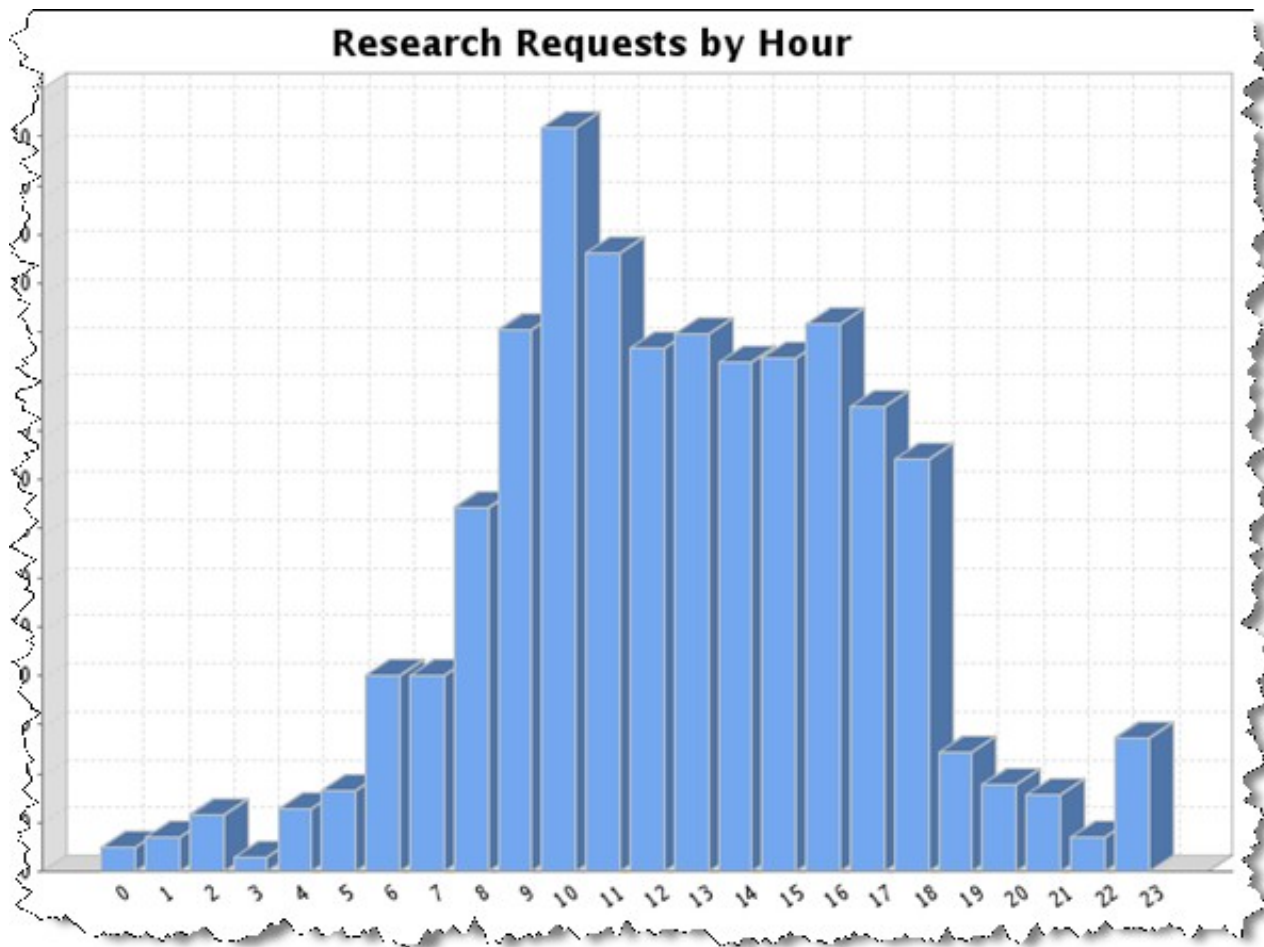
Top Requestors (Attorneys only) in March



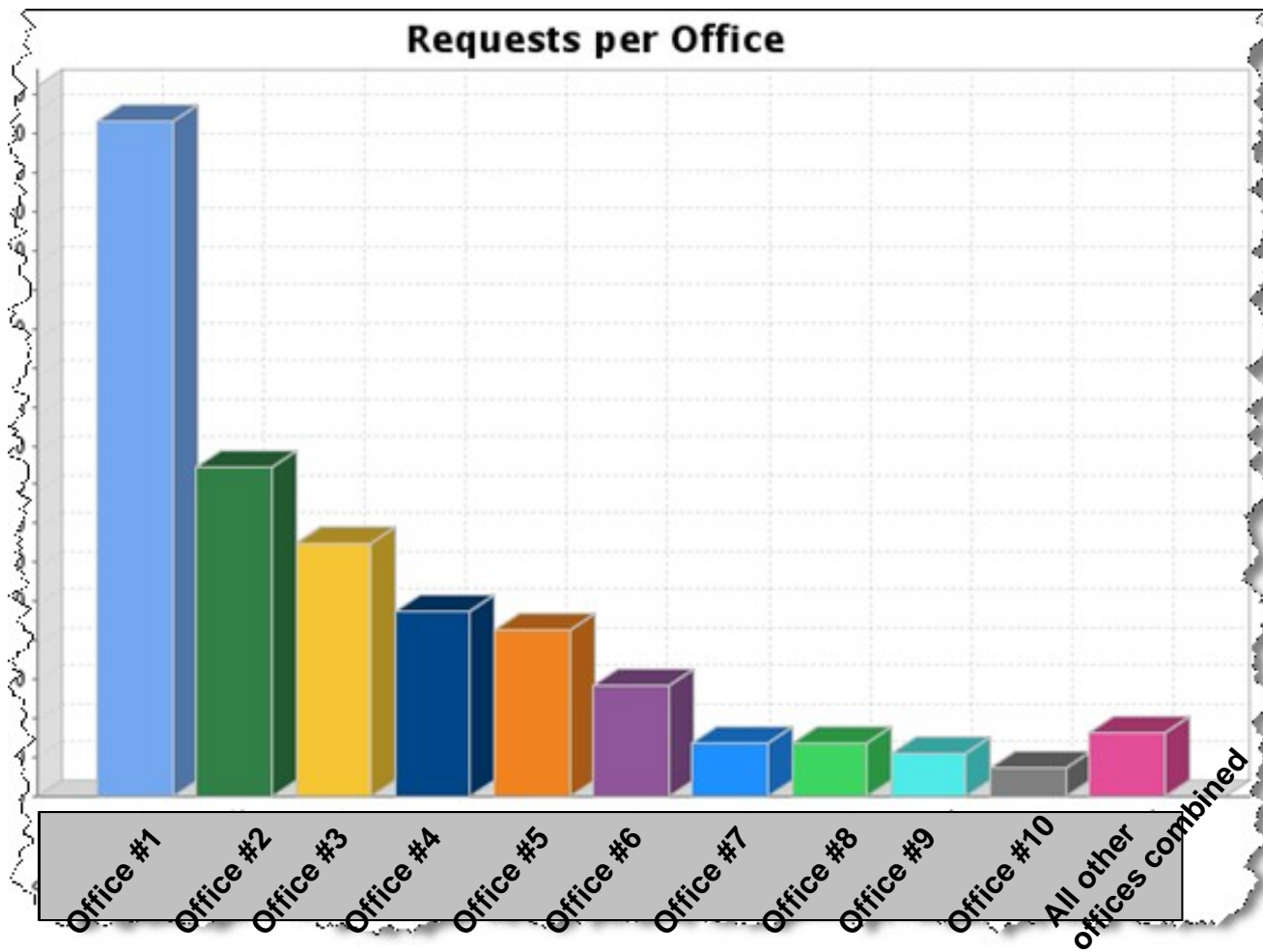
Total Work Duration by R&I staff in March



Requests by Hour (in Military Time) in March



Requests per Office in March



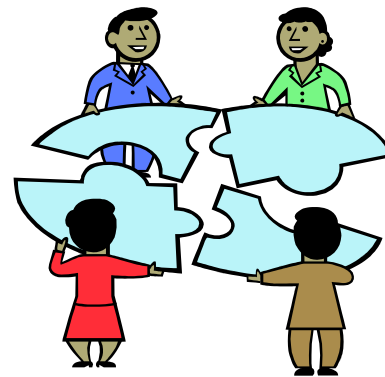
Play nicely in the sandbox

- You can't do it all yourself and you will need to work with other departments
 - Resources are tight and everyone is leanly staffed
 - Collaborate DON'T compete
 - Frequent concise communication is key to effectuate change
- Involve your team in the process and share in the success



Why are we here?

- To connect our users with the people, information and knowledge they need to deliver superior client service



MAKING IT HAPPEN.

Questions?

Thank you!

Camille D. Reynolds, MLS
Director of Knowledge
Management

creynolds@nossaman.com

www.linkedin.com/in/camillereynolds

www.nossaman.com

Kathy Skinner, MLIS
Firmwide Information Resources
Manager

kskinner@mofo.com

www.mofo.com