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— Guy Wiggins

*Director of Practice
Management,
Kelley Drye*

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Law Firm Increases Productivity with Better Enterprise Search

Kelley Drye is a New York City–based law firm with a long history in litigation excellence. It can trace its history back to 1836. Kelley Drye attributes its continued success to the expertise and hard work of its attorneys and other professionals who work together to prevent problems for their clients and to minimize the impact of those issues that do occur. The firm also recognizes the role that technology brings to building its competitive advantage. Kelley Drye makes extensive investments in knowledge management, litigation support, and work-product retrieval technology to continually drive greater efficiency, service quality, and client savings.

The Situation

In 2007, Kelley Drye began evaluating how it acquired and managed its software asset portfolio. The firm had been licensing software from different vendors as needed and, as a result, had built up a sizeable collection of third-party products. This piecemeal approach to software acquisition, which solved immediate needs, has its drawbacks. It is not cost effective to buy redundant software or pay for applications with overlapping capabilities, and it’s a drain on IT resources to ensure that heterogeneous systems work together. It is also difficult to administer a large number of licenses and vendor relationships.

Kelley Drye wanted to better align its IT investments with corporate strategies to improve employee productivity and customer service. But with the company’s heterogeneous IT environment, it was a challenge to gain a global perspective on the value of the company’s IT investments, let alone an understanding of how well they supported Kelley Drye’s vision.

That vision included providing the best possible IT tools and technologies to boost employee productivity, while incurring minimum support and maintenance costs. Kelley Drye also wanted to provide attorneys with a rich set of collaboration tools to facilitate teamwork and better offer the firm’s wealth of experience and capabilities to clients—even to the point of bringing in attorneys from other practices to pursue joint opportunities or proactively avoid issues for their clients.

Enterprise Search

Documents are the firm’s “lifeline” – they contain extremely valuable information. As repositories of the firm’s intellectual capital, the value of the company’s documents can be realized only by accessing and using their content. The same argument can be made for data stored in the firm’s line-of-business applications. Kelley Drye faced a real challenge in providing its attorneys and other professional staff with the tools they needed to search and access corporate documents and data stored in line-of-business applications, file shares, and email inboxes and archives.

Employees were frustrated with having to learn different search tools and techniques, which performed with varying degrees of success. During the course of a regular business day, attorneys may have to look for information in Aderant, the firm's time and billing system; LegalKEY, a records management solution from Open Text; and RealPractice's practice optimization software. And the search tool for the firm's Open Text document management system, which contains 60 million documents, returned different sets of results for the same key word.

"For those attorneys that spend a lot of time drafting documents, their productivity depends on how quickly they can perform research and find the information they need," says Guy Wiggins, Director of Practice Management at Kelley Drye. "We wanted a single search tool that would connect to all our line-of-business applications and expose the information uniformly." At the same time, Kelley Drye needed an intelligent search engine capable of serving content to employees according to the firm's security protocols, which are designed to avoid conflicts of interests between client matters within the firm.

Also, Kelley Drye wanted to deploy an enterprise search solution to reduce attorneys' reliance on the Microsoft Office Outlook 2007 messaging and collaboration client for content storage for content storage.

Kelley Drye had a clear vision for the technology tools its attorneys needed to maximize productivity and job satisfaction. These tools had to facilitate the communication, collaboration, document and knowledge management, and search activities that are integral aspects of attorneys' daily work. To better protect its attorneys' information and improve data access, Kelley Drye needed an end-to-end security solution that would interoperate with its existing technology. And for a company that prides itself on prudent fiscal management, Kelley Drye needed a cost-effective way to acquire and manage these technology solutions.

Solution

Since renewing its Microsoft Enterprise CAL Suite agreement, Kelley Drye has begun an eagerly anticipated enterprise search solution that takes advantage of search for SharePoint 2010 to provide a single, powerful, and scalable search tool for key line-of-business applications. Working with Microsoft Gold Certified Partner BA Insight, Kelley Drye is running a pilot project that showcases the deep, faceted navigational capabilities of SharePoint and the ability to perform conceptual searching of similar documents.

"The proof of concept is about integrating SharePoint with Open Text, Aderant, LegalKEY, and Real Practice," says Guy Wiggins. "Law firms are lucky in that most of what we do revolves around a client matter number, and that number is consistent across our major line-of-business applications, including our time and billing system and our records management system. The problem is linking them all together under one search solution."

"BA Insight's Knowledge Integration Platform is helping us do that. We are working with BA Insight to include its search engine optimization solutions that not only have the ability to search, say, Open Text, but also to connect to Aderant and Real Practice to expose additional results you normally wouldn't find in a document management system, such as industry codes and the billing attorney. And using the preview functionality, attorneys can efficiently preview documents returned in a search, and even search within the previews."

SharePoint enables searching of portal documents, file shares, other websites and Exchange public folders. This is a good basis to start from, but insufficient to meet the search needs of a law firm. Therefore, Fenwick & West continued to evaluate external search solutions based on Microsoft SharePoint technology and decided that BA Insight's Knowledge Integration Platform made the most sense for their requirements that included: speed, security, flexibility, and complete and relevant results.

Speed and Security

"We were happy to report that in our initial tests, SharePoint Search is quite fast. A search for a complex litigation term across three DMS document stores, our external website (SharePoint) and several line-of-business databases returned 2,560 hits in 1.22 seconds. And, making it faster is essentially a technical problem that can be addressed by adding hardware and/or segmenting content sources," recalls Mark Gerow, Director, Applications Development and Business Process.

SharePoint relies on one of two mechanisms for securing search results so that only the appropriate people see the items they are allowed to see; either ACL security or real time security trimming. ACL security is highly scalable, but cannot be used easily to secure non-AD based systems. Real time security trimming is non-AD dependent and can be used to secure most systems, but is limited to

only the first few hundred results. Neither alone is sufficient for a law firm with millions of matter items spread across multiple systems, where security can change by the minute.

"Being able to combine the two security models was paramount to the success of our enterprise search implementation. We were able to include our non-AD systems in the SharePoint index securely and handle searching millions of documents without performance lag," says Gerow. "Shortly after release of the DMS search component the portal team received calls questioning whether SharePoint Search was reflecting the underlying DMS security policy. In each case, the research showed that SharePoint was faithfully reflecting the underlying policy."

Breadth and Relevancy

A key element to deploying a complete enterprise search solution rests in the ability to connect to the firm's enterprise systems. Fenwick & West required the ability to index their Hummingbird DM and Interaction CRM stores for search in SharePoint in order to present a complete set of results to attorney and staff searches. Speed and security accounted for, Fenwick & West sought to further improve the relevancy of these results.

Prior to indexing, firm administrators can leverage data relationships across multiple systems to extend the searchable metadata. Through simple formatting and also advanced scripting options, administrators can tailor the data to any format.

"The incorporation of DMS and database content sources has allowed us to make SharePoint a one-stop-shop for our user's search needs. In an information intensive profession such as legal this leads to significant time savings which translates into better service for our clients," explained Gerow.

To further enhance the relevancy and usability of Search, Fenwick & West implemented an improved search interface. When users receive results, they will be presented with the most relevant page in the document immediately for preview. Then users can take immediate action on data directly from the search result by clicking any of the links presented in the result.

Benefits

Kelley Drye is excited about the productivity-enhancing potential of its enterprise search solution. For the first time, attorneys will be able to use a single solution to search for information across all SharePoint sites and five line-of-business applications. Using BA Insight's Knowledge Integration Platform to leverage and enhance SharePoint search, Kelley Drye attorneys will experience a paradigm shift in their ability to access and find information.

With the solution, search also becomes a navigational tool for attorneys to link directly to SharePoint pages with relevant content. After performing a search, it is possible to look up a specific client matter directly from the search interface by clicking on a link that takes the attorney directly to the SharePoint site with a synopsis of that client matter. "I have been waiting years to see these kinds of results," says Wiggins. "The enterprise search solution we are building with BA Insight is a truly next-generation platform that blows away everything that I've seen from a search perspective inside the enterprise."



BA Insight provides software that enables organizations to rapidly implement powerful search-driven applications at a fraction of the cost, time, and risk of other alternatives. With our Knowledge Integration Platform, our customers deliver a remarkable user experience, classification, and connectivity to a wide variety of systems. It can function as a comprehensive solution or be implemented in a phased approach to meet growing organizational needs.

We serve visionary organizations such as ADP, Australia Department of Defence, Bayer, Chevron, ConocoPhillips, Deloitte, Ford Motor Company, Green Mountain Coffee, Pfizer, Rio Tinto, The Procter & Gamble Company, U.S. Army, and the U.S. Department of Veterans Affairs.

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