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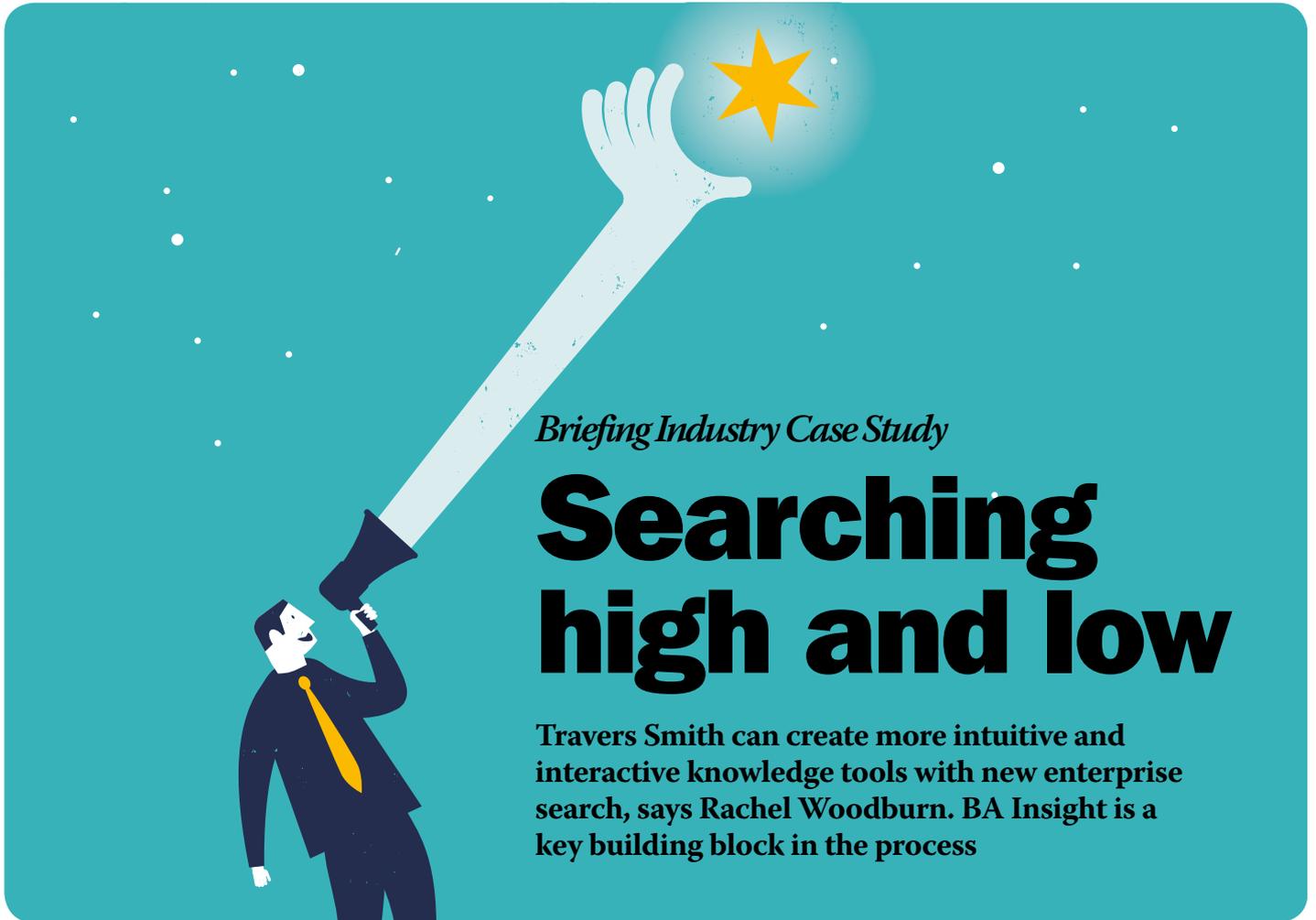
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Briefing Industry Case Study

Searching high and low

Travers Smith can create more intuitive and interactive knowledge tools with new enterprise search, says Rachel Woodburn. BA Insight is a key building block in the process

As the number of knowledge stores at a firm increases, capability to search across repositories as seamlessly as possible always needs to keep pace.

But Travers Smith had reached a point in its development where it needed something really new, says head of professional support Rachel Woodburn.

“A software upgrade meant that our search functionality had basically stopped working as it should,” she says. However, this seemingly dramatic situation also handed the firm the perfect opportunity to improve what was business as usual on the knowledge-filtering front.

“Over the years we had built up a very large number of different sites and siloes across different document libraries. People were already finding it increasingly hard to find what they were looking for when they needed it.

“We realised that people today are much more agile with knowledge. It’s contained in our client matter-related documents, in the intranet and also in emails.”

Fee earners had particular trouble locating important emails, she says. “We all know those ‘where did I put that email?’ moments well. And thousands and thousands all went through bulk filing automatically. Trying to retrieve just one was like looking for a needle in a haystack.

“What we needed was to be able to filter by creator, client matter, date and topic – and with the search engine pointed not just at traditional knowledge, but also at client matter-related documents and emails.”

Total effect

The solution was therefore to move from standard document search to enterprise search – and the firm turned to BA Insight for the necessary knowhow to make it happen. The concept and end-result is known as TotalSearch internally, says Woodburn.

This is a search system built on SharePoint

combined with BA Insight technologies – a one-stop search system available to any person at the firm. Anyone can search across all the document management systems, including knowledge, precedents and client matter documents. TotalSearch also includes file shares, emails, the firm’s intranet content, and external online systems such as Practical Law.

Finding an email that was sent to ‘John at client X,’ say six months ago, and with the term “liability” in the subject line becomes a point-and-click operation, explains Woodburn.

But it’s also just the first phase of a much bigger project. Now Travers is set to carry the search on to its new SharePoint intranet. TotalSearch has merely made people more efficient by saving them time. The intranet functionality has the potential to change how they work, she says.

“By creating new portals we will be able to present information to our people in different ways. TotalSearch will be able to pull information from various document libraries – accounts, client relationship management and document management system – out onto a single intranet page.

“Creating a dashboard for everything relevant to particular legal topics and practices is especially exciting for the knowledge managers at the firm. We could use TotalSearch to pull in knowhow on the Bribery Act, for example – rather than manually uploading each item.

“In the case of a client we could pull in information from the CRM and accounts systems to interrogate their key documents, or the total number of open and closed matters, and who’s working on what.

“There are definitely going to be some big gains. We’re not there yet, but we couldn’t do it at all without TotalSearch in place.”

Searches with a smile

Woodburn says it was BA Insight’s potential to pave the way to this more interactive future that gave it the ultimate edge over others.

“We carried out quite an extensive internal trial of two vendors’ systems with a sample of associates, trainees and partners. They road-tested both for a few

weeks, but it was the potential for future development available with the BA Insight tools that really decided things for us.”

But she stresses that TotalSearch was more than an IT project. It was developed collaboratively with a team of legal professionals and IT implementers working alongside each other. Together, they decided on the details that would make the difference. “For example, do we want to see the precedent document keywords in

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Rachel Woodburn, head of professional support,
Travers Smith

the search results? Should those keywords be weighted higher?”

In addition to the system of more segmented internal portals, she says the future may also involve opening carefully chosen content up to clients.

“We already have a few SharePoint client extranets – and being able to link all these ideas together is probably closer to the way we’ll all be working in future.”

Until that day the daily grind of searching for “stuff” is simply simpler – which mostly means a lot more smiles all round.

“The efficiency gains are impossible to quantify in a meaningful way at the moment,” says Woodburn, “but I can say we have definitive thumbs up from associates – for finding their things that much faster, and even things they just couldn’t find at all before.”

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