



AT A GLANCE: Where should KM information be stored and accessed: Outlook or portals?

By Lisa Kellar, Practice Automation Manager,
Hunton & Williams, L.L.P., Washington, DC

MS Outlook: KM Friend or Foe?

"[F]irms are focusing on making KM more transparent,... leading to improved adoption and sustainability."

Knowledge Management (KM) efforts have finally become mainstream in the legal market. Although the level of sophistication and completeness may vary greatly, and although many firms don't even use the dreaded KM acronym, most firms are in fact managing at least some of their institutional knowledge. But many firms are realizing that first attempts at managing knowledge have had less than ideal results, often due to the extra steps required to use and maintain KM processes. For the next generation, firms are focusing on making KM more transparent, where it is simply a part of conducting business, leading to improved adoption and sustainability.

One of the more difficult questions to answer is where KM information should be stored and accessed. Because studies show that attorneys spend the largest amount of their workday in e-mail, doesn't it make sense that Outlook® should become the KM platform? Is this even possible? What are the drawbacks? A variety of recent legal blogs, list-servers, articles, and webinars have focused on this issue. People tend to be much divided, falling into one of two camps: the Outlook as KM camp and the Portals Are Still the Best KM Tool camp.

Thoughts from the Outlook as KM Camp

In a recent article, Tom Baldwin (Sheppard Mullin Richter & Hampton LLP) observed that many lawyers are comfortable with Outlook. Because of that and the well-known difficulty drawing attorneys into training on new products, he concludes that it might be advantageous to develop enhanced capabilities within Outlook. "Most of an attorney's clients are already in Outlook, in one form or another, and Outlook 2003 seems to hold a lot of promise for making it easier to embed data from disparate systems into it."¹ In a recent AmLaw Tech profile, Warren Jones (Pillsbury Winthrop Shaw Pittman LLP) characterized his firm's knowledge management approach as one based upon the firm's e-mail system, which allows lawyers to drag and drop their files and e-mail messages into a

firm database much as one moves messages into a personal Outlook folder. "It took lawyers a long time to learn Outlook—why ask them to leave that environment [for knowledge management]?"²

Regardless of whether Outlook is your primary place for KM or not, certain solutions appear to be a natural fit with Outlook. Raquel A. Holder (Snell & Wilmer L.L.P.) points out that her firm deploys InterAction, which allows attorneys to use Outlook Contacts while at the same time sharing their non-personal contacts in a firm-wide view. Noting decreased redundancy and improved accuracy as a result of the integration, she says, "It is possible for attorneys to do almost everything in Outlook while still maintaining the integrity of our InterAction database."

Another clear fit is using Outlook to locate experts. Haynes & Boone is looking at using Tacit Mail, which "examines e-mail stores and taxonomizes the information so that people can ask 'who knows' type questions," explains Thomas P. Wisinski. Other firms are making efforts at capturing the in-search-of e-mails so they can be searched and reused.

Outlook and DMS integration may make a good fit also, since e-mail and documents represent most of an attorney's work product. For example, "Interwoven provides a tool that stores and profiles e-mail along with documents, and integrates the DMS with Outlook so you are working inside both at the same time," says Don Oppenheimer, a Senior Consultant with ii3, Inc.

The basic capability of Microsoft Exchange is a limiting factor on Outlook's potential as a KM tool, however. "IT managers are exasperated with the amount of data lawyers dump into their mailstore. It is now not uncommon to hear of lawyers with 10GB of data stored in Exchange. The architecture behind Exchange was never intended to house this much data," said Theresa Grote (Dinsmore & Shohl LLP) during a recent ii3 webinar.³

Many firms rely on Exchange public folders as the filing mechanism for KM. This is a temporary solution at best, as Microsoft has announced it will eventually phase out public folders from this product.

Thus, the view has emerged that Outlook cannot be scaled up to an enterprise-wide KM environment. Mark Boggis (Clifford Chance LLP) strongly agrees: "In its current form Outlook is next to useless in KM terms, but it is not going away. It has its tentacles deeply embedded in every process the law firm has, but needs to be focused back on being a communication platform, not a collaborative platform."

Thoughts from the Portals Are Still the Best KM Tool Camp

Those who felt strongly that KM does not belong in Outlook most frequently cited portals as a better solution. "To me, integrating CRM, Outlook, Document Management, external news, company profiles, and other content via a Web portal makes more sense than to try and access all of those services via Outlook," says Nina L. Platt (Faegre & Benson LLP).

Portals' searching capability usually far exceeds that of Outlook. Don Oppenheimer concurs, "Portals, like SharePoint, are far better tools to search, categorize and aggregate content from diverse sources of knowledge than Outlook is or was ever intended to be." Portals usually provide for taxonomy too, another way to locate information not easily done in Outlook.

Both John Halbleib (Mayer, Brown, Rowe & Maw LLP) and Oz Benamram (Morrison & Foerster LLP) are waiting to see what will shake out of Microsoft's much-anticipated Longhorn, the next operating system upgrade. It will add relational database capabilities to the file system, which should vastly improve the speed and ability to find documents, e-mail, and other data. They are also interested in the promises of SharePoint and Groove. (In March 2005, Microsoft acquired Groove, which "will change the way people collaborate in Outlook".)⁴

Let Them Have KM Cake and Eat It Too

There is third position. Many people feel that a solid universal search engine or work product search engine will largely negate or at least greatly reduce the need to spend time identifying, coding, and organizing firm knowledge. Products such as Recommend, WestKM, LexisNexis Total Search, and Practice Technologies Inc.'s Real Practice not only allow you to search, but provide ways to pivot views of data, offer multi-faceted searching, and allow for automatic classification of information. These tools are becoming much more commonplace in the legal market and may drastically affect the Outlook versus portal debate. ●

1. Tom Baldwin, "Knowledge Management: Looking out for storage," Legal IT, www.legalit.net/ViewItem.asp?id=22364.

2. Amy Kolz, "Spending Wisely on Technology: Law firms are starting to invest in upgrades, but only those with quick benefits," AmLaw Tech (09-23-2004), www.law.com/jsp/article.jsp?id=1095434447140.

3. Transcripts of the webinar and the Q&A portion of it can be found at www.ii3.com/webinar/101404/.

4. Microsoft, "Groove Networks to Combine Forces to Create Anytime, Anywhere Collaboration," March 10, 2005, www.microsoft.com/presspass/features/2005/mar05/03-10GrooveQA.msp.