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PRACTICE

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WEST
GROUP

A THOMSON COMPANY

INNOVATIONS

MANAGING IN A CHANGING LEGAL ENVIRONMENT

Corporate Taxonomist

NEW ROLE or CATALOGER REINVENTED?

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BY MARY CORCORAN VICE PRESIDENT, OUTSELL INC.



MARY CORCORAN

Suddenly, corporate taxonomies are hot, hot, hot! What is a taxonomy and what role should the information professional play in its development?

A taxonomy is a form of categorization. It is a hierarchically ordered, systematic list of the subject matter, organized by keyword or term. Online taxonomies enhance information search and retrieval by providing structured content organization and multilayered access via directories and menu selections. The hierarchical data relationships within a taxonomy allow users to easily broaden or restrict their searches, as well as look for related information. Taxonomies also drive the way information is displayed to users.

The output of a taxonomy project is an authoritative list that provides the terms and definitions your organization will use to classify its content. At a company or organizational level, the taxonomy must accommodate the viewpoints and content sets of multiple populations, including employees, suppliers, and clients.

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Corporate Taxonomist: New Role or Cataloger Reinvented?

cont'd from p1 Taxonomies are not new to librarians, who have traditionally developed and used classification systems to describe the subject matter of their collections. Today, however, taxonomies address more than library or document collections—they provide a structure for content management at an enterprise or intra-enterprise level. Corporate information professionals are now jumping on the taxonomy development bandwagon. The unique training of content classification experts is especially valuable at a time when companies are beginning to implement portal strategies and struggle with unwieldy intranets that often do not behave like the Web.

*“The time has never
been better to put your skills
of organization to work to benefit your firm.”*

Increasingly, we find taxonomies being developed that will support the needs of internal and external Web initiatives. In other words, the taxonomy becomes the common language upon which the content management and architecture rests, regardless of the organization’s intended venue, e.g., intranet, extranet, or portal.

Building a taxonomy across a corporation can bestow an additional benefit by clarifying the company’s organization, both internally and within its external supply chain. Knowledge-management groups often use the building of a taxonomy as a change agent for the organization itself. If the organizational chart doesn’t make sense as a way to describe who fits where, the executive team may consider either reorganization or new organizational models to fill in gaps identified by the taxonomy. The taxonomy also provides a common language that can be shared across an organization, furthering organizational goals of knowledge management.

Why a Taxonomy?

A wave of interest inside organizations often results as an organization’s content is moved to a portal environment. Generally speaking, portals seek to create easier ways for employees, students, and faculty to get content from disparate sources at their point of need. The taxonomy provides the organizing framework for the content and facilitates access for users. Simply put, a taxonomy connects users with relevant content by having a common language to describe the subject matter of that content.

Information professionals have built taxonomies to classify documents—primarily external content sources or special collections of internal content such as research

reports or primary research documents. The organization-wide taxonomy simply expands the work of classifying content to new content repositories and to users throughout the organization.

Portal companies have created awareness of taxonomies among information technology (IT) professionals. Some companies build a rough organizational framework directly into their portal platforms. And users see a huge gap between their successful information experiences using Web search engines and their intranet environments. Using Web search engines such as Yahoo or Google, they find content organized into categories that make sense. Using their internal online environments, access is often haphazard and the infrastructure for managing content is often weak, disparate, or nonexistent.

In both the corporate and academic information environments, taxonomies help serve local needs and also ensure that critical content can be leveraged and reused in new contexts.

The Key Ingredients to Taxonomy Success

Cooks understand that the secret ingredient to a successful meal is careful preparation. The same rule applies to a taxonomy project; go into the project with eyes open, a game plan, and knowledge gleaned from failures and successes in past taxonomy projects.

Outsell Inc., a company that has done extensive work developing a taxonomy for the information content industry, has assembled a list of the overarching principles of preparation and development:

UNDERSTAND YOUR GOALS AND TARGET AUDIENCES

Every organization and every digitization project has different user communities, goals, priorities, projections, funding, and organizational structures. Successful taxonomy projects must determine what level of cost and benefit is desired.

THE TAXONOMY IS NEVER FINISHED

The taxonomy is never complete. It's a dynamic document that evolves over time. Building the perfect, exhaustive taxonomy is futile. Focus on content that users care about, and develop a schema for the key terms that classify those content sets. Just get started, because the objective of building the exhaustive, definitive, finished taxonomy will never be attained. As one taxonomy expert put it, "Ask yourself the question: Will this term be used? Does anyone care?"

INCLUDE SUBJECT MATTER EXPERTS

The taxonomy team must include experts in technical domain knowledge and business processes.

The successful taxonomy project leader will speak three languages:

1. Technical Knowledge
2. Business Process
3. Information Categorization

The project leader must be able to assemble the right mix of folks to support these three knowledge sets and, at the same time, understand the language of the organization.

BORROW, BUY, AND BUILD

Don't build if you can buy or borrow. The following are all possible sources for taxonomies: commercial content vendors, portal platforms, published controlled vocabulary lists that are available as open standards, and taxonomies that have already been developed in your firm or information center. However, all these lists will need to be rolled into an overarching list and rationalized across many different groups.

THE TAXONOMY PROJECT LEADER OWNS THE LIST

As a dynamic document that will function as your organization's content classification authority, the taxonomy needs to be maintained and updated over time. An explicitly recognized leader is essential to maintaining the taxonomy over time. The taxonomist is the "go to" person for changes requested by other people in the organization. That person also proactively looks for changes in the organization, such as new product lines or areas of practice and adoption of new business processes.

DIFFERENTIATE BETWEEN CONTENT AND FORMAT

The taxonomy is used as a scheme to describe content—that is, the subject terms. The overarching metadata scheme describes the content types, formats, and locations. Taxonomy developers often confuse these items.

cont'd on p12

We face an Everest of legal information every day, and conquering this information presents many challenges. One challenge—that of classifying and organizing documents so users can easily retrieve them—can be addressed through the application of a taxonomy. But a taxonomy alone doesn't resolve other important issues, such as how to store, share, and efficiently search that information. Extensible Markup Language (XML) is a new technology that can help.

BY DAVID S. SMITH
M.S. CANDIDATE IN LIBRARY
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CONQUERING THE MOUNTAIN

STORING, SHARING, AND SEARCHING LEGAL DOCUMENTS WITH XML

The beauty of XML lies in its simplicity. XML is not a software program or Web-based application, nor is it a programming language. XML is a *markup* language, which means it's a way of identifying structures within documents. Data (i.e., content) and metadata (information about the content) reside within document structures such as a header, title, or section. The document becomes object-oriented, in the sense that document structures become objects that can easily be manipulated online.

You may be familiar with Hypertext Markup Language (HTML), which is ubiquitously encountered on the Web. HTML differs from XML in two key ways:

- HTML tags (for example, <H1></H1>) identify structures (in this case a level-one heading) as well as indicate how the enclosed text should be formatted. While XML tags also convey information about structure, they provide no indication of formatting. In the XML world, content and format are separated.
- The other major difference between HTML and XML is that HTML authors use a set of predefined tags. XML authors, on the other hand, specify, create, and define their own markup tags to indicate structures.

Let's look at how XML can help alleviate three challenges that arise from an overabundance of legal information: storing, sharing, and searching documents.

Storing

- By separating content from format, XML allows for greater compression of electronic documents than HTML. XML documents are stored as simple text files (with an .xml extension).
- Data stored in legacy systems can often be easily extracted and converted into an XML configuration, thus making it accessible via updated technologies.
- XML also benefits e-filing, which involves storing and transmitting electronic documents in as little space as possible.

Sharing

Besides saving space, XML makes document sharing easier for several reasons:

- The lack of formatting means that an XML file can be viewed on most computers.
- The same document can be offered to different audiences in different ways. This is accomplished through style sheets that specify formatting rules. For example, style sheets can produce an e-file version to submit to the court, an HTML version to post on your client's extranet, a version that can be viewed on a lead partner's personal digital assistant (PDA), and a printed version that can be handed to opposing counsel. The style sheets change; the content remains the same.
- XML uses DTD (document type definition) to create rules that govern the structure of documents. DTD allows document authors to specify the structures that appear in particular types of documents, how often those structures appear, and in what order. To make DTD effective for sharing documents, however, certain standards need to be established requiring certain types of documents to follow structural rules.



DAVID S. SMITH

Searching

In addition to document storage and sharing advantages, XML enhances search capabilities. By adding structural identifiers (that is, tags) to the different parts of a document, XML enables users to perform complex searches without requiring extra work to indicate different search fields.

cont'd on p12

Law firm libraries have long supported law firm marketing by responding to requests for information about companies and industries from the firm's marketing department and the firm's lawyers. While this traditional role continues to be important, changes in the competitive nature of the practice of law have prompted some firms to ask their library staff to provide new resources that enhance the firm's competitive advantage.

NEW MARKETING RESEARCH RESOURCES

BY NINA PLATT FAEGRE & BENSON LLP

Monitoring Company and Industry News

As law firm marketing becomes more sophisticated, the needs of those involved in the marketing process change. Today, marketing staff and attorneys need current, reliable news about clients and prospective clients. They also need to know about the events that drive their clients' businesses and industries. To accomplish this, firms are using technology to set up news monitoring services that deliver relevant news to individual e-mail boxes or the firm's intranet. Depending on needs, the monitoring can be done using tools as tailored as news from Dow Jones Interactive® via WestIntraClip™ (for print media) or as broad as Burrelle's Information Services (for broadcast, print, Web, etc., monitoring).



NINA PLATT

Specialized Monitoring

Some firms take monitoring a step further by using technology to monitor specific types of information. For example, a firm can track Securities and Exchange Commission filings, trademarks, patents, or court filings through various services, such as LiveEdgar, Markmonitor, Dialog®, and CourtLink, respectively. These services allow firms to respond proactively to their clients' needs.

Directed Access to Company Information

Until recently, the use of company information by law firms was generally not too sophisticated. Attorneys would call the library and ask for "all the information you can find on a company." There was a time when that may have been a realistic request. Today, no one really wants "all" the information. Instead, libraries are developing tools that assist marketing professionals and attorneys in defining their needs.

For example, the library staff and marketing department in one Midwest firm have worked together to develop a "Company & Business Information Request Form" and make it available on the firm's intranet.

An information-seeker within the firm can choose the "Get Smart" packet, which includes the type of background information a partner would need when meeting with a prospective client, or choose specific types of information from a menu of options. The menu offers options for information regarding corporate structure, directors and officers, description of company, competitors, rankings, Standard Industrial Classification codes for type of business, address and phone numbers, subsidiaries, locations, number of employees, counsel, accountants, revenue, and more.

When a request is received, the library staff uses various resources (e.g., Dun & Bradstreet, FIS Online, or Hoovers Online) to compile the information.

Other Marketing Resources

While many firms focus on gathering external marketing information, they also look inward for information. Following are some examples:

- One West Coast firm developed a client/matter-centric intranet that allows attorneys and staff to view client information from internal and external sources drawn into a single portal. For example, one can view a Web page displaying the client's name and listing all current or past matters by practice area. The result is increased knowledge about the ways in which the firm is engaged by the client and where cross-marketing can be done.
- An East Coast firm relies on its library staff to pull together statistics on deal flow, legal representation, and rankings. This information is used in newsletters and client presentations, and at the annual partners' meeting.
- Other firms gather client content for their firm's intranet, extranet, and Internet sites. In one instance, the firm developed intranet pages that centralize information about a client for the attorneys and staff who are working with that client. In another firm, a resource was developed that allows the client to track news about its own company and industry via the firm's extranet.

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David W. Maher

SONNENSCHN NATH & ROSENTHAL

BY KINGSLEY MARTIN

WEST GROUP ADVISORY BOARD MEMBER

David Maher is someone you should know. A partner in the Chicago office of Sonnenschein Nath & Rosenthal, Maher epitomizes what once was known as a gentleman's profession, and he is a force in the cutting-edge world of the Internet. He is truly an information innovator, a person who has deeply considered the importance of technology to the legal profession.

Background

Maher's education is impeccably crimson, having attended Harvard School for Boys in Chicago, followed by Harvard College and then Harvard Law School. He is a member of

several professional groups: the American Bar Association; the bar associations of Illinois, Wisconsin, and Chicago; the American Law Institute; the American Intellectual Property Law Association; the Computer Law Association; the Intellectual Property Law Association of Chicago; the Licensing Executives Society; the American Association for Artificial Intelligence; the International Trademark Association; and the Internet Society. For a number of years he taught communications law at DePaul University and

Loyola University Law Schools. He is currently a member of the Visiting Committee to the Divinity School at the University of Chicago.

To know David Maher is to understand the depth and diversity of his interests. Later this year, for example, Maher's article about Roman numerals will be published in *Classical Philology*. The article is a study of Latin literature, describing how the Romans used their

number and fraction system. Maher is also an expert on the life of Mozart.

Maher exemplifies the traditional practice of law—a profession held in high standing. He recently received the Illinois Better Business Bureau's Torch Award, given to "the person who exhibits high ethical standards in his or her business practices." He carries the torch for the next generation, contributing to the advancement of technology in many, varied, and important ways. He has the strength of character and depth of intellect to tackle the hardest technology issues.

On the Role of Technology in the Legal Profession

Reflecting on the role of technology in the legal profession, Maher is ready to tackle the inherent contradiction posed by the hourly compensation system and the productivity sought by automation. Maher accepts the observation supposedly formulated by Abraham Lincoln that "a lawyer's time and advice are his stock in trade" and asks, "Is the corollary that efficiency and productivity are a secondary concern?" This may, in fact, be the opinion of many professionals.

Any young lawyer smart enough to graduate from law school and pass the bar exam is smart enough to realize that his or her first career objective is to generate the required number of billable hours. As a result, law firm culture has created powerful disincentives to the application of technology. Nevertheless, Maher is a tireless proponent of the use and understanding of technology in the legal practice. Why?



KINGSLEY MARTIN

“Strategic technologies such as
knowledge management
will be served by a combination of
advanced technologies and
educational curriculum.”

- Technology allows attorneys to practice more effectively, not just efficiently. Technology is a tool, one of many skills in a lawyer’s bag of tricks. In an increasingly high-tech world, command—or at minimum, understanding—of technology and communications systems is a required skill. Clients now simply expect lawyers to be technologically fluent.
- Technology is a means for competitive advantage—it can be used to reduce costs, speed performance, increase visibility, or generate revenue. And despite the failure of many dot-com endeavors, numerous opportunities exist for “brick and mortar” law firms to take advantage of the fiscal and cultural conservatism of the market.
- Given the growing cost of technology, lawyers are ill-advised to abdicate their fiscal responsibility in delegating technology planning to professional IT staff. Planning should be a joint effort between well-informed attorneys and technology professionals.

Law firms, Maher says, waste millions of dollars every year adopting new technologies that do not increase revenues or earnings. Lawyers must get actively involved in the technology platforms of their firms, understand the purpose of information systems, and develop sophisticated models for assessing their value. Too often, however, the complexity of current systems means that they simply cannot see the forest for the trees.

Despite the challenges—no one said this would be easy—lawyers and law firms can benefit from the intelligent application of technology. Maher would stress the word *intelligent*. In his words,

“If the argument is accepted that technology is here to stay, and that lawyers must come to grips with it, this still does not mean that every lawyer must be completely proficient in every new program that promises a saving in time and energy. The argument can be made that many lawyers should not be using technology, provided that they are supported by legal and nonlegal staff that are effectively using the technology. A lawyer whose chief talent is rainmaking for the firm need not even know how to turn on a computer, but others in the firm do need to know how to use technology to produce the services that clients will demand. Similarly, law firms today should not be proud of the fact that they have turned a generation of associates into first-class typists. The headlong rush to cut back on secretarial services has succeeded brilliantly in cutting the expense of secretarial salaries. But, there is still a question whether clients are best served by paying \$200 per hour for the work of an associate who types well, or, in many cases, poorly.”

Looking forward, Maher predicts two outcomes:

- On the one hand, much of today’s basic technology suite will be increasingly viewed as a business utility, and back-office applications will coalesce into an integrated and fungible suite of business productivity and communications tools.
- On the other hand, strategic technologies such as knowledge management will be served by a combination of advanced technologies and educational curriculum. While early adopters relied heavily on skilled individuals to code and organize documents, continued efforts by key software vendors to create automated indexing tools will eventually be rewarded. This technology—combined with training to give practicing lawyers a deeper understanding of information systems—heralds a breakthrough and keeps Maher bullish on the future of law office technology.

On the Role of the Legal Profession in Technology

Maher approaches the intractable issue of governance of the Internet with equal vigor, working to ensure that the Internet is an open and secure place for commerce and information.

The history of Maher’s involvement with the Internet is instructive. In 1995, the Internet Society met in San Diego. At the time, Maher was co-chair of an Internet task force of the International Trademark Association and asked fellow task force members if they planned to attend the meeting on behalf of the trademark bar. No one showed any interest. Maher attended by himself, and although he represented what some in the Internet Society perceived as the enemy—i.e., private commercial interests—he became acquainted with some of the founders of the Internet such as Jon Postel, Vint Cerf, and Larry Landweber.

Today, Maher is vice president for Public Policy of the Internet Society, an organization in which many leaders in the development of the Internet work to ensure the Net’s continued vitality.

The lesson here is to get involved, explore, and be willing to go where your quest leads you. ♦

Knowledge for Sale

BY JOHN HOKKANEN

LATHAM & WATKINS



JOHN HOKKANEN

Lawyers have traditionally provided actionable knowledge products and services (e.g., advice, representation, and documents), tailored to a client's particular circumstances and strategic needs. Lawyers also provide legal information that is not individualized, such as seminars, newsletters, and other miscellaneous products. However, such generalized legal information has long been considered to be a marketing expense rather than a fee-generating service. Now, Internet technologies enable law firms to blur practice with publishing and thereby reconceive the products and solutions they provide to clients.

Two examples of this new thinking are online services offered by the international law firm Clifford Chance. These subscription-based services leverage the connections among client service, internal knowledge management, and new technologies:

- Cross Border Acquisition Guide (CBAG), a Web site application that guides corporate executives through issues relating to the purchase or sale of a company in another country.
- Communications and Media Alerter, an e-mail news service that provides structured updates of legal and regulatory developments in radio, television, and communications internationally.

Cross Border Acquisition Guide (CBAG)

To retrieve information using CBAG, the subscriber selects the jurisdictions of the acquiring and selling companies and then uses check boxes to select items from extensive lists of issues that are associated with each jurisdiction. The user is presented with a high-level executive summary that includes specific *do's* and *do not's*, along with industry standards, for each particular topic. The user can print this information using the familiar browser print function.

Another major asset of CBAG is a cross-jurisdictional glossary through which users can see how an issue or term "maps" across various jurisdictions. Thus, executives using CBAG can familiarize themselves with core issues and terms relevant to a proposed deal.

Communications and Media Alerter

The news updates supplied through Clifford Chance's Communications and Media Alerter cover not only issues related to infrastructure (e.g., bandwidth), but also content issues. Though covering both these types of issues may seem odd at first, Ben Ebdon (commercial manager of Client Online Services at Clifford Chance) explains that analysts at investment banks typically cover both of these areas. In addition, the Communications and Media Alerter focuses on legal news and information that nonlegal news services may fail to report.

Practice support attorneys at Clifford Chance collect information (from governmental agencies and regulators, from the Web, and from other sources), draft relevant notifications, and place the news summaries within predefined categories. The e-mail summaries received by subscribers often contain links to relevant Web sites or to resources within Clifford Chance. Clients who have signed up for the service receive at most a single e-mail message that reflects their particular topical or jurisdictional interests. In addition to receiving the alerts, users can search Communications and Media Alerter archives.

New Thinking Leads to New Benefits for Client ...

Both CBAG and the Communications and Media Alerter service offer straightforward value to the executives and analysts who use them.

For example, a management team can use CBAG to brief itself via a quick, comprehensive executive-level summary

that helps identify potential roadblocks, issues, and opportunities relating to a deal *before* a deal is proposed. Such a briefing reduces the risk of a misstep and raises the credibility of the proposal. CBAG can be accessed at any time, from any place with Internet access. The subscriber thus avoids the time and expense associated with engaging an attorney for specific custom guidance.

The Communications and Media Alerter service helps clients stay informed about developments in a rapidly changing industry via high-quality updates and legal analysis prepared by lawyers who understand the issues.

... and Firm

Benefits to the firm fall into the following categories:

MARKETING

By becoming part of business processes—even pre-deal—the firm enhances the potential that it will be engaged for the legal work when a deal moves forward.

“STICKINESS”

The overall value of the firm to a client increases when that client uses the firm’s online services; the “switching costs” of changing representation also presumably increase for clients who use a range of services offered by a firm.

INTERNAL USE

Services such as CBAG and the Communications and Media Alerter become intellectual assets for the firm that may be leveraged by the firm’s lawyers as well. While less experienced lawyers may find CBAG more suited to their needs, experienced lawyers clearly benefit from the industry-specific updates of the Alerter service.

SKILLS PLATFORM

Deploying, maintaining, and marketing such systems are valuable (and not easily acquired) skills that can be used in designing future systems.

PROFIT

According to Mark Ford (strategic research manager at Clifford Chance), subscription-based profit is not ignored, but does not dominate discussion.

An Investment in Technology and Service

An interesting feature of the development of these services by Clifford Chance is the methodology of execution. The firm determined that a key goal is to provide additional tools to current major clients (rather than, for example, develop products for sale to nonclients). Project ideas were scrutinized and client surveys and interviews further qualified and defined the projects. Development proceeded from select client testing and use-based feedback. Because both services use Internet technologies, rollout occurred rapidly.

Clifford Chance takes a thoughtful approach to its investment in Internet technologies to support its clients in new ways. There is a long-term commitment to thinking through client needs, process development, and the human resources necessary to create and sustain the services over time.

Ben Ebdon states, “These services have been developed to improve the way we deliver legal services to our clients ... as part of the overall package of legal services we can offer to clients.” Accordingly, design, content, and client relevancy dominate the focus. The result is the development of online services that place client value, not whiz-bang technology, at the center.

Corporations are beginning to inquire about the willingness of outside counsel to develop online services. Their use will raise the bar for the level of service that corporate clients expect from their large law firms. ♦

Industry Innovations

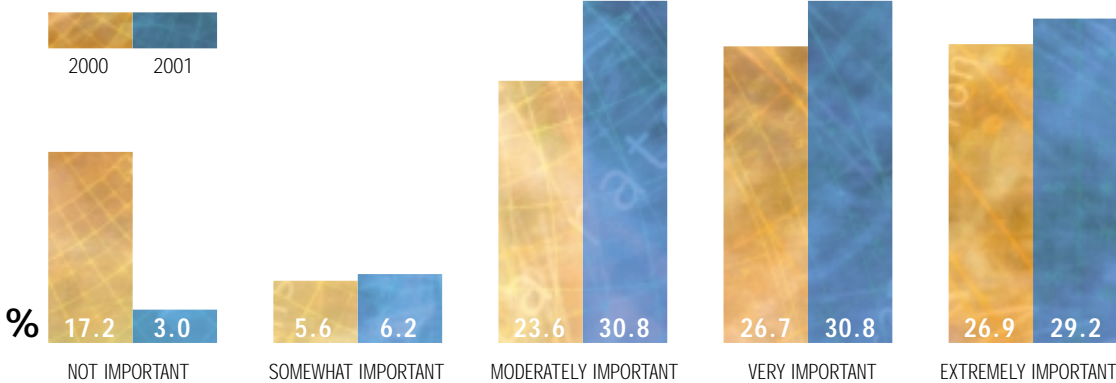
In 2000, the first report of the UCLA Internet Project created a base profile of behavior and attitudes about Internet use and non-use. The 2001 UCLA Internet Report presents data on more than 100 major issues. To view or download the full text and graphs in the report, go to www.ccp.ucla.edu.

THE INTERNET: AN IMPORTANT SOURCE OF INFORMATION?

One of the most revealing questions in the 2001 UCLA Internet Project explores how users view the Internet as a source of information and entertainment.

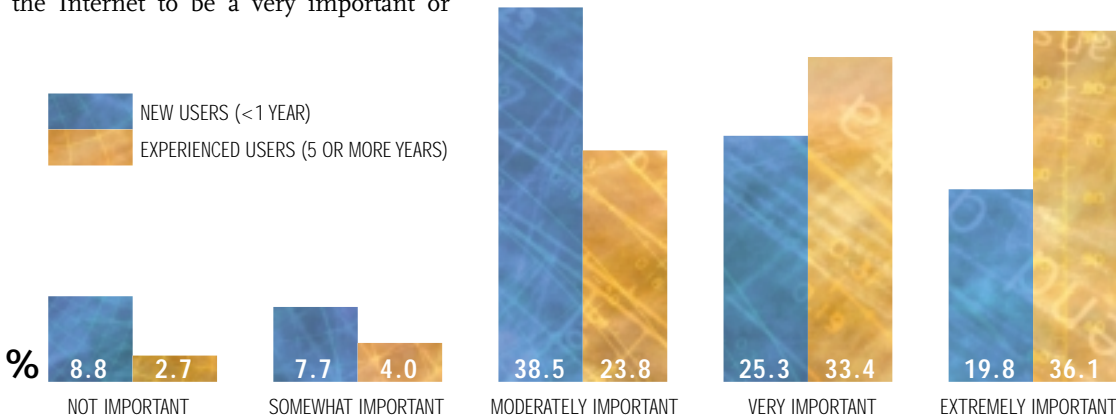
After little more than six years as a widespread communication tool, the Internet is viewed as an important source of information by the vast majority of people who use the online technology.

The importance of the Internet as a source of information is growing among users. In 2001, 60 percent of all users consider the Internet to be a very important or extremely important source of information, up from 53.6 percent in 2000. Add those who say moderately important, and the total increases to 90.8 percent for 2001, up from 77.2 percent in 2000.



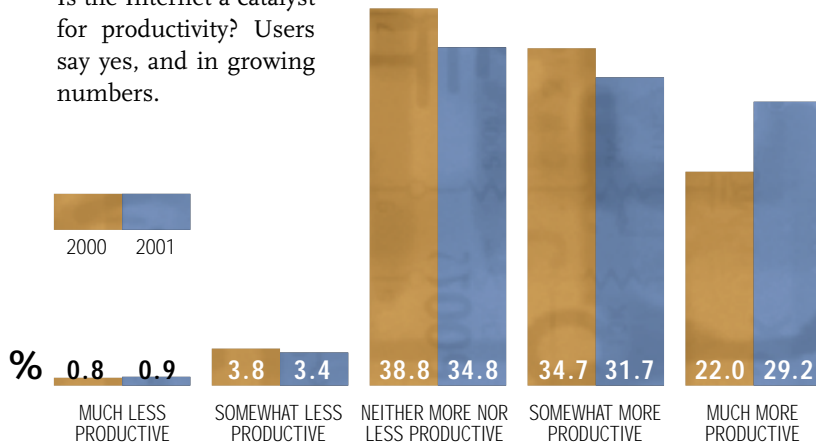
Even the newest users believe that the Internet is an important source of information (see chart below); 45.1 percent of users with less than one year of experience online consider the Internet to be a very important or

extremely important source of information—a notable statistic about an audience with less than 12 months of experience online.



DOES THE INTERNET AFFECT PRODUCTIVITY?

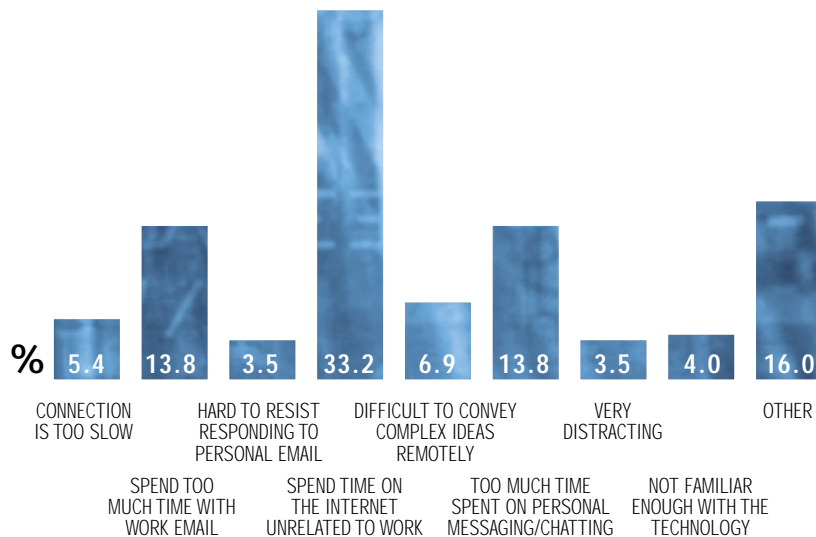
Is the Internet a catalyst for productivity? Users say yes, and in growing numbers.



In 2001, 60.9 percent of users say that access to the Internet at work makes them somewhat more productive or much more productive, up from 56.7 percent in 2000. The largest change was the increase among those who say the Internet makes them much more productive.

WHY DOES THE INTERNET AT WORK MAKE YOU LESS PRODUCTIVE?

Of employees who say the Internet makes them less productive at work, by far the number one reason they gave was that they spend time on the Internet doing things unrelated to work. Other top reasons are the time required to read and write business-related e-mail, and too much time spent on personal messaging and online chatting.



Used with permission. *The UCLA Internet Report 2001—Surveying the Digital Future*. UCLA Center for Communication Policy.

cont'd from p5

While most of the resources described in this article provide information directly to the marketing professional or attorney, there are still times that these persons need the ability to find basic information themselves. Many law firm libraries offer research training. This training enables attorneys and staff to acquire and hone their research skills and learn how to use developing technologies, and promotes understanding and use of the full range of research services that law firm librarians can provide.

Client Relationship Management

The need to know more about clients and their businesses and industries is prompted by two principles:

- A firm can be more proactive in representing a client when it has more information about the client's interests.
- Law firms—like other businesses—have learned the importance of managing the relationship they have with the client. In the current business climate, when clients expect counsel to represent them in a cost-effective manner, the relationship between the client and the firm is key.

In “Beyond Client Care: Managing Client Relationships Strategically” (an article that appeared in Altman Weil’s *Report to Legal Management*, April 2001), David Temporal wrote, “Firms that manage relationships with their clients effectively tend to develop a very deep understanding of the client. This means they understand the client’s strategic and competitive environment and the key challenges it faces.”

Selective access to information, using monitoring and tracking tools and research resources like those mentioned above, plays a large part in developing the background knowledge needed to manage that relationship. ♦

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Conquering the Mountain

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Suppose you want to find all contracts written by Jane Doe between June 1998 and April 2002 that include a nondisclosure section. In a traditional word-processing world, you would enter information regarding the type of document, the author, the date, and the subject into different search fields in some type of database (usually separate from the documents) that would allow retrieval of documents containing the information entered in those fields. Alternatively, you would have to run a full-text search. With XML, the markup can indicate the type of document (a contract), the author (Jane Doe), the date created or modified (June 1998–April 2002), and even sections within the document (nondisclosure agreement). By using XML, searching documents becomes more efficient.

Conquering the Mountain

Several groups within the legal information management profession are looking into creating XML standards, the largest such group being the LegalXML working group. This group has been developing XML standards for several different types of legal documents since 1998.

The group's latest success has been with a test project with the state courts of Georgia

that demonstrated the viability of the LegalXML standard for e-filing. You can find out more about LegalXML at www.legalxml.org/ and about the Georgia courts project at gsulaw.gsu.edu/gsucp/.

One of the best examples of a successful XML implementation project comes from the Michigan Legislature. Several years ago, the legislature began implementing XML on *Michigan Compiled Laws* and related legislative documents. By all reports, the result has been greater efficiency and better information exchange among state agencies. In addition, the legislature's Web site offers better search capabilities and allows users to generate printer-friendly versions of documents on the site via PDF (Portable Document Format). Visit the Michigan Legislature's site at www.michiganlegislature.org/.

The trend in the business community is to adopt XML, and this trend will have a strong impact upon the legal community. XML adoption is especially likely in the legal community because nearly every type of legal document has a particular structure, based upon custom or rule, that lends itself to exploitation by XML. Thus, while XML will not transform a mountain of legal information into a molehill, it will make the peaks and valleys easier to explore. ♦

Corporate Taxonomist *cont'd from p3*

DON'T EXPECT USERS TO DO THE WORK

Successful taxonomy developers interview or do appropriate internal research and then iterate, draft, and give users something to respond to. They incorporate user responses, but they don't ask users to do the work. Asking users to build term lists is a recipe for disaster.

THINK GLOBALLY, ACT LOCALLY

It's important to understand differences in terminology and language to create a taxonomy that will work within the global reach of the users you serve.

The time has never been better to put your skills of organization to work to benefit your firm. Become a taxonomist! ♦