

# Sustainable KM

## *Turning treadmills into windmills*

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Mary Abraham

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August 17, 2017





# SPEAKERS

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**A PRACTICAL FRAMEWORK  
FOR SUSTAINABLE KM**



# What Is “Sustainable” KM?

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- The most R for the least I
- Leverages existing people, processes, and technologies
- Goes with the flow rather than against the flow
- A windmill, not a treadmill
- Maybe even... an “Infinite Energy Machine”



# Signs of a Treadmill

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- It takes dedicated attention and effort
- It stops when your attention and effort stop
- Often involves manual labor
- It requires nagging
- Your team dreads it



# Examples: Treadmills

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- Billable attorneys; pay with billable hours
  - Deal tracking
  - Precedent selection
- PSLs and other dedicated KM attorneys; pay with comp
  - Forms
  - Content management
- External databases; pay with license fees (PLC, Lex Machina)



# Signs Of A Windmill

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- Leverages existing processes (e.g. new business intake)
- Leverages existing roles (e.g. having secretaries maintain practice group content)
- Leverages existing technology
- Does not require constant nagging or daily management



# Examples: Windmills

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- Enterprise search that leverages existing knowledge stores
- Case profiling (WSGR)





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Case Name	SunPower Securities Class Action	Case No.	3:16-cv-04710	Practice Group	Securities/Commercial Litigation	Case Status	Active Litigation
Jurisdiction	Federal / District	Court	California / N.D. Cal.	Names of parties represented by WSGR	SunPower Corporation	SCAS iManage #	
Plaintiff(s)	Keneth Bristow et al.; Je	Defendant(s)	SunPower Corporation, T	Motion Judge	Seeborg, Richard	Trial Judge	Seeborg, Richard
Type Of Case		<<	Securities Class Action	Attorney(s)		<<	
Opposing Counsel		<<	Glancy Prongay & Murray LLP Pomerantz LLP Goldburg Law Group				
Lead Plaintiff's Counsel		<<	Brower Piven	Client's Insurance Carrier(s)		<<	
Factual Allegations for Class Actions		<<					
Cause(s) of Action		<<	Violation of Section 10(b) and 20(a) of the E	Client Matter	6803 SunPower Corporation 501 Securities Class Action		

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3	117	Plaintiff Mundeog Seoul	Motion-Other	9111858	[60] Lead Plaintiff's Reply in Further Support of Motion to Withdraw	F: 04/21/2017	X	Edit	Del
3	118	Plaintiff SunPower Investor Group	Motion to Appoint Lead Plaintiff	9128753	[61] Notice of Renewed Motion and Renewed Motion of The SunPower Investor Group for Appointment as Lead Plaintiffs and Approval of Counsel; Memorandum of Points and Authorities in Support Thereof	F: 04/25/2017	X	Edit	Del
3	119	Plaintiff SunPower Investor Group	Proposed Order	9128754	[61-1] [Proposed] Order Appointing Lead Plaintiffs and Counsel	F: 04/25/2017	X	Edit	Del
3	120	Plaintiff	Declaration		[62] Declaration of Laurence Rosen in Support of Renewed Motion of the SunPower Investor Group for	F: 04/25/2017	X	Edit	Del



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Jurisdiction	<input type="text" value="v"/>	Court	California / N.D. Cal. <input type="text" value="v"/>
Motion/Trial Judge	Orrick III, William H. <input type="text" value="v"/>	Case Status	<input type="text" value="v"/>
Type Of Case	Securities Class Action <input type="text" value="v"/>	<<	Securities Class Action
Opposing Counsel	<input type="text" value="v"/>	Paralegal	<input type="text" value="v"/>
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Cause(s) of Action	Violation of Section 10(b) and 20(a) of the Exchange Act and R. <input type="text" value="v"/> <small>Selecting more than one is an OR search</small>	<<	Violation of Section 10(b) and 20(a) of the Exchange Act and f

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## Examples: Windmills

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- Enterprise search that leverages existing knowledge stores
- Case profiling (WSGR)
- Asylum pro bono workspace (Perkins Coie)

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	A. CGRS_DV_Advisory_1-11-2017_FINAL	...	DV	Articles	EI	Salvador
	B. Matter of ARCG_Decision	...	DV	Articles	EI	



# Examples: Windmills

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- Tax practice group meetings (Oslers)
- Client-facing SEC filing document assembly tools
- Social and distributed intranet (White & Case)

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Post

## iManage Acquires Leading Artificial Intelligence Pioneer RAVN Systems



Esther Sarofiem  
May 24th 17, 1:18 pm

"iManage, the leading provider of Work Product Management solutions, today announced that it will revolutionize the way companies find, extract and act on key information from documents and emails through its acquisition of RAVN Systems, UK-based leading experts in Artificial Intelligence."

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Oz Benamram

@Liz Najman - Worth mentioning that we're starting a pilot with #RAVN to profile time records by task and phase.

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Mark mentioned you in a comment on a post - 3 hours ago  
Appreciate the feedback @Kristin...



Leigh made a comment on a post you follow - 4 hours ago  
I agree with the points @Ennio...



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@George Dateno and @Kristin ...



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# Extending The Impact Of Windmills

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- Improved marketing
- Dashboards and other data visualization
- Standard taxonomy and data architecture
- Put existing tools in new places



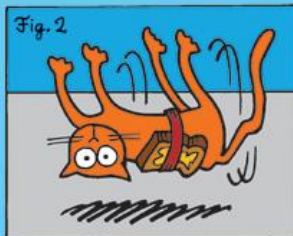
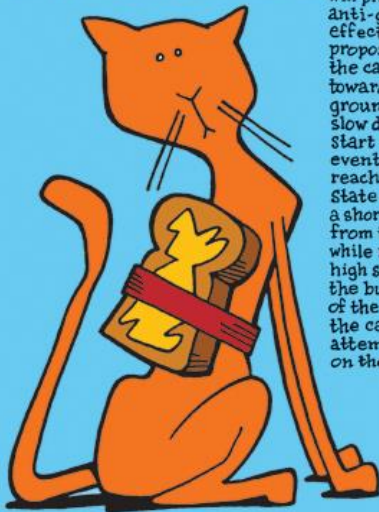
# BUTTERED CAT PARADOX

The buttered cat paradox is a paradox based on the tongue-in-cheek combination of two bits of folk wisdom:

- Cats always land on their feet.
- Buttered toast always lands buttered side down.

The paradox arises when one considers what would happen if one attached a piece of buttered toast (butter side up) to the back of a cat, then dropped the cat from a height.

Some people jokingly maintain that the experiment will produce an anti-gravity effect. They propose that as the cat falls towards the ground, it will slow down and start to rotate, eventually reaching a steady state of hovering a short distance from the ground while rotating at high speed as both the buttered side of the toast and the cat's feet attempt to land on the ground.







# Signs Of An Infinite Energy Machine

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- It creates its own energy
- The built-in incentives are aligned and foster ongoing participation
- It improves by itself
- It is not primarily dependent on your attention and effort



# Examples: Infinite Energy Machines

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# TABLE EXERCISE



# To Discuss And Report

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1. What windmills have you built?
  - How did you do it?
2. What treadmills have you turned into windmills?
  - How did you do it?
3. What treadmills would you like to turn into windmills?
  - What steps should you take?

# TABLE REPORT-OUTS

**MAKING YOUR KM  
SUSTAINABLE**



# Making Your KM Sustainable

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- Regularly assess current and new tools for sustainability
- Consistently identify and harness windmill opportunities
  - Data flows
  - Roles that can be leveraged
  - External resources
- Regularly assess which treadmills should be unplugged



# Typical Law Firm Winds

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- *Data:* clean, organized, accessible
- *Technology:* DMS, CMS, CRM, time entry
- *Processes:* new client/matter intake, hiring, training/PD, timekeeping
- *People:* New Business & Conflicts, DP, HR, Legal Support, Library, Marketing, PD, Records





# Ways To Turn Treadmills Into Windmills

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- Model forms: license PLC or LPA + proprietary supplements
- Expertise location: auto-profile
- Matter profiling: leverage legal support roles; AI?
- Matter fees: integrate with matter databases
- PTI / Q&A: automatically collect, save, and serve up emails
- Practice pages: leverage SharePoint and legal support roles



# Examples: Turning Treadmills Into Windmills

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- Concierge services (Littler, White & Case)
- Dynamically generated intranet pages & data visualizations (Goodwin)
- Saved searches that leverage expert search ability (OMM)

# SUSTAINABLE KM TOOLKIT



# Our Five-step Plan

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1. Make a commitment to end your treadmill dependency
2. Do the 20-minute exercise (see next slide)
3. Do the 20-minute exercise with your most critical KM projects
4. Share your learning
5. Rinse. Repeat.



## If You Have 20 Minutes:

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- List 5 KM projects that put a smile on your face
- List 5 KM projects that make you crazy
- For each project, identify 3 contributing treadmill/windmill factors
- Spot the patterns – find the major contributing treadmill/windmill issues



# Address The Patterns

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- Focus on each major contributing *treadmill* issue
  - Should you be doing this anymore?
  - If yes, is there an alternative, renewable resource for it?
  - Which other KM projects should switch to this new resource?
- For each major contributing *windmill* issue, can you extend this to other KM projects?



# Share Your Learning

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- Now that you've upgraded from treadmills to windmills (or even infinite energy machines), can you
  - Report your success to firm management
  - Distill your learning and share it with other departments
  - Provide support to departments that want to upgrade too
- This will keep your firm on the cutting edge



# QUESTIONS?

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