




# **Understanding Knowledge Management**

## **Case Study: Lowenstein Sandler**

***Kitty Schweyer***  
***kschweyer@lowenstein.com***  
***SLANY LLAGNY October 2013***

# Highlights:

- **Search = Highest ROI**
- **Software Rolled out in 4 months**
- **KM** 
- **Attorney - focused**
- **KRS Project**
- **IT Collaboration**
- **Consultant**
- **Train, train, and train some more**

# **KM Mandate:**

- **Leverage Who and What**
- **Improve:**
  - ✓ **Productivity and Efficiency**
  - ✓ **Access to content**
  - ✓ **Communication**
- **Firm growth**
- **Virtual**
- **5 Rs**



# KM Mandate:



## **THE GOOD NEWS:**


- You found the document



## **THE BAD NEWS:**

- All Attorneys e-mailed
- 5 minutes lost per 30 seconds
- \$800,000 lost per year

# KM at Lowenstein:

- **Focus on Content**
- **Needs Assessment**
- **Attorney – focused**
- **Quick win**
- **Respond to a specific need**
- **Poor DMS search and retrieval**
- **Tip #1: KM** 

# Our Search Strategy:

- **Vetted Search Vendors**
- **Selected Recommend**
- **Priorities:**
  - ✓ **Restricted to FileSite**
  - ✓ **Access from Outlook**
  - ✓ **POC on our entire database**
- **Tip #2: Hired Consultant**
- **Built Infrastructure First**

# Purchase to Rollout Timeline:

- **Purchased Software (7/12)**
- **Decisiv Quick Start**
- **KRS and IT Tested**
- **Security, Usability**
- **Indexing, UI, Exclusions**
- **Tip #3: DB Log UI**
- **Training materials**



# Purchase to Rollout Timeline:

- **Pilot (8/12)**
- **Pre-Rollout fixes: (9/12)**  
**names, concepts,**  
**filters, exclusions**
- **Rebrand**
- **Low-tech Marketing**
- **Rollout (10/12)**





# Training:

- **Tip #4: Specialized group trainings**
- **Attorney trainings**
- **On-going training**
- **KRS and Help Desk**



# Gamification:

Search

Exact match  Search within results

[Advanced Search](#)

## Search Criteria

Search Supercalif\* ✕

Application ~~Microsoft Outlook Email~~ ✕

Save

## Filter results by

[Document Properties](#) ▼

[Authors, Editors, Recipients](#) ▼

[Client & Matter Properties](#) ▼

[Dates](#) ▼

Results 1 - 2 of 2

Order by Relevancy ▼

 [Supercalicontentious.pdf](#)

[Open from FileSite](#)

Document Number [REDACTED] Document Type Research/Memos

Author Gottlieb, Jamie on 5/10/2012

Client Matter Folder [REDACTED]

[REDACTED]

Attached to  [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] "supercalifragilisticxpialidocious." [REDACTED]

 [Westlaw\\_Document\\_16\\_44\\_50.doc](#)

[Open from FileSite](#)

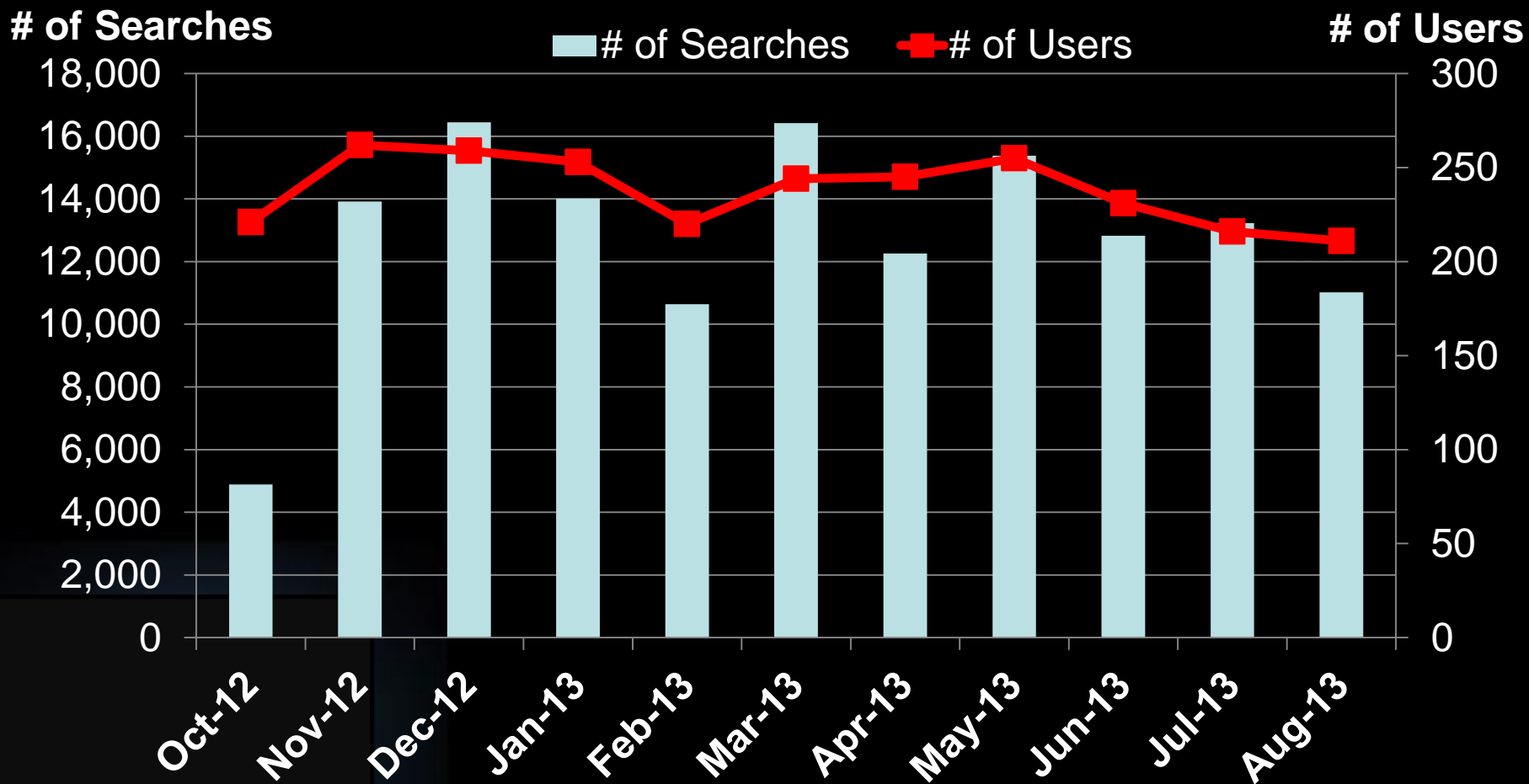
# Positive Results:

- **Fast**
- **Accurate**
- **Easy to use**
- **Increased KRS  
visibility and credibility**
- **Improved IT Helpdesk service**



# OneSearch Usage

Total # of Searches: 145,587    Average # of Searches per Month: 12,821  
Total # of Users: 592    Average # of Users per Month: 238



# Challenges:


- **FileSite search and display legacy**
- **UI and Sorting**
- **Tip #5: E-mail author searching**
- **Date searching**



# Future:

- Upgrade to 7.6
- Expertise
- Matters
- People Directory
- Data normalization
- Source integration
- NMI
- Enterprise Search
- Focus on Context

# Highlights:

- **Search = Highest ROI**
- **Software Rolled out in 4 months**
- **KM** 
- **Attorney - focused**
- **KRS Project**
- **IT Collaboration**
- **Consultant**
- **Train, train, and train some more**



***Kitty Schweyer***  
***kschweyer@lowenstein.com***

**Understanding  
Knowledge Management**

**Case Study:  
Lowenstein Sandler**

***SLANY LLAGNY***  
***October 2013***