



# How Law Firms Use PBwiki To Reduce Information Overload & Raise Billable Hours

White Paper

## Overview

While information is the heart of many professions, perhaps in no field is the exchange, analysis, and delivery of information as crucial and fundamental as in the profession of law. Many of PBwiki's current clients are successful law firms with long experience at handling the mass of information associated with each litigation, merger or corporate client. However, every attorney needs the tools to manage such information flows effectively and comprehensively. And in this age when the term "information overflow" reverberates throughout all industries, legal professionals must adapt even faster to increasingly overwhelming floods of information without sacrificing either the quality or the quantity of their work.

This white paper describes how PBwiki provides a quick, easy solution to the information overload challenges law firms face today. It will discuss the difficulties in three areas: information transmission by email, information retrieval from legal databases, and information analysis of case data, and will discuss how PBwiki can improve the efficiency and profitability of both individual employees as well as entire case teams.

## Information Transmission: Managing Email Overload

The legal industry, like all others, follows the golden adage, "Time is money." Based on this principle, it would seem like email, with its instantaneous transmission of messages and documents, would be the ultimate time- and money-saver. Alas, few legal professionals could agree.

The very trait of instant delivery that we covet in email is becoming one of our biggest problems. Rapid delivery of information causes a rapid pileup of information, and often, this mountain of data is far more than an average human being can reasonably process. According to a LexisNexis workplace study, "62% of professionals report that they spend a lot of time shifting through irrelevant information to find what they need." In the legal industry, when you are being billed out at fractions of an hour and are crushed by deadlines imposed by both courts and clients, you cannot afford to be paralyzed by a deluge of information.

Sure, everyone keeps yelling about information overload these days, but which aspects of email actually cause the problem? According to a study by IBM/Lotus, email is no longer used as a simple communications tool. Among many other things, it's now used for "task management," "personal archiving," as well as assistance requests. All of these contribute to "email overload." Let's look at each of these uses in the legal industry, as well as how uses of email in this manner impacts your office productivity, and how online collaboration tools can help mitigate such efficiency losses.

### **"Help! Where do I find this old pleading? ASAP!"**

In an industry with immense law firms that rely on a large number of highly specialized professionals (associates, paralegal database specialists, legal librarians), it is inevitable that you would tap on someone's door, shoot off an email, or make a quick phone call asking for assistance in that specialty area. However, the ubiquitous ease of email has broadened the door to these specialists to the point where they are bombarded with simple questions that would be better addressed by a "Frequently Asked Questions" list.

According to a recent study, the average recovery time for an employee to “recover” from an email interruption and get back to their original task is about 64 seconds. In an industry where employees are continually bombarded with emails – especially emails with “ghosting” pop up alerts, those 64 seconds (triggered hundreds of times per day) add up to a lot of lost productivity.

In addition to lost efficiency, the specialist might be so bombarded with multiple requests that your request gets lost in the shuffle! The poor specialist becomes a bottleneck through which your urgent inquiry cannot squeeze through. As you pace about, call repeatedly, and wait for an answer to your query, you end up wasting your time and energy.

### **Let PBwiki Filter The Flood Of Requests**

Set up a wiki page for each of your specialists. They can add a quick FAQ, or even a quick “How-to” blurb that would answer the majority of the simple questions they get. PBwiki offers an incredibly easy system of adding and editing pages; most users report that after a single 30 minute training session, they’re off and running. All wiki pages can have multiple “tags” or words associated with each page. The specialists can ensure that the rest of the firm can easily find their information pages by anyone searching any one of those associated tag words.

This solution won’t be a cure-all, and is not meant to be one. But it will free your specialists to answer the truly urgent and complicated cases, versus wading through hundreds of non-urgent requests. Having wiki pages for all of your specialists in one central location will also help instill the habit of your employees asking themselves, “How do I find this old case?” and then replying with, “Oh! I can first look on the wiki.”

### **Use Email For Communication, Not Archiving**

Although email was initially meant as a communication tool, email today also acts as an information storage and personal archive of possibly useful information. These emails

often contain reference information and, being sent on a “FYI” basis, do require a reply. For some users, this additional storage role for email came about because of their reluctance to delete informational emails that might become useful later on. For others, email might have just seemed like a convenient place to temporarily store a document. However, regardless of why users now store reference information and documents in email, the result is the same: information overload from an overflowing inbox.

Some professionals, hating the idea of deleting reference information that one day be helpful, are left organizing their inboxes for hours per day. Yet, even all of that organizing might be counterproductive. Current email applications do not provide a good framework for intensive information filing. A few Outlook folders are neat and easy to use, but with the huge volumes of emails today, an entire collapsible mess of folders and subfolders is just as hard to navigate and maintain.

In addition, Outlook folders as an information filing system are resistant to change. In a paper studying efficient methods of organizing email, Gabor Cselle points out that using email folders as an organizational method creates problems simply because a folder forces the user to anticipate a need that might change over time. I can create a beautifully intricate system of folders to organize case facts, but what if my priorities change?

The alternative, however, might be worse. Simply leaving the emails in collective jumble within your inbox means resigning to the fact that one day, you might have to waste valuable time searching one particular email – often when you need it the most.

To add insult to injury, personal archiving fragments access to information. Unless a user specifically goes out of the way to add viewing rights, Outlook folders are typically viewed by one person only. When people rely on email to store their useful information, this often means that the same information is not stored elsewhere in an easy to reach, central location. Every single email account becomes its own standalone database, each with separate, repeating maintenance costs, and a membership of one. If Jane

religiously organizes her information-containing emails, while John avidly deletes all informational emails unrelated to his current projects, both employees are paying the maintenance cost. The difference, however, is John's access to the same information base.

There is a simple solution to this problem of "personal archiving." Why not restore email's original role as a communication tool, and use another method to distribute reference information?

PBwiki fits this role perfectly.

### **PBwiki = A Central Location For Reference Documents**

While emailing reference information out to ten employees means that you'll have ten separate individual "databases" in ten inboxes, the use of a wiki as a central data repository condenses those ten databases into one. Think of the wiki as a hub; employees input useful information into the hub, and then return to retrieve information.

This would not only eliminate a large bulk of incoming email from employees' inboxes, but would also help alleviate the, "Can't Delete! Possibly useful later," mentality, as employees know that there will always be a central location in which the information resides. In addition, with minimal effort on their parts, Jane and John will have access to the exact same set of information; John will never have to ask around for someone to re-forward a previously deleted email. And this set of information will only have one set of maintenance costs.

Take the example of Andrew, an attorney at the United States Patent and Trademark Office. He uses PBwiki to help manage the huge volumes of reference information received in email. "With around 9,000 attorneys [in the USPTO], there's lots of room to lose things," he explains. PBwiki provides a much quicker way to get extremely specific information to the employees. For example, the USPTO has numerous "traditions" and

rules and practices such as section 8 compliance, mandatory use of the ampersand instead of the word “and,” just to name a few. Andrew and his coworkers use the wiki to warehouse these procedures, and thus eliminate the need to search through 500 emails to find the specific protocol that they need.

## Information Retrieval: A Roadmap To The Right Resource

Email is not the only technology that opened the floodgates and drowned us in more information than we can absorb; legal databases drag us under just as often, and just as quickly. While legal databases indisputably expanded a law firm’s ability to quickly scan through staggering amounts of documents, they created an entirely new set of management difficulties:

- Legal databases tend to have steep learning curves, and many employees are inadequately trained in using them.
- Larger law firms often use several brands of internal databases depending on the case. Some brands of databases, despite being used for a certain case, are not “firm standard” and no formal training is offered for those brands.
- Even several instances of the same brand-name database vary greatly in content and in usability; human input creates a huge amount of variability in each individual database.

### **How Do I Use This Database?**

Concordance, DocuMatrix, LiveNote, Summation, and CaseMap are all examples of legal databases, each aimed at specific needs within the legal industry. Some are document management and storage systems designed to house millions of documents (Concordance and DocuMatrix), while others are made specifically for depositions (LiveNote and Summation), or for organizing case facts (CaseMap). In this overwhelming rush of new technology, it is not surprising that paralegals and associates are often paralyzed not only by information overload, but by technology overload.

While most law firms do offer initial database training sessions, these classes are often only a few hours long, and only cover the select brands of databases used most often in the firm. The rest is, "learn as you go," which often translates into trial and error.

In addition, training sessions are not always given around the time when the legal professional anticipates using a certain database. Depending on training schedules, a teaching session can be given months before actual use. Unfortunately, as most of us at one point realized, highly technical knowledge crammed into our heads by quick classes "uncram" just as fast when not used.

A PBwiki, however, is present even when training sessions are not available. By presenting a central location in which technical manuals and "how-to" tips reside, PBwiki can supplement a firm's pre-existing training session, and can also offer a permanent, easy to find location for instruction when the legal professional needs it the most. Changes to the database and shortcuts can also be easily listed on the wiki so that paralegals and attorneys can be kept up to date in a manner that won't clog up their inbox.

Another one of PBwiki's legal customers is an electronics services manager at a major international law firm. Her department regularly uploads materials for meetings and trainings to the wiki. With PBwiki, not only is the information accessible before the meeting so that everyone can arrive to the meetings or trainings informed of the topics, but they're also available any time after the meeting. No more stuffing training manuals, instructions or tip sheets into a corner of your desk, wondering whether or not you'll be able to find it when you finally need it five months later.

### **Self-Directed Learning**

For certain legal professionals, training in a specific database is just not available. You might be a legal professional in a large law firm, stuck with a database that is not typically used in your firm, or you might be a part of a small law firm that does not have

dedicated trainers. Or, you're using an online external database from a third party vendor, and very little training is available. Unfortunately, cases that throw you unfamiliar databases also tend to be cases inherited from other law firms; along with the new database, you also inherit a crushing schedule in which there is no time to slowly tinker about until you understand things. In these cases, PBwiki again can help alleviate the costs of learning by trial and error.

Most cases are worked upon in teams. If you're confronted with a strange database, chances are your team members are confronted with the same thing. Since a wiki is a collaborative tool, the entire team can work together to create a wiki page in which each person can add helpful tips on how to navigate through the database. Think of it as setting up a collaborative roadmap. This roadmap will not only help new additions of the team during periods in which case rosters shift and change, but will also ease the future burden on those few employees who, through hundreds of hours spent searching and using the databases, will become "specialists" for that database.

### **No Two Databases Are The Same**

As those who work with databases know all too well, each legal database possesses its own unique set of quirks and idiosyncrasies that impede smooth navigation of database contents. Whether it's irregular coding (How many times have you searched for one set of Bates numbers, only to realize that you couldn't find it because it's coded slightly differently in the database?), human input error, or lack of OCR, legal databases have a reputation for being finicky, bulky, and most of all, for being only as good as their coding.

Although some fortunate cases have databases so well coded and maintained that one hardly needs any special instructions, most large, complex cases are not neat and tidy. In such environments, eventually one team member becomes so familiar with the database that they become known as the person to go to for database questions. And in traditional settings, these "specialists" act as the information hub to which all team members run to for answers.

### **Computers Never Tire (But Specialists Do)**

During times of duress and strain, however, both deadlines and workloads increase, and human beings can only be awake a certain amount of hours and can only respond to a certain amount of requests a day before burnout sets in. This, however, is where PBwiki shines.

By creating an online resource containing information such as, "How to search for documents using Bates numbering," while listing the coding quirks that make such searching difficult, the specialist can create a buffer zone for him or herself. If John is the specialist, he can shift the information hub from himself to the wiki and let the wiki take the brunt of the common questions. Unlike a human being, wikis never tire, and can be accessed by as many people as there are in the team, at the same time. With the simple questions being rerouted to the wiki, John can respond to more urgent and complicated matters without a barrage of interruptions, and without being pulled in ten different directions by ten different team members.

## **Information Analysis: Managing Case Facts**

Every legal professional working in litigation knows well the long hours spent combing through hundreds of thousands of pages in document review. The grueling effort culminates in facts painstakingly collected and gathered to formulate a case for your client, and so it is no surprise that you would want the best tools to manage those nuggets of facts. This section will discuss how PBwiki can cut down on wasted time, and boost efficiency in fact management.

### **Case Facts Are Dynamic (Microsoft Word Documents Are Not)**

In current practice, unless a law firm uses a case fact database such as CaseMap, the members of a case team throw facts into memos and lists using Microsoft Word or Excel. However, the pool of case facts is constantly subject to updates, expansion and

changes. And unfortunately, Microsoft Word is not meant as a tool to manage ever-changing information. Although Word is a wonderful method for creating pleadings and letters, such documents are meant to be edited once, twice, and then finalized. Collections of case facts, however, constantly change, update and expand until the very end of the case, and, most importantly, are shared between large groups of people with innumerable edits from start to finish. For the sake of convenience, let's use an example.

### **Buried By Email Attachments?**

Sharon is a junior associate with a large law firm. She is staffed in a new case just starting the discovery phase of litigation, and she has the responsibility of providing brief summaries on the key players, such as the CEO, CFO, VP of human resources, etc. She quickly throws the summaries into a memo based on the information currently available, and then distributes the memo via email to the entire team as reference material. As discovery continues, and the weeks pass, more information about those key players come to light, and more key players are added to the picture. Updating her memo is an easy thing, but she will have to once again email the updated memo out to the entire group. This results in multiple versions of the same memo in each team member's inbox, once again contributing to email overload.

Unfortunately for Sharon, the more that her memo remains up to date, the more useful it is to the team. However, in order for the memo to remain current, Sharon will have to continuously send out updates to the entire team. Let's take this one step further. Imagine not just Sharon, but an entire group of junior associates responsible for gathering case facts and keeping those fact collections current, and you have a veritable flurry of "update" emails.

### **Use PBwiki To Distribute And Manage Document Versions**

A wiki page, however, is built for change. PBwiki's edit function was designed specifically with the aim of being as user-friendly as possible. One can either use the built in editor, or copy and paste directly from Word documents to add or edit

information. Even multiple versions of the same Word document, if uploaded, are grouped into versions so that you can easily access both the most recent and all previous versions. As changes are instant, all team members can access the new and updated information that instant. Email alerts can be turned on and off, and the frequency of alerts adjusted. Best of all, you will never have to archive or folder another email attaching, "Updated Witness List.doc" ever again. The wiki will keep your information for you in a central, easy to reach location.

"I hated searching through 5,000 emails or through multiple versions of procedures to get what I need," Andrew at the USPTO says. "We use PBwiki to warehouse those documents."

### **Available Anywhere, Anytime**

If you ever travel, you will never need to worry about connecting to your company intranet to make changes. Since PBwiki is hosted and accessible online, all you need is a web browser. Security, of course, is an integral part of PBwiki. With encryption for traffic as well as IP whitelisting and blacklisting, you can both control access and rest assured that your information is secure. For reliability, redundant connections, automatic backup systems, and multiple backup locations ensure that you will always be able to access your information. In this way, PBwiki, like all good services, is available whenever, and wherever you need it.

### **Collaborate Across Boundaries, But Retain Accountability**

A wiki page also opens up a new possibility: Sharon doesn't have to be the sole person keeping that fact list up to date. With a few simple clicks, she can set the rights on the page so that anyone on her team can add and update. There need never be those conversations in which John, who is specializing in in-depth research of the CFO, wants to add an extremely useful tidbit about the CFO to the "Key Players" fact list, but must interrupt Sharon and wait for Sharon to add it. Why take three long steps when you can hop once?

In fact, several of our clients also use PBwiki to collaborate across departments and ease the trouble of non-case related administrative tasks. A client at Connolly Bove Lodge & Hutz LLP uses the wiki at her firm as an administrative task manager. Instead of collaborating on a witness list, for example, this client uses PBwiki to collaborate on administrative duties. "Everyone realized that there were some processes that were simply frustrating for everyone," she explains. "There were several administrative steps that should be perfected and better articulated, and so we use the wiki to streamline those tasks." For example, one such process was the "new hire" process. "We used to do this process in the traditional matter: shuffle a lot of paper around, make a lot of emails internally. And we thought it would be good to have something that is centrally located." Instead of pushing paper and emails around, employees across the departments of facilities, HR, IT, and the recruiting staff all upload forms and keep updates on the wiki page of each new hire in a streamlined, collaborative effort.

Changes are also entirely trackable. With PBwiki's easy function of displaying all changes in a convenient list as well as the ability to reverse each individual change with one click, accountability need never be sacrificed. With this "audit trail" feature, you never need fear that a new team member unfamiliar with the wiki might inadvertently erase valuable information. In addition, the ability to delete wiki pages can be restricted to certain users, giving even greater security against accidental deletion of data.

### **Replace Faulty Memory With A Searchable Information Respository**

People forget. Every professional today is faced with a massive onslaught of information both within and without the office. Most employees simply do not keep the small details of where to access a useful reference document in their heads. 3M's Post-It division makes its living based on this principle. When team members forget, they find themselves emailing each other, asking, "Do you remember that document and where it is?" Even worse, they might simply forget the document's existence altogether, defeating the purpose of creating it as a reference resource in the first place.

A wiki provides a central location that everyone can go to for reference. Let the wiki be your memory, and access the wiki when you need the information. Use your energy and memory for more crucial issues and let the wiki handle the rest.

Secondly, most document management systems within law firms either do not have in-depth search functions, or are clunky to use. Depending on your firm's specific server set up, your document retrieval system might not allow even you to search text within documents. How many times do you remember searching through rows upon rows of MS Word documents, trying to guess the contents by skimming over the short and frustratingly similar file names. Did you find yourself laboriously opening up each file, hoping that it's the correct document?

PBwiki, however, has two search advantages. For documents that go through hundreds of tiny updates, and constantly need to be pulled up for the entire duration of your case, use the wiki. Not only does the search function scan through text within documents, but a document can also be "tagged" with multiple key terms. A witness fact list can be tagged with, "witness fact list," "key players list," "witness summaries," just to list a few examples. With both search advantages, you need never worry about a valuable reference document becoming "lost" within an electronic maze.

In addition, PBwiki, by virtue of being the central repository for reference information, can be the first stop for employees even when they have no idea whether or not the document exists in the first place. With PBwiki's easy and comprehensive search function, you can easily glance through a Google-like search results list to quickly see which search result contains the desired page. This not only reduces time wasted searching through rows upon rows of Word documents, but will also help mitigate the problem discussed in our next section: information overlap.

### **Collaboration Prevents Wasted Effort On Redundant Tasks**

In the section above, we laid out several reasons why Microsoft Word documents are not best suited for managing dynamic collections of case facts. Those same limitations

of Word documents cause problems in managing and preventing overlapping labor within law firms.

I define overlapping labor as unnecessary duplication of work and effort. In other words, overlapping labor is when someone reinvents the wheel. In today's working environment, overlapping labor occurs frequently from:

- Communication disconnects when legal cases span several offices around the country.
- Inefficient organization, when an employee cannot find a document and assumes that it does not exist.

PBwiki provides solutions for both problems.

### **Communicate And Collaborate Regardless Of Geography**

In the instance of the communication disconnect in a case involving multiple offices, in order to make sure that all offices are on the same page, meetings and progress update emails need to be scheduled and sent. Such meetings and update emails need to be regular to be effective, and unfortunately, in times of high stress and rapid deadlines, those status updates tend to be pushed down the priority ladder. Even if a team does religiously adhere to update meetings or emails, such status reports tend to concentrate on larger issues; smaller details that might be crucial tend to fall through the cracks.

With PBwiki, however, even if interoffice communication lags, the chances of overlapping labor would still be significantly reduced. The reason is that in the sense of updates, PBwiki is instant. The moment that a team member in D.C. creates a new wiki page and fills it with useful reference information, team members in San Francisco, New York, or even China can access the page and the new information. There is little to no need for update emails when each team member has instant access to the wiki, and can see the progress of certain projects first-hand.

Furthermore, PBwiki can transform overlapping effort into collaborative effort. When John believes that a quick timeline of multiple cases that merged into the current case would be useful to the entire team, he can search in the wiki, and realize that Jane in the L.A. office is making the same timeline. Instead of Jane and John making two different timelines for the same purpose, they can combine efforts and work together on the wiki, creating a resource in less than half the time.

To use a real life example, one of our clients is Bracewell & Giuliani LLP. As a prestigious law firm with busy and successful practices across many industries, every minute counts for Bracewell's associates. With PBwiki, Bracewell created a "knowledge database" in which legal research is stored. Associates researching legal topics can easily access past research done by other associates at the firm and can use the shared research as a great jumping-off point for new assignments. In this way, previous knowledge and experience is preserved and continuously provides value, and the attorneys can save valuable time for both themselves and their clients.

## Conclusion

As we have seen, legal professionals are the ultimate knowledge workers, and much of their day consists of transmitting, retrieving, and analyzing data such as case facts. Using PBwiki to replace the traditional unwritten knowledge and endless emails can have a major impact on the productivity of all the members of the firm, from overloaded specialists and paralegals, to attorneys and partners. Law firms can generate incredible improvements in both productivity and profitability using tools like PBwiki, including increases of up to 100 billable hours per attorney per year.

## About PBwiki

PBwiki is the world's leading provider of hosted collaboration solutions for businesses and education. Leading companies and organizations like Oracle, DePaul University, and the FDA choose PBwiki to collaborate across geographic and organizational boundaries with employees, customers, partners, and vendors. We host over 750,000 wikis, serve millions of users per month, and 94% of users would recommend PBwiki to a friend. Over 50,000 businesses have chosen PBwiki to implement knowledge management, extranets, project management, and a host of other business processes and workflows. PBwiki's investors include Mohr Davidow Ventures, Seraph Group, Sippl Investments, and Ron Conway.

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