Knowledge Management

What it is, why it matters, and (Google) options for making what you know findable

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Legal Services of Northern California

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January 13, 2010

Center for Access to Justice & Technology



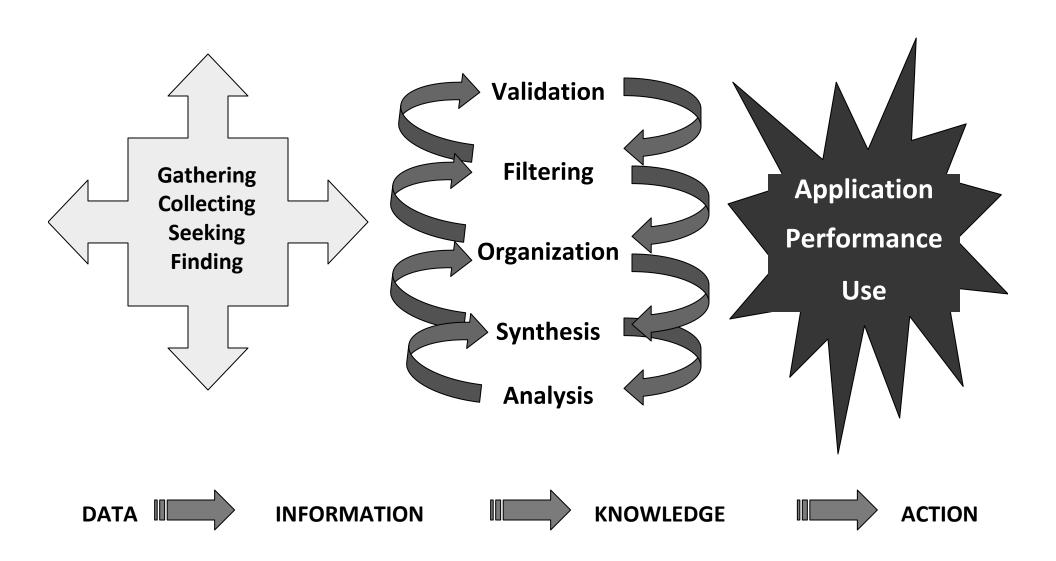
- Curriculum: Public Interest Certificate
- Research: Meeting the Needs of Self Represented
 Litigants w/ NCSC & Institute of Design
- Access to Justice:
 - A2J Author™ Project w/ CALI
 - Self Help Web Center w/Cook County Circuit Court & Clerk
 - A2J Author™ Student Editorial Board

Knowledge Management Early Definitions

 It is ... knowledge creation, capture, organization, access, and application.

> Richard Hunter, VP Gartner Group Quoted in Infoworld 2/22/99 p. 69

3 Stages of Knowledge Work



Knowledge Management: What is it?

 It is more a discipline that includes tacit knowledge that resides in individual workers as well as explicit knowledge that is documented."

> Richard Hunter, VP Gartner Group Quoted in Infoworld 2/22/99 p. 69

Knowledge Management: Some Included Technologies

- Data Mining
- Expert Systems
- Document Management
- Groupware
- Workflow
- Distance Learning
- Document Assembly

Knowledge Management: Some Newer Included Technologies

Web 2.0

Blogs

Wikis

Social Media- i.e. Facebook, et al

Enterprise Search

Recommind

Autonomy's Universal Search

Google's Search Appliance!!



Bryan Cave's Zones

- NoZone® is a widely acclaimed, interactive, web-based application that teaches supervisors and employees how to recognize and prevent harassment of all types.
- Fair Housing TrainerSM was created to help one of the world's largest rental property lessors increase compliance with U.S fair housing laws.
- Insider Zone® helps protect officers, directors, employees and entire companies from the possibly criminal consequences of insider trading.
- FCPA Zone® helps clients avoid violating the Foreign Corrupt Practices Act.
- Campaign Finance Zone® helps clients prevent campaign finance violations at the state and federal levels.

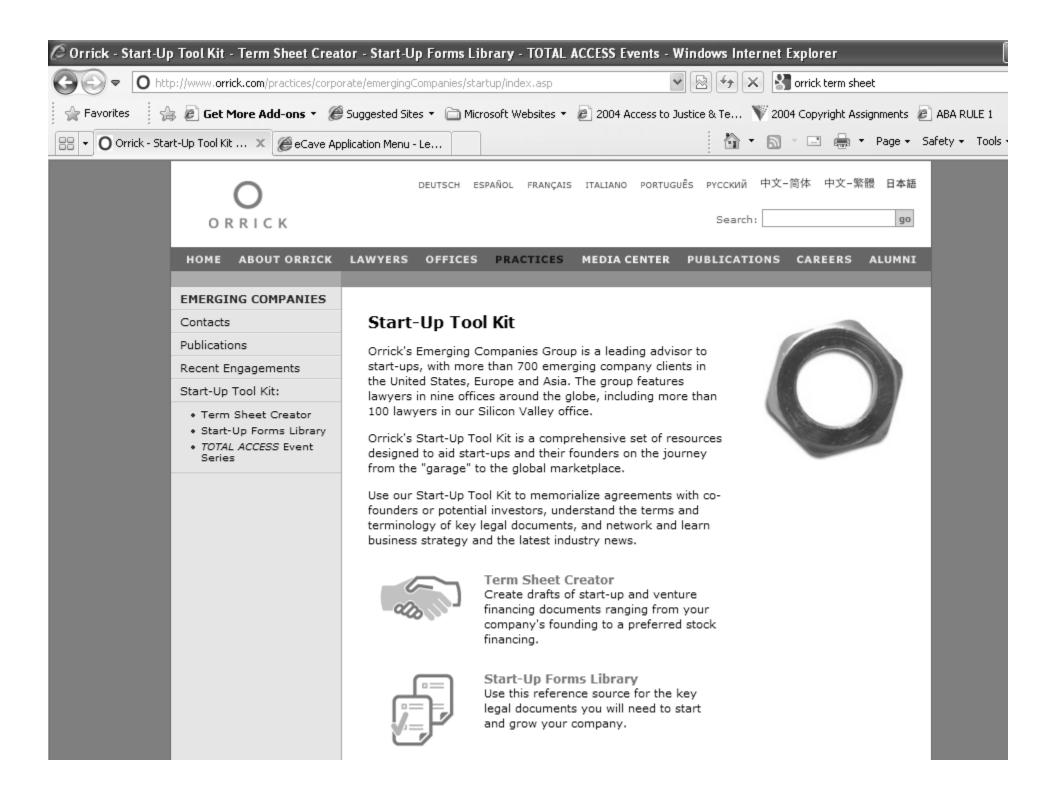


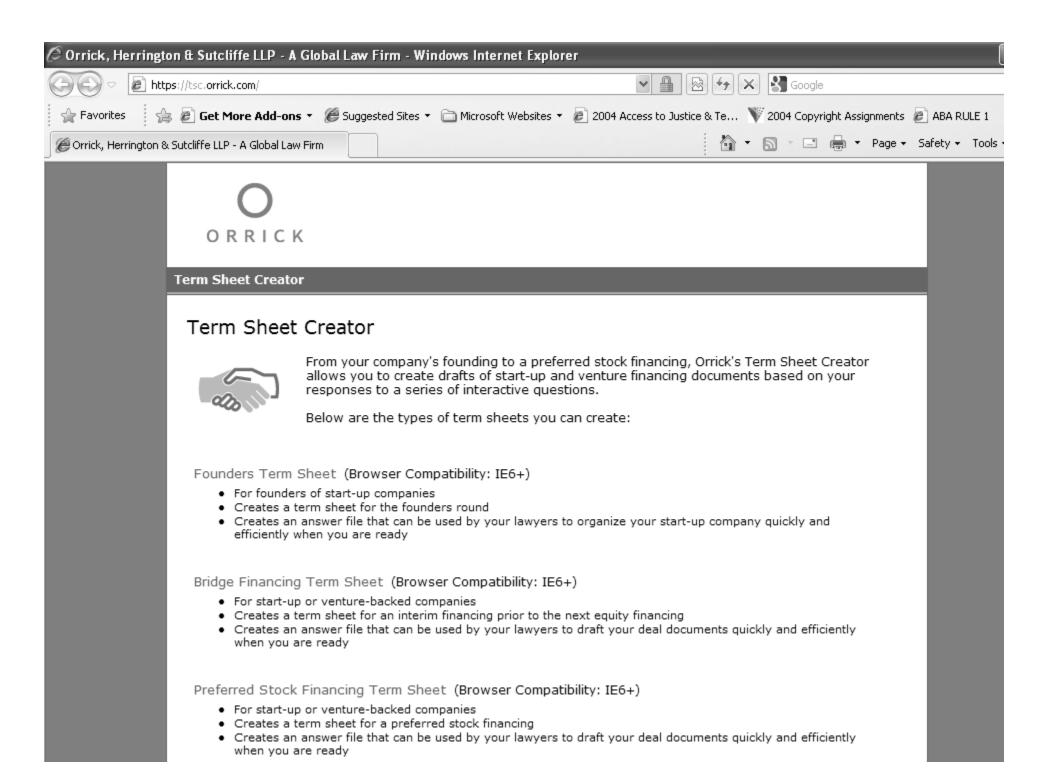
• **Decision-Support Tools:** Bryan Cave's decision support applications, such as TradeZone®, distill large bodies of firm expertise into actionable information that our clients access online and use to make decisions.

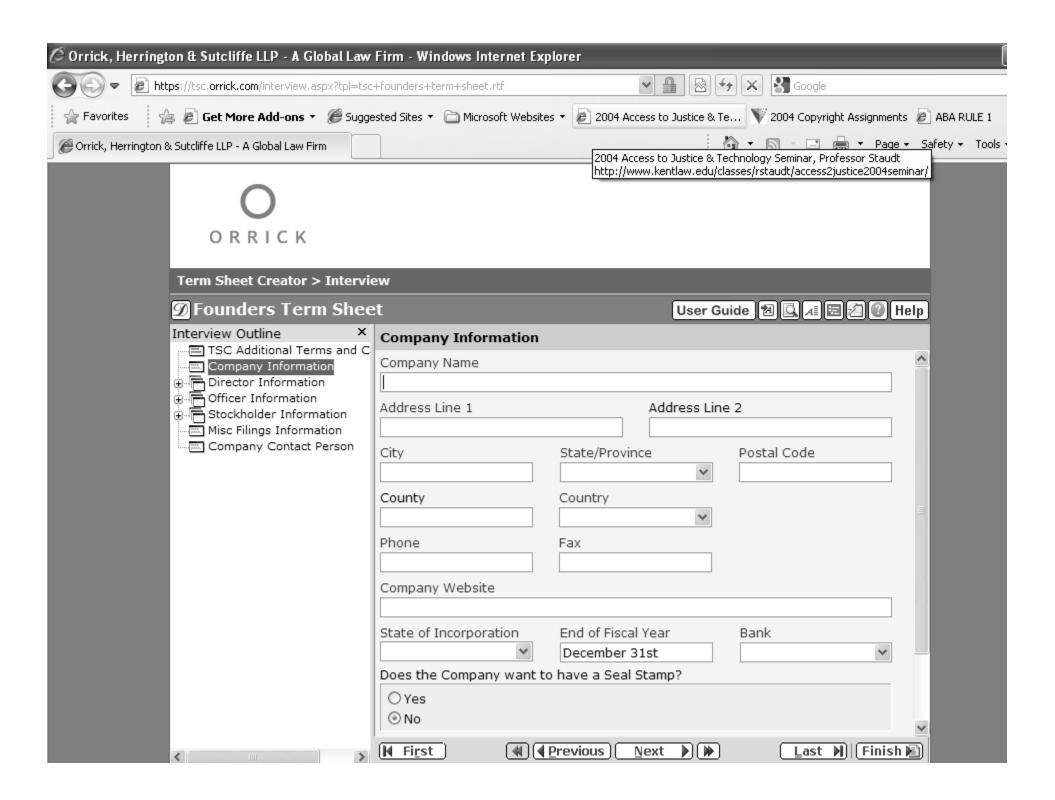




http://www.ecave.net/demos.cfm







Seyfarth Shaw -- Lean Six Sigma

- Six Sigma goals: To integrate the SeyfarthLean approach throughout the firm, so that each person is asking: "Can I do this better?" Also, to achieve a point at which each attorney is asking, "Am I adding value, as defined by the client, to the delivery of my services?" To make sure that we are asking the client what they want and then delivering it in the most efficient, cost-effective way possible.
- Number of projects: 57 process maps in existence in addition to more than 30 internal projects
- Financial benefit/savings: Client savings of
 15 percent to 50 percent

Seyfarth Shaw -- Lean Six Sigma

- Six Sigma is a business process improvement methodology, which was introduced in the early 1980s. Born in the manufacturing departments of Motorola and championed by Jack Welch, former General Electric CEO, Six Sigma has become well-known across many industries.
- The Six Sigma "DMAIC" process (define, measure, analyze, improve, control) is a staged approach to evaluate existing processes falling below specification and needing incremental or greater improvement.
- Seyfarth built--Web based process management; workflow charts; decision points on all engagements; process sheets; activity based cost model

Stages of Large Law Document Centered KM

Document Management Systems West KM
And
LexisNexis
Search Advantage

Universal Search







Document Management Systems

- Central control of word processing, file storage, and printing
- Version control- team document preparation
- Virtual work product case file
- KM Drawbacks of Document Management Systems
 - Huge volume of documents and versions
 - Inadequate search tools
 - Little or no metadata and classification

LexisNexis and West KM Products

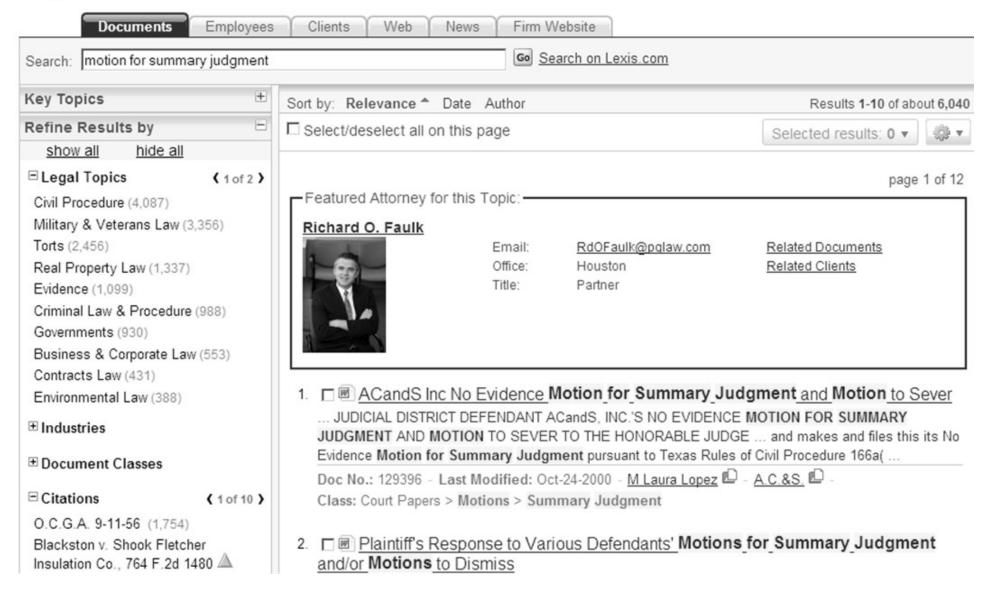
- Separate stand alone databases drawn from document management system
- Require the creation of a new data base, selection of documents and formatting for work product search
- Results enhanced with research products like Shepards and Keycite

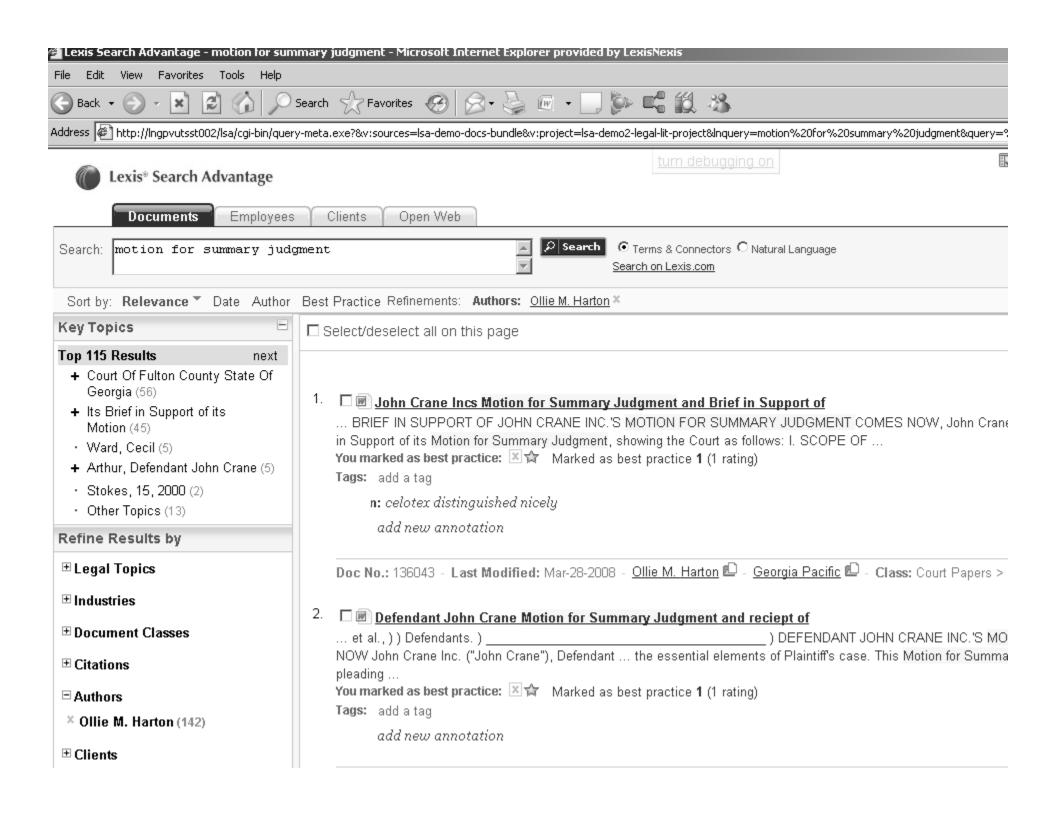


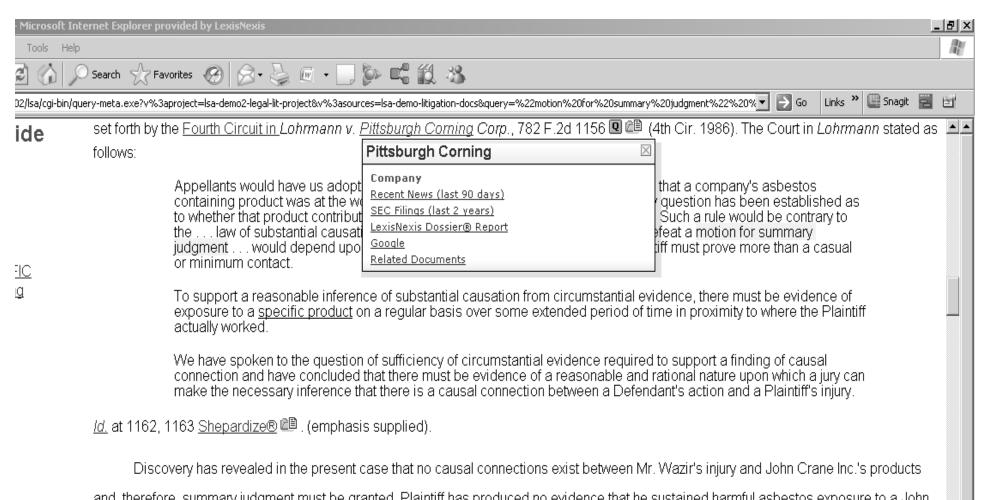












Discovery has revealed in the present case that no causal connections exist between Mr. Wazir's injury and John Crane Inc.'s products and, therefore, summary judgment must be granted. Plaintiff has produced no evidence that he sustained harmful asbestos exposure to a John Crane Inc. product. Pursuant to O.C.G.A. §9-11-56, Plaintiff may not rely on what may be produced at trial in opposing a motion for summary judgment. See 9-11-56(e); SEC v. Spence & Green Chemical Co., 612 F.2d 896, 901 (5th Cir. 1980), cert. denied, 499 U.S. 1082 (1981) Shepardize® (5th Cir. 1978). Nor may they rely on an opposing affidavit that does not specify the affiant's personal knowledge that Plaintiff had an asbestos exposure in relation to this Defendant's product. Blackston v. Shook & Fletcher Insulation Co., 764 F.2d 1480 (11th Cir. 1985). Therefore, in the absence of any evidence of harmful exposure, Defendant John Crane Inc. is entitled to summary judgment as a matter of law.

In his deposition, Plaintiff failed to identify a single location during his entire work history in which he worked with or in the vicinity of John Crane Inc.'s products. Because of the absence of any evidence of exposure, John Crane Inc. is entitled to summary judgment as a matter of law.



Document Guide

Entities

Company

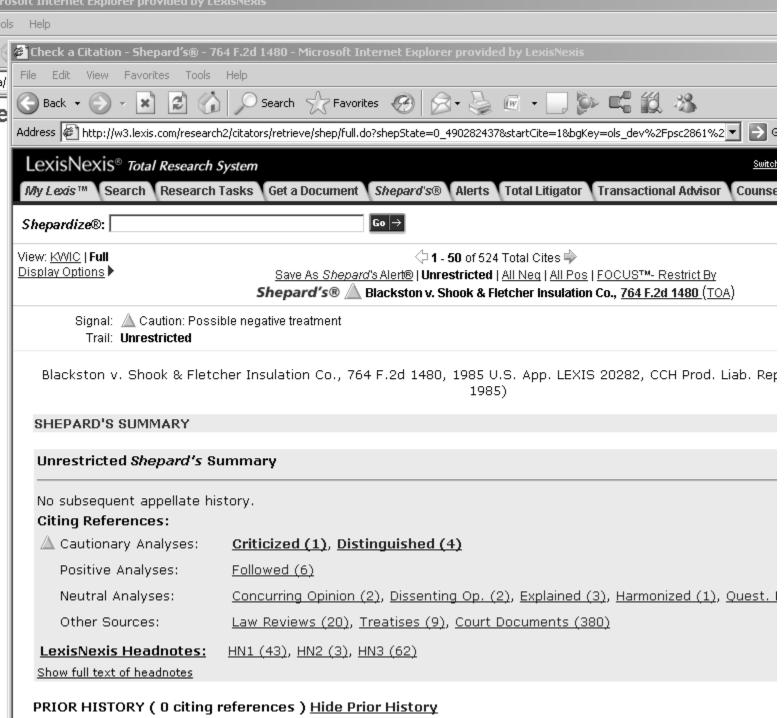
CSX GEORGIA PACIFIC Pittsburgh Corning

Employee

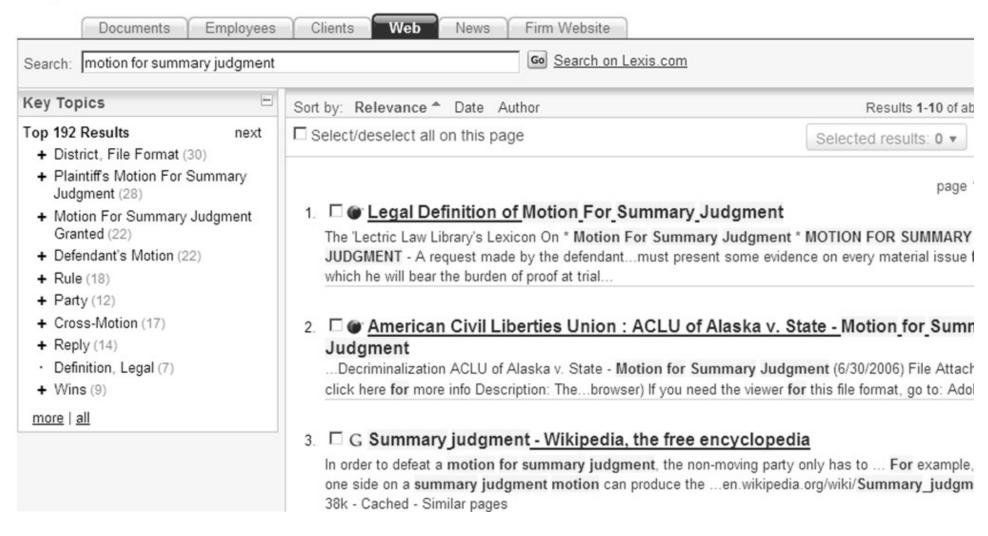
Ollie M. Harton

PhoneNumber

(404) 614-7400







Stages of Large Law KM







INFORMATION



Knowledge Management is about Information Convergence and Collaboration

 To conceive of knowledge as a collection of information seems to rob the concept of its life. Knowledge resides in the user and not in the collection. It is how the user reacts to a collection of information that matters...

Churchman 1971

Large Law KM Obstacles- Trust

David Maister

- When a firm's prevailing atmosphere is one of <u>competition, not collaboration</u>, partners rarely make sacrifices for the good of the firm.
- There is <u>low tolerance for ceding power</u> or influence to practice group or firm leadership.
- [O]bjective formula-based compensation systems entice partners into gaming the system through hoarding work and bickering over origination credits.
- Most important, <u>absence of trust</u> may be a significant contributing factor to the <u>extremely short-term orientations</u> of many law firms. Investments of time or money that don't yield immediate results are rarely made.

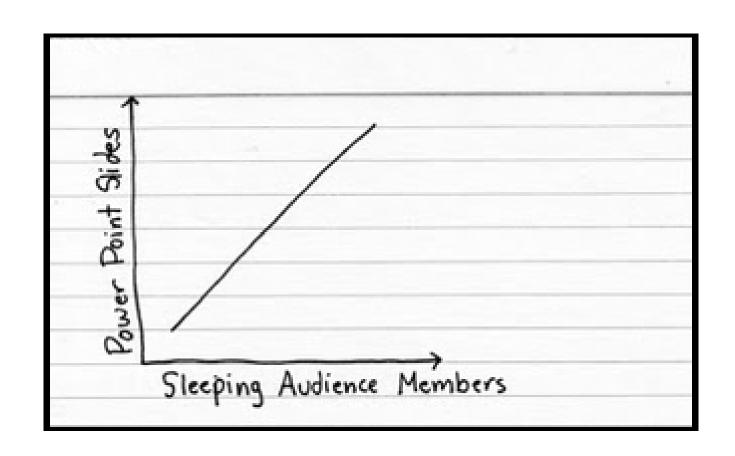
Lessons for Legal Aid

- Findability
- Process Management
- Shared Expertise Systems
- Client Facing Efficiencies
- More?

Knowledge Management

What it is, why it matters, and (Google) options for making what you know findable

... and as the tenth bullet states:



Jessica Hagy

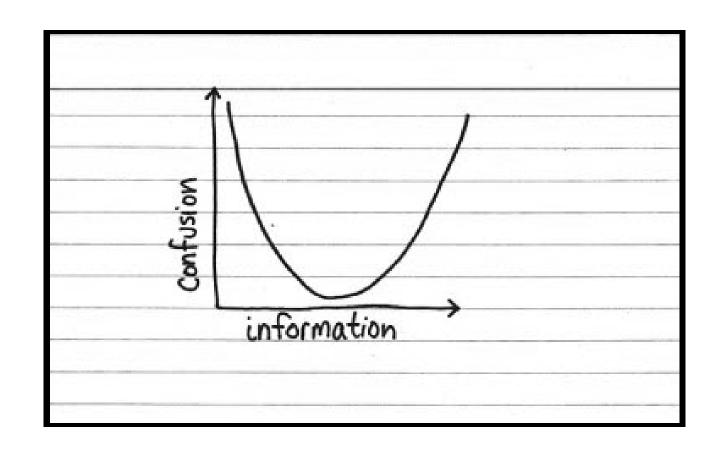
Knowledge as a hard copy concept



Knowledge as a digital concept

Creation
Organization
Use
Sharing
Findability

Needles and haystacks and such...



Jessica Hagy

We now pause briefly for a poem...

"The Unknown"

by Donald Rumsfeld

As we know,

There are known knowns.

There are things we know we know.

We also know

There are known unknowns.

That is to say

We know there are some things

We do not know.

But there are also unknown unknowns,

The ones we don't know

We don't know.

Web search paradigms

It's not just about the search box...



Advanced Search
Language Tools

Google Search
I'm Feeling Lucky

Web search paradigms

Navigational... you want to know *where* - i.e., tell me where a particular site or document is located

Andrei Broder

Web search paradigms

Navigational... you want to know *where* - i.e., tell me where a particular site or document is located.

Informational... you want to know who or what

- i.e., acquire static information on a web page or in a document

Andrei Broder

Web search paradigms

Navigational... you want to know *where* - i.e., tell me where a particular site or document is located.

Informational... you want to know who or what - i.e., acquire static information on a web page or in a document.

Transactional... you want to know how – i.e., take a web search result and perform an activity or process the information dynamically, to a particular purpose

Andrei Broder

Other web search paradigms

exploratory search
crowd sourcing
real-time search
known-item search
vertical search (filtering)

Vertical search (filtering)

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Updates

<u>Books</u>

Forums

Any time

Latest

Past 24 hours

Past week

Past year

Specific date range

All results

Visited pages
Not yet visited

> Standard view

Related searches
Wonder wheel
Timeline

> Standard results

LSC's TIG Program: Home Page

The online registration system for the 2010 TIG conference is now open! For more information and to register to the TIG conference please click here. ... tig.lsc.gov/ - Cached - Similar - Pi | X

LSC's TIG Program: TIG Conference System

LSC will host its 10th annual TIG Conference in Austin, Texas at the Hilton ... tig.lsc.gov/tigconferencesystem.php

LSC's TIG Program: TIG Conference Presentations

TIG Conference System. TIG Conference Presentations. TIG Conference Links ... tig.lsc.gov/tigconferencepresentations.php

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LSC TIG Conference 2010: Strategic Planning for Telephone Systems - How-to's and Examples. This application requires Flash 9. Click here to download. ... www.illinoislegaladvocate.org/index.cfm?fuseaction=calendar... - Cached - PA

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Google

Isc tig conference

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Medium

<u>Large</u>

lcon Larger than...

Exactly...

Any type

Face Photo

Clip art

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Any color

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Black and white
Specific color



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Ron Staudt receives 258 x 276 - 110k - jpg lsc.gov



LSC's TIG 237 x 145 - 17k - gif tig.lsc.gov



LSC Annual TIG 100 x 100 - 5k - png docstoc.com



at the 2008 TIG 406 x 427 - 31k - png webdogs.org

Impact of search paradigms

Search concepts have changed how we...

perceive "information"
locate information
access that information
use information
share information

Is it all about "search"?

"I'm gonna search like it's 1999"

Google becomes a verb

Web content goes crazy social

The cloud emerges as an application platform

Sharing of documents breaks out

The **pervasiveness** of Google

The New York Times Media & Advertising WORLD U.S. N.Y. / REGION BUSINESS TECHNOLOGY SCIENCE HEALTH SPORTS OPINION Search Business Financial Tools More in Business » Global Markets Economy News, Stocks, Funds, Companies Select a Financial Tool Gο Business

The morning before I went to visit Google, I searched my Gmail to find my schedule and plugged it into my Google Calendar before pumping the address into Google Maps. I checked Google News to make sure that I was up to date on the latest headlines and made a file of questions in Google Docs and then hit the road, driving down from the Bay Area to see the basket where I store all those eggs at a cost of exactly nothing.

When I told Mr. Schmidt I was worried about Google's dominant presence in my digital life, he said: "It's a legitimate concern. But the question is, how are we doing? Are our products working for you?"

How Good (or Not Evil) Is Google?

David Carr, New York Times (June 21, 2009)

Is it all about Google?

Google has ~70% of the search engine market

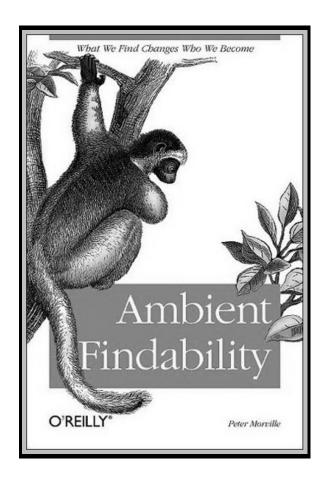
Google offers **50+** web applications

A year ago, **1.75 million** companies were using Google Apps, increasing at a rate of **3,000** a day

Seriously, is it all about Google?

No...
It's about "findability"

What is **findability**?



Peter Morville

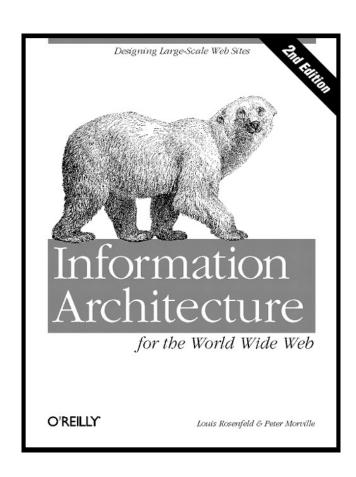
find.a.bil.a.ty n

- a. the quality of being locatable or navigable
- b. the degree to which a particular object is **easy to discover** or locate
- c. the degree to which a **system or environment supports**navigation and retrieval

Information as a value



What about information architecture?

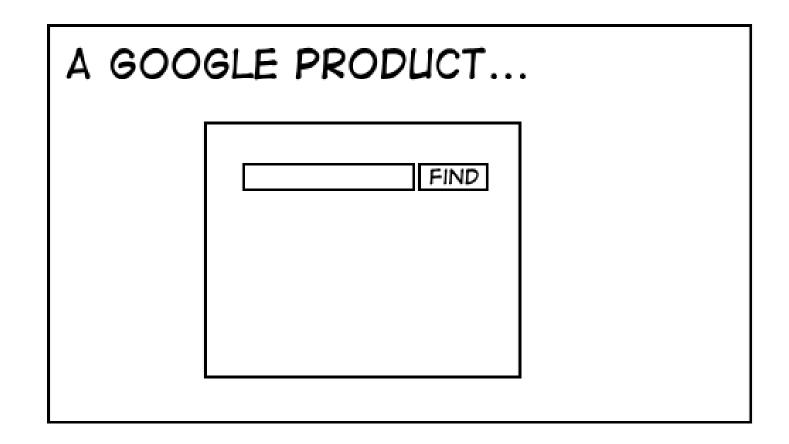


- **structural design** of shared information environments
- combination of organization, labeling, search, and navigation systems in web sites and intranets
- art and science of shaping information products and experiences to support usability and findability

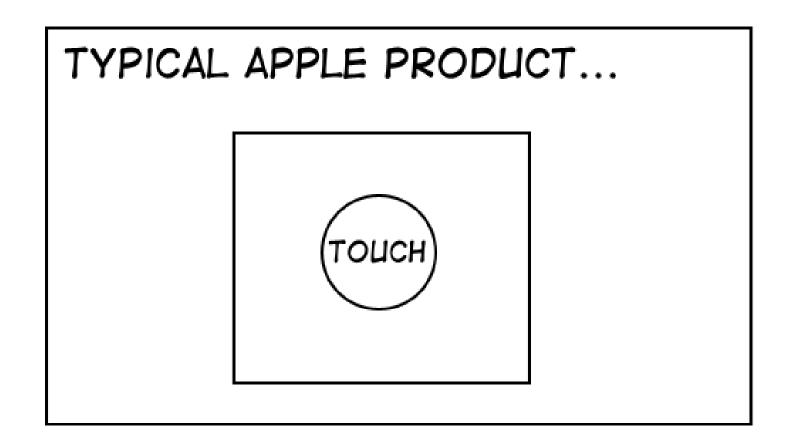
Complaints about IA design

- design and layout damages usability and credibility
- users do not trust accuracy or currency of content
- difficulty of submitting content discourages use
- users cannot find the information they need

"design and layout damages usability"



Eric Burke



Eric Burke

YOUR COMPANY'S APP	
FIRST NAME:	4 - K AA2- DK9B KKA? CN3 AA-9 NEW
OKAY APPLY SAVE LINDO HELP DELETE SELECT BROWSE ERRORS	EDIT

Eric Burke

Usability: visual hierarchy



Luke Wroblewski

Usability: no clear hierarchy

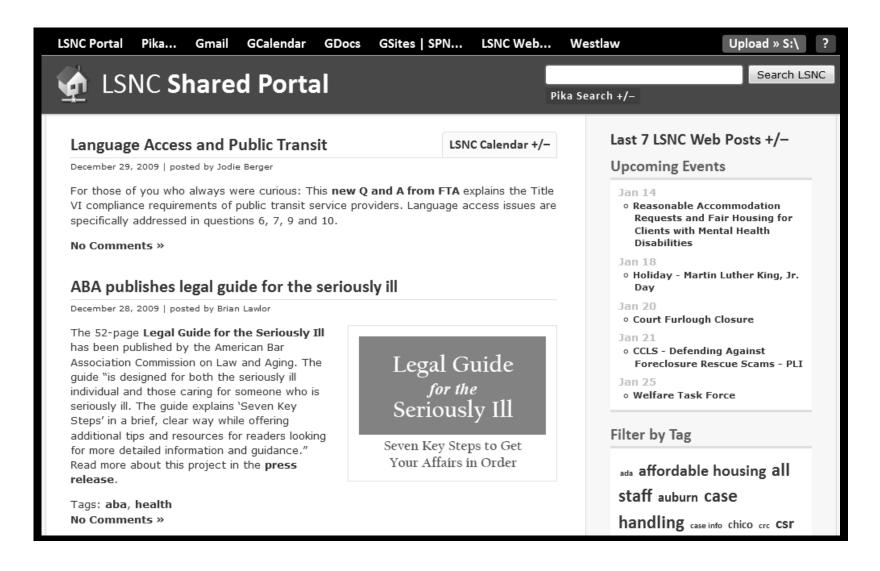


Luke Wroblewski

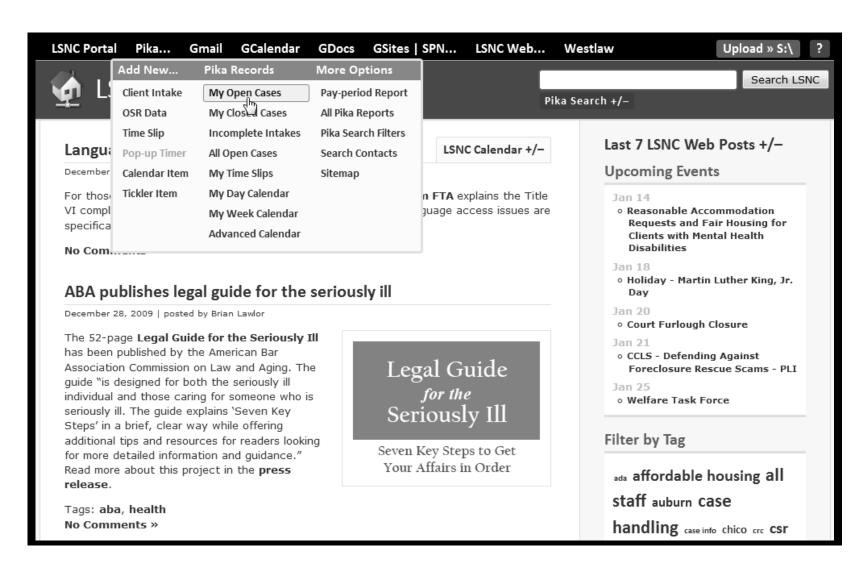
Enterprise Findability = IA + KM + Search

- In a portal space, IA is top-down: traditional, controlled methods of structure and organization
- In a collaboration space, IA is emergent: learn by observing and harnessing user patterns and metrics
- enterprise search is the bridge across portal, intranet and collaboration space, web sites and (CMS) databases
- Success requires supportive culture and incentives

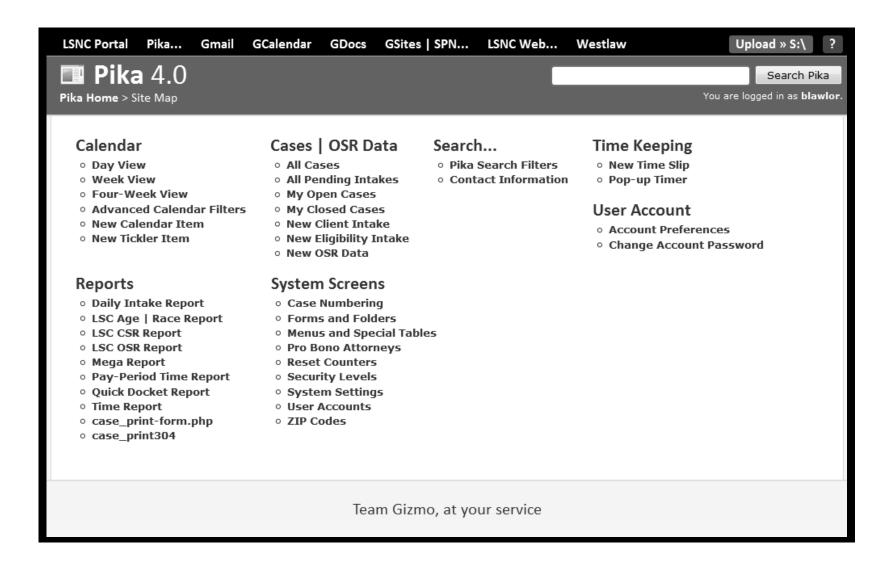
Our shared portal



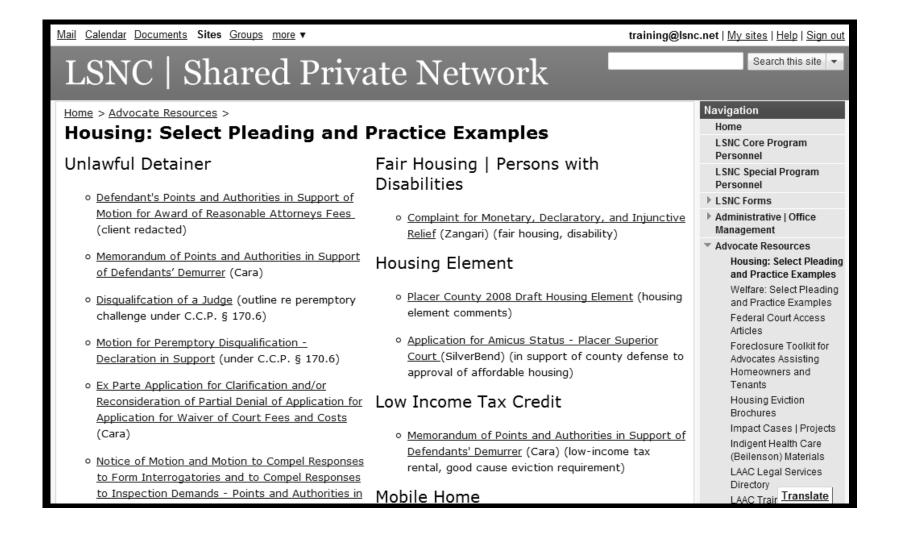
Our shared portal



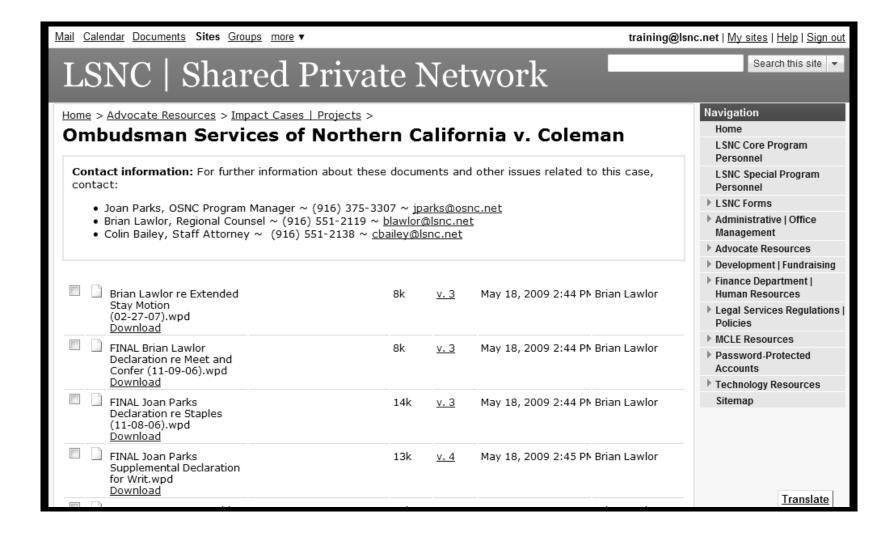
Our shared CMS

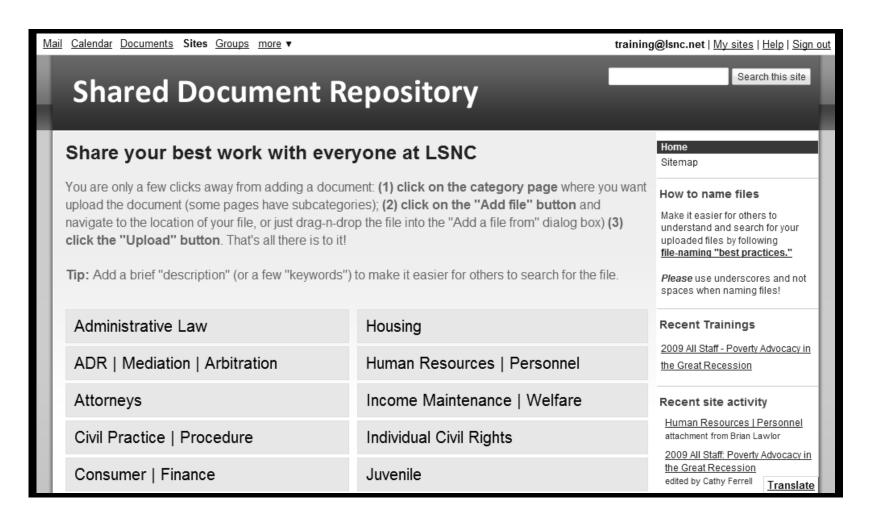


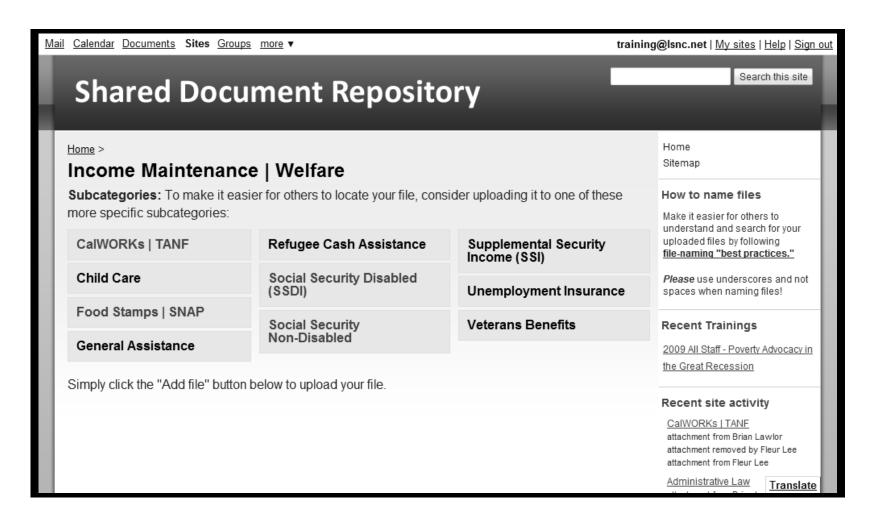
Our shared intranet

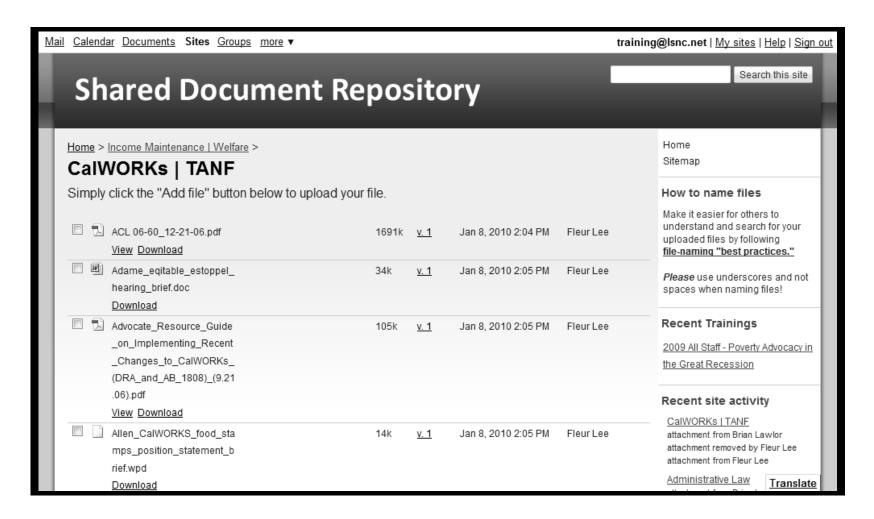


Our shared intranet



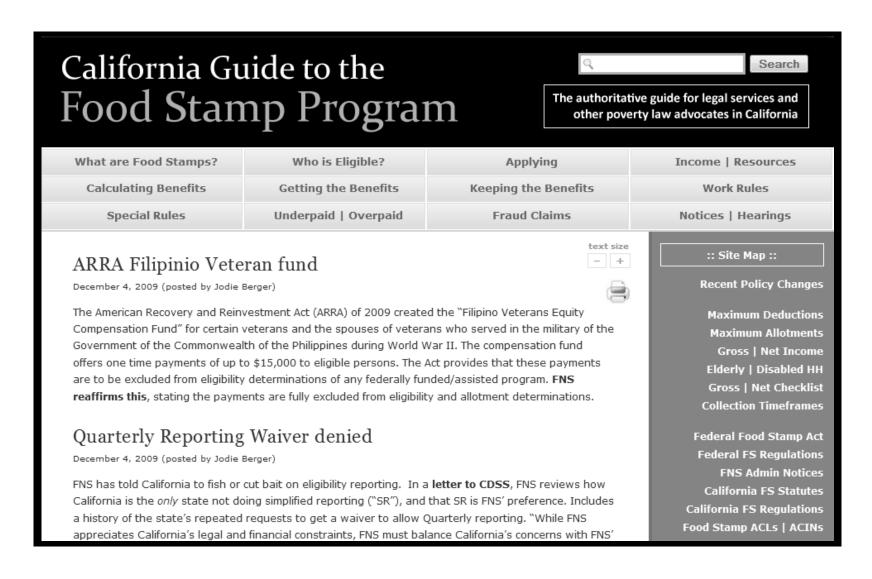








Our public web content...



The **Findability** Project

How LSNC as an organization identified what it knows and how it went about organizing it so it could be targeted by a **Google Search Appliance** (GSA).



Summary of **GSA targets**

1. all Google Sites organizational "intranet" content

Summary of **GSA targets**

2. Additional Google Sites **special project content**

Summary of **GSA targets**

3. **peer-reviewed advocate exemplars** of recommended pleadings, memoranda, etc.

Summary of **GSA targets**

4. comprehensive collection of supporting documents for all impact cases and projects

Summary of **GSA targets**

5. all LSNC **public web content**, including 11 program sites, 6 feeds, and all domain-linked documents

Summary of **GSA targets**

6. user-generated, high-value text-based documents organized in a structured taxonomy in a Google Sites shared document repository

The **Findability** Project

{webdogs 2.0}



The Findability Project Archive

In its original form The Findability Project (TFP) was a public project development site documenting implementation of enterprise search within a non-profit, multiple-office legal services work environment. It was the public face of a special technology search project undertaken by Legal Services of Northern California (LSNC), a legal services program assisting low-income clients in 23 counties in the upper third of California. Made possible by a grant from the LSC Technology Initiative Grant Program, the goal of the project was to implement a Google Enterprise Search Appliance as the principal building block of a modest but secure, well structured, fully web accessible knowledge-content system.

The Findability Project was completed in June 2009 and you can download the LSC-approved **TIG final evaluation report**. Upon completion of the project its dedicated website was deactivated and all of its content was then moved to Webdogs 2.0, which serves as the web repository for various LSNC technology projects.

All 42 project posts have been chronologically integrated here. Other project content has also been migrated to this site, including finalized versions of the project's content taxonomy, document protocols, file-naming conventions, recommendations for organizing individual user directories, configuration of a SharePoint server, and the project's hand-rolled list of CSS selectors selectors for use with the GSA open source XHTML stylesheet:

http://www.webdogs.org/the-findability-project-archive/

Promoting presumptive sharing

{webdogs 2.0}



Presumptive Shareability

After the first of the year, we'll be cranking up as we complete porting of our existing target documents into our new **taxonomic organization**, resolve some filtering and usability touches we want to integrate into our default **GSA front end**, primp and polish the layout and presentation of the front end, implement a few basic **OneBox** modules, and set in motion what we're now referring to as the "Rolling Thunder Roadshow" to all our eight office locations.

The RTR will be our way to recognize and promote among all our staff the changes in how documents and other files are made easily and intuitively findable, and given a new level of access and usability throughout our non-profit organization. After all, that is the core purpose of enterprise search. And a key element of all this is changing deeply rooted individual notions or assumptions about what can or should be "shareable."

In working on this project within a non-profit environment, we have learned that most employees have an inclination to undershare, not overshare. Not because they are selfish or secretive; rather, because the type of transparent sharing that enterprise search makes possible is foreign to most of them. It is familiar to them to be asked to provide a document to others on request in person, by phone or by email. It is foreign to them to decide in advance that a document they created or have received from someone else should be transparent to the rest of the entire organization. The concepts of creation and possession are severed from the concept of findability.

home

chrono: archives

{projects}

data: gis: analytics

findability: project

food stamp: calculator

food stamp: guide

health rights: rebuild

lsnc.net: rebuild

pika: palooza

race equity: project

web: derring-do

{tags}

accessibility add-ons ajax

http://www.webdogs.org/2008/12/18/presumptive-shareability/

What about **CMS data**?

Yeow! What happened when we targeted Pika CMS with the GSA

We had two options: either make code fixes to Pika's PHP so it would play nice with the GSA, or target the MySQL database directly

"Did I mention...

...not everything is **find-worthy**"



1. financial costs

2. **organizing your organization's "stuff"** - the paralysis that comes with issues of taxonomy, vocabularies, folksonomies, metadata models, etc.

3. integration of document management - the need to address document handling protocols and real world practice.

4. hidden costs of the learning curve, maintenance and nurturance

5. **expectations of practical obscurity:** the good news is, Google finds everything; the bad news is, Google finds everything. *Like, it really finds* everything.

Google Apps vs. SharePoint

Why LSNC abandoned SharePoint

Why SharePoint Scares Me, by Peter Campbell @ Idealware

Sharepoint and Enterprise 2.0: The good, the bad, and the ugly, by Dion Hinchcliffe @ ZDNet

Rethinking metadata models

Why metadata matters

The problem(s) with metadata

Why metadata may or may not be essential

Rethinking how users "add search value" to documents

{webdogs 2.0}

Google™ Custom Search



Schmetadata 2: Judgment Day

Think of it as the Revenge of the Empiricists.

A few days ago my **earlier post about metadata**, with the conclusion that "we don't need metadata," caught the attention of **Daniel Tunkelang**. It just so happens that Daniel is the chief scientist at **Endeca**, a prominent enterprise information company. You know, like, he knows what he's talking about.

Long story short, Daniel **commented** on my post here and then, after I responded, mirrored our discussion in **Does Metadata Matter**, a new thread at **The Noisy Channel**, his blog that hosts vigorous discussions of search design and other enterprise information issues way above my pay grade. Daniel and others there critically but constructively took me to task because of the empirically unsupported general conclusion that metadata is not needed, and the specific failure to make clear the anecdotal basis for our conclusion about metadata on this project. As you can see from the discussion at Daniel's blog, they killed me on the empirical point. In response, **I better explained there** than I did in my original post why our conclusion about not needing metadata on this project makes sense.

The discussion there ended on Christopher's **grace note**, something that the **TIG program** and others within the legal services community will appreciate:

I also want to applaud your project which I should have done before, the mission your team has set is very admirable. It's gratifying to see technology being put to use to help people who may not otherwise be able to have access to the same advances we do.

{core}
home

chrono: archives

{projects}

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food stamp: guide

health rights: rebuild

lsnc.net: rebuild

pika: palooza

race equity: project

web: derring-do

{taqs}

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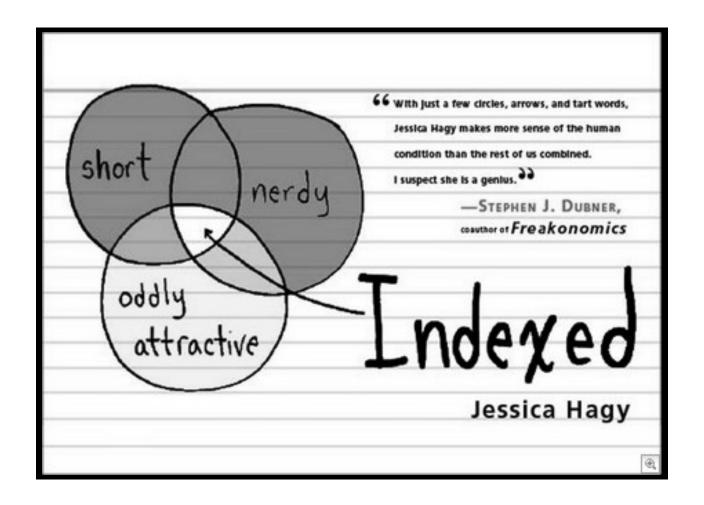
basecamp bias books

http://www.webdogs.org/2009/03/29/schmetadata-2-judgment-day/

- "As we ramp up the digital content we acquire, the need for indexing and tracking this content in a meaningful way has grown exponentially, and it's the elephant in the room every time we capture [and] save content.
- "Automatic metadata creation remains the Holy Grail, but the technology isn't ready yet to be affordable and mainstream. The way broadcast media handles metadata today doesn't work for this mass market scale: You can't have people dedicated to spending eight hours to index a one hour broadcast. And individuals can't do like Rovi, whose company has hundreds of people dedicated to metadata generation.
- "For metadata to work and work well, it has to be universal, and be understood in context by different devices, applications, and systems. The consensus that easy and meaningful metadata generation is necessary may be there, but ... as one speaker on the panel noted, 'For metadata to be useful, everyone needs to agree on it.' We're not there yet."

What are the possibilities?

Q A



http://thisisindexed.com/

Presenters

Brian Patrick Lawlor

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blawlor@lsnc.net

lsnc.net
foodstampguide.org
webdogs.org

Ronald W. Staudt

Chicago-Kent College of Law rstaudt@kentlaw.edu

Faculty biography

LinkedIn profile