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## Creating an Intranet Portal at Parker Poe

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In a crowded diner in Brooklyn, two men study a laptop computer. On the screen, a spectacular infinity pool disappears into the sea beside St. Lucia's lush green Gros Piton mountains. Beside it, a colorful box lists the country's hotels, real estate developments and golf resorts. There are Web links for the St. Lucia government, tourism and local news sites -- even today's weather.

No, these guys aren't planning a vacation on a travel agent's Web site. A senior law firm partner is illustrating his team's expertise in Caribbean resort and hospitality developments to a prospective client. What's on the screen is one of the more than 200 practice group pages on Parkway, the intranet at Parker Poe Adams & Bernstein.

This is the story of a law firm, with no prior experience in intranet portal technologies, that formed close partnerships between firm departments and its vendor XMLAW to create Parkway, an invaluable resource for attorneys and staff. It wasn't easy, but here's how it happened.

### WHERE WE BEGAN

In 2007, we had more than 200 lawyers and an equal number of staff spread throughout six offices, with a growth rate among the fastest in America. We had five legal departments, 15 practice groups, and more than a dozen active committees. We had millions of documents in a well-organized document management system, a sophisticated VoIP phone system with unified messaging and a serious need for an intranet portal.

We had employee data scattered throughout multiple systems and databases. Administratively, we kept policies, forms and lists in Microsoft Word documents and Excel spreadsheets. Our internal communication was limited to e-mail and our firm's use of a 160-page phone/fax directory published twice a year for

450 users, and therefore never current. We had a growing mess and huge inefficiencies in administering even the most basic, non-legal information.

By the summer of 2007, we brought together marketing and business development and information services personnel to discuss what we wanted in an intranet. We gave it the name "Parkway" -- which offered a great brand identity and plenty of creative fodder down our information superhighway. As our wish list grew, we soon realized that the success of the project depended upon a close partnership between the two departments. It had to be a joint effort, where the management of the project was clearly defined. Technical configuration, installation and training would be handled by IS, while all graphic design, layout and news content would be managed by marketing. This would prove to be a major key to our success.

### LOOKING FOR A PARTNER

We'd seen Microsoft SharePoint implementations at other law firms and were comfortable with that platform, so we looked only at vendors who developed SharePoint portals for medium to large law firms. Because we had zero expertise, we needed a vendor who could provide a "turnkey" approach -- install SharePoint, offer a wide variety of Web parts used in other firms, train our team and provide seamless integration to our key systems: Interwoven DM, Interaction CRM and Elite. We were also insistent on our ability to customize colors, fonts and typestyles to create a look and feel consistent with our firm's internal and external marketing program.

We also knew the importance of enterprise search. One partner told us, "We want a Google -- that searches our systems. With relevance, with refining capability, and with our internal security." XMLAW's enterprise search delivered that and more.

While several vendors could provide Web parts and developers to customize the intranet to our needs, XMLAW provided more of a total solution -- a finished portal -- that we could have up and running in less time than if we had to have someone design

a solution from our specifications. And as mentioned, with no expertise in this area, we didn't feel comfortable in the design of the portal and certainly didn't want to pay massive development fees to build what we thought would address our needs.

As with any vendor selection and negotiation, you have to develop a clear scope of work. Even before we'd made our decision, XMLAW provided us with a detailed project plan, broken into milestones, with time and cost estimates for each activity. Yes, they were estimates; and yes, some sections took longer. But overall, the project came in on budget.

### HOW DID WE FORGET THAT?

Wouldn't it be great to have one place to go for all your employee and firm information needs? Employee lists, phone numbers, addresses, designations for practice groups, offices and departments. Which secretaries work for which attorneys; who's a notary; which attorneys in our Raleigh office speak German. Not a problem -- just cruise down the Parkway and you'd find it all.

Problem: An employee's name, address, phone, department, practice group, etc. were located in systems for human resources, IS, accounting and marketing, as well as in documents and spreadsheets maintained by all these departments. Attorney bios, including areas of expertise, education, bar affiliations, etc., were published on our Web site. User names, including e-mail address, security or distribution groups and phone extension were stored in Active Directory.

We had to stop, midstream, and build a workflow process to assure all the data was funneled from each of these systems to a place where Parkway could access it in an accurate, real-time fashion. XMLAW recommended we use the Interaction database, since much of the data was already there (including an existing data transfer from our payroll system) and XMLAW had extensive integration using Web parts between SharePoint and Interaction. Several months later, we were back on track.

### THE TEAM

We assembled a diverse Parkway Admin team to design and build the sites. The team included the CIO, the training supervisor, an office manager from our Columbia, S.C., office, a member of library services and a marketing communications specialist. We didn't yet have our SharePoint Web developer, so we brought in a graphic designer from our marketing team to work with XMLAW on creating Parkway's look and feel.

Once XMLAW had completed the basic installation of the portal with our graphic design and overall structure, they trained PA for a week on the use and configuration of their Web parts. These included SharePoint Web parts and those designed specifically by XMLAW for the integration of our primary systems: Elite, Interwoven DM and Interaction. The PA team then split up

the various sections of the portal so that our trainer handled all the administrative sites, the office manager handled all the office sites, one of us took on the practice group and committee sites, and so on. We each created a site that would serve as a prototype or example of what was possible in that area. Our practice group prototype was for our Resort & Hospitality team from our Charleston, S.C., office. The site that found itself in a Brooklyn diner was the result of months of collaboration between the CIO, marketing director and practice group leaders and now contains hundreds of pages, documents and forms used in both the collaboration of the team and the development of its future clients.

### READY TO ROLL

After a pilot group spent a month or so navigating Parkway, we turned to marketing for our official launch. There were sneak previews, flyers and creative, high-quality e-mail alerts. We conducted a road show for each office with 30-minute demonstrations of the key areas of the system: document search; locating employees, policies and forms; where to find targeted news; and practice group collaboration sites.

The morning Parkway went live, everyone had a colorful brochure on their keyboard proclaiming "Parkway is Ready for Traffic!" A laminated quick reference with "Your Secure & Speedy Route to Work, News & More" was on their desks. When e-mails went out to all staff, we made sure to publish the news on Parkway. Eventually, we began sending e-mail announcements without the text of the announcement -- only a link to it on Parkway. It's important to keep up the promotion as long as possible to get folks familiar with what's available.

### KEEPING IT ROLLING

As with any publication, news stories must be fresh -- replenished every day or two, and more frequently for our front-page features to keep interest and readership high. And all our data -- all neat and organized from that workflow effort -- must be kept accurate. A new employee sitting in a training class must already be listed in the portal with all other employees, and should also be featured in a "New Employee" section of the HR or office site. To solicit news and events, we put a "Quick Link" on the Parkway home page that sends an e-mail to our news teams. News articles and calendar events usually get to the site within the hour. We also have the choice of publishing news by target audience or physical site, or both. This allows us to post news on Parkway's home page, e.g., a marketing event for the Raleigh, N.C., office that appears only on the home page for Raleigh users. A breaking story from the South Carolina legislature might be published on the home pages of South Carolina office users, but also appear on the Regulatory Department's site for review.

To promote the enterprise search, we replied to lawyer e-mail

requests for information on a particular client or type of work by performing a Parkway search, then sending them a link to the results of the search. They click on the link and immediately go to the Parkway search results. Our hope is that next time, they'll do the search on their own.

### PRACTICE GROUP COLLABORATION

The Resort & Hospitality site on Parkway is a lot more than pretty pictures of white beaches and turquoise waters in the Caribbean. There are dozens of sites for industry links, broken into associations, publications and sustainable development areas. There's a "Markets" section that lists major regions of the world where our clients are creating or managing projects -- or where they may want to pursue in the future.

In Markets, for example, you can select Caribbean, then St. Lucia. In addition to everything we saw in the Brooklyn diner, we can view a list of document folders using XMLAW's Interwoven Web parts. There you can see documents organized by "Dining & Entertainment," "Golf," "Developments," "Resorts," "Land Registrations" and "Zoning Restrictions" -- all for St. Lucia. The beauty of these document Web parts is that they point to a master practice group folder within the DM repository. The practice groups then organize their documents any way they wish and they're published instantly on the site, without any required efforts by Parkway Admin. There's also a section on the Resort site for industry professionals. Contacts for developers, land planners, local law firms, financing specialists, government agencies and research providers are all found on Parkway.

Now that other practice groups see what can be done, we're consulting with them to build sites specific to their needs. Though the look and feel will stay the same on each practice group site, we're finding that each group has unique needs and uses for their sites. Some want a site as complex and content-rich as the Resort site, while others simply want a calendar and a Web links section. After nearly six months after our launch, we're seeing most of the groups and committees wanting to have their own sites.

### WHAT WE HAVE NOW

With XMLAW's Web parts and technical assistance, Parkway has grown significantly, and now includes the following sites:

- Departments (5 -- though only 2 are populated with links, resources, documents, etc.);
- Practice Groups (15 -- 6 are currently active);
- Offices (6 -- with new travel pages showing the current weather, driving directions, hotels and restaurants for all our offices);
- Administrative departments/teams (7);
- Committees (5 active);

- Client/matters (thousands) -- XMLAW's "Client and Matter" sites are automatically created for each client and each matter. This includes financial information, matter listings, matter profiles, invoices, accounts receivable information, etc. And each client page has an automatic RSS-feed news link for the latest news for that client;
- Calendars for every site, with events published by target audience or physical site;
- Quick Links to extranets, comments and requests, emergency contacts, the help desk, notaries, news submissions, phones lists, Westlaw and Lexis databases, and our new site for green resources;
- Enterprise search (our very own Google);
- "People Search" to locate any employee in any office, including their photograph, contact information, department, office, practice team and where they're located on the floor plan maps.
- "My Page" for users includes their Outlook calendar for the week as well as their documents and contacts from the DM repository and Interaction; and for timekeepers, tabs for "My Clients" and "My Matters."

We've come a long way, but it's been well worth the effort. Perhaps the best surprise has been the use of Parkway as a marketing and business development tool by some of our attorneys. It's always a challenge to quantify return on investment for a technology project, but we know that Parkway has brought in a couple of new clients who were impressed with the passion with which we built sites like the one for St. Lucia.

This project also forced us to organize our administrative data in a far more efficient manner. It made us create a workflow with our employee data and it now gives us one place to go to find (or correct) data. And while not all the firm's employees use Parkway, the numbers are growing. Nearly a third of the firm uses Parkway every day, another third several times a week. Eventually, if we keep the sites full of fresh content, proactively consult with practice group and department teams, and assure that everyone knows how to use the sites, nearly everyone will be using this valuable tool.

*Steve Fletcher is Chief Information Officer at Parker Poe Adams & Bernstein.*