



Why Matter Centricity?

Today, we have more electronic information coming at us than ever before. At the same time, the need to manage matters and share knowledge with a geographically dispersed workforce are prompting law firms to seriously consider how they can do a better job of efficiently managing critical content.

The exponential growth of data, coupled with client and staff expectations of availability and response time, are forcing law firms to look at how information is shared and how they can provide clients with greater access and a consistent online user experience.

While no surprise, many firms have found that information has been tucked away in private data stores, often Outlook inboxes or private Outlook folders, thereby creating informational silos rather than shared repositories. This situation, in large part, grew out of an environment that had effective processes in place to manage data in a hard copy format but not in its corresponding electronic format.

For most firms, there were few "firm rules" for electronic data management, and even fewer viable user options for electronic data storage. Information that had been centralized in the physical folder for all to access was now being partially replicated into individually owned data stores.

Some of the challenges were fairly obvious. Clearly, there was a need for a shared database in order to give the user base a place to store the firm's electronic data. More importantly, the firm had to provide a means to replicate the structure of the physical files and provide seamless access to the matter folders for all related documents, e-mail correspondence and attachments, financial reports and any scanned content or images.

All of this led up to the concept of matter centricity, which, in reality, is not so new after all.

A matter centric environment takes the focus off of the individual "information worker" and puts it squarely on the client. All firm-related information is in the case file. Clearly this is not a unique idea in the paper world, but a very challenging one in the electronic environment. The intention of matter centricity is ultimately to make case level information securely accessible to internal and external users on an anytime – anyplace basis.

The impact of a matter centric environment is many fold. Some of the key areas are financial, risk mitigation and work style.

Financial

When information is easily accessible and well organized, staff

members can be more productive.

Work process standards can be established to maximize staff productivity to help the firm better leverage its ever-increasing workload.

The firm is in a better position to capture the value of its knowledge base

Risk Mitigation

The firm needs to maintain control over its work product – the document. Many clients are demanding access to their documents. Accordingly, firms must be prepared to provide secure repositories to their clients. Otherwise, they risk losing control of their work product as it is deposited into the client's or co-counsel's repository.

When case information is centralized into an identifiable data store, the firm is in a much better position to manage the lifecycle of its client's records and institute a viable retention policy on those records.

Workstyle

With standardized work processes and an environment in which information is accessible anytime from anyplace, the firm will have the option to offer alternative work style options to its staff members. This may result in greater long-term retention of staff.

Ultimately, the concept of matter centricity is to serve the client better by getting information to them faster and more cost effectively. For many firms, implementing a system that enables access to information anytime from anyplace requires a culture change that must be a top down initiative.

We have simplified implementation into the following steps:

1. Once convinced of the value of matter centricity, the law firm's managing partner should assign a project team to examine the firm's situation, review the range of possible solutions, recommend an

Basics of matter centricity

- Takes the focus off of the individual "information worker" and puts it squarely on the client.
- Makes case level information securely accessible to internal and external users on an anytime – anyplace basis.
- Serves the client better by getting information to them faster and more cost effectively.
- Enables the law firm to focus on their clients and deliver services in an efficient, cost effective manner.

approach and guide implementation.

2. In the due diligence phase, the project team should meet with employees from each practice group to understand how they work and examine the system used to organize physical files.
3. Working with a legal technology consultant, a concept is developed, demonstrated and tweaked as necessary.
4. Once finalized, the practice group is trained in the new process and, if necessary, further refinement of the concept is completed.

5. With a successful implementation behind them, the process begins again with the next practice group.

In summary, matter centricity positions the firm to do a whole myriad of things that would be very interesting to attorneys. Their documents become infinitely more portable and they have the ability to download all documents based on a particular case or matter. It integrates the electronic and paper records.

Matter centricity enables the law firm to focus on their clients and deliver services in an efficient, cost effective manner. In order to achieve this paradigm shift, firms must be

prepared to face the cultural issues that come with change and growth. The payoff, in the long term, will be increased leverage of some of the firm's most valuable resources: people, time and knowledge.



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