

Business & Careers

Cut down the amount of time spent on searches



Luigi Benetton
Hi-Tech

Robert Drake figures he spends about 15 hours each week searching for information.

"Fifty years ago, I think the entire bar would only have knowledge of six cases in an area of law," says Drake, an associate at Goldman Sloan Nash & Haber LLP. "Now there are 1,000 cases for an area of law."

Lawyers face this low-signal-to-noise conundrum each time they build a case. They want both — access to large amounts of information and to minimize time spent sifting through that information.

Peter Aprile's firm has been configuring a document management system using the cloud-based tool Actionstep to tackle such concerns. The system (nicknamed "Hank")

contains "articles explaining everything from complicated tax topics to how to use the coffee machine," says Aprile, tax counsel at Counter Tax Lawyers.

"Hank instantly searches our client files and highlights any (relevant) cases, including examples of pleadings and arguments we previously used to successfully persuade the (Canada Revenue) Agency to reverse its position."

Search tools prove more effective when users adopt effective document management habits like tagging documents and articles with pre-defined topic labels; using naming customs with common acronyms; and using standard folder organization.

While admitting staff has mostly been consistent, James Kosa's experience with such habits hasn't been encouraging. He considers a document management system without near-perfect compliance practically useless.

"It fails to provide you with the information you need," says Kosa, a partner at Deeth Williams Wall LLP.

"Let's say I put a form in front of users each time they need to save a file in Word. A certain percentage of the user population

will not complete the form properly."

An administrator has to audit, track and manage this complexity, and in his firm, such responsibility would fall on Kosa's shoulders. "I have a day job already," he quips. "We need systems that can tolerate some misbehaviour from users."

Some lawyers gravitate to search tools that ship with their computers (Windows Search, or Spotlight on the Mac).

Desktop-based search tools would not work in Kosa's firm's computing environment, with its terabytes of data. "In order to be fast, they must index," he explains, adding that having multiple computers index servers simultaneously would slow servers and the network to a crawl.

"The Windows search tool is not robust enough," Kosa continues. "It was designed to search a desktop environment only."

Kosa's firm opted for MetaJure, a server-based search tool that has been configured to index data on the firm's servers each night so it doesn't place any load on the network during the work day. Users query the search tool (marketed as a document management system) instead of the whole network.

"The lawyers who helped develop this application gave the engineers input into what search terms might mean," Kosa explains. "If you type 'NDA,' it searches for the string 'NDA' plus comparable terms within the legal dictionary it maintains, like confidentiality agreements and MNDAs."

Kosa recommends law firms invest in hardware that can handle the extra load that search tools place on computing infrastructure. He offers the example of installing extra storage on the search server.

"MetaJure creates copies of some files in

the index itself to return results faster to the user," he explains.

Law firms must be able to configure search tools to keep them from digging through documents nobody needs.

"The search tool was so good at its job, people worried that it would make personal correspondence too easy to find," Kosa recalls.

He recommends finding ways to prevent search results from including documents like newsletters and spam result reports.

Kosa himself uses e-mail rules to sort messages into appropriate folders, and he configures MetaJure to exclude certain folders from search.

Aprile notes that Hank is "cloud-based and encrypted and has built-in safeguards to protect our information."

Hank's data and the practice management system reside on different servers "to minimize potential exposure in the event of a security breach." (Aprile's firm does not store client names or identifying information on Hank.)

Not all the information lawyers need can be found inside the firm. Drake notes useful external sources like LinkedIn (and other social networking sites), Canada411 and other websites. Aprile's firm uses third-party tax-specific databases (TaxNet Pro, Tax Court Practice) for up-to-date case analysis and legislative references.

Could search tools probe these external sources as well? "Subscription-based services are unlikely to allow this kind of access but we have not explored this option," Aprile says. "In theory, it would be possible. If TaxNet Pro and Tax Court Practice released an API, we would try to merge the systems."

HSBC

Corporate Secretary

HSBC Bank Canada

In this role, you will support the Chief Executive and Board of HSBC in Canada by ensuring best practices and oversight. HSBC Bank Canada is part of a global network with 6,100 offices in 72 countries and territories. With assets of US\$2.5 trillion, the HSBC Group is one of the largest banking and financial services brands in the world. As the country's largest international bank, HSBC Canada has assets of \$93 billion from its operations in Commercial Banking, Retail Banking and Wealth Management, and Global Banking and Markets.

Based in either Vancouver or Toronto, you will report to the President and CEO of HSBC Canada and the HSBC Group Company Secretary in the UK. You will also report to the Board of Directors (through the Chair of the Board) for HSBC Canada as well as the Boards of its various subsidiaries.

Your professional mission is to draw from and strike a balance between international and Canadian best practices, ensuring comprehensive, compliant and effective governance practices for HSBC Bank Canada and its subsidiaries. Through your strong self-motivation and independence, you will ensure that your Boards and their committees have appropriate and consistent support for meeting the constantly evolving expectations of multiple stakeholders. You have the organizational and leadership skills to effectively contribute to the Global Corporate Secretary function, including participating in (and possibly leading) global committees.

Almost certainly a lawyer, you have experience as an Assistant or Corporate Secretary and Head of Governance with a Canadian reporting issuer, preferably a financial institution or similar regulated company. You have familiarity with the dynamics of subsidiary relationships, including the demands placed upon senior executives in terms of travel and working hours. You have also served as a strategic contributor to a senior executive team. With HSBC, you will immediately serve the Canadian operation with best practices and have the opportunity to pursue international positions in the future.

CALDWELL PARTNERS

www.caldwellpartners.com

Please indicate your interest in Project 151210 at www.caldwellpartners.com/apply.php

All responses to Caldwell Partners are confidential.

Needs: Be more than a 'minder-grinder'

Continued from page 21

A recent survey by Robert Half indicated that law firms are bringing on lawyers in certain high-demand practice areas like real estate, corporate law and litigation and small and mid-size firms, in particular, are doing much of the hiring. Corporate legal departments, meanwhile, are responding to increasing business demands and adding staff at every level to contain outside counsel costs, the survey noted.

To get a leg up in 2016, recruiters say lawyers seeking work will need to have not only the legal skills and business smarts but also a personality that will enable them to bring in clients.

Legal recruiter Heller says law firms have changed and partners are now looking beyond technical skills and legal expertise when hiring and instead choose lawyers who are business-minded and understand the importance of developing clients for a firm.

"Client development and being business-minded is certainly going to be important in 2016. That is really how lawyers will get ahead. The well-rounded lawyer who does very good work but at the same time has the ability to develop business for the firm is really the key and very key for transitioning into partnership down the road."

Bongard of ZSA Legal Recruitment says law school graduates must have the right

persona and ability to figure out how to turn clients into a book of business.

"No one expects you to develop business out of the gate but at some point you have to demonstrate that it's something within your wheelhouse and that it won't be hard for you down the road."

For years, says Bongard, lawyers thought that by being the best student in law school, it would guarantee them a job in the field, but nowadays that's only half the battle.

He suggests that new grads be open to the idea of working in practices in smaller suburban areas, instead of big firms in big cities, because that is where many jobs may be.

Borins of the RainMaker Group says employers want hard skills but also look at a prospect's EQ, or emotional quotient, when hiring, especially if they're getting brought onto a private practice as they have to make money for the firm and attract clients.

"Everyone who graduates from law school is smart. Beyond that, you definitely need some business-mindedness. You've got to kind of rise above and beyond in personality."

Law firms want the type of people that would fit in at any organization, says Borins, so lawyers seeking work have to show they can deliver. "You need to have a personality, you need to have an EQ, you need to have a business sense. It's not just about being that minder-grinder anymore."