Running your law firm with proven AI applications from the business world

OPPORTUNITY
When considering adoption of machine learning technology, firms will first want to identify whether they will make or buy the technology. Hiring or partnering with individuals or entities with mastery level data science skills isn’t a process to be taken lightly.

Once the make or buy decision has been answered the firm will likely explore a pilot project for proof-of-concept, process development and logistic vetting. If your Information Technology team isn’t driving the initiative, they will need to be involved very early in the process.

PILOT
After deciding we would look to an outside partner to collaborate on this machine learning initiative, we went through internal discussions and debates to determine our pilot project area of focus. There were already a handful of machine learning technologies in place at our firm at the time. Those existing technologies focused on our clients and efficient, cost-effective delivery of our services. This latest machine learning technology initiative was focused on our internal data and what it could tell us about our business.

The discussion around the pilot project took a little time as different stakeholders lobbied for their area to receive the focus of the technology. We settled on revenue forecasting as our pilot. We wanted to see how accurately a machine learning model could predict the Firm’s fee revenue. Many firms like ours operate on a cash-basis, instead of an accrual basis. Being able to accurately forecast fee revenue is an important component of being a cash-basis firm.

RESULTS
The results of our pilot were impressive.

We first built the revenue forecasting model using only revenue data from 2007 through the end of 2015. We asked the system to project 2016 revenue, already knowing the actual results. This time-series model predicted 2016 revenue within 3% accuracy. This initially wasn’t very impressive. Our historical forecasting methods could return very similar results, although not nearly as fast as the model.

Our second attempt would introduce a myriad of additional data points that we believed the model needed for greater accuracy. The results of our second run were similar to the first. After discussing the disappointing outcome and some lengthy discussions about over-fitting the model with data, we identified two new data points that we would introduce into the original model.

The results, after adding these two new data overlays, were significantly more accurate. 2016 revenue was predicted within $10,000. That isn’t a typo either. We used the model for 2017 forecasting and the system predicted fee revenue within $195,000.
“WHAT NEXT?”

Once a firm moves beyond a successful pilot, the question will likely be “What next?” Refer back to the list created during the outset of the pilot that asked “What areas of our firm should we turn this technology on?”

Law firms, like the vast majority of organizations in the world, create a significant amount of data. Thinking about that data in a way likely never considered historically, may reveal significant insight into the business.
The usual growth metrics of revenue and headcount don’t adequately convey the intensity by which our data needs have evolved. Our growth in headcount has come from teams of lateral lawyers who bring decades of new experience to our door. We have legal ops leaders and quantitative PhDs embedded in our practices. Our executive committee and practice leaders expect real-time insights. Our clients are assessing us with more measures than law firms historically share internally. In short, we’re a modern business run on data and metrics—probably no different than your business. We’ve been planning for this for years, so here’s our story.

Collective Intelligence
Look outside the legal market. Waze, Amazon, Quora, Reddit, Yelp, Wikipedia. Common among these thriving businesses is their ability to leverage crowdsourced knowledge to create value. That crowdsourced knowledge provides real-time intelligence that grows and adapts based on the activities of those involved. We recognized that we, too, had to expand our capabilities beyond searching previously documented information and shift our focus to providing access to real-time, fluid, and even tacit experience and relationship information that grows along with the firm. We call this “collective intelligence” and we changed Gwen’s title to reflect our mission: to evolve from sharing what happened previously to what’s happening now and what’s likely to happen next. To sustain this focus while the firm and our clients evolve around us has required investments in process, data, search, user experience, and a firmwide effort to jump forward.

Legal ERP as a Foundation for Data
Over the years, we’ve taken a “legal ERP” approach to automating our key business processes, focusing on end-to-end workflows in financial, project, risk, content, and talent management, as well as client service and...
marketing intelligence. To support these process flows, we also subscribe to dozens of premier information sources. As a result, we have great business systems, but also a high class problem of “great silos” of data. While we leverage APIs to trade data across systems, no system has more than a small percentage of the overall information.

So, for years, we’ve been laying the groundwork for aggregating our data across these silos, in anticipation of assembling a big data warehouse. We’ve been doing the boring but critical early work of standardizing granular matter tagging, enabling detailed matter opening and conflicts data collection, instituting phase and task tracking for every matter, and so on. Implementing our new business systems helped improve the quality and availability of our internal data, but it didn’t address the challenge of providing the added context that external data sources had to offer. Requests to data and legal analytics vendors to download and blend their data with our own were previously met with incredulous stares. Now, increasingly, vendors are coming to recognize that sharing data creates both a revenue stream and an opportunity to establish mutually beneficial partnerships with customers.

Master Firm Data Collection
Data now forms the core of our business systems. Our data warehouse pulls together data from our internal systems and dozens of external sources, matching entities (people, companies, matters) across sources in a carefully designed structure. We maintain information on matter parties, third-party experts, court records, relevant lawyers, company governance, and the correlations between them all. Today, we have over 500,000 entities and 250M data points, with an expectation of aggressive growth from this foundational level.

Having a comprehensive core that any system can access means that whether a person is pricing a matter, helping a client, marketing, hiring, improving processes, or managing the future of an entire practice, they have full and consistent perspectives and detail.

Authoritative and Complete Search
As we designed our data warehouse, it became apparent that no one system would be able to ingest and search the quantity and complexity of data to which we would have access. Every existing business system had advanced search capabilities, but only for the data in its own limited universe. Every time we added a chat bot, AI assistant, document analysis system, or other so-called innovation, we had to contend with yet another unique embedded search at their core.

It was unreasonable to expect our team to adequately support and tune so many search engines and, worse, we saw a future where searchers would get incomplete and different answers from any one of those solutions. We wanted a single, authoritative source that would provide the official Winston answers, whether a person is chatting with a bot on their phone or searching our Winston Intelligence platform. Although our master data plan didn’t include undertaking a leading edge search project, it was clear we needed to create our own search capabilities to make the most of our rich data collection.

As we considered our options, we noticed that most of our vendors (and most vendors marketing AI-based solutions) are using Elasticsearch, or its brother, Solr, at their core. While the prevalence of Elasticsearch didn’t ensure it was the right option for our enterprise use, we knew that SharePoint search was becoming
less configurable and would not meet our needs. We consulted search experts MC+A and identified a number of key benefits of Elasticsearch that support the interactive and subjective nature of collective intelligence, including:

• Advanced tuning options for multi-faceted algorithms, like ranking experience and relationships.

• Native support for graphing knowledge and relationships, the key assets of a professional services organization.

• The ability to show lawyers the context of answers (e.g., relationship heat maps, criteria for relevancy ranking), which they can adjust on the fly to meet their needs and better understand the results.

• The ability to embed the experience into our browser and mobile-based intranet.

• The capacity to address the needed scale and speed for large quantities of both structured and unstructured data.

We undertook some proof of concept work and ultimately decided to pilot the Elastic Stack with BA Insight as our new firmwide “one authoritative source” search. Having this core allows us to build other capabilities from the same tuned index rather than recreating the wheel with every product. Now, whether a person is chatting with a bot, analyzing documents, pricing a matter, finding an expert, or seeking competitive intelligence, they benefit from the data and algorithms of the firm’s core intellect.

Personal Insights You Didn’t Know to Ask For

This effort, however, isn’t about moving from one software system to another; it’s about rethinking how information can be discovered and applied. Traditional search works like the biggest sale of the year that’s never advertised – great information is available but only if you know to come ask about it. In a firm with thousands of clients, hundreds of lateral lawyers and alumni, dozens of key geographies and industries, and constantly changing laws and precedents, we can’t sit back and hope lawyers ask for just the right information at the right time.

Our collective intelligence mission is about revealing useful insights, the proactive nuggets of information that can make all the difference. In the legal market, we have the luxury of personalizing these insights, not merely by guessing one’s interests based on past behavior and cookies deposited on a computer, but through the detailed employee information recorded in our internal systems. We know basic profile information (such as practice, active matters, jurisdictions, top clients); business, marketing, and client service plans for the year; recent meetings and correspondence; the phase of a matter recently completed; budget status with key clients; recent research; and so much more.

Assessing changes in the firm’s data collection and serving up personalized, useful insights to the right people at the right time - that’s potential for a secret sauce that becomes a competitive edge. While not a full replacement for traditional just-in-time search, surfaced insights are a great complement. We incorporate insights in a few ways:

• **Opportunities**: Machine learning to identify new ways we can serve our clients.

• **Personalized and leader activity logs**: An automated Twitter-like feed for lawyers to stay current on clients, people, industries, and the firm.

• **“No search” landing pages**: Serving up personalized insights that are likely beneficial, even if the lawyer didn’t know to ask for them.
• Exploratory graphs: Using visual cues and links to related entities in search results (i.e., knowledge or relationship graphs) in order to provide greater context and encourage exploration of related information.

Winston’s WinstonWay - Bringing it all Together

Despite all our systems and data work, the most creative challenge we faced was bringing everything together into a single, personalized user experience that supported our objectives. Asking busy lawyers to learn different business systems (each with different styles of navigation and mobile apps) plus a powerful new search would be confusing and inefficient.

For us, this meant evolving our traditional app-store-like intranet into a personalized site for intelligence delivery, client service, and visible status of what’s happening with clients and around the firm. We had recently created a Winston Design approach, so worked with West Monroe Partners to undertake a series of intensive workshops to freshly consider what’s possible and then bring it to life.

One of our guiding design principles throughout this journey was that Winston employees shouldn’t have to navigate our firm’s org chart or different applications to get their job done, just like you wouldn’t expect to learn Marriott’s or Fidelity’s organizational charts or third party systems if you visited their sites as a customer. By taking a functional approach to design and embedding the modules and workflow of our business systems into WinstonWay, we were able to focus on developing navigation that reflects actions rather than departments and use personalized data to minimize the need to navigate at all.

This set of initiatives is momentous, but not necessarily innovative. Similar efforts are underway in some professional services firms and none of the technologies we’re using are new. Our chance to be innovative is ahead of us – how our firm applies our real-time, evolving collective intelligence to serve our clients, shape the talent of the firm, and keep improving our service delivery. We’re just getting started. ILTA

1 Thanks to modular systems like Prosperoware Umbria that address many business functions and complement an integrated and data-intensive approach.

David Cunningham is the Chief Information Officer at Winston & Strawn LLP. Dave is a data-driven client advocate disguised as a CIO. He enjoys leading business improvements through streamlined processes, transparency of information, and real-time collaboration. He advised executive management on technology, data, and risk as a consultant for 20 years, cofounded the CLOC/CxO program, and has been CIO at Winston & Strawn for 7 years.

Gwen Watson is the Director of Collective Intelligence & Research (CIR) at Winston & Strawn LLP. Gwen identifies opportunities and solutions to make Winston & Strawn smarter. Her talented team provides a broad range of research and intelligence services and oversees the firm’s collection of information sources. She is also a member of Winston’s Information Services design team, which takes a structured, yet agile, approach to innovation. Prior to joining Winston in 2005, Gwen was at Hogan & Hartson LLP (now Hogan Lovells) where she assisted the Associate Review Committee after working for four years in the firm’s Information Resource Center.
Learning from clients to improve decision-making in the legal industry

Aileen Leventon, Esq.
Legal Shift, LLC

Gill Eapen, President and Founder, Decision Options LLC

August 2019

Practicing lawyers and those who manage law firms make decisions and judgments with incomplete information. When clients seek legal advice to guide their business decisions, lawyers frequently respond with “It depends.” Managing a law firms to grow profits requires many trade-offs in allocating resources, assessing risks, and making choices to implement strategy effectively. Both the business and the practice of law require assumptions and dynamic information. Both entail the use of appropriate heuristics, data, and analytics.

Faced with so many choices and much uncertainty, is there a way to improve how we make decisions? Can we foster better results if we go beyond intuition, personal experience, and cognitive biases to use the right kind of information? In law practice there are many possibilities: the lawyer’s experience; empirical information; the client’s risk profile and tolerance for complexity; the lawyer’s judgment. But are they sufficient?

Managing and allocating resources, staffing, lateral hiring, in-sourcing and outsourcing, business development, and pricing involve similar challenges. Should we benchmark against others, predict the future, or use statistical models from which to draw inferences? Have we framed a valid hypothesis to ask the right questions in using statistical models? Is there a better place to start than lots of excel spreadsheets and expensive systems?

Look outside the legal industry

Many believe that the legal industry is different. Lawyers are excellent at spotting issues, identifying risk, and marshalling the power of precedent. The legal industry lags other industries in the use of rigorous methods from the world of empirical analysis, statistical modelling, econometrics and data-driven decision-making. These are not merely technology solutions; they are a different way of solving problems in uncertain and evolving situations.

Gill Eapen’s experience in other industries provides guidance for the legal profession. Artificial intelligence and machine-learning methodologies have transformed decision-making practices and improved shareholder value for companies in consulting, health care, food manufacturing, biosciences, automotive and, agriculture, to name a few industries, and they are available to the legal industry as well. They have developed predictive models that assist in answering questions that impact legal and business risk and value. In the legal industry we refer to this as “business intelligence.”
Aileen Leventon recommends consideration of the following “use cases” in the business and practice of law.

**Hiring**

Just as the results of R&D efforts create the value in many industries, lawyers are the most valuable asset for a law firm. Is there a way to predict success beyond the current methods? There are many choices to be considered in making decisions about who should be hired, at what level (partner or associate), and when.

Once an individual is hired, what kind of integration efforts does the firm make to support laterals? Are there programs to foster skills development in critical substantive, business generation and other core areas? What impact does such factors as office location, virtual work and demographics have on success?

These and other questions are asked every day; but they may all be the wrong questions because they reflect the biases of the firm’s managers. Machine-learning models can add value to the law firm by getting a better return on its investment in its principal asset – its lawyers.

**Staffing**

What is the best mix of lawyers and other professionals for staffing a matter? Does the type of matter, location, client, existence of a client team or relationship partner, or the amount at stake make a difference?

Staffing decisions are often based on who has the right skills, whether they are available and whether they meet the client’s expectations about the profile of a team. Although these qualitative choices are important, do they necessarily create the best outcome in levels of client satisfaction? If a staffing model is adjusted, what are the trade-offs in quality, risk and profitability and pricing structures?

Law firms that are able to make these decisions with a rigorous analysis will have an edge in business development, revenue management and talent management.

**Pricing Matters and Portfolios of Matters**

The professional services consulting industry has developed predictive pricing models that are relevant to the legal industry. The sources of the data may be different, but both industries have fragmented incomplete systems as well as qualitative data sources that are capable of analysis. Gill Eapen has developed a model that starts with historical information, and once put into service the model updates continuously. By learning from ongoing experience, the model adjusts and offers insights to provide real-time guidance about suggested pricing models and their impact on profitability.
Learning from clients to improve decision-making in the legal industry
ABA Legal Analytics Committee CLE program materials, August 2019

Case strategy

Most cases settle or there is a payout after trial and appeal. Lawyers and their clients face the challenge of assessing whether there is an optimal amount of legal work and associated fees and expenses. Is there a certain point at which further work on a matter will not produce a better outcome? Are there certain cases that should be handled differently because of their attributes?

Artificial Intelligence-based agents are able to operate on data from both a client’s docket and reported cases (whether they are court documents or announcements in the media) to provide guidance to lawyers about pursuing or settling a case. These AI agents improve over time based on newly-arriving data and past experiences.

A client could look at all its cases of a certain type (all products cases; all employment cases) to make decisions about when to settle a case. In the case of contracts with suppliers, the analysis could expand to assess whether there are attributes that indicate potential disputes (e.g. medical conditions) and whether business people involved in the arrangement might be counselled to conduct themselves in a manner that mitigates risk.

Conclusion

Clients are harnessing available data to make more effective decisions and improve their financial results. Typically the data is unstructured, incomplete, and pulled from many different systems within the company. Publicly-available data may also be used to enrich the analysis. The legal industry is well positioned to learn from the experience of its clients.

When there is data, even when there are gaps and the data is “dirty,” there is information to be found. Using well-established tools from mathematics and combining it with extraordinary increases in computing power, companies are already achieving and maintaining a competitive advantage. The lawyers who take advantage of these techniques will be better positioned to achieve a sustainable competitive advantage and add value to the clients they serve. They can draw on success stories from the business world that have been proven over the course of 20 years.
Running your Law Firm with Proven AI Applications from the Business World

Friday September 13, 2019.

Panelists:
Aileen Leventon, Esq.
Gill Eapen
Gwen Watson
Kevin Bielawski

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LEGAL ANALYTICS COMMITTEE
Business Intelligence and Analytics for Law Firms: Insights for a shifting business ecosystem

EDITED BY FRANCESCA RAMADAN
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Executive summary

We live in an information age. In both our personal and professional lives, we are consistently bombarded with data in various forms; through our interactions with technologies in our homes and workplaces, we are also constantly generating data that will in turn be harvested and displayed to another. Information has arguably become the most valuable resource of all businesses, as technology grows in sophistication and utilization, the world becomes ever more globalized, and economies continue the shift to operating on the acquiring and exchanging of knowledge. With the right data – and the appropriate tools for gathering and processing it – the key to success for any organization seems to be within easy reach. When correctly utilized, data analytics can contribute to the construction of meaningful information patterns, identifying opportunities to boost profitability, and improve product quality and service delivery. However, the essential problem lies in the sheer quantity of available data. With such a tsunami of information, it can be difficult to know where to start. What exactly is the “right” data? Which tools and methodologies can we use to measure it effectively?

For the majority of law firms, these are difficult questions to answer. Cultural norms in the profession and the traditionally risk-averse, occasionally technophobic, nature of many lawyers are both obstacles to the alteration of working practices to encompass data analysis. However, despite the fact that global economies are in recovery and the demand for legal services is picking up, the marketplace remains incredibly tough, and processing of data has become essential for those firms wishing to retain a competitive edge. It is therefore critical for the legal profession as a whole to initiate a cultural change and acquire new skills in order to survive in a dynamic landscape being transformed by technological disruption and economic pressure. Business Intelligence and Analytics for Law Firms: Insights for a shifting business ecosystem is the ideal tool to begin the implementation of this development, featuring advice and observations from pioneers in this relatively uncharted territory. Expert
Executive summary

guidance is also complemented by examples of best practice – something which is typically difficult to gain access to, considering the frequently sensitive nature of business intelligence processes.

Both practicing lawyers and those who manage law firms and law departments make decisions and judgments with incomplete information. Faced with such uncertainty, is there a way to improve decision-making? Other industries can provide guidance for the legal profession, with artificial intelligence and machine learning methodologies transforming decision-making practices and improving shareholder value. In chapter 1, Aileen Leventon – a practicing lawyer and management consultant – and Gill Eapen – an engineer and economist – show how those who embrace an analytically driven risk, value and resource management process could gain significant competitive advantages in this age of possibilities and in the presence of high uncertainty.

From pitches and proposals, to deepening client relationships through client targeting and cross-selling, data and technology are changing the way firms operate. In conjunction with this, we are also aware that the sheer amount of information available can be a problem in itself – how can we be sure where is the best place to start? In chapter 2, Jennifer Roberts – data scientist at Intapp - lays out ways in which the power of data can be harvested within your firm for strategic client-centric efforts, and explores ways to initiate the change and areas in which technology can help you and your firm excel.

“Business intelligence” differs from “practice intelligence.” Running a law firm like a practice often comes at the expense of maintaining a business mindset. Law firms are a profit paradise, but the field is changing; new forces that present new challenges are quickly gaining momentum. Pricing pressure and fierce competition have long been a reality in the business world. In chapter 3, Ariela Tannenbaum – principal at Edge International and CEO of Advanced Financial Analytics – delves into the ways that law firms can develop and take full advantage of the financial intelligence that predominates in the world of big business and succeed in the new normal of the legal practice realm.

The right kind of information can contribute to a firm’s success in many different ways. While emotional intelligence may seem an oddity for consideration in the discussion of business analytics for lawyers, well-documented data establishes the importance of these skills in achieving the highest levels of performance. There is also evidence to suggest that a lawyer’s tendency to discount and underperform in these areas can lead to disaster, both on a personal and organizational level.
In chapter 4, principal and founder of Law People Management Ronda Muir argues that developing emotional intelligence provides an avenue for improved mental and physical performance, higher personal and organizational profitability, and a better competitive position – all of which is critical at a time where AI robots are nipping at the lawyer’s heels.

The implementation of formal business intelligence and data analytics strategies within law firms continues to increase, including data governance and the use of data visualization dashboards. However, in this relatively new field, direction and real-world examples are sometimes difficult to come across, with many firms unwilling to share their experiences. In chapter 5, Melaina Fireman – senior manager of business intelligence and database services at Goodwin Procter – defies this trend, sharing best practice and lessons learned from the formal BI strategy recently implemented at her firm. Those looking for ways to develop and strengthen a data-driven enhanced culture within their own practice will benefit from the insight into Goodwin Procter’s collaborative and agile approach to business intelligence.

Due to today’s rapidly changing market for legal services, law firms have engaged a myriad of strategies to adapt and compete. One investment many firms are making is in their marketing and business development department. Over the past few years, business development and marketing has become more of a science than an art — largely due to the availability and abundance of data. Litigation and transactional analytics tools allow users to benchmark themselves against their peers, receive alerts about potential new business, and assess litigation and transactions activity by practice area, volume of matters, and significant clients and industries at large. Chapter 6 by Michelle Murray – chief marketing officer at Cahill Gordon & Reindel LLP – explores four ways legal professionals can harness big data to better identify both opportunities and competitive risks.

It is becoming a more accepted fact that law firms have a strong need for data analytics. Taking this into account, examples of best practice are invaluable tools in this emerging sphere. In chapter 7, Kesney Fotes, data analytics manager at WilmerHale, provides an extensive overview of the journey undertaken in creating a modern data platform at his firm, a member of the AmLaw 100 list. Discussed within this chapter are some of the pressing issues facing those seeking to improve their operations using BI and analytics, including considerations on the question of build or buy and the quantification of business value.
Executive summary

Business intelligence tools have been instrumental in analyzing historical and current data to assist law firms in both business and operational decisions. However, many firms have been making successful decisions without the use of business intelligence tools for years. Some law firm leaders may say they have always relied on “gut instinct”, but sometimes the analysis may suggest that this is not always the best measure for decision making. Chapter 8 by Paige Keith, chief financial officer at Hawkins Parnell Thackston & Young LLP, discusses the challenges law firms face when business intelligence guides them in a direction differing from what they have always done or feel like doing. Furthermore, it will examine ways to reconcile seemingly opposing data with the cultural identity of the firm without undermining either one.

In chapter 9, John Alber – futurist for the Institute for Future of Law Practice – discusses the fundamentals of business intelligence in order to highlight the reason of why BI is undertaken and, more importantly, why it is a key to success. He then outlines the process of “Design Thinking”, and how it can be used to help firms evolve their business in the right direction – by questioning and defining the most basic operations of a firm. As developments in technology steadily progress, the question of how firms will interact with and utilize high-end technology to augment their intelligence functions is becoming a key subject for debate.
About the authors

John Alber serves as futurist for the Institute for Future of Law Practice. He was also the first futurist for the International Legal Technology Association. He writes, speaks and consults widely, focusing on finding practical ways to reshape the delivery of legal services to suit a future demanding excellence far beyond substantive legal skills. Prior to his current role, John was a transportation industry CEO. Thereafter, he led Bryan Cave LLP to become one of the most innovative firms in the world, serving as its strategic innovation partner for more than 16 years. John is an Emeritus fellow of the College of Law Practice Management and has received a number of awards, both in the legal field and in information technology generally.

Gill Eapen is the founder and CEO of Decision Options, a leader in artificial intelligence applications in business decision-making. He has over 30 years of experience in strategy, finance, machine learning, artificial intelligence, engineering and general management, and has advised clients in a broad range of industries, including aerospace, pharmaceuticals and financial and legal services. Gill is the author of two textbooks, Decision Options: The Art and Science of Making Decisions and Flexibility: Flexible Companies for the Uncertain World, which address the theory and practice of real options in economic valuation and investment decision-making and the structure, systems, and strategies needed for companies to survive and succeed in an increasingly uncertain world, respectively. His blog “Scientific Sense” is followed by people in over 150 countries, and he is a frequent speaker at conferences worldwide on subjects of strategy, innovation, economics, and analytics.

Melaina Fireman helps organizations make better decisions. As Goodwin Procter’s senior manager of business intelligence and database services, she focuses on data management, business intelligence, knowledge management and data governance best practices. She provides
technical leadership and serves as a data visualization champion to legal and administrative departments while optimizing data solutions in support of the business strategy. Prior to joining Goodwin in 2003, Melaina has held database management and data warehouse positions in the United States and Europe.

**Kesney Fontes** is the data analytics manager at WilmerHale. He has over 20 years of experience with enterprise systems, focusing the first part of his career on Document Management Systems (DMS) for large organizations and managing a team of engineers responsible for the implementation and integration of third party applications. His experience ranges from document management, enterprise search, finance and HR, to other legal vertical systems. Most recently, he has created a data warehouse solution, including ETL, reporting and Tabular cubes, leveraging PowerBI. He manages a team of developers maintaining the data analytics infrastructure and partners with business areas such as finance, practice management and legal project management in support of the organization’s data solution.

**Paige Keith** is a business executive with extensive experience leading financial and accounting operations of law firms, including planning, reporting, billing, tax compliance, and accounts payable. Before becoming a chief financial officer at Hawkins Parnell Thackston & Young LLP, she spent 15 years in various management roles responsible for developing and implementing strategic initiatives. She has also overseen client relations and the delivery of legal services, emphasizing the design and integration of consumer-centric business models and technology. Paige studied at Southern Methodist University in Dallas, Texas, where she earned an MBA from the Cox School of Business and a BS in mechanical engineering with biomedical specialization.

**Aileen Leventon** is a business counselor to the legal industry and a practicing lawyer with over 35 years of experience. She advises lawyers and legal operations professionals on strategies to manage and sustain sound financial performance and continuously improve the efficiency of legal work. Recognizing the impact of artificial intelligence techniques to improve the quality of decision-making, Aileen launched Predictive Legal Economics in 2017. She collaborates with Gill Eapen, the founder of Decision Options, to apply proven techniques from other industries to create value in the legal industry. Now a principal of Edge International,
she began her consulting career at PricewaterhouseCoopers LLP after obtaining her MBA. Her work at PwC served as the template for the founding of the General Counsel Roundtable and current approaches to data analytics in the legal profession. As both a project manager, speaker and collaborator, Aileen has actively participated in many pro bono projects for the Bar, CLOC, ACC and the ABA.

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**Michelle Murray** spent 14 years in institutional fixed income sales on a trading desk before changing paths to become the leader of Cahill Gordon & Reindel LLP’s marketing, business development and communications department. At Cahill, Michelle works closely with the firm’s executive leadership, management and practice groups to develop and execute strategic business and client-focused initiatives that advance the firm’s objectives. She directs all aspects of the firm’s branding and marketing strategy, client relations, alumni relations, communications and public relations, digital marketing and social media. Michelle is currently the chair-elect of the LMA’s New York Local Steering Committee, and is a certified White Belt in Legal Lean Sigma and Project Management.

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Thomson Reuters. Jennifer received her Master’s degree from Humphrey School of Public Policy, with an emphasis on statistical methodology and performance measures within various industries.

Ariela Tannenbaum is the CEO of Advanced Financial Analytics, a consultancy firm focusing on enhancing law firms’ profitability, and principal at Edge International. She has over 25 years of top tier leadership experience working with global Fortune 500 companies, instilling the financial intelligence and discipline used by the most successful organizations in the world to drive performance at law firms. Prior to establishing Advanced Financial Analytics, Ariela served as executive vice president of finance at one for the largest companies in the world and global head of finance of its $2 trillion investment management subsidiary for over 14 years.
Chapter 1:
Learning from clients to improve decision-making in the legal industry

By Gill Eapen, founder and CEO of Decision Options, and Aileen Leventon, principal at Edge International

Practicing lawyers and those who manage law firms and law departments make decisions and judgments with incomplete information. When clients seek legal advice to guide their business decisions, lawyers frequently respond with: “It depends.” Those who manage law firms seek to grow profits by increasing revenue and controlling costs. Those who manage legal operations are charged with implementing tactics to add value in serving the business while also optimizing legal spending, in pursuit of adding to the company’s bottom line. The management of a legal organization requires a great many trade-offs in allocating resources, assessing risks and making choices to formulate high-impact strategy. Both the practice of law and the stewardship of an organization require assumptions based on incomplete and dynamic information. Both entail the use of appropriate heuristics, data and analytics.

Faced with many choices and much uncertainty, is there a way to improve decision-making? When a lawyer states that “It depends,” how might we go beyond intuition, personal experience and cognitive biases to use the right kind of information to foster better outcomes? In law practice there are many possibilities: the lawyer’s experience; empirical information; the client’s risk profile and tolerance for complexity; and the lawyer’s judgment.

Management questions about allocating resources, staffing, lateral hiring, insourcing and outsourcing, business development, and pricing involve similar challenges. Should we benchmark against others, predict the future, or use statistical models from which to draw inferences? Have we framed a valid hypothesis to ask the right questions in using statistical models?
Chapter 1: Learning from clients to improve decision-making in the legal industry

Experience from outside the legal industry

Many believe that the legal industry is different. Lawyers generally and law firm management in particular are excellent at spotting issues, identifying risk, and marshalling the power of precedent. The case for change is evolving slowly, but the legal industry tends to see the solution as a technology choice, when in fact it is about making better business decisions. The legal industry appears to be lagging compared to other industries in the use of rigorous methods from the world of empirical analysis, statistical modelling, econometrics and data-driven decision-making. These are not technology solutions; they are a different way of solving problems in uncertain and evolving situations.

Experience in other industries provides guidance for the legal profession. Artificial intelligence and machine learning methodologies have transformed decision-making practices and improved shareholder value for companies in industries ranging from consulting, healthcare, food manufacturing, biosciences, automotive, and agriculture, to name a few. Combining the latest ideas in machine and deep learning, it is possible to develop predictive models that assist in answering questions that impact legal and business risk and value.

This chapter provides examples from other industries and then suggests ways in which the same methodology may be applied in the legal industry. We start with two basic case studies:

**Industry: Professional services consulting**

**Challenge**

Pricing of engagements is inconsistent, often driven by the fear of the managing director failing to be retained by the client, and profitability of engagements fail to meet economic targets for profitability required by the firm.

**Question**

What’s the optimum price for an engagement based on all available characteristics, including but not limited to project and client attributes, availability of internal personnel and skills, and strategic aspects of the relationship with the client?
Solution

Development of a robust pricing model that provides standards to managing directors to improve the profitability of engagements.

Impact

A more disciplined approach to pricing based on predicted optimum price providing decision-guidance for managing directors to take into account any qualitative considerations, with improved profitability of engagements.

Industry: Healthcare

Challenge

Develop a strategy for managing disease risk for patients in such modalities as hypertension, diabetes and COPD. In the current regime of increasing value and quality-based payments, providers are under increasing pressure to enhance patient outcomes while simultaneously optimizing the economics of their practices. It is possible that the industry will slowly migrate to full capitation and providers will be forced to use technology to fundamentally transform their practices.

Question

What is the probability that patient will develop certain conditions in the future and, if this is known systematically, how can providers proactively engage with such patients to prevent diseases or to improve outcomes?

Solution

Artificial intelligence-based agents constantly operating on electronic medical record data can provide decision guidance to physicians to manage the patient populations. Such agents can also get better over time based on newly arriving data and past experiences.

Impact

Physician practices can move into personalized care to manage their patients to improve outcomes patient by patient, enhance overall population health as well as optimize the economics of their practices.
Chapter 1: Learning from clients to improve decision-making in the legal industry

Taking these case studies further, consider more complex business environments:

**Food manufacturing**

How do companies make decisions that impact a company’s compliance with government regulations, resource allocation, corporate reputation, as well as the cost of a product to consumers? Assessments about legal and business risk factor significantly in the management decisions in the food manufacturing industry. The quality of the manufacturing process is critical, and getting it right involves many choices and trade-offs. How many quality assurance professionals are required per number of units produced? Are there factors that impact quality (or defects in manufacturing) based on the season, the work shift, the demographics of personnel? Which regulations pose the biggest risks if there are compliance failures? Can those risks be quantified? Some of these questions have been considered in the application of lean manufacturing practices, but the decision-making process has been improved through a systematic approach based on a predictive economic analysis. Shareholder value is enhanced when a company makes effective trade-offs between productivity and risk to enhance the manufacturing workflow.

**Biosciences**

Consider an even more complex challenge faced by the biosciences industry, which invests hundreds of billions a year on research and development programs that aim to discover and develop new therapies to prevent, diagnose, cure, or alleviate diseases affecting humans and animals. These expenses are spread over a long time, often decades, from idea generation stage to marketed product. With only one out of over 100 ideas turning into a commercially viable product, the risks are enormous. Traditional financial analytics methods and qualitative methods are insufficient. A focus on building systems that collect large amounts of data to tackle uncertainty is also misguided and has led to significant data intensity, which has not necessarily increased the quality of decisions. The ability to make these decisions more effectively – how to best allocate money, people and time – is a driver of competitive advantage.

To meet the objective, R&D programs target to develop a number of different “candidates” that may fit a general profile. Each candidate has expectations in terms of the end products, delivery mechanisms, pricing,
and other factors. Each candidate also has a project plan with various investment options and schedules. Adding further to the complexity, the development plan for each candidate may also include many internal departments and partners outside the company who may provide resources and services specific to the program.

The complexity of these development plans creates significant uncertainty about outcomes – but along with such uncertainty comes considerable opportunity to build managerial flexibility into the design and execution of such programs. Using the Decisions Options® methodology, author Gill Eapen has achieved significant improvements in maximizing the value from limited resources as well as making decision-processes nearly real-time in some of the largest life sciences companies.

**Translation to the legal industry**

Powerful tools that have had impact on shareholder value in consulting, health care, food manufacturing, biosciences are available to the legal industry as well. We consider below some “use cases” in the management of a law firm and law department, and the substantive practice of law as well.

**Pricing matters and portfolios of matters**

The experience in the professional services consulting industry is directly relevant to the legal industry. The sources of the data may be different, but both have fragmented incomplete systems as well as qualitative data sources that are capable of analysis. Although the model starts with historical information, once put into service the model updates continuously. By building into the system the opportunity to learn from ongoing experience, the model adjusts and offers insights to provide real-time guidance.

**Case strategy**

The example from healthcare provides guidance in developing a case strategy. Most cases settle or there is a payout after trial and appeal. If we treat this as analogous to the outcome in the healthcare example, we have the parallel challenge of assessing whether there is an optimal amount of legal work and associated fees and expenses. Is there a certain point at which further work on a matter will not produce a better outcome? Are there certain cases that should be handled differently because of their attributes?
Artificial intelligence-based agents are able to operate on data from both a client’s docket and reported cases (whether they are court documents or announcements in the media) to provide guidance to lawyers about pursuing or settling a case. These AI agents improve over time based on newly-arriving data and past experiences. A client could look at all its cases of a certain type (all products cases; all employment cases) to make decisions about when to settle a case. In the case of contracts with suppliers, the analysis could expand to assess whether there are attributes that indicate potential disputes (e.g. medical conditions) and whether business people involved in the arrangement might be counselled to conduct themselves in a manner that mitigates risk.

Hiring
Just as the results of R&D efforts create the value in the biosciences industry, lawyers are the most valuable asset for a law firm and a law department. Is there a way to predict success beyond the current methods?

There are many choices to be considered in making decisions about who should be hired, at what level (partner or associate), and when. Once a hire is made, what kind of integration efforts does the firm make to support laterals? Are there programs to foster skills development in critical substantive, business generation and other core areas? What impact does such factors as office location, virtual work and demographics have on success? These and other questions are asked every day; but they may all be the wrong questions because they only reflect the biases of the firm’s managers.

Decision Options® is an approach that analyzes data from a wide range of systems, such as personnel files, time and billing systems, dockets, new matter intake records, and so many more. From this, it is possible to develop a predictive model that looks for patterns in the data of the organization (i.e., law firm, law department, practice group, office location). After patterns emerge it is possible to formulate hypotheses to test, and ultimately develop a decision-making methodology. The data provides insight that is continuously updated as it is used to gain an unbiased look into the firm; the model self-adjusts over time. This is a machine learning model, which and can add value to the law firm by getting a better return on its investment in its principal asset – its lawyers.

Staffing
What is the best mix of lawyers and other professionals for staffing a
matter? Does the type of matter, location, client, existence of a client team or relationship partner, or the amount at stake make a difference? The approach used in the food manufacturing example is relevant because that situation involved trade-offs that affected quality, productivity, risk and economics. The same applies in law practice and matter management.

Staffing decisions are often based on who has the right skills, whether they are available and whether they meet the client’s expectations about the profile of a team. Although these qualitative choices are important, do they necessarily create the best outcome in levels of client satisfaction? And if a staffing model is adjusted, what are the trade-offs in quality, risk and profitability and pricing structures?

**Conclusion**

Clients are harnessing available data to make more effective decisions and improve their financial results. Typically, the data is unstructured, incomplete, and pulled from many different systems within the company. Publicly-available data may also be used to enrich the analysis. The legal industry is well positioned to learn from the experience of its clients.

When there is data – even when there are gaps and the data is “dirty” – there is information to be found. Using well-established tools from mathematics and combining it with extraordinary increases in computing power, the profiled companies are better positioned to achieve and maintain a competitive advantage. The legal industry should take advantage of the invaluable opportunities that have enabled improved outcomes and economic results for their clients. The lawyers who take advantage of these techniques will be better positioned to achieve a sustainable competitive advantage and add value to the clients they serve.
Running your law firm with proven AI applications from the business world

Case study presented by Kevin Bielawski, MBA, PMP
Director of Legal Project Management & Strategic Pricing
Husch Blackwell LLP
August 2019

OPPORTUNITY
When considering adoption of machine learning technology, firms will first want to identify whether they will make or buy the technology. Hiring or partnering with individuals or entities with mastery level data science skills isn’t a process to be taken lightly.

Once the make or buy decision has been answered the firm will likely explore a pilot project for proof-of-concept, process development and logistic vetting. If your Information Technology team isn’t driving the initiative, they will need to be involved very early in the process.

PILOT
After deciding we would look to an outside partner to collaborate on this machine learning initiative, we went through internal discussions and debates to determine our pilot project area of focus. There were already a handful of machine learning technologies in place at our firm at the time. Those existing technologies focused on our clients and efficient, cost-effective delivery of our services. This latest machine learning technology initiative was focused on our internal data and what it could tell us about our business.

The discussion around the pilot project took a little time as different stakeholders lobbied for their area to receive the focus of the technology. We settled on revenue forecasting as our pilot. We wanted to see how accurately a machine learning model could predict the Firm’s fee revenue. Many firms like ours operate on a cash-basis, instead of an accrual basis. Being able to accurately forecast fee revenue is an important component of being a cash-basis firm.

RESULTS
The results of our pilot were impressive.

We first built the revenue forecasting model using only revenue data from 2007 through the end of 2015. We asked the system to project 2016 revenue, already knowing the actual results. This time-series model predicted 2016 revenue within 3% accuracy. This initially wasn’t very impressive. Our historical forecasting methods could return very similar results, although not nearly as fast as the model.

Our second attempt would introduce a myriad of additional data points that we believed the model needed for greater accuracy. The results of our second run were similar to the first. After discussing the disappointing outcome and some lengthy discussions about over-fitting the
model with data, we identified two new data points that we would introduce into the original model.

The results, after adding these two new data overlays, were significantly more accurate. 2016 revenue was predicted within $10,000. That isn’t a typo either. We used the model for 2017 forecasting and the system predicted fee revenue within $195,000.

“WHAT NEXT?”
Once a firm moves beyond a successful pilot, the question will likely be “What next?” Refer back to the list created during the outset of the pilot that asked “What areas of our firm should we turn this technology on?”

Law firms, like the vast majority of organizations in the world, create a significant amount of data. Thinking about that data in a way likely never considered historically, may reveal significant insight into the business.
Running Your Law Firm: Collective Intelligence for New Insights

Successful businesses increasingly rely on data and metrics. Law firms are no exception, but as professional services organizations, knowledge and relationships are also key assets. Lawyers with decades of experience, individual systems providing a record of firm activities, and third party information services together form a rich collective intelligence to mine for new opportunities. And yet, asking busy lawyers to learn different search systems, each with different styles of navigation, is confusing and inefficient.

Winston, like many firms, has invested in best of breed products to improve processes and information capture in all areas of firm management and the practice of law. Those systems now also provide crucial data and metrics, raising the bar for delivering real-time insights. We needed to evolve from sharing what happened in the past, to what’s happening in the present and what’s likely to happen next. This requires ongoing investments in process, data, search, and user experience.

Not too long ago, our portfolio of products was matched by silos of data across different business systems. APIs were trading data, but no one system had more than a small percentage of the overall information. For years, we laid the groundwork for aggregating these silos in anticipation of assembling a single data warehouse, doing the less exciting early work that was necessary to improve the quality and availability of our internal data. More recently, working in partnership with a team of search experts, we’ve developed the ability to search across the warehouse using Elasticsearch. With its advanced tuning options for multi-faceted algorithms, we’re able to build a range of capabilities from the same tuned index, which now also includes information from external sources.

Our next challenge was to evolve our app-store-like intranet into a personalized site for intelligence delivery, client service, and a visible status of what’s happening with clients and around the firm. Using our Winston Design approach, we sought the input of attorneys and staff to create a Winston Intelligence platform where search will support activities such as seeking an expert, pricing a matter, helping a client, developing new business, or hiring a lateral.

As is generally the case, the technology is the means, not the end. The opportunity to be innovative arises in how attorneys and staff apply the insights they discover to improve client service. That’s our next chapter. What’s yours?

Action Items

Wondering how to drive a similar effort in your firm? Here are a few ways to be a technology leader:

- **Be a champion for good data.** Encourage your team members to practice care when using firm systems. Garbage in, garbage out.
- **Be a technology design partner.** The best systems are the result of lawyers and business professionals working together to define problems and design solutions. Reach out to IT and offer to participate in future requirements-gathering discussions.
• **Be an early adopter.** New technologies nearly always pass through a beta stage where important user testing takes place. Volunteer to participate, then use the technology as you work and give feedback to make the solution better.

To learn more about Winston’s search project, check out the article, *Search is Dead, Long Live Insights*, in the Spring 2019 issue of *Peer to Peer* magazine at: [http://epubs.iltanet.org/peer-to-peer-magazine/spring-2019](http://epubs.iltanet.org/peer-to-peer-magazine/spring-2019)
The usual growth metrics of revenue and headcount don’t adequately convey the intensity by which our data needs have evolved. Our growth in headcount has come from teams of lateral lawyers who bring decades of new experience to our door. We have legal ops leaders and quantitative PhDs embedded in our practices. Our executive committee and practice leaders expect real time insights. Our clients are assessing us with more measures than law firms historically share internally. In short, we’re a modern business run on data and metrics – probably no different than your business. We’ve been planning for this for years, so here’s our story.

**Collective Intelligence**

Look outside the legal market. Waze, Amazon, Quora, Reddit, Yelp, Wikipedia. Common among these thriving businesses is their ability to leverage crowdsourced knowledge to create value. That crowdsourced knowledge provides real-time intelligence that grows and adapts based on the activities of those involved. We recognized that we, too, had to expand our capabilities beyond searching previously documented information and shift our focus to providing access to real-time, fluid, and even tacit experience and relationship information that grows along with the firm. We call this “collective intelligence” and we changed Gwen’s title to reflect our mission: to evolve from sharing what happened previously to what’s happening now and what’s likely to happen next. To sustain this focus while the firm and our clients evolve around us has required investments in process, data, search, user experience, and a firmwide effort to jump forward.

**Legal ERP as a Foundation for Data**

Over the years, we’ve taken a “legal ERP” approach to automating our key business processes, focusing on end-to-end workflows in financial, project, risk, content, and talent management, as well as client service and

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Search is Dead. Long Live Insights.

*Our journey to making collective intelligence a competitive edge.*

**BY DAVID CUNNINGHAM AND GWEN WATSON**
marketing intelligence. To support these process flows, we also subscribe to dozens of premier information sources. As a result, we have great business systems, but also a high class problem of “great silos” of data. While we leverage APIs to trade data across systems, no system has more than a small percentage of the overall information.

So, for years, we’ve been laying the groundwork for aggregating our data across these silos, in anticipation of assembling a big data warehouse. We’ve been doing the boring but critical early work of standardizing granular matter tagging, enabling detailed matter opening and conflicts data collection, instituting phase and task tracking for every matter, and so on. Implementing our new business systems helped improve the quality and availability of our internal data, but it didn’t address the challenge of providing the added context that external data sources had to offer. Requests to data and legal analytics vendors to download and blend their data with our own were previously met with incredulous stares. Now, increasingly, vendors are coming to recognize that sharing data creates both a revenue stream and an opportunity to establish mutually beneficial partnerships with customers.

Master Firm Data Collection
Data now forms the core of our business systems. Our data warehouse pulls together data from our internal systems and dozens of external sources, matching entities (people, companies, matters) across sources in a carefully designed structure. We maintain information on matter parties, third-party experts, court records, relevant lawyers, company governance, and the correlations between them all. Today, we have over 500,000 entities and 250M data points, with an expectation of aggressive growth from this foundational level.

Having a comprehensive core that any system can access means that whether a person is pricing a matter, helping a client, marketing, hiring, improving processes, or managing the future of an entire practice, they have full and consistent perspectives and detail.

Authoritative and Complete Search
As we designed our data warehouse, it became apparent that no one system would be able to ingest and search the quantity and complexity of data to which we would have access. Every existing business system had advanced search capabilities, but only for the data in its own limited universe. Every time we added a chat bot, AI assistant, document analysis system, or other so-called innovation, we had to contend with yet another unique embedded search at their core.

It was unreasonable to expect our team to adequately support and tune so many search engines and, worse, we saw a future where searchers would get incomplete and different answers from any one of those solutions. We wanted a single, authoritative source that would provide the official Winston answers, whether a person is chatting with a bot on their phone or searching our Winston Intelligence platform. Although our master data plan didn’t include undertaking a leading edge search project, it was clear we needed to create our own search capabilities to make the most of our rich data collection.

As we considered our options, we noticed that most of our vendors (and most vendors marketing AI-based solutions) are using Elasticsearch, or its brother, Solr, at their core. While the prevalence of Elasticsearch didn’t ensure it was the right option for our enterprise use, we knew that SharePoint search was becoming
less configurable and would not meet our needs. We consulted search experts MC+A and identified a number of key benefits of Elasticsearch that support the interactive and subjective nature of collective intelligence, including:

- Advanced tuning options for multi-faceted algorithms, like ranking experience and relationships.
- Native support for graphing knowledge and relationships, the key assets of a professional services organization.
- The ability to show lawyers the context of answers (e.g., relationship heat maps, criteria for relevancy ranking), which they can adjust on the fly to meet their needs and better understand the results.
- The ability to embed the experience into our browser and mobile-based intranet.
- The capacity to address the needed scale and speed for large quantities of both structured and unstructured data.

We undertook some proof of concept work and ultimately decided to pilot the Elastic Stack with BA Insight as our new firmwide “one authoritative source” search. Having this core allows us to build other capabilities from the same tuned index rather than recreating the wheel with every product. Now, whether a person is chatting with a bot, analyzing documents, pricing a matter, finding an expert, or seeking competitive intelligence, they benefit from the data and algorithms of the firm’s core intellect.

**Personal Insights You Didn’t Know to Ask For**

This effort, however, isn’t about moving from one software system to another; it’s about rethinking how information can be discovered and applied. Traditional search works like the biggest sale of the year that’s never advertised – great information is available but only if you know to come ask about it. In a firm with thousands of clients, hundreds of lateral lawyers and alumni, dozens of key geographies and industries, and constantly changing laws and precedents, we can’t sit back and hope lawyers ask for just the right information at the right time.

Our collective intelligence mission is about revealing useful insights, the proactive nuggets of information that can make all the difference. In the legal market, we have the luxury of personalizing these insights, not merely by guessing one’s interests based on past behavior and cookies deposited on a computer, but through the detailed employee information recorded in our internal systems. We know basic profile information (such as practice, active matters, jurisdictions, top clients); business, marketing, and client service plans for the year; recent meetings and correspondence; the phase of a matter recently completed; budget status with key clients; recent research; and so much more.

Assessing changes in the firm’s data collection and serving up personalized, useful insights to the right people at the right time - that’s potential for a secret sauce that becomes a competitive edge. While not a full replacement for traditional just-in-time search, surfaced insights are a great complement. We incorporate insights in a few ways:

- **Opportunities:** Machine learning to identify new ways we can serve our clients.
- **Personalized and leader activity logs:** An automated Twitter-like feed for lawyers to stay current on clients, people, industries, and the firm.
- **“No search” landing pages:** Serving up personalized insights that are likely beneficial, even if the lawyer didn’t know to ask for them.
• **Exploratory graphs**: Using visual cues and links to related entities in search results (i.e., knowledge or relationship graphs) in order to provide greater context and encourage exploration of related information.

**Winston’s WinstonWay - Bringing it all Together**

Despite all our systems and data work, the most creative challenge we faced was bringing everything together into a single, personalized user experience that supported our objectives. Asking busy lawyers to learn different business systems (each with different styles of navigation and mobile apps) plus a powerful new search would be confusing and inefficient.

For us, this meant evolving our traditional app-store-like intranet into a personalized site for intelligence delivery, client service, and visible status of what’s happening with clients and around the firm. We had recently created a Winston Design approach, so worked with West Monroe Partners to undertake a series of intensive workshops to freshly consider what’s possible and then bring it to life.

One of our guiding design principles throughout this journey was that Winston employees shouldn’t have to navigate our firm’s org chart or different applications to get their job done, just like you wouldn’t expect to learn Marriott’s or Fidelity’s organizational charts or third party systems if you visited their sites as a customer. By taking a functional approach to design and embedding the modules and workflow of our business systems into WinstonWay, we were able to focus on developing navigation that reflects actions rather than departments and use personalized data to minimize the need to navigate at all.

This set of initiatives is momentous, but not necessarily innovative. Similar efforts are underway in some professional services firms and none of the technologies we’re using are new. Our chance to be innovative is ahead of us – how our firm applies our real-time, evolving collective intelligence to serve our clients, shape the talent of the firm, and keep improving our service delivery. We’re just getting started. *ILTA*

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1 Thanks to modular systems like Prosperoware Umbria that address many business functions and complement an integrated and data-intensive approach.