

The Legal Intelligencer

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Using Microsoft SharePoint to Combine Office Operations

It comes as no surprise that Microsoft Office SharePoint ranked in the top three list of answers to the question, "What is the most exciting technology or trend?" in the recently released ILTA 2008 Legal Technology Purchasing Survey. According to this year's study, if they have not already done so, law firms are notably earmarking funds to employ Microsoft Office SharePoint. Specifically, 28 percent of survey respondents indicated that their firms implemented this technology this past year, and SharePoint ranked as one of the most popular planned purchase technologies for 2008-2009.

The combination of SharePoint's powerful collaboration tools, ability to customize and easy integration with popular applications, particularly Microsoft Office, is advancing its popularity with all types of law firms, large or small.

Share and Share Alike

SharePoint allows law firms to store and locate critical information in convenient, flexible sites, bringing it together in a more meaningful way and enabling every member of the firm to become more educated on industry trends and client concerns via the use of wikis, blogs, and the like.

Best defined by Wikipedia.com, a "wiki" is a page or collection of Web pages designed to enable anyone who can access it to contribute and modify content, and a blog (a contraction of the term "Web log") is simply a Web site, usually maintained by an individual, with regular entries of commentary, graphics or even video.

In fact, Osterman Research describes SharePoint as "the de facto collaboration platform for many organizations today." And many law firms are already seeing direct benefits of this workflow solution. Take one Philadelphia-based firm, for example, which improved their accounts receivable by making the information about clients who are 30 days overdue on their bills available to all attorneys through SharePoint. The firm has been able to reduce the time taken to collect overdue bills by tying its accounting system to SharePoint and designating SharePoint as the initial Website for attorneys opening their Internet browsers.

Internal Collaboration Simplified

SharePoint is highly customizable and offers flexible collaboration tools to share business critical information. Whether a firm has one office or multiple locations, SharePoint enables departments, practices, internal teams and individuals to connect and collaborate. Without the help of information technology experts,

users have the ability to make changes to an intranet site, such as adding documents, pulling together and publishing related information, or adding a firm member's blog information as a feed.

Simply by accessing a Web browser, teams can work together more effectively, collaborate and publish documents online, maintain task lists and implement workflows. Teams can also create group workspaces, coordinate calendars, organize documents and receive notifications and updates through alerts set up on the system.

SharePoint also provides an easy and quick search tool that allows firms to access information across many sites and even to other data outside SharePoint. The search is extremely comprehensive, ranging from locating attorneys and staff by name to presenting documents containing specific keywords. It can also locate content in business applications and has features like duplicate collapsing, spelling correction and alerts to improve the relevance of results and help users find what they need.

Improved Client Relations

Firm clients can also benefit from SharePoint through the use of extranet sites, which enable law firms to provide better client service, a faster recall of information and increased ease of communication and collaboration with clients. Like the intranet site capabilities, the extranet is highly customizable, and both clients and internal team members can make most changes to the extranet site on their own, without involving the IT experts.

SharePoint makes the process of collecting sensitive data from clients and suppliers relatively effortless. For example, data can be integrated directly into the system from the firm's billing software, which helps avoid redundancy and errors that normally result from the manual entry of the information. The customized extranet site also can include matter documents and agreements which both the firm and clients can access simultaneously, speeding up the process of review and approval time, and helping teams gain a holistic view of a particular client matter.

The extranet is an excellent benefit for clients because it allows them to directly share information and ideas through a Web browser, creating a more personal experience and tighter client connectivity.

A Personalized Experience

SharePoint's open, scalable architecture enables the creation of customized, self-service "portals," whereby any firm member can create department sites, document libraries, meetings sites, survey sites and discussion boards for use within a firm's intranet. A portal functions as a framework to provide a single point of access to a variety of information and tools. Portals also offer many application templates that address specific business processes, such as billing, so that reports for clients can be pulled from the financial systems.

Through the portal, wikis can be created and used to brainstorm team ideas, collaborate on design, build encyclopedias or store administrative information. Also, firms can use blogs to share ideas, ask questions and give project updates on the portal. Generally, internal wikis and blogs can be used to share institutional knowledge with other members of the firm, eliminating the need to find the “right person” to obtain information.

Additionally, SharePoint enables users to create and use dashboarding techniques in very innovative ways. The ultimate goal of a “digital dashboard” is to gather and present data in a summarized fashion. Dashboards generally describe ways a firm can display various related information on a single page, making it easy to see the big picture.

Dashboards have many applications, like helping with client matter coordination, project management or employee tracking. Firms can integrate back-end data, such as contact lists and client billing information, in one place to get a full picture of what work is being done.

An Effective Business Solution

As many firms are finding, SharePoint saves time, strengthens internal and external communication lines and improves the flow of business. Adding SharePoint to common applications can increase firm productivity and allows for daily tasks and projects to be completed more rapidly. To garner the full benefits of this social computing technology, firms can work with a managed services provider or IT consultant who can assist them with the strategic planning, end-to-end development and implementation of a successful SharePoint solution.

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