

Total Practice Solutions in Action

The Law Librarian Experience

Research Solutions:

Current Awareness Initiatives Integral to Achieving Excellence in the Business and Practice of Law

Product Solution—LexisNexis® Publisher

Prepared by the LexisNexis Librarian Relations Group

Introduction

A recent national survey sponsored by LexisNexis found that two in five law and business professionals are heading toward an “information breaking point.”¹

This scenario appears to be part of business as usual in many law firms. According to the survey among legal professionals, 80% reported that they felt an overload of information and 70% said that they spend too much time sorting through information that ends up being useless. About 40% of the survey participants indicated that they would be unable to handle any future increase in the information flow.

LexisNexis takes the results of this survey seriously. Relevant, reliable business information is critical to a law firm’s competitive effort and is fundamental in maintaining an edge in an ever-evolving marketplace. Current information is paramount to monitoring the latest news about clients and their industries, business trends, new client prospects and competitor activity. At its best, a current awareness initiative can deliver crucial information on a daily basis throughout an entire enterprise and help mitigate increasing information overload.

As a result, we have developed LexisNexis® Publisher, an advanced content management tool that can help law librarians take a front line position on mitigating an organization’s “information breaking point” by selectively disseminating access to pertinent information to the entire firm, practice groups, sales and marketing, clients and more.

The old saying, “Information is Power” could not be more true today. Power leads to profit in today’s competitive business climate. Librarians now more than ever are leading the way to harness information to work for the benefit of the law firm. Librarians are uniquely qualified for the task. They have the critical thinking skill, multi-dimensional problem solving ability and insight into the nuances of both the firm and the people in it to succeed in launching current awareness initiatives that positively impact the bottom line. Librarians are choosing LexisNexis Publisher, in particular, because it leads the competition in delivering access to critical news and information that adds value to every aspect of a law practice.

LexisNexis Publisher empowers librarians to push access to LexisNexis content on a scheduled basis to the firm via e-mail, intranet, portal, BlackBerry® and/or the Internet. LexisNexis Publisher delivers daily articles and relevant facts giving users needed information to make informed decisions, track daily developments, monitor business trends and clients, and much more.

The following offers you a unique insight into how three firms of different sizes successfully implemented LexisNexis Publisher, and how the firms’ libraries and information professionals use this product to enhance and improve current awareness initiatives at their firms.

¹ “LexisNexis Workplace Productivity Survey,” February 20, 2008.
http://www.lexisnexis.com/literature/pdfs/LexisNexis_Workplace_Productivity_Survey_2_20_08.pdf

“The fact that LexisNexis Publisher was a product from one of our preferred business partners gave us a high degree of confidence.”

Sarah Nichols,
Global Director, Research and Information Resources
Orrick, Herrington & Sutcliffe LLP

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Chaos. Stress. Frustration. Apt words to describe the challenge of keeping informed in today’s business environment. Orrick, Herrington & Sutcliffe LLP, a 900+ attorney global firm in San Francisco, faced this challenge and chose to look for help in determining an approach to current awareness needs that balanced the right amount of information with a timely delivery method. Sarah Nichols, Global Director, Research and Information Resources, describes what motivated Orrick: “We needed an automated newsfeed tool that would include top quality business and legal information, including global coverage. Additionally, it had to be easy to use, with search syntax familiar to the research staff, with customizable output that could be pushed via e-mail and via portal. The fact that LexisNexis Publisher was a product from one of our preferred business partners gave us a high degree of confidence.”

Orrick did not have centralized coordination of current awareness research before adopting LexisNexis Publisher. Different departments used several free Internet-based services. And the research department created alerts within other online research platforms.

Once Orrick determined that LexisNexis Publisher was the right solution for them, one person was made the project manager. Next, they determined that a ‘train the trainer’ approach would be most effective in implementing the solution. This meant that a few key stakeholders were trained and were allotted an agreed-upon number of topics. The research department’s unique formatting and branding was retained, so that the departmental brand identity persists across any LexisNexis Publisher output, regardless of whether the departmental “owner” is different. The formatting is also consistent with the rest of Orrick’s intranet colors, fonts, etc. But the work is shared, so no one person or department is over-taxed.

LexisNexis Publisher proved easy to adopt from the administrative viewpoint. But how was it received by the attorneys who were the very people reeling under the information overload? To be a success, it had to provide attorneys the right information, at the right time, in the right format.

Nichols relates that the attorneys have given “very positive feedback.” She goes on further to say that “the ability to offer the ‘my subscriptions link’ on the portal so that attorneys can sign themselves up to receive the newsfeeds directly in their e-mail, has been a very popular option; and one that eases the administrative work of a current awareness project.” Other aspects of LexisNexis Publisher have also garnered praise from the attorneys. For example, the robust coverage of non-U.S. clients, including the option to offer content in French, Italian or other languages is very beneficial to users in Orrick’s European offices. This reinforces the mission of Research and Information Resources to deliver truly global content and services rather than appearing U.S.-centric. Additionally, the time-saving ability to look quickly at abstracts and determine the relevance of specific articles is considered to be a valuable feature.

“The customization of the presentation formats, the tailoring of the searches and increasing the value of the results by adding Orrick’s own documents all add layers and depth to this project and make it come alive.”

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Nichols notes that the flexibility of publishing is also an asset. Currently LexisNexis Publisher results are delivered to the Orrick portal, to client landing pages, to practice pages and to the Research and Information Resources homepage.

After working with LexisNexis Publisher and experiencing how it can help corral access to current awareness information, Orrick recommends it to any institution looking to do the same. For Nichols, LexisNexis Publisher is the right solution because of its “comprehensiveness of content, ease of use and customization, flexibility in terms of how content is delivered, familiar search syntax and the responsiveness of the product development team.”

Additional implementation plans for LexisNexis Publisher lie on the library’s horizon. Future plans involve utilizing more of the non-English language publications, and also identifying industry sectors and geographic overviews and sharing that information across the firm. Additionally, there are plans to use LexisNexis Publisher to deliver access to new areas of the portal, helping to keep those areas fresh and current. Also, Nichols says there are plans to expand use by creating and offering topics to staff in addition to lawyers.

LexisNexis Publisher has helped Orrick develop a successful current awareness program, which is not a surprise. But an unexpected result of adopting LexisNexis Publisher is the excitement and engagement of the LexisNexis Publisher team members within Orrick. Far from being burdened or bored by LexisNexis Publisher, they are pushing its limits. As Nichols describes it “The customization of the presentation formats, the tailoring of the searches and increasing the value of the results by adding Orrick’s own documents all add layers and depth to this project and make it come alive.”

LexisNexis Publisher further solidified the relationship between Orrick and LexisNexis. Orrick’s librarians gave feedback and suggestions that were then acted on to help improve the product. The LexisNexis Publisher product team valued their insights and comments. And LexisNexis helped when Orrick was facing a tight deadline and needed 500 topics and searches created. The LexisNexis Librarian Relations Group assisted by creating 25% of the searches, which earned the appreciation of Orrick. Nichols explains that: “Selecting LexisNexis Publisher has given substantive proof of the value of LexisNexis content for business research, and as Orrick expands and extends its focus on business research and competitive intelligence, LexisNexis offerings will be eagerly sought and evaluated.”

“... not only has LexisNexis Publisher provided for more timely and germane information for attorneys, it has reduced the transmission of duplicative information.”

Jennifer Schroth Tusche
Electronic Services Manager
Drinker Biddle & Reath LLP

Drinker Biddle & Reath LLP

Adding value to the overall organization is something that virtually any law librarian strives to accomplish. Delivering information on existing and potential clients and their respective industries is one of the many ways in which law firm libraries realize this goal today. The question facing many legal information professionals is: what’s the most efficient way to achieve this objective? This was indeed the challenge facing the library at Drinker Biddle & Reath LLP, a 600-plus attorney law firm headquartered in Philadelphia.

Linda-Jean Schneider, Director of Libraries & Research Services, sought a way for her department to deliver automated and simultaneous delivery of information to attorneys in the firm. Schneider explains the process they were using before implementing LexisNexis Publisher was far from practical. The library had in place a rather rudimentary system that relied heavily on library staff reading trade publications and making photocopies to send to interested attorneys—as individuals or groups. “It was primarily a reactive process where we responded to specific requests,” recalls Schneider. In addition to the library’s efforts, there was also some informal market research being conducted on an ad-hoc basis by a limited number of individuals in a few practice areas. Schneider notes that this “was not a cohesive process at all,” and the firm chose LexisNexis Publisher to be the bridge that would connect the variety of information current awareness methods that were taking place in the firm.

In order to have a well-organized transition from these informal methods to the integration of LexisNexis Publisher, Schneider appointed her Electronic Services Manager, Jennifer Schroth Tusche, to manage and spear-head the project. By collaborating with other members of the library staff on topic/search development, as well as the firm’s IS department to integrate LexisNexis Publisher access with the firm’s portal, Tusche, as project manager, ensured that only the most relevant and pertinent information would be delivered. She, along with other members of the library staff, spent time developing precise and accurate searches that generate relevant results, so they don’t have to manually review the search results on a daily basis. “At Drinker we do very little staging and editing of topics once they are deemed good searches ... we try and develop the best searches possible and just let them run automatically,” remarks Tusche.

“It is one of the highlights of our department.”

Linda-Jean Schneider
Director of Libraries & Research Services
Drinker Biddle & Reath LLP

She goes on to add that not only has LexisNexis Publisher provided for more timely and germane information for attorneys, it has reduced the transmission of duplicative information. As part of their implementation process they reviewed the individual alerts being run on *lexis.com*[®] and found multiple alerts being run on the same subjects. Accordingly, they now have many of those alerts as topics that they manage through LexisNexis Publisher.

So now that the library has undergone a full and complete rollout of LexisNexis Publisher to the firm, what has been the response from end-users? In one word, Schneider sums it up, “Excellent!” She also shares that firm management embraces and supports the new improved current awareness system. What’s more, is that in reflecting on Drinker Biddle’s merger with another firm in 2007, LexisNexis Publisher stood out as one of the best features of the firm’s existing information architecture. Tusche also recounts the positive feedback she has received from attorneys at the firm. She notes that a lot of the users appreciate the ability to view the results in abstracted format and then if they determine that they want to read the entire article they can easily click on the hyperlink to retrieve the full text. Furthermore, because LexisNexis Publisher is integrated with the firm’s portal, access to the information it delivers is both seamless and prominent. The library plans on expanding implementation with additional topics and end-users, with a continued focus on client development and working closely with the firm’s Client Relations team.

The real measure of success with LexisNexis Publisher at Drinker Biddle, according to Schneider, is “how easy end-users have grasped the concept and become reliant upon it.” She is also extremely proud of the way LexisNexis Publisher has showcased the library’s capabilities. “It is one of the highlights of our department.” Schneider recommends LexisNexis Publisher to any firm that is seeking a versatile and easy-to-use current awareness platform. She also shared that the implementation of LexisNexis Publisher further strengthened their alliance with LexisNexis “by offering the firm a value-added product from which their users benefit greatly.”

“This feature provides me with timely, valuable information...”

Nelson Block
Shareholder
Winstead PC

Winstead PC

Imagine this scenario: The firm mandate to you and your library is to solve the information overload problem for attorneys, while simultaneously building full information collaboration throughout the firm. You have six months to get it done. Does that sound like mission impossible to you?

What if you really could help tame the information overload happening in the law firm you serve? What if you could provide news about the legal industry, regulatory changes, business trends in law firm management, competitors, potential clients and international news as part of your law firm’s culture? What if you could eliminate duplicate e-mails and alerts, improve the circulation of publications throughout the firm and even make editorial notation of important information? What if the attorneys who access this incredible system receive all the information they need via e-mail and even *participate* in setting up the topics and information that would serve them? This is no dream scenario; it is a reality come true for Winstead PC, a 300-plus attorney law firm in Dallas. By using LexisNexis Publisher, Terri Lawrence, the Director of Library and Information Resources and her team transformed business as usual at her firm.

Lawrence explains that, “Three years ago Winstead’s current awareness program was less than ideal. An intranet page was in place but no one really used it because it was clumsy. We were using LexisNexis® Alerts and WestClip®. A WestClip required too much maintenance and I wanted to solve any copyright problems and duplicative alerts. I knew we needed to find some way to automate the current awareness process. Additionally, our marketing department was working on building teams within the firm and was also seeking a more centralized process.”

As the planning for Winstead’s current awareness solution progressed, a SharePoint® portal was established to facilitate collaboration by sharing documents and document management functionality. Once the portal was established, the firm determined that something else was needed to create a centralized, uniform communication capability that could *automatically* provide Winstead attorneys with desktop access to relevant news and information on a daily basis. The criteria for that “something” was simple: the solution had to enable attorneys to follow daily developments with top clients and their industries, business and practice trends, and firm news. And, the solution had to be easy to use. That solution was LexisNexis Publisher.

The LexisNexis Publisher concept was presented to Winstead’s managing partners by Lawrence. She fully explained to them how the product works and gave them a clear idea about what their daily experience would be with the SharePoint portal once LexisNexis Publisher was up and running. They asked, “Do you *really* know this will work?” Lawrence replied, “Absolutely.”

The implementation of LexisNexis Publisher was managed closely by Lawrence and she worked very closely with the Winstead librarians, the technology group and the marketing department. The marketing group designed the layout, branding and organization of the pages. One of the advantages of LexisNexis Publisher that the firm particularly liked was its transparency and neutrality.

The next step was to involve Winstead attorneys in various practice areas known as “Teams.” Much time was spent in organizing Team Pages for all practices throughout the firm. Once a Team Page was ready to go, it was sent to the attorneys on the team for them to determine the relevancy of a LexisNexis Publisher search to their practice. Feedback from the attorneys helped the Library tweak the searches until the topics were exactly on point.

“One thing that really impressed me during the LexisNexis Publisher portion of the change was the speed at which the LexisNexis team assisted in re-branding our portal.”

**Terri Lawrence
Director of Library and Information Resources
Winstead PC**

Lawrence recounts a turning point experience she had in setting up one of their most difficult searches on the Dallas Cowboys. Although they had gone back and forth and endlessly tweaked the search, “we still kept getting scores, stock information and other irrelevant ‘hits’ especially on Mondays. One of the great new features of LexisNexis Publisher is a check box to eliminate all irrelevant information like obituaries, social news and stock tickers. Once we checked that box, the search was perfect!”

Among the other Winstead favorite features is the ability to test the accuracy and review results prior to publishing. LexisNexis Publisher can remove duplicate or irrelevant documents in the initial topic search. Librarians also use LexisNexis SmartIndexing Technology™ indexing terms across sources to help ensure consistent results. The reporting feature lets the Winstead librarians track the usage of topics and monitor subscriptions.

Since the attorneys, library, marketing and technology departments shared ownership in the project, the firm really engaged in making the portal, now powered by LexisNexis Publisher, part of the everyday workflow at Winstead. LexisNexis Publisher has changed the firm’s culture by providing the vital information attorneys need to keep pace with changes in the law, news about the firm, news about clients and information about competitors. The heads of the practice groups encourage their teams to harness the power of LexisNexis Publisher. Here is an example of a note sent from one senior attorney to his team:

“Please consider doing this: Ask the library to set up your favorite client(s) on the portal so that you may receive all ‘news’ about the client. I have done this so far for XXX (as part of the XXX client team) and I receive e-mails like the one below. (The links are to actual articles on the Web.) It is FREE. It is a great way to learn about the client. It’s client development AND entertainment!”

The value of LexisNexis Publisher has been recognized by key decision-makers and leaders in the firm. Winstead shareholder, Nelson Block of the Houston office, wrote a note of praise to the library, commenting “This feature provides me with timely, valuable information...” As result of this type of shareholder endorsement, Winstead practice groups make heavy use of LexisNexis Publisher and, in turn, the product has become part of the firm culture. Attorneys utilize the “my subscriptions” link and tailor their subscriptions to the content that is most relevant to them in their practices. Now attorneys use the portal every day and rely on it as the go-to source before seeing clients. And, attorneys can have access to today’s news daily, hourly and via archives whether in the office or traveling.

Winstead’s experience with LexisNexis Publisher has been extremely positive. Key to the success of the implementation is the fact that LexisNexis Publisher is easy to manage so a librarian can react to change within the firm by altering topic searches and quickly push out vital information. With the editorial function, librarians can add comments on particular articles or add annotations.

Recently Winstead went through rebranding at the firm, complete with a new logo and new look to the portal. Winstead librarians enthusiastically praise the support they were given by LexisNexis during this important transition. Lawrence tells the story: “One thing that really impressed me during the LexisNexis Publisher portion of the change was the speed at which the LexisNexis team assisted in re-branding our portal. It had to be the fastest transition in history. I sent out all our information one Thursday and took down the portal. The next day, Friday, all the changes were made and our new portal was complete and ready to go. That was impressive.”

The success of LexisNexis Publisher at Winstead has opened the door for future implementation of LexisNexis products at the firm. Included among the plans is a joint project between the library and the marketing director to implement LexisNexis® InterAction® for law firms. This product will further capitalize on Winstead's most valuable assets—the relationships it nurtures with clients and contacts.

LexisNexis Publisher has helped Winstead achieve a customized and comprehensive current awareness program which has had a distinct impact on the business and culture of the firm. The library has partnered with each and every attorney and met their objective of giving Winstead the best possible information and support to help them serve their clients and prepare them to the business of the firm. Relevant, reliable and timely information provided by LexisNexis Publisher is keeping Winstead more competitive, productive and profitable.

Conclusion

You have just read how three organizations adopted LexisNexis Publisher as a way to develop and grow the manner in which access to information is delivered to the firm. While each of these firms had its own unique objectives and challenges, they all three share a common ambition: the need to deliver the right information, to the right people, at the right time. In each of these firms the library director and staff spearheaded the efforts to expand and improve the current awareness systems in their organizations. In doing so they are imparting knowledge that affects their attorneys' practice and clients, they have illustrated that the library is positioned to best serve as the hub of current awareness management, and they have demonstrated that librarians are best equipped to be the architects of building and maintaining these types of value-added initiatives.

If you are interested in becoming the current awareness architect in your firm, please contact your LexisNexis Librarian Relations Consultant, or go to <http://law.lexisnexis.com/infopro/Training-and-Resources/LexisNexis-Publisher-Resource-Center/> for additional details on LexisNexis Publisher.

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