

LawPORT

SharePoint Portals for Law Firms



WHITE PAPER

SharePoint Advantages, SydneyPLUS LawPort Acceleration:
Making it Work with LawPort 5.0

*SydneyPLUS LawPort is proud to announce the next generation of LawPort. The **all new, all MOSS 2007/2010 edition**, of the **original, award-winning legal industry portal** is now fully compatible with SharePoint's Standard and Enterprise Editions, allowing you to accelerate and optimize your MOSS deployment, and immediately see a real return on your investment, without painful, expensive customization*

JANUARY 2011

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EXECUTIVE SUMMARY

SharePoint – Many Advantages to Leverage, Some Challenges to Overcome:

The legal industry has moved to embrace Microsoft's SharePoint as the platform of choice for building web-based portal and knowledge management infrastructures. Efficient collection, organization and distribution of a firm's intellectual capital (both internally and externally in some cases) has become increasingly important, most especially for those firms with a leadership team that values cross-practice, cross-geographic, and even cross-industry client service.

In addition, visionary law firm leaders understand that it is critical to efficiently and effectively offer enterprise access to data and information about the firm's people, processes and financial operations as part of the growing focus on the business of law.

Equally important, firms with a strong commitment to the continuing professional development of their lawyers excel at encouraging them to document and share their expertise, thereby building their own reputations and that of the firm.

At **SydneyPLUS/LawPort**, we believe that SharePoint 2007 and 2010 represent many significant advances that are critical to the continuing success of a progressive law firm, in terms of the practice of law and the business of law, and also in terms of leveraging the expertise and professional development of individual lawyers and staff:

- an acknowledgement that collaboration and sharing is key
- an understanding that knowledge means more than documents
- the use of modular web page components that can be easily moved, shared and changed (web parts) has come of age
- portals are now fundamental infrastructure and not the latest fad
- the integration of business data and key performance metrics is vital to the usability and therefore, success of a portal.

With experience, law firm CKOs and CIOs are telling us that even with the many groundbreaking benefits that SharePoint offers, it is increasingly clear that simply installing the product does not deliver complete results to the legal sector. While Microsoft's enterprise products are designed to be adapted by expert IT staff to the varied needs of all kinds of businesses and individuals, they are not tailored to the specific requirements of law firms, which are unique even within the world of professional services. In addition to having a strong commitment to leveraging and growing the firm's intellectual capital, and to sharing business intelligence with practice and functional department managers, top law firm leaders understand that making the best use of their IT and financial resources is critical to the bottom line.

Executives we've interviewed feel strongly (and we agree) that they've done the right thing in selecting SharePoint. However, they are now looking for solutions to the challenges of accelerating the implementation, to making the most effective use of internal resources, and to delivering law firm specific applications that integrate seamlessly with SharePoint 2007 and 2010.

TOP 10 BENEFITS OF SHAREPOINT

SharePoint provides an integrated suite of easy-to-use server applications that boost organizational effectiveness and optimize the way that people, content, processes, and business applications interact.

- **Delivers a consistent, simple and familiar user experience.**
SharePoint 2007 and 2010 is integrated with familiar client applications to provide consistent user experience that simplifies how people interact with content, processes, and business data. Employees can easily accomplish business activities without depending on IT.
- **Boosts employee productivity with simplified business processes.**
Simplifies workflows for initiating, tracking, and reporting common business processes such as document review and approval, issue tracking, and signature collection.
- **Meets regulatory requirements through comprehensive control over content.**
Sensitive business information can be managed effectively to reduce litigation risk by specifying retention and auditing policies for business records in accordance with compliance regulations.
- **Effectively manages and repurposes content to increase business value.**
Users can easily author content for Web sites, submit it for approval and schedule deployment to the Internet. Multilingual content and translation management is simplified with special templates.
- **Simplifies access to structured/unstructured information across disparate systems.**
Users can access business data in common LOB systems like SAP and Siebel through OOB connectors. They can also create personalized interactions with configurable back-end connections.
- **Connect people with information and expertise.**
SharePoint incorporates information about people, documents, and Web pages to produce comprehensive and relevant search results with de-duplication, spelling correction and alerts.
- **Accelerates business processes and maintains control of electronic forms.**
Smart electronic forms collect critical business information from customers, partners, and suppliers. Built-in data validation rules accurately gather data to integrate into back-end systems.
- **Shares business data preserving its consistency and protecting sensitive information.**
Give employees interactive Office Excel spreadsheets from a Web browser. They are efficiently shared with one central, up-to-date version while protecting proprietary information.
- **Facilitates decision making with business-critical information in one central location.**
Creates live, interactive BI portals that assemble and display business-critical information from disparate sources, using dashboards, Web Parts, scorecards, and data connectivity technologies.
- **Provide a single, integrated platform to manage intranet, extranet, and Internet applications across the enterprise.**
Scalable, services-oriented architecture provides support for interoperability standards including XML and SOAP, which makes it easier to integrate with existing processes and applications.

SHAREPOINT CHALLENGES

Law Firms are implementing Microsoft's SharePoint platform for collaboration and content management on an unprecedented level.

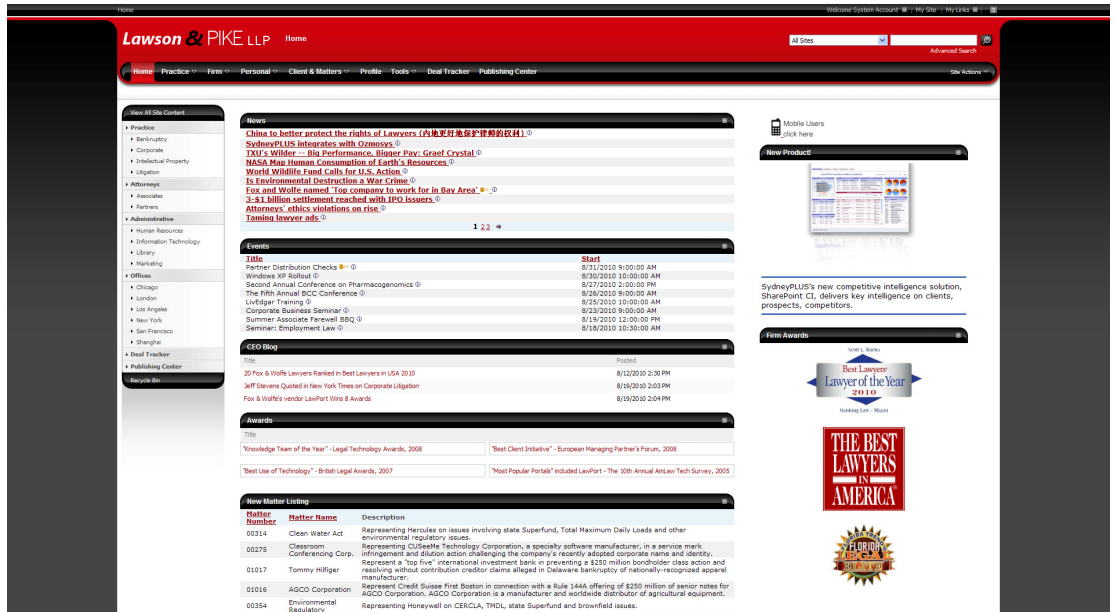


Technology analysts have raised challenges which should be considered when implementing SharePoint.

- SharePoint is a platform, not a law firm specific solution, because Microsoft's products are not designed with the specific needs of law firms in mind.
- SharePoint's inherent flexibility has, in many firms, led to repetitive meetings about the "best" architecture resulting in failed attempts to customize it for the environment, or has consumed significant resources and time devoted to developing work-arounds.
- Implementation that truly works in a law firm can take months, and may place a heavy burden on already stretched IT resources.
- SharePoint's sophistication can sometimes bypass the "basics" – lawyers need to record time, open matters, write and search for documents, and send emails.
- The ability to create multiple sites, download web parts, and allow users to change their view into the business and practices is fantastic, but it can sometimes mean a proliferation of empty sites, and an escalation in support calls – all without significant results in terms of lawyer or staff productivity and bottom line cost savings.
- Market research suggests that because SharePoint 2007 and 2010 is not a full enterprise content management system (for example, lacking the ability to support compound documents which include multiple attached elements and formats) and is not designed to provide a full archive (such as would be required for various compliance, cross-practice or cross-department processes), it might be best deployed in tandem with another content management system instead of being used as a replacement.

LAWPORT – THE SHAREPOINT ACCELERATOR BUILT EXCLUSIVELY FOR LAW FIRMS

The all new, all SharePoint 2007 and 2010 edition of the original, award-winning legal industry portal is now fully compatible with SharePoint's Standard and Enterprise Editions, allowing you to accelerate and optimize your MOSS deployment, and immediately see a real return on your investment without painful, expensive customization.



- Designed specifically for law firm environments by experts who have been supporting the software applications and knowledge management needs of the legal sector for over 20 years.
- Best practices for a smooth implementation in your environment built right in, along with our consulting expertise.
- We offer a dynamic database management system that is easily customized by non-programmers and MOSS experts alike, empowering you to evolve the data architecture as needed, without stretching limited IT resources.
- Interacts seamlessly with your existing email, timekeeping, billing and other workflow applications.
- Suite of legal specific web parts and applications that reduces or eliminates the 3rd party products you would normally have to buy and integrate.
- Built on a .NET foundation, LawPort 5.0 delivers a robust enterprise content management system, as well as the tight DMS, CRM and HRIS integration capabilities of earlier generations.

THE CASE FOR LAWPORT 5.0

As a CIO, CKO or as a CMO with marketing technology responsibilities, you know that your firm's portal needs to reflect the preferences of your managing partners, practice leaders and other departmental stakeholders in order to succeed. You got the buy-in for a SharePoint implementation, it's installed, and now you need to customize it for your firm, with additional input and approval. **The forum most likely to give you an audience of leaders who can be engaged, and who can give you the go-ahead, is either a partner meeting or a practice retreat.**

For one or more of these meetings, you'll need to deliver a compelling demo of what can now be done to enable seamless knowledge transfer, both in terms of **legal expertise and prior work product**, and in terms of the firm's **business intelligence**. You'll want to show how **attorney work flow** can be optimized using your existing productivity applications. Depending on the audience, you might need to demonstrate how your SharePoint portal can help you **attract new clients**, and **maintain/expand your existing client relationships**.

It's likely that your expert IT staff will be able to put together a test portal demonstrating SharePoint's *potential* to deliver on all the above critical dimensions. If done well, this will whet the audience's appetite. **The next thing you will hear is: "we need this to be ready in three months."** You'll be told that you need the business intelligence information in time for the **budgeting process** which starts in two months, and you'll be told that you need to develop **client pages** that incorporate both external and internal information in time for the annual meetings with ten of the firm's largest and most profitable clients, all of which are happening in about three to four months. If you've impressed the practice leaders, they will ask you to develop **cross-practice linkages** in terms of individual **lawyer expertise**, and a way for them to **quickly identify critical documents**. The more progressive members of your audience will be wanting the ability to **personalize** their own portal page views and select from a **menu of law firm specific content and applications**.

Given the **lean infrastructure** that today's well managed law firm's preserve, you are likely to be asking yourself how you can possibly deliver on *any* of the above projects, let alone *all* of them, within the two-to-four month timeframe you've been given. **Your IT staff is probably fully occupied** and is scoping projects to *begin several months downstream*. It's not clear that you can get the necessary resources moved over from other priority initiatives. The firm has funded the acquisition of SharePoint, and now you **need to manage any additional financial resources extremely carefully**. Finally, you need to accelerate the effective deployment of SharePoint without compromising the integrity of any of your existing applications such as your human resources, billing, business intelligence, timekeeping, and document management systems.

What's required?

- A law firm specific solution that can be paired with SharePoint for a speedy, thorough implementation that will address your stakeholders' requirements and expectations, including being **up and running inside a very short time frame**.
- You need to **temporarily add to your available IT resources** and you need to **benefit from best practices** in portal development and management in the legal sector without having to spend weeks researching what those best practices are.
- It's now understood and expected that you will **deliver a jumping off point** for all partners, associates, paralegals, staff-side executives and departmental staff to **access, share, personalize and analyze** the firm knowledge relevant to them.
- You'll need to integrate profitability information, expense-to-budget information, and staffing information for **budget owners**.
- You'll need to provide easy **access to timekeeping tools, billing systems, matter value and expertise** information for **billing partners**.
- The **marketing and business development** professionals will want to see portal pages that serve up critical client information at a glance.
- The portal must have **rock solid security**, with permissions, filters and access levels designed to address risk management and confidentiality.
- The **"my portal" concept** has caught on, and your users expect a level of highly relevant personalization capability.
- You have an hour on the agenda for the next partner meeting in two months and they expect to see a live demo of the new firm portal – **the clock is ticking**.
- You need a commercial partner with **solutions** to your challenges, and a **commitment** to enabling your success.

LAWPORT 5.0 VALUE PROPOSITION

SydneyPLUS LawPort Solutions - SharePoint for Legal

Designed from the ground up to tackle the challenges faced by today's global law firms, and to leverage the power of SharePoint 2007 and 2010 while retaining the manageability, simplicity and legal focus of earlier generations, LawPort 5.0 will help you deliver a portal that satisfies the requirements of the business, on time, on budget and with usable, sustainable, measurable results. We provide you with the means to leap ahead with your SharePoint implementation, and make it work in your environment.

LawPort 5.0 provides a **legal framework** that leverages and optimizes the flexibility of SharePoint; **integrates your existing document management system** into SharePoint document and content storage functionality; **provides a management layer** over SharePoint sites, users and permissions; offers a **suite of legal specific web-parts**; and **delivers a packaged solution that can include hosting and consulting services**.

Experience, Innovation, Partnership, Solutions

At SydneyPLUS, we focus on both software AND solutions. Unlike other providers, we have a demonstrated track record of delivering packaged software that solves your problems right out of the box, without the requirement to spend additional resources on customization. We offer robust, pioneering, industry accepted and globally deployed software, support for server farm deployment, or hosting solutions, coupled with a wide range of consulting services both pre- and post-install, to ensure that your project is a complete and measurable success.

Consulting

Many of our consultants have practiced as lawyers, KM advisors, or have worked in law firm IT departments. They have assisted with LawPort deployments for many of the AmLaw 200 and Legal100 firms (including those with global reach) in the US, Canada, Australia and the UK. Consulting services include: pre-install architecture review; needs analysis; change and communication management; technology strategy services; and KM audit and planning.

No risk; low cost of ownership

A LawPort solution costs a fraction of what it costs to build your own or hire 3rd party consultants. In addition, you pay nothing until you see the system you want fully operational.

FUNCTIONAL AND TECHNICAL CAPABILITIES

Key LawPort Features Include:

COSTS AND LICENSING

- Total solution: not just tools, not just consultants – a complete solution that fully addresses all your requirements
- Instant gratification: an out-of-the-box solution that can match a firm's most aggressive operational timeline
- Full migration service and support for all clients
- Subscription-based licensing that lowers the cost of entry and ensures continued support, upgrades and 3rd party integrations
- Option to extend existing SharePoint sites and structures with LawPort functionality
- Optional module, feature and license "slices" to ensure that you pay only for what your business requires

DEPLOYMENT

- Content management and distribution user interface for SharePoint with a **LP Publishing Wizard** that comes with its own SQL database driven build-in and ready-to-use knowledge management system.
- Content management system augments SharePoint and integrates seamlessly with your DMS (can be extended to include RSS feeds, SharePoint sites, other searchable content types, and audio/video files)
- User interface **LP Customization Tool Kit** and **LP Forms Designer** lets non-programmers with no SharePoint expertise easily develop forms for specific document or content types.
- Extensions to the **LP Legal Object Model** (a virtual representation of your firm) including many-to-many client/matter relationships, sub-matters, ethical walls and cross-practice teams
- API access to the **LP Legal Object Model** provided

USAGE

- Unique **LP Multi-part Document Publisher** and **LP Navigator** eliminate the inherent problems with managing and navigating complex content by combining and relating content distributed across multiple pages into familiar tree-like hierarchy.
- Multi-region, multi-language and translation support (including multi-byte character sets)
- Attorney friendly **LP Workflows** improves productivity and eliminates portal frustration
- **LP Categorization Engine** lets search and display information be sorted by categories and related categories to find the most relevant content available
- **LP Context Provider** automatically filters non-relevant information from user-specific portal pages by relevant categories such as practice group
- **LP Mobile** provides support for mobile access to LawPort data

MAINTENANCE

- Enhanced logging and support to help your administrators work out what is and is not being used, and why

About SydneyPLUS

Interested? SydneyPLUS is a leading developer of knowledge management and portal solutions. Since 1977 we have partnered with many of the world's top law firms to improve knowledge delivery and achieve a **real return on investment**. In 2007 we added the award winning LawPort software to our product suite.



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