Mining for information - bringing the gold to the surface.

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Information overload is a problem for all of us: too many emails, too much data, too many magazine articles to read. Sorting the wheat from the chaff is a major challenge. And if lawyers are to focus on the right information, a lot of the sorting has to be done for them. How can firms approach this challenge?

At the beginning of a lawyer's career a lot of time is spent on legal research, digging through cases and commentary for the right answer, or at least an arguable answer to support the client's position. This is a painstaking process, but it is what lawyers are trained for and, on the whole, it interests them. It is also generally chargeable, so spending the time to dig for the right nuggets of information is acceptable. However, a lawyer may be less inclined to spend time digging for information about their firm and their clients. It isn't billable and it wasn't what they trained for. But as a lawyer gets more senior and has more responsibility for management (whether it be of matters, groups, offices or a whole firm), even finding the (non-chargeable) time to keep up to date with developments in the law can be a challenge. Nevertheless, if the practice of law is to be efficient (for the benefit of clients and the bottom line), this kind of information needs to be readily available.

Add up all the different types of information a lawyer at any level should have available day to day and it soon becomes a mountain:

- Business information/news
- Legal developments in their practice area (received from internal and external alerts – possibly several of them)
- Financial information – outstanding bills, work in progress (WIP) – particularly compared to the estimates given, realisation, utilisation, time spent on non-billable activities
- Client information – billings, trends, BD expenditure, business information, spread of work across the firm
- Expenditure against budgets.

Much of this information is likely to change on a daily or almost daily basis. And that's before you get to information about the training available this month, today's menu in the canteen, new matters, the firm's best practice/policies, somebody's leaving collection or the latest missive from management. How does a lawyer who looks at all this stuff ever get any client work done?

There are some obvious things that can be done to help. Spam filters and strict email circulation policies can filter out some of the irrelevant information. In some areas it can be worthwhile investing in the manpower to distil large volumes of information into manageable bulletins – for example by creating internal legal updates to aggregate information about changes in the law from multiple sources (or purchasing a comprehensive updating service from a provider, where such thing exists). A similar approach can be taken to business information. But still there is a huge volume of information to be absorbed. The danger is that the important messages get forgotten. These might be about changes in the law, or they might equally be the message that asks the lawyer to chase an outstanding bill, or alerts them to the build up of WIP on a matter where the estimate is getting close.

It is not just volume that is an issue. It is also the type of information. Although generalisations can be dangerous, in working out how best to present information it is important to be aware of the mindset of the target audience. It is interesting to note that lawyers who will happily get to grips with a contract three inches deep, will carry a much slimmer pack of management figures to and from the office for weeks without ever getting around to looking at them. I recall a conversation with a former partner of mine, who ran a large and successful group in the firm. 'Every month I get a pile of management accounts,' he said, 'but frankly there are only about three numbers in there that I can do anything about and it takes me half an hour just to find them.' The presentation of information which is not directly matter-related is key if it is to gain the attention of the busy lawyer.

Much of the information needed (and much more) is probably sitting in one of the firm's IT systems – finance, CRM, time recording etc. – or in online legal or business sources. Software systems and resources for law firms will each have user interfaces to allow access to the information they contain. However, they are often designed for the power user whose job is intricately linked with the subject matter of that particular system. This means that they are not always easy to navigate and for a user with half a dozen different systems to navigate it may be a struggle to get to grips with each of their nuances. Training may help, but it would be so much better if the information was aggregated and presented so intuitively that training wasn't needed. Clear and simple presentation can make a huge difference. The BBC website, for example, provides an enormous quantity of information, but no-one ever needed training to find their way around it.

For years people have been talking about dashboards as a way of presenting important information. The analogy with motoring is a good one. When I am driving a car I don't need to know what the pistons are doing, but I want to know my speed and how much fuel I have left. I also need to be sure my dashboard gives me the right information without me having to take my eye off the road for too long.

The tools exist to enable firms to 'liberate information from the various applications'[1]. Search engines, reporting software, and SharePoint can all provide the means. But there is a trap. There is so much information available that there is a huge temptation to expose too much. This is particularly the case when the specification is put together by the power users. Ask a Finance Director what information should be available on the lawyers' dashboard and he or she will probably want to push quite a lot of detail. Similarly with regard to client and contact information, the Business Development department will probably want a considerable amount to be surfaced. As the picture builds up the dashboard gets more and more complex until the lawyers conclude they don't

[1] Neatly put by a client of ours recently.

want to take their eyes off the road long enough to study it. One of my favourite (and often used) quotations is, 'Sorry for the long letter. I didn't have time to write a short one'[2]. Presenting information succinctly is hard. Really hard. Look at the complexity of the dashboard on a new car these days and the difficulty of keeping it simple is obvious.

It would be unrealistic to imagine that all the information relevant for a lawyer day to day can be presented 'at a glance'. It therefore needs to be categorised. As well as deciding which information can be presented 'raw' (ie drawn directly from the firm's systems) and which needs to be synthesised, summarised or commented on, it is important to distinguish:-

- Information that should be looked at in a second, daily, to 'check the fuel'. For this type of information being able to present the headline information but with the ability drill down further can be useful, although there is a danger of duplicating too much information and the drill down becoming as complex as the original applications.
- Information that should be exposed as a 'newsflash', which may be urgent, but only sporadic. This is a real danger area, if it is not to become as crowded as the user's email inbox.
- Information that needs to be there (and obvious) when needed, but probably doesn't need to be read at any fixed intervals. The firm's general policies and contact data might fall into this category.
- Information that the lawyer should take some time to look at periodically. This might include legal updates and, if bulky, it may need to be in a printable form so it can be read more conveniently.

Getting this right is not going to be a question of a one-off big bang. Information pressures change all the time and any method of presentation must be flexible. From a change management perspective too, starting small makes it easier to allow the users to adjust to a new way of receiving information, and to using it effectively.

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[2] Variously attributed to Mark Twain, Churchill and GK Chesterton.