

KNOWLEDGE MANAGEMENT: THE KEY TO IN-HOUSE EFFICIENCIES

TORONTO May 26, 2010 CALGARY JUNE 9, 2010

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In Calgary June 9, 2010

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DATES AND VENUES:

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CONFERENCE CENTRE

May 26, 2010

St. Andrew's Club and Conference Centre
150 King Street West, 27th Floor
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CALGARY, TELUS CONVENTION CENTRE

June 9, 2010

Calgary Telus Convention Centre
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- » In-house Corporate Counsel
- » Chief Knowledge Officers
- » Chief Information Officers
- » Learning and Development Professionals
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- » Directors of Knowledge Management
- » KM Lawyers
- » Directors of Information Management
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KNOWLEDGE MANAGEMENT: THE KEY TO IN-HOUSE EFFICIENCIES

THE COURSE LEADERS

NORMAN LETALIK, PARTNER,
BORDEN LADNER GERVAIS LLP
ANDREW TERRETT, NATIONAL DIRECTOR OF KNOWLEDGE MANAGEMENT
BORDEN LADNER GERVAIS LLP

COURSE HIGHLIGHTS

- Background of Knowledge Management
- Building a Knowledge Culture
- The Information Source
- The Technology
- The Future of Knowledge Management
- Bridging the Gap between Service Provider and Client
- Building a Business Case

In just a few short years, KM has become an integral part of law firms' infrastructure. Surprisingly, the business community and its in-house departments are just beginning to realize the potential of in-house KM. The longer they wait, the more it will cost them.

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MAY 26, 2010

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program outline

8:15 – 8:50 | REGISTRATION AND BREAKFAST

8:50 – 9:00 | INTRODUCTION

9:00 – 10:00 | BACKGROUND

KM is not a recent invention for lawyers, but one that has evolved since firms started building precedent and research collections. The advent of sophisticated search engines and the convenience of the Internet, however, have enabled sophisticated KM tools, an evolution that has conveniently dovetailed with client demands for better, more efficient service and attendant cost savings arising from a culture of shared knowledge that engenders collective wisdom and teamwork.

To obtain the greatest benefits from this evolution, however, businesses and their in-house departments must understand KM so they can collaborate properly with their legal service providers.

- » What is KM?
- » Law-firm KM versus in-house KM – what are the differences?
- » Benefits of KM
- » KM and document management
- » KM and the regulatory environment – copyright, privacy and records retention policies
- » KM and the litigator

10:00 – 11:00 | BUILDING A KNOWLEDGE CULTURE

Because KM is a process by which diverse expertise frequently separated by place and time becomes organization-wide knowledge that is easily accessible to anyone, it is critical that KM be regarded as an essential and integrated part of an organization's entire infrastructure. But what does a "knowledge-sharing culture" look like and how does an in-house legal department get there?

- » What does a "knowledge-sharing culture" look like?
- » How would you describe your current in-house culture?
- » What's the gap and how can it be spanned?
- » What's the best model for spanning that gap?
- » Do you need dedicated KM resources?
- » Do KM incentives work?
- » What can the Web 2.0 world teach us?

11:00 – 11:15 | BREAK

11:15 – 12:15 | THE INFORMATION SOURCES

It's not clear that the traditional divide between information and knowledge has survived the cutting-edge search tools that are so vital to a KM infrastructure. But it is clear that whether it's called information or knowledge, the constituents of KM must be identified, gathered and worked into a cohesive, accessible form. What are the potential repositories?

- » Precedent Databases
- » Research Databases
- » Expert Databases
- » Deals Databases
- » "Who knows about this?" – expertise location
- » The KM potential of e-mail as unstructured information

12:15 – 1:00 | LUNCH

1:00 – 2:00 | THE TECHNOLOGY

While culture is at the core of KM, the proper technology is essential. And there's a wide array of choices to make. What's right for you?

- » Document Assembly Tools
- » Enterprise Search Engines
- » Website Search
- » Enterprise Portals
- » Databases
- » Blogs, Wikis and other Web 2.0 Tools
- » Law-firm Extranets
- » Taxonomies and "Folksonomies"

2:00 – 3:00 | THE FUTURE OF KM

KM has evolved well beyond a research and precedent function. Its tentacles now reach out to both the business as well as the professional functions of a law firm or an in-house department.

- » KM and the Business Plan
- » Competitive Intelligence
- » Project Management
- » Process Management



NORMAN LETALIK

Norm Letalik is a Partner and Managing Director, Professional Excellence at Borden Ladner Gervais LLP (BLG LLP). His responsibilities include recruitment, mentoring, performance evaluations, continuing education, knowledge management and professional-development activities, which constitute BLG LLP's Professional Excellence Program. Norm also practises as a litigator, primarily in the fields of product liability and marine law. Norm is the national leader of BLG LLP's Automotive Industry focus group. Norm is listed in *Best Lawyers in Canada* for Product Liability, and in *Lexpert*® for Marine Law. Norm is the past national leader of the following practise groups: Product Liability, IT, International and ADR. Additionally, he was the Toronto regional leader of the Marine practice group. Prior to entering the practise of law, Norm was a law professor at Dalhousie Law School and a visiting fellow at the Faculty of Law of the National University of Singapore.

Norm has delivered numerous papers and presentations throughout the world and is the author of more than 50 publications in many areas of the law.



ANDREW TERRETT

Andrew Terrett is the firm's National Director of Knowledge Management. He was admitted as a solicitor in England and Wales in 1994. He is also a certified project management professional (PMP). Andrew has focused almost his entire professional career on technology as applied to the practice of law. To this end, he has worked with and within law firms as a technology consultant, an in-house project manager and for a number of software vendors on large IT implementation projects, ranging from document-management systems to digital dictation systems, through to learning management systems. He has also written extensively on the area, including a book entitled *The Internet – Business Strategies for Law Firms*, published by the Law Society of England & Wales (2000). Andrew has a bachelor's degree in law from the University of Warwick, England, and a master's in law (LL.M) from the University of British Columbia.

3:00 – 3:15 | BREAK

3:15 – 4:15 | BRIDGING THE GAP BETWEEN SERVICE PROVIDER AND CLIENT

The move to alternative and particularly fixed fees and the general demand for control of legal costs exacerbate the frictions between lawyer and client. By collaborating on KM, the gap can be bridged.

- » What are the law firms doing?
- » What are in-house departments doing?
- » How can law firms and in-house departments work together?
- » What does law-firm "client-facing KM" look like?
- » How can in-house departments get the most out of law-firm KM initiatives?
- » Bringing KM from in-house counsel to in-house clients

4:15 – 5:15 | BUILDING THE BUSINESS CASE

If your organization has not started a KM function, the first step has to be to develop the business case. These materials would cover:

- » Building the return on investment (ROI) equation
- » Application metrics
- » KM department metrics
- » KM and the perception of value

5:15 – 5:20 | Q & A

5:20 | COURSE CONCLUSION

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