

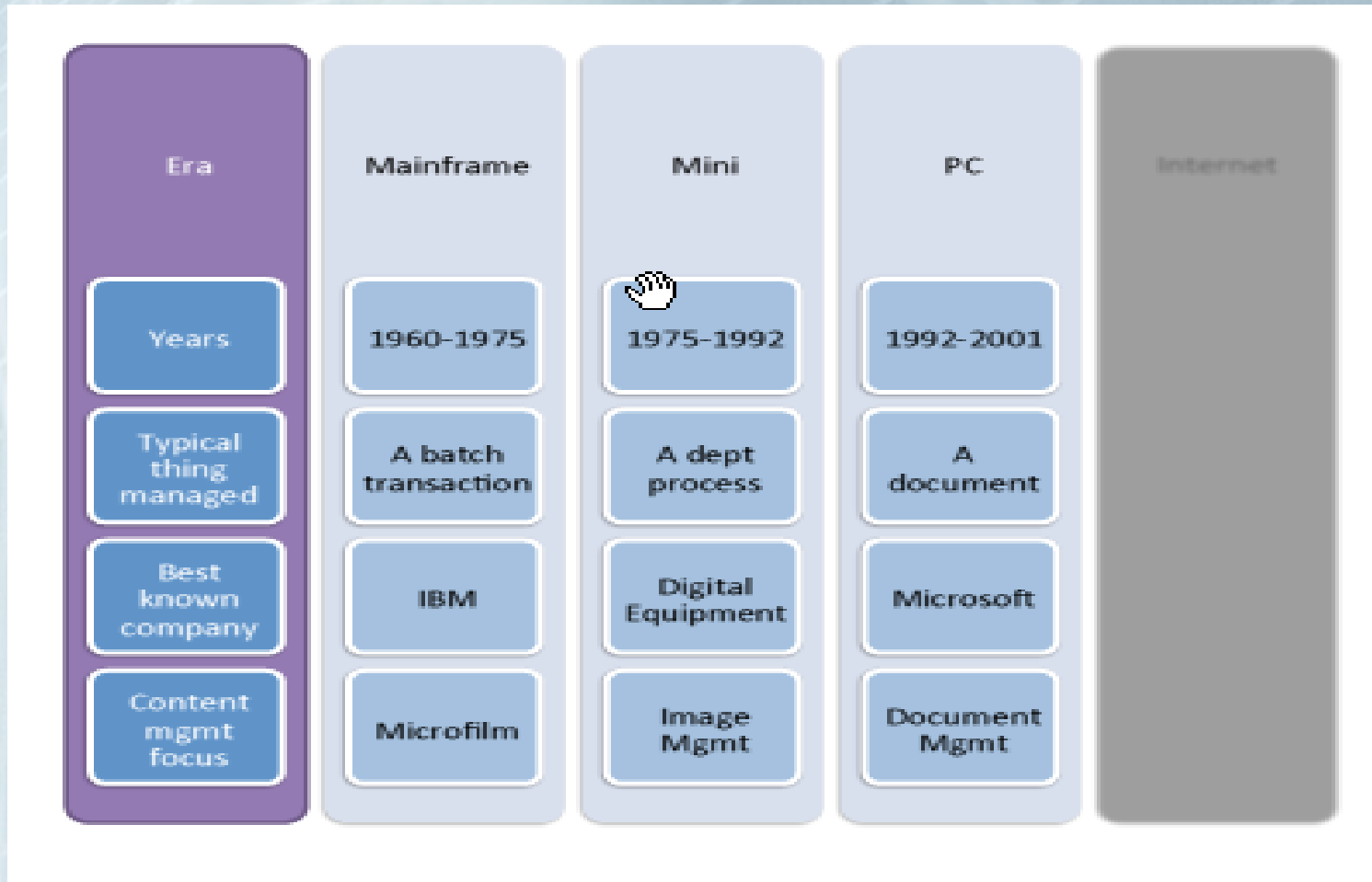
THE EVOLUTION OF ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS IN THE LEGAL ENVIRONMENT

This discussion will explore how document management has changed and the issues that impact document and content management in general. How Document and Records Management is a risk management and efficiency issue. Current issues and trends that will help you evaluate the effectiveness of your current system and provide you with ideas for the future.

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History



THE MID 1990'S DOCUMENT MANAGEMENT IN LAW FIRMS

- Stand alone systems
- One list of document types
- No distinction between works in progress and records

THE MID 1990'S RECORDS MANAGEMENT IN LAW FIRMS

- Back office operation
- Strictly paper based, mostly “box movers.”
- The notion of “information lifecycle management” was foreign.
- Paper likely managed at the end of a case/deal, etc. but not from start to finish.

EARLY 2000

DOCUMENT MANAGEMENT IN LAW FIRMS

- Systems were speaking to another system
- Software companies forming strategic partnerships
- Email started speeding up/complicating things

EARLY 2000

RECORDS MANAGEMENT IN LAW FIRMS

- The notion of records management was still not at the forefront of anyone's mind.

AROUND 2005

DOCUMENT MANAGEMENT IN LAW FIRMS

- Live integration
- Matter centricity
- Email Management
- Software companies on shopping spree

AROUND 2005

RECORDS MANAGEMENT IN LAW FIRMS

- Popular RMS packages part of DM Companies
- Merging of RMS into the DMS
- Works in Progress V Records

Questions

- 1) How are your records management departments defined?
- 2) With/To Whom does records report?
- 3) Are you working on, or do you have a strategy, surrounding document management and records management?

NOW & GOING FORWARD DOCUMENT MANAGEMENT IN LAW FIRMS

- “Cloud” internet based programs
- ECM
- Content Management
- Software Companies have a suite of products

NOW & GOING FORWARD DOCUMENT MANAGEMENT IN LAW FIRMS

- Early SharePoint Rollouts
- Matter Centric here to stay
- Smart Filing
- Managing Social Networks

NOW & GOING FORWARD RECORDS MANAGEMENT IN LAW FIRMS

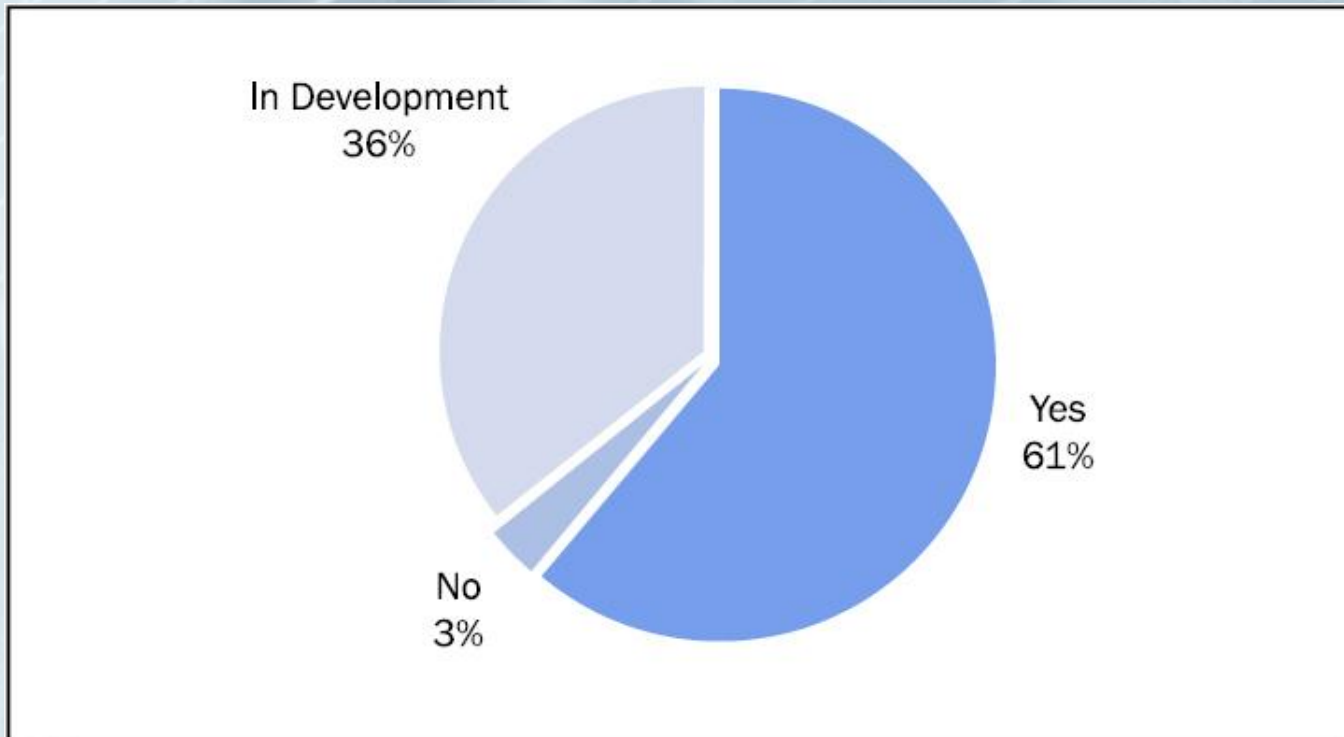
- Records Retention Policies starting to be taken seriously in the legal environment

Record Types



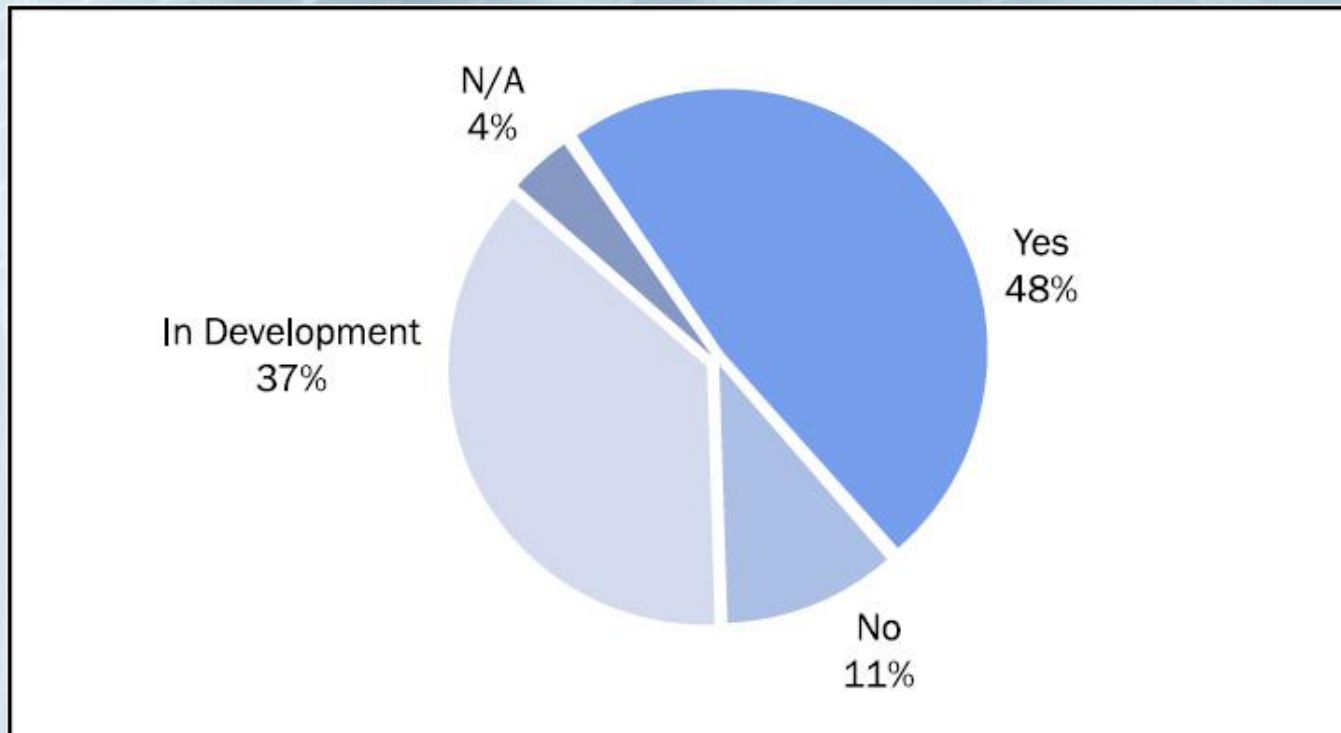
NOW & GOING FORWARD RECORDS MANAGEMENT IN LAW FIRMS

Does the firm have a retention policy for e-records?



NOW & GOING FORWARD RECORDS MANAGEMENT IN LAW FIRMS

Does the policy require users to classify email?



Relationships



What to Consider?

- Org Structure – where does records fit?
- Staffing – skill set of employees
- Training – transform the new knowledge worker
- Technology
- Program Development – policies, procedures, communication, end user training

NOW & GOING FORWARD RECORDS MANAGEMENT IN LAW FIRMS

Thank you