

McMaster Gervais**PensEra Knowledge Technologies**

Prestigious Law Firm Adopts New Knowledge Management Solution

A merger between two prestigious Montreal law firms created a need to combine the vast vault of knowledge from each firm into one cohesive data mart for use across the organization. Teaming up with PensEra Knowledge Technologies, a legal systems integration firm and Microsoft Certified Solutions Provider, McMaster Gervais implemented a new Knowledge Management solution, called MGénie. The solution has improved communication and knowledge transfer within the firm while promoting easy access to the company's knowledge assets. This has enabled the firm to greatly maximize productivity - all through the use of a Knowledge Management solution based on Microsoft technologies.

Situational Analysis

Overview

In April 1998, in an historic merger, McMaster Meighen and Mackenzie Gervais combined to form McMaster Gervais. With roots dating back to 1823, these Montreal-based legal practices, joined to become one of the most long-standing, prestigious and progressive members of the Canadian legal community. Today, the firm boasts more than 260 professionals and support staff, making it one of the larger law firms in Canada.

A member of a national legal association with two other leading Canadian law firms, McMaster Gervais has developed an extensive network of correspondents and clientele from around the world. It has a Canada-wide and international presence with offices in Toronto, Ottawa, Calgary, Montreal and London, England. Whether their clients are looking to engage services, acquire expertise abroad or to build business relationships beyond its borders, the lawyers at McMaster Gervais have the expertise, services and advice of over 400 lawyers practicing in every area of the law, at their disposal.

Microsoft

Company Profile

Montreal-based McMaster Gervais is the longest established and one of the most prestigious law firms in Canada. The firm currently employs more than 260 lawyers and support staff.

Business Situation

A 1998 merger amplified a need for an effective, simple, easily integrated knowledge management solution. It was vital that the solution build upon the operating processes already in place.

Solution

A flagship "knowledge center" solution known as MGénie provides McMaster Gervais with quicker access to all key law firm information through a Web enabled infrastructure.

Software and Services

Microsoft Site Server 3.0
Microsoft SNA Server 3.0
Microsoft SQL Server 7.0
Microsoft Internet Information Server 3.0
Microsoft Visual Interdev 6.0
Microsoft Visual Basic 6.0
Microsoft Visual C++ 6.0
Microsoft Word 97
Microsoft Exchange 5.5
Microsoft Office 97
Microsoft Windows NT Server 4.0
Microsoft FrontPage 2000
Internet Explorer 5.0

Partners

**PensEra Knowledge
Technologies**

McMaster Gervais has a very discerning customer base that expects high-quality professional services. In the service of their clients, the firm provides a comprehensive range of legal services and maintains a consistently high level of professionalism through its adherence to a customer service policy.

Challenges

After the merger, McMaster Gervais' management team wanted to leverage both firms' historic strengths and integrate the vast store of knowledge into one strong unit with solid communications, smooth operation and quick response teams. The integration of its information systems was critical to McMaster Gervais after the 1998 merger. The newly merged firm required an efficient way to combine two different hardware, software and information infrastructures (operating in both English and French), into one single effective entity. This goal meant that, for example, data from legacy AS/400 systems needed to be extracted and moved to newer systems.

Document work constitutes about 70 per cent of a law firm's activities. Sifting through the mounds of information, such as different cases, clients, and laws, is mind-boggling at best. By channeling McMaster Gervais' document production through the knowledge center, it allows users to tap into a vast pool of knowledge-sharing tools. The accelerated and timely flow of information helps boost productivity.

To that end, McMaster Gervais developed a clear set of criteria for its ideal Knowledge Management solution. Key elements in its strategy included ready-accessibility by lawyers and staff, Internet-based remote access to a wide range of information, and multi-lingual access and operation. The firm wanted a seamless integration of their various data sources and applications that was not only easy to use, but also easily managed and seamlessly integrated with the firm's day-to-day operations. In a business where privacy is paramount, McMaster Gervais knew that secure and reliable access was a vital component of the solution. The user-interface was also important, the firm demanded a system with characteristics that included customizable information delivery and a consistent look-and-feel.

Technical Roadmap

Partner Biography

To best address its Knowledge Management needs, McMaster Gervais called upon Montreal-based consulting and systems integration firm, PensEra Knowledge Technologies. PensEra Knowledge Technologies services and supports more than 100 law firms and corporate law departments across North America. The company assists clients with system selection, project management and implementation, including development of law firm intranets and extranets. PensEra Knowledge Technologies (www.pensera.com), specializes in online knowledge centre strategy and development for the legal profession.

In collaboration with McMaster Gervais, PensEra developed a unique intranet-based knowledge centre designed to meet the law firm's objectives, and thereby improve productivity and enhance client service.



“To build a knowledge centre in a law firm, you need more than just practical and technical expertise,” explains Dan Felean, PensEra consultant and former lawyer. “You need a good understanding of the business and practice processes – how decisions are made and how people access information in the dynamic, sometimes chaotic, environment of a law firm.” PensEra Knowledge Technologies brought to the table its team of Microsoft Certified Professionals, skilled in developing Knowledge Management and other Microsoft solutions, and employees with extensive knowledge of law firm operations.

Implementation

When PensEra arrived on the scene, McMaster Gervais was already working in a Microsoft-based environment through Windows NT Workstation, Windows NT Server, SNA Server, Exchange Server and Office 97; these products were leveraged to construct a platform on which to build the McMaster Gervais' Knowledge Management solution. For example, document folders held in storage areas on Microsoft Exchange servers could be grouped according to criteria and then shared among McMaster Gervais' users.

Microsoft SNA and SQL servers provided easy access and robust database replication features so that McMaster Gervais could extract data from a legacy AS/400 system. These products enabled changes in data to be synchronized automatically between databases that were being constantly accessed by the firm's employees.

Existing applications for word-processing, billing and accounting were not replaced, but were simply channeled to the Intranet middleware. The integrated suite of Microsoft software and PensEra's customized solutions built with Microsoft technologies made for a robust and reliable environment.

Leveraging Microsoft Internet Information Server (IIS), the integrated web server in the Windows NT operating system, system security is maintained at McMaster Gervais. All information is securely protected behind the organization's firewall to prevent unauthorized access.

Development

Development of the solution was undertaken with Microsoft tools, including Visual Interdev web development system, Visual Basic for desktop, ActiveX controls, Visual C++ development system for server-side component development and Visual Basic for the development of specialized macros in Word that were used to accelerate standard business functions at McMaster Gervais.

“After researching our options, we concluded that Microsoft had all the components to meet the firm's needs,” Felean explained. “As developers, we knew there were greater efficiencies and lower risks involved in working through an integrated environment. It makes system management easier, reduces maintenance and simplifies troubleshooting.”

Although each component was designed to specifically address McMaster Gervais' needs, many of the knowledge center components are fully developed products available from PensEra . They have become part of PensEra 's inventory of tools used as the basis for rapid development at other law firms and legal departments.



PensEra 's customized intranet knowledge center solution for McMaster Gervais was dubbed "MGénie." (The MGénie name was the result of an internal contest designed to generate firm wide interest in the knowledge center. The winning entry is a bilingual word play on the "M.G." logo of the firm.)

The knowledge center has individual sections dedicated to documents, the library, conference room schedules, client information, internal directories, etc. "All members of the firm visit MGénie because it is the central point for business information," Zver says. The knowledge center is completely bilingual so all information and functions are available in English or French according to user selections.

Mgénie's most innovative feature is a Web-based document management facility where users can create, classify, index and retrieve any firm documents through a central intranet site. "PensEra built a hybrid system that seamlessly layers the Web-based document facility over the regular word-processing functions," Felean said. "This helps secretaries, paralegals and lawyers classify and retrieve documents without interfering with the normal document production processes."

Benefits

The Microsoft Knowledge Management platform promised the integration the firm required to manage its knowledge assets effectively and by carefully following a project framework, the solution stayed on time, on target with measurable results, feedback, progress and cost control. The PensEra's solution offered users a standard, consistent and familiar way to work with information that allowed users to get up to speed quickly.

Peter Zver, President of PensEra Knowledge Technologies thinks that the solution's quality is demonstrated by its immediate impact on the users. "The scope of an intranet knowledge management solution is virtually unlimited and the payback can be substantial," he said. "Not only is the knowledge center worth its development cost, but it actually helps recoup prior investments by making information that was previously hidden in other application systems more accessible."

Since most of the firm's popular line of business applications remained unchanged, McMaster Gervais employees needed only brief training sessions. Most were already familiar with Internet Explorer's search and browse features, which they would use to access information off the corporate intranet.

From McMaster Gervais' perspective, the rollout offered all the advantages of continuity, with the added flexibility of the all-new quick and easy access to a vast array of information and resources at the users' fingertips. In addition, lawyers and staff benefited from more fluid, hassle-free communications, boosting business productivity

"Why did PensEra and McMaster Gervais select Microsoft? Quite simply, no other vendor offered such a powerful, consistent combination of development tools, infrastructure and desktop integration," said Zver. "And Microsoft products and knowledge management technologies provided all of the answers for us. They provided the products, scalability and reliability that were essential to delivering and sharing information across the firm.



"It's been a pretty painless process for everyone at the firm," said Marie-Claire Garneau, director of information technology at McMaster Gervais. "Lawyers working at home now have access to documents from their laptop and it's much easier to keep track of who is using what conference room at any given time."

Garneau said she is particularly impressed with the community center aspect of MGénie's homepage, which allows everyone in the firm to access shared news and ongoing developments. This aspect of the solution automated previously irksome duties such as conference room scheduling, and reduced many administrative tasks. Communications among all members of the firm has also been strengthened.

The unique makeup of the Knowledge Management solution allows the firm to customize the way information is delivered to each person, based on their needs and responsibilities. Instead of spending countless hours pouring through endless reports, a lawyer can now pick and choose what information he or she needs and have that instantly delivered. Through this filtering and personalization, McMaster Gervais has actually tightened its security of sensitive information, while benefiting from increased access to knowledge assets throughout the firm.

For More Information

For more information about Microsoft products or services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada information Centre at (800) 563-9048. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary.

For more information about the products or services of PensEra Knowledge Technologies, you may contact PensEra by telephone at (514) 874-0003 or by e-mail:

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