



# Enterprise Search in Modern Law Firms

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About BA Insight



# Executive summary

Search is foundational to a wide variety of experiences. For example, the data that organizations accumulate contains key insights that can significantly increase productivity and efficiency. However, the ability to instantly find relevant information to gain insights from within the large amounts of data that exists from a variety of sources is often a hurdle that needs to be overcome. Enterprise search is the key to finding and unlocking insights from these massive volumes of data.

**The reasons we search remain constant: we are looking for insight, information, and answers.** Google has taught us just how useful and powerful search can be, but it has also given employees high expectations for simplicity, ease of use, and instantaneity—to the degree that the phrase “Google it” is now a part of our everyday language.

In any organization, the information needed to do one’s tasks has grown to include a rapidly increasing amount of structured and unstructured data from a multitude of sources. This includes applications, databases, websites, and file shares, both internal and external to the firm, disconnected, and more often than not, hard to find.

Historically, it has been difficult to meet these expectations, but when they are met, users are more engaged and productive, creating measurable returns on the investments made in search. Effective search is crucial for today’s knowledge workers to be successful in their roles.

This paper is the framework for implementing a next-generation enterprise search solution for your legal professionals. The overall objective is to enable your team members to take advantage of technological advances to bring a “web-like” search experience to the firm. It is based on the premise that everyone uses Google to find information and prefers that experience. In fact, some say that at times it is easier to use Google to find the information they need to do their jobs than it is to sift and search through multiple internal systems, guessing at where the information resides.

# Technology provides a world of new possibilities

The evolution of search technology has enabled many new capabilities to make search more “Google-like” and therefore more relevant and useful to law firms, improving overall productivity. The following are some capabilities of BA Insight’s search solutions:

- Provide a web-like search experience for your legal professionals
- Extend search beyond the traditional keyword search and provide your firm with a modern, natural language search experience for its users, just as it exists on the web today
- If your firm uses iManage or NetDocuments, improve search within the DMS
- Simplify systems such as Salesforce, SharePoint, SharePoint Online, ServiceNow, and any web-based application with a consistent user experience while providing access to enterprise-wide information
- Go beyond simply returning a list of documents to users as search results by also showing them the specific locations within the documents that have the information they are looking for—highlighted and sorted by number of occurrences of the search terms
- Personalize search to an individual’s position, experience, workplace needs, and a variety of other attributes to proactively deliver information to them that boosts their productivity
- Take advantage of dashboards to consolidate information into a single view, decreasing the need to search multiple times and/or multiple systems to get things done
- Enable the firmwide promotion of information based on input from partners and others



**3.5  
billion**

Our collective thirst for knowledge is real. Google processes over 3.5 billion searches every single day.



## Additional capabilities

### Expand your search

BA Insight makes enterprise search available to users from within the applications they work in including NetDocuments, iManage, Teams, Outlook, SharePoint, Salesforce, and any browser-based application.

This capability makes it possible for users to access enterprise search from any of the applications they work in, enabling them to stay in those systems for a consistent search experience.

This essentially brings enterprise search to individual “Work Hubs,” as this is the place users work from most.

### Get automated

Automation can also be added to the search interface to make actions an extension of search. As an example, you can enable a team member to upload new documents from the search interface.

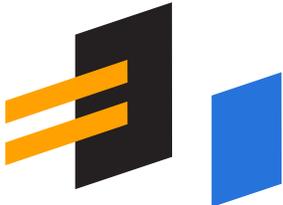
Alternatively, on a standalone basis, you can automate manual processes and decrease the need to go to a variety of applications, saving time and increasing efficiency. For example, this gives you the capability to capture billable time as an extension of search.



# Everyday use cases for law firms

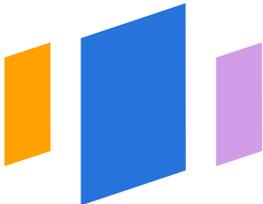
The following scenarios illustrate how our search technology could be utilized in real-world situations and the meaningful impact it can bring.

## Use Case #1: Attorney searching for previous work projects



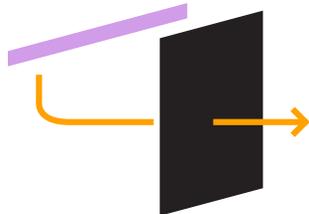
### Need

Attorneys need to be able to quickly find relevant previous briefs that have been filed in specific locations and areas of law.



### Current state

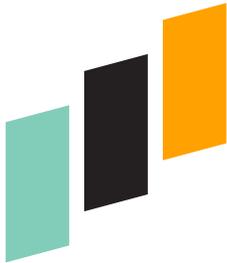
The attorney is faced with searching many disparate systems directly—from iManage, matter databases, client databases, and other sources. It is difficult to find related information and determine the applicability and relevance of the information that is found.



### Future state

With the deployed Enterprise Search solution, this attorney now searches all selected firm content from a single location and is provided with accurate results from all data sources, with each result enriched with related information (client details, matter details, West km analysis, and metadata) as well as relevant aggregated information that is all presented in a clear and concise view, allowing the attorney to quickly filter and refine to meet specific needs. These new capabilities include natural language processing and suggested content, leveraging AI and machine learning to communicate with the attorney and suggest specific answers to solve the problem(s) at hand.

## Use Case #2: Partner searching for client information



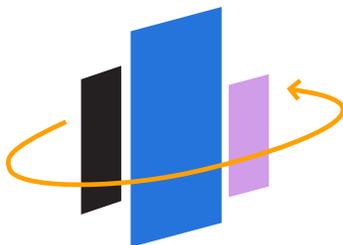
### Need

Partners require the ability to have a single view into all client-related activities.



### Current state

The partner has to manually access several systems and individually aggregate information in order to gain a complete picture of their clients today. The partners first access a client system to see contact related information, then a time keeping system to see current billables, plus other systems to try to create a holistic and complete overview of the current interactions happening with the client in question.



### Future state

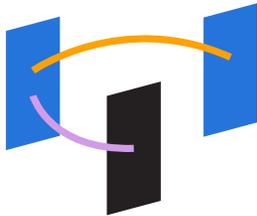
With the deployed Enterprise Search solution, the partner would access the "Client Dashboard" provided within the Enterprise Search system. This dashboard aggregates a summary of time keeping data, matter data, document data, and any other related information from corporate and external resources within this single dashboard, allowing the Partner to see the health and details of each client, to include client contacts, billable hours, completed work products, and other relevant information.

## Use Case #3: Junior attorney searching for help on a new matter



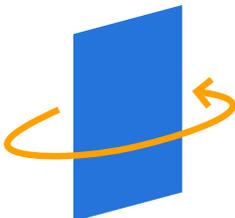
### Need

Junior attorneys need the ability to access existing firm expertise and find resources to provide them assistance and guidance.



### Current state

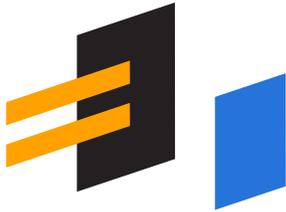
The junior attorney relies on in-office advice or “who knows \_\_\_\_\_” emails distributed to a wide list, in hopes that someone will identify as an expert and provide the required assistance.



### Future state

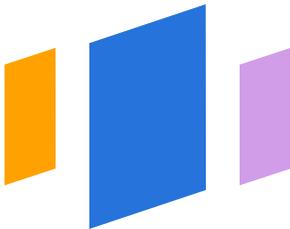
With the deployed Enterprise Search solution, this junior attorney can ask the enterprise search system for the help they require in natural language. As an example, this junior attorney asks, “Who last filed for injunctive relief related to patent disagreements in California?” The enterprise search system will identify the area of law, the location required, and other pertinent details to suggest the specific senior attorney who oversaw the most recent matter that meet the provided criteria. The junior attorney is then able to contact the identified expert directly and get the needed help.

## Use Case #4: Junior attorney searching for previously filed briefs



### Need

Attorneys need to be able to quickly find relevant previous briefs that have been filed in specific locations and areas of law.



### Current state

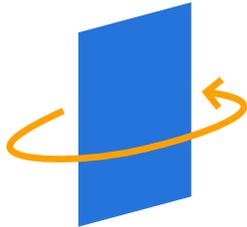
The attorney is faced with searching through various brief states, including draft, final, and canceled, without ever knowing the final state of the brief they are researching for applicability to their current matter. Additionally, in order to read the brief, the lawyer must first download it, open it in the correct application, and then search again within the brief for the specific area of interest.



### Future state

With the deployed Enterprise Search solution, the filed briefs within the firm are automatically, as a function of the Enterprise Search solution, enriched with additional data that allows categorization and retrieval by filing status, legal jurisdiction, and area of law. All these criteria are available as search refiners, or in natural language. The lawyer is simply able to ask the search system to “show me briefs that have been filed in California district 22 dealing with property rights”. They are then shown only briefs that satisfy the criteria from all the selected data sources across the company.

## Use Case #5: Research assistant searching for contract clauses



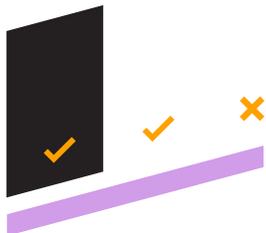
### Need

Access to a complete and accurate clause bank can be an essential tool to reduce time and errors in preparing legal work products.



### Current state

Research assistants are required to manually aggregate results from multiple searches with varying degrees of accuracy across document management systems and sample clause databases, but do not have the expertise required to ascertain which clauses are more accurate or pertinent to the client or to the matter at hand.



### Future state

With the deployed Enterprise Search solution, clauses can be automatically extracted from all documents by the solution itself, regardless of where the documents are stored, and then classified by matter type, client information, location, and a list of other properties. These clauses can then be made available to research assistants, aggregated into a personal workspace, and then compiled into a new document with only a few clicks.



## **BA Insight**

Upland BA Insight transforms the outcome of digital interactions through advanced search experiences that are relevant, personalized, and actionable. Our connector-based software works within the enterprise, customer portals, and websites. It turns searches into actionable insights, regardless of where your content or users reside.

**Want to learn more?**

**Contact us.**



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