

# Matter Profiling @ ReedSmith

**ILTA '09**

**Lisa Gianakos, Director of Knowledge Management**

**ReedSmith**

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August 7, 2009



## Reed Smith Background

- Global firm with ~1700 attorneys
- 13 US offices
- London, Paris, Munich, Greece
- UAE: Abu Dhabi, Dubai
- China: Beijing, Hong Kong

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## Technical Background

- May '08 - Meridio (Microsoft CRM) & Contact Networks
- Oct '08 – rolled out Interwoven
- Jan '09 – rolled out SP 2007 and Recommind
- Elite for Accounting; DataMagic (financial warehouse); DTE for time entry

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## Matter Centricity

- “Digital File” (Interwoven) – matter centric
- Recommind – client/matter searching
- “ouRSpace” (SharePoint)– dynamic client and matter dashboards
- “Meridio” (CRM) – client dashboards for top 250 clients
- Recommind - expertise searching including matter name, description and time entry notes

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# Digital File (Interwoven)

[-] 999934.75500 Sample Litigation Matter

[+] \_Searches

Administration

Agency Documents

Background

Court / ADR

Discovery / Disclosure

Email

Experts

Lawyer Notes / Memos

Legal Research

Other Correspondence

[-] 999934.75500 Sample Transactional Matter

[+] \_Searches

Administration

Background

Collateral

Diligence

Email

Legal Research

Organizational Documents

Other Correspondence

Transaction Documents

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# Meridio

Company: Microsoft Corporation - Windows Internet Explorer

Company: Microsoft Corporation  
Matters

Details:

- Information
- More Addresses
- Planned Activity
- Past Activity
- Sub-Companies
- Contacts
- Relationships
- Audit
- Workflows
- Education
- Key Matter Surveys
- Account Plan Goals
- Matters**
- Client Numbers
- Opportunities

Business Dev:

- Opportunities

Marketing:

- Marketing Lists
- Marketing Events

New Matter Add Existing Matter More Actions

<input type="checkbox"/>	Matter Number	Client Name	Matter Name	Responsible Attor...	Supervising Attorney	Open Date
<input type="checkbox"/>	7467422-081070	Microsoft Corporation	Fast Search UK Limited - Secretarial S...	Gibbons, Sue	Boutcher, David	03-Nov-08
<input type="checkbox"/>	7467422-081068	Microsoft Corporation	UK AVMS Implementation I (LCA LPA) ..	Stankey, Robert	Boutcher, David	29-Oct-08
<input type="checkbox"/>	7467422-081067	Microsoft Corporation	UK AVMS Implementation II (LCA LPA) ..	Stankey, Robert	Boutcher, David	29-Oct-08
<input type="checkbox"/>	3525461-220006	Microsoft Corporation	Online Advertising Policy Advice	Feldman, John	Boutcher, David	12-Oct-08
<input type="checkbox"/>	3525461-080004	Microsoft Corporation	Administrative Appeal	Kleier, James	Boutcher, David	09-Oct-08
<input type="checkbox"/>	7467422-081045	Microsoft Corporation	Telco Regulatory Compliance	Stankey, Robert	Boutcher, David	07-Oct-08
<input type="checkbox"/>	7467422-081046	Microsoft Corporation	In-country Data Centre Requirements	Stankey, Robert	Boutcher, David	07-Oct-08
<input type="checkbox"/>	7467422-081044	Microsoft Corporation	SMS Storage Service	Stankey, Robert	Boutcher, David	11-Sep-08
<input type="checkbox"/>	7467422-081042	Microsoft Corporation	Regulator Meetings and Follow-up	Stankey, Robert	Boutcher, David	02-Sep-08
<input type="checkbox"/>	7467422-081043	Microsoft Corporation	Eir Telecom	Stankey, Robert	Boutcher, David	02-Sep-08
<input type="checkbox"/>	7467422-081041	Microsoft Corporation	Energy Ltd - Secretarial Services	Gibbons, Sue	Boutcher, David	27-Aug-08
<input type="checkbox"/>	3525461-110001	Microsoft Corporation	General Environmental	Wagner, David	Boutcher, David	21-Aug-08
<input type="checkbox"/>	7467422-081040	Microsoft Corporation	BPCS 9. x and MSA Telecom Review	Stankey, Robert	Boutcher, David	13-Aug-08
<input type="checkbox"/>	7467422-081039	Microsoft Corporation	Hong Kong Qualification - Phase 1	Stankey, Robert	Boutcher, David	12-Aug-08
<input type="checkbox"/>	7467422-081038	Microsoft Corporation	Singapore Licensing	Stankey, Robert	Boutcher, David	03-Aug-08
<input type="checkbox"/>	7467422-081037	Microsoft Corporation	Live Meeting Licensing	Stankey, Robert	Boutcher, David	27-Jul-08
<input type="checkbox"/>	3525461-100004	Microsoft Corporation	Google Broadband Advice (EU LPA)	Feldman, John	Boutcher, David	16-Jul-08

1 of 250 selected.

Done Unknown Zone (Mixed) 100%

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# Recommind – Matter Search

ouRSpace DigitalFile Lawyer Experience Matters

[Advanced search](#) | [Saved Searches](#) | [Preferences](#) | [Search History](#) | [Search Tips](#)

**925 Results**

Preview

Sort by [Relevancy](#) | [Date Open](#) | [Date Close](#)  
Order by [Ascending](#) | [Descending](#)

Page [1](#) [2](#) [3](#) ... [10](#) | [Show 100 results](#)

**Search Criteria**

Search "digital media" ×

[SAVE](#) [SHARE](#)

**Search within Search**

**Filter Results**

[Client Name](#)

[Client ID](#)

[Matter Name](#)

[Matter ID](#)

[CRL](#)

[MRA](#)

[MDA](#)

[Department](#)

[Office](#)

[Area of Law](#)

[Related Matter](#)

[Status](#) +

- Action Impact Events LLC > Digital Media Division ( 729098.00003 )**  
**Open Date** November 12, 2007 **Close Date** June 10, 2008  
**Client Status** Current **Billable** Billable  
**Office** Dubai  
**Area of Law** EL-General  
Drafting of an employment agreement and heads of terms offer. Closed 6-10-08 requested by F. Sequeira DP-CDM
- Client, Eugene L. > Digital Media TV, Inc. ( 849399.20001 )**  
**Open Date** February 11, 1997 **Close Date** January 19, 2000  
**Client Status** Inactive **Billable** Billable  
**Office** Philadelphia  
**Area of Law** CB-Mergers, Acquisitions, or Divestitures  
Acquisition of television station.
- Dalet Digital Media Systems > UK Establishment ( 723260.00001 )**  
**Open Date** November 13, 1997 **Close Date** April 30, 1998  
**Client Status** Current **Billable** Billable  
**Office** London  
**Area of Law** WC-COMMERCIAL
- 550 Digital Media Ventures > Talking Sleeve Patent ( 878077.20002 )**  
**Open Date** October 31, 2000 **Close Date** August 24, 2004  
**Client Status** Inactive **Billable** Billable  
**Office** New York  
**Area of Law** I-Patent  
\*
- 550 Digital Media Ventures > UCSB/Chang Research Rights ( 878077.20001 )**  
**Open Date** October 31, 2000 **Close Date** December 11, 2002  
**Client Status** Inactive **Billable** Billable  
**Office** New York  
**Area of Law** T-General

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# Client Dashboard

ouRSpace



Fri, 12:36pm, 29-May Cloudy, 78°F (26°C)  
 Washington D.C. Meeting Organizer

ouRSpace | DigitalFile | Lawyer Experience | Matters

Search More

Home Firm Practice Office Admin Clients Directory Outlook Word Compare DTE DMagic Expense Docs Links

Welcome Gianakos, Lisa K.

Site Actions

WYETH [353840]

Overview Financials Matters Billing and Payments News Calendar

### Client Overview

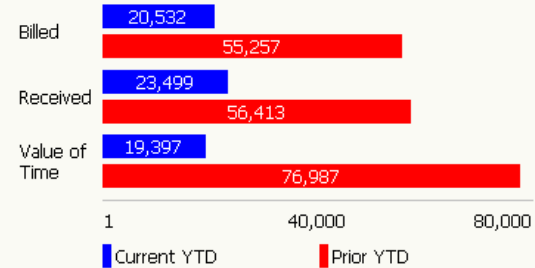
Client: WYETH [353840]  
 Industry: 2804 Pharmaceutical preparations  
 Address: Wyeth Pharmaceutical Legal Department - Det Drug P. O. Box 6299  
 Philadelphia, PA 19105-6299  
 Philadelphia, PA 19105-6299  
 United States  
 Phone:  
 Fax:  
 Status: Current  
 Open Date: Jan 17, 1998  
 Office: Los Angeles

Practice: Life Sciences Health Indus  
 CRL: Michael T. Scott  
 Related Client: (PC) Wyeth [103020]

### Top Matters by Fees Billed (Rolling 12 Months)

Matter Name	AOL	Fees Billed
<a href="#">Tomers, et al. v. LT Wheels</a>	US Compensation/Disability/Traffic - litigation	\$25,553.80
<a href="#">Schmuck (Theracal General)</a>	US Pharmaceutical/Medical Devices	\$21,932.40
<a href="#">Chittenden, Michael and Nancy L. v Arnold Zulow</a>	US Product Liability/Negligence	\$8,250.80
<a href="#">Bomersheim, George, et al. vs. Wyeth, et al.</a>	US Product Liability/Negligence	\$422.00
<a href="#">Hallvorst, Blanche L. vs Wyeth (SA)</a>	US Pharmaceutical/Medical Devices	\$0.00
<a href="#">Patterson, Carrie E. vs. Wyeth (SA)</a>	US Product Liability/Negligence	\$0.00

### Financial Overview



### Headlines (10 Most Recent)

- [Wyeth Pharma reveals preliminary data from two ongoing studies ... - RTT News](#) *Fri, 29 May 2009 12:26:40 GMT*
- [Wyeth \(WYE\) PriceWatch Alert with \\$45.57 Break Even - Market Intelligence Center](#) *Fri, 29 May 2009 12:13:59 GMT*
- [Drugmaker to pay nearly \\$100 million settlement - The Associated Press](#) *Thu, 28 May 2009 15:50:35 GMT*
- [Wyeth accused of defrauding government - United Press International](#) *Wed, 20 May 2009 15:48:37 GMT*
- [Wyeth \(WYE\) PriceWatch Alert Up To 11.94% Return - Market Intelligence Center](#) *Wed, 27 May 2009 12:10:19 GMT*
- [Final Wyeth painting published in journal - United Press International](#) *Wed, 20 May 2009 01:14:41 GMT*
- [Find Treasures at Thomaston Auction - WCSH-](#)


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# Matter Dashboard



Wed, 11:59am, 29-Jul Cloudy, 79°F (26°C)

Washington D.C. Meeting Organizer

ouRSpace | DigitalFile | Lawyer Experience | Matters

Search More

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Home Firm Practice Office Admin Clients Directory Outlook Word Compare DTE DMagic Expense Docs Links

Welcome Gianakos, Lisa K.

Site Actions

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[223438 60296] United Guaranty
[223438] Bank of America

Overview
Financials
Billings and Collections
Documents
Calendar

### Matter Overview

Matter: [United Guaranty \[223438 60296\]](#)  
 Client: [Bank of America](#)  
 AOL: [LI-Financial Services Litigation](#)  
 Industry: [6021 National Commercial Banks](#)  
 Client:  
 Address: [Bank of America c/o LawFirm Examn P.O. Box 340850 Sacramento, CA 95834-0850](#)  
 Phone:  
 Fax:  
 Status: [Open](#)  
 Open Date: [Feb 09, 2009](#)  
 Close Date:  
 Office: [Los Angeles](#)

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Practice: [Insurance Recovery](#)  
 CRL: [Mary J. Hackett](#)  
 MRA: [David M. Halbreich](#)  
 MOA: [David M. Halbreich](#)

### Financial Overview

Billed 2,033,824

Received 1,079,687

Value of Time 3,369,749

1
2,000,000
4,000,000

Current YTD
  Prior YTD

### Timekeepers

65 record(s) found.

Timekeeper	Hours Worked	Hours Billed
Alcala, Salvador M.	363.80	363.50
Annand, Katie B.	8.80	8.80
Asadourian, Lilit	115.30	113.40
Averett, Jill N.	12.80	12.80
Avitia, Anthony G.	7.20	2.80
Bailey, Christopher P.	1.60	0.00
Berkowitz, Shari	1.70	0.70
Billings, Eric L.	1.60	0.00
Brown Jr., Jon Michael	10.60	10.60
Cameron, Douglas E.	338.20	336.90

1 2 3 4 5 6 7

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**ROU**

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# Recommind "Lawyer Experience" Search

477 Results

## Search Criteria

Search "digital media" x

SAVE SHARE

## Search within Search

Apply

## Filter Results

Title  
Office  
Country  
Department  
Group  
Education  
Expertise  
Concentration  
Professional Admissions  
Court  
Language  
First Name

Sort by Relevancy | Hired Date | Last Name | First Name  
Order by Ascending | Descending

1.  **Pryor, Gregor J. (Gregor)**  
Partner  
Business & Finance - European & Middle East Corporate  
London  
gpryor@reedsmith.com  
Office Phone +44 (0)20 3116 3536

(Click here to see Gregor's experience relevant to "digital media")

2.  **Hicks, Laura A (Laura)**  
Associate  
Business & Finance - European & Middle East Corporate  
London  
LHicks@reedsmith.com  
Office Phone +44 (0)20 3116 2979

(Click here to see Laura's experience relevant to "digital media")

3.  **Edwards, Stephen** Partner  
Business & Finance - European & Middle East Corporate  
London  
SEdwards@reedsmith.com  
Office Phone +44 (0)20 3116 2910

(Click here to see Stephen's experience relevant to "digital media")

## Relevant Matters

Practice Development > General Marketing ( 999906.00700 )	Work Date	Worked	Note
	September 11, 2008	1.00	Meeting - Digital Media Team meeting.
		0.80	Preparation for meeting - Organising digital media seminar.
Nonchrg Time-Group/Office Activities > Firm Meetings Attendances-time spent at Group,Dept., or Firmwide meetings (	Work Date	Worked	Note
		1.00	Meeting - Meeting to discuss digital media seminar.
RB - Knowledge > Knowledge Management: Reviewing, submitting know how created on client matter ( 999920.20021 )	Work Date	Worked	Note
		3.50	Meeting - Attend Digital Media and Broadcasting Conference.
Alliance Atlantis Releasing Limited > General Matters ( 768318.00001 )	Work Date	Worked	Note
		0.50	Reading - Reviewing documentation and advising Michael Whalley by phone conc digital media wording for distribution agreement.
Falthe Pictures Limited > FilmFlex Distribution Agreement ( 762818.00002 )	Work Date	Worked	Note
	May 9, 2007	1.60	Meeting - Meeting with Cameron, Jack and Lucy to discuss digital media exploits including advising on business models, rights available and platform distribution te provisions and advertising and recoupment models.
SBC Worldwide Limited > Agreement with Google ( 734069.00194 )	Work Date	Worked	Note
	July 17, 2008	0.40	Telephone - Telephone call with David Deakin to discuss digital media matters a platform, consider distribution arrangements offered by other operators, advise a SBCW should seek on DRM.

## Relevant Responsible or Billing Matters

 <b>Sagent Inc. &gt; European interactive digital media advice ( 803985.30002 )</b>		
Open Date March 6, 2009	Client Status Current	Billable Billable
Office London	Area of Law M-Film and TV Finance, Prod & Distribution	
Providing general digital advice to include productin, interactive marketing and online gaming as well as European and		
 <b>Sagent Inc. &gt; European interactive digital media advice ( 803985.30001 )</b>		
Open Date November 4, 2008	Client Status Current	Billable Billable
Office London	Area of Law M-Film and TV Finance, Prod & Distribution	
Providing general digital advice to include productin, interactive marketing and online gaming as well as European and		
 <b>Sagent Inc. &gt; European interactive digital media advice ( 803985.30001450 )</b>		
Open Date February 23, 2009	Client Status Current	Close Date March 6, 2009
Office London	Area of Law M-Film and TV Finance, Prod & Distribution	Billable Billable
USE MATTER 803985.30001. Providing general digital advice to include productin, interactive marketing and online and privacy.		

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## Matter/Deal Databases – Problems

- ~40 individual deal list, some geographic, some practice-specific
- multiple forms – Word tables, Excel, Access databases
- Need to improve closing of matters. Was causing us to not take work because things were coming up as conflicts that should not have been.
- Global reporting was not possible

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# Matter/Deal Databases - our solution

- extend client dashboard with a firm-wide matter information capture vehicle
- Adding a “matter details” tab to matter dashboard pages where additional info can be captured
- Fields are specific to the type of matter based on a three-tiered structure
- Flexibility to add/modify fields
- Workflow – 2-3 weeks after billing activity has stopped, trigger an email to working team (anyone whose billed x+ hours). Includes link to matter details tab. Option to postpone for one year at most.
- Additional triggers to MRA if matter details aren’t being capture
- Compliance reporting to help “herd the cats”

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## Matter Codes Analysis/Update

- Legacy codes are usually not comprehensive
  - Based on myopic, loud barking lawyers, not reporting needs
- Starting with Marketing
- End with the Lawyers

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# Profiling a Matter

## Matter Profiles

## Application Links

Step 1: Enter a Client Matter Number

[Client/Matter Lookup](#)

Client: **PNB Bank**

Matter: Mortgage Loss Mitigation Contract Advice #201352501

Step 2: Check an existing entry for the matter or [create a new entry](#)



Mortgage Loss  
Mitigation Contract  
Advice #201352501

Step 3: Select the Area of Law

AOL Tier 1

AOL Tier 2

AOL Tier 3

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Client Matter Number: 200442.20082

Description of Work Performed?

Court / Jurisdiction?

Judge (First Name, Middle Initial, Last Name)?

Experts (Name and Expertise)?

Other Counsels Used?

Opposing Counsels?

Alternative Dispute Resolution?

ADR Type?

N/A

Appeal/Writ?

Class Action?

Alternative Fee?

Alternative Fee Type?

Significant Matter?


Value of Case (US Dollars)?

Case Status?

Other Case Status:

N/A

Anticipated Date of Completion?

Represent?

# Matter Profile embedded on dashboard

**ouRSpace** | DigitalFile | Lawyer Experience | Matters

Wed, 3:18pm, 29-Jul Partly Cloudy, 66°F (19°C)

GCC Meeting Organizer

Welcome Graham, Justin P.

**[361812.20001] Corporate and Transactional Matters**  
**[361812] Aryaka Networks, Inc.**

Overview Financials Billings and Collections Documents Calendar

**Matter Overview**

Matter: Corporate and Transactional Matters [361812.20001]  
 Client: Aryaka Networks, Inc.  
 AOL: CB-General  
 Industry: 7777 Unknown  
 Client: AJK Gupta, CEO & President  
 Address: c/o Aayuja, Inc. 35453-B Dumbarton Ct. Newark CA 94560  
 Phone: 510-996-1714  
 Fax:  
 Status: Open  
 Open Date: Nov 11, 2008  
 Close Date:  
 Office: San Francisco

Practice: Corporate & Securities  
 CRL: Robert B. Dellenbach  
 MRA: Robert B. Dellenbach  
 MOA: Robert B. Dellenbach

**Financial Overview**

Billed: 70,498  
 Received: 30,000  
 Value of Time: 87,696

1 45,000 90,000  
 Current YTD Prior YTD

**Timekeepers**

7 record(s) found.

Timekeeper	Hours Worked	Hours Billed
Balasubramanian, Balaseetha	36.60	36.60
Dellenbach, Robert B.	62.40	60.40
DiSanto, Michael D.	0.60	0.60
Gasser, Steven O.	13.80	13.80
Shum, Andrew	88.60	88.60
Sin, Wing-Yan	6.80	6.80
Tanner, Craig P.	1.80	1.80

**Available Profiles**

Series A Preferred Financing 72% Complete  
 > Transactional - Corporate - Securities Offering / Private

Property Purchase Agreement 47% Complete  
 > Transactional - Real Estate - Purchases & Sales

**Selected Profile**

**SERIES A PREFERRED FINANCING**

**GENERAL INFORMATION**

Jurisdictions: US - WEST  
 Client Acted As: Issuer  
 Other Consels Used: N/A  
 Opposing Counsels:  
 Gunderson Dettmer Stough,  
 Villeneuve Franklin & Hachigian, LLP  
 Attention: Scott Dettmer

Significant Matter: YES  
 Transaction Status: OPEN  
 Anticipated Completion: 10/08/2009

**FINANCIAL DETAILS**

Alt. Fee: NO  
 Company Valuation: \$7,500,000  
 Transaction Amount: \$9,416,000

**OTHER COMMENTS**

Major Investors:  
 Trinity Ventures  
 Mohr, Davidow Ventures  
 Nexus India Capital

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