



Deciding Between a Portal and an Intranet

Consider Organizational Strategy, Information Types and Communication Styles When Choosing the Best Technology for Your Workplace

by Catherine Monte

The Career Development Task Force, which coordinates the Desktop Learning Opportunity Series, encourages members to explore professional development offerings and opportunities at the local, regional and national levels.

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To portal or not to portal — is that the question?

Market trends strongly support the benefits of portal technology. As I compose this article, two magazines just arrived touting the importance of portals in the business environment. *EWeek's* "Portal Power: Enterprise Information Portals are More Compelling than Ever" in its July 21 edition and *Portals'* special report on "The State of

Enterprise Portal Initiatives: Portal Adoption Trends 2003" in its July issue both discuss the burgeoning market and future growth of this technology.

Major business analysts are also sending the same messages. Delphi Group, Gartner Group, META Group and Forrester Research all report that businesses are in the midst of a hotbed of portal development, with more features and enhancements coming down the pike. META Group's study "Enterprise Portal Frameworks META Spectrum" predicts that 85 percent of Global 2000 companies will have selected an enterprise portal framework by 2004 and concludes that the number of companies that treat portals as core systems will reach 35 percent by 2007, according to the ASPnews.com article "Enterprises Sailing Towards Portals" by Dan Muse in the Nov. 13, 2002, edition.

Gartner Research also observes a new trend in the portal market — the creation of a product it calls smart enterprise suite, which would include content management, knowledge management, and collaboration inside and between enterprises. Furthermore, according to the article "Tear Down the Wall" by Andy Moore in the Special Supplement to *KMWorld* in May, "[b]y 2004, smart enterprise suites will emerge as an aggregation of the functionality offered today by portals, team collaboration and content management," Gartner Research concludes.

Portals seem like a foregone conclusion. "For most organizations, the decision to invest in an enterprise portal is not a question of 'if,' but 'when,'" says Craig Roth, vice president with META Group, in the M2 Presswire article "META Group Outlines Six Steps For Enterprise Portal Best Practice" on June 3.

Portals and Law Firms

But is this really true for all types of organizations, especially for law firms? Most law librarians would agree that the majority

of firms in the legal community are more cautious in embracing technology tools as compared to their business and financial counterparts, especially when it comes to deploying cutting-edge desktop technologies.

However, according to the article "Law Firms Join Portal Trend" in the Special Supplement to *KMWorld* in May, the 2002 AMLAW Tech survey found that "38 percent of the 200 largest law firms [have] already implemented portal technology ... with more expected in the future." The 2003 AMLAW Tech survey also indicated an increase in the purchase of knowledge management software.

AALL Professional Development Program Competencies of Law Librarianship

1 Core Competencies

Specialized Competencies

2 Library Management

3 Reference, Research and Client Services

4 Information Technology

5 Collection Care and Management

6 Teaching

This article addresses the AALL Specialized Competencies on Reference, Research and Client Services and Information Technology. The complete AALL statement of Competencies of Law Librarianship is online at <http://www.aallnet.org/prodev/competencies.asp>.

The 2003 Price Waterhouse Coopers-Legal Research Center Knowledge Management Study confirms that legal practitioners are on the portal road. Eighty-two percent of respondents said that they would be more efficient if their KM solutions could access legal knowledge in multiple formats from multiple sources — in other words, via a portal.

Questions and Considerations

Perhaps it made sense to consider a radical move to a full-fledged portal. As project lead for our firm intranet, I had doubts about devoting staff time to developing a second-generation redesign. We were adding more and more "knowledge management" databases to our intranet, but we were not able to easily integrate existing applications with them. We did not have an enterprise-wide search option and, of course, we could not offer customization to individual users.

I needed to find more information. I wasn't surprised to discover that a significant percentage of larger firms had purchased portal software, but I was curious to know how

many had moved beyond the initial phase, how many were still piloting the software and who had actually deployed the technology. And if they had deployed, what sort of project plan did they develop for such a complex undertaking? Factors such as document management platform, firm culture, attorney workflow, staffing and, of course, budget will greatly affect a decision to choose a portal. How did these factors influence the project plan during rollout and beyond?

I was initially overwhelmed by the types of portal choices and the plethora of technology vendors available in the marketplace. Naturally I put on my research cap and trolled the Internet for incisive articles and analyses. Having some luck, but still overwhelmed, I contacted several informational professionals in the law firm arena to explore their development processes and learn firsthand from their experiences. I was specifically looking for guidance and to glean some “lessons learned.”

These discussions primarily included firms who had recently deployed or were soon to deploy portals, but I included the experiences of a few firms like mine with institutional intranets because I wanted to know what features, functionality and enhancements these firms currently had in place and also what was on their “wish lists.” This informal poll yielded some clear conclusions — and also a few interesting surprises.

Primary Reasons for Portal Deployment

Firms had various reasons for migrating from an intranet to a portal. Nola Vanhoy, director of library and knowledge services at Kutak Rock LLP in Atlanta, and her staff discerned a need for Intranet content to be more interactive and less “flat” in nature. They encouraged the information technology department to find a tool that could do more for the users — a “more robust technology that could [handle] internal data,” Vanhoy says. The idea was to migrate the existing intranet, Internet Web presence, extranet and Web tools into one portal.

Vanhoy readily admitted that implementing a portal is a “risk-taking venture.” She also firmly believed that change typically results when administrative staff takes the plunge. “Very little change in the organization comes from the top down, but from the bottom up,” she says. “We lead others.” (See sidebar for additional information.)

Several firms stated that their portal decisions were based on a technology or

firm strategic plan. “The firm is looking at technology to solve business processes,” says Elise Bellicini, law practice technology manager at Hogan and Hartson LLP in Washington, D.C. A portal serves as a “central repository of information for all offices ... [allowing employees] access to the same information,” she explains.

“The CIO of the firm was ... looking for some type of overlay technology that would integrate all of the firm’s disparate types of systems while still providing an easy-to-use interface,” says Jennifer Schroth, electronic content services coordinator at Drinker Biddle and Reath LLP in Princeton, N.J. “[The] system would enable users to readily gain access to various pieces of knowledge scattered throughout the network.”

Other major reasons firms decided to use portals included enterprise search and classification technology, knowledge management, collaboration and content management, single sign-on capability and customization for the user.

Intranets = Portals?

But there were other firms with fully functioning intranets that questioned the need for migration. Faegre and Benson LLP in Minneapolis looked at portal products several years ago but decided to continue to use the intranet it had built in-house using a combination of Cold Fusion, SQL and Access databases. The intranet web pages it creates are dynamic and not static, and the content is pulled from existing data warehouses in departments such as human resources and accounting, according to Nina Platt, director of library services at Faegre and Benson LLP.

At Dewey Ballantine LLP in New York City, the library staff developed a browser-based intranet, adding a work product database on ISYS, premium fee-based flat rate subscriptions, Westlaw IntraClips and Newslinks. With its intranet in place, the firm added more functionality with links to services provided by outside vendors, including banking and after-hours food caterers. The firm “uses Lotus Notes for many of the same functions that one would have on a portal (firm address book, office manuals, personnel arrivals and departures, picture book, contacts, etc.),” says Gitelle Seer, director of library services at Dewey Ballantine LLP.

The intranet development team at Fox Rothschild LLP in Philadelphia uses the MS SQL server to dynamically add

Readings for Further Information

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content to basic pages, such as the firm directory, daily newsletter and request for services forms, as well as practice area “Hot Topics” and knowledge bank pages.

Portals and KM

All of the respondents indicated that KM would comprise a major component of a law firm portal. But did participation in KM initiatives necessitate portal technology?

Not according to a recent informal survey by Platt. “Other than use of Lotus Notes, Microsoft SharePoint and a few other less expensive products like DBTextworks, responding firms’ costs on KM technology has been minimal,” Platt writes in her article “Knowledge is Power: KM Remains Vital to Firm Success” in the April issue of *AALL Spectrum*. “Several of the firms in the survey use Docs Open for management of document collections. A couple of the firms reported developing in-house applications.” This observation is also shared by other information professionals.

Sabrina I. Pacifici, founder and editor of LLRX.com (<http://www.llrx.com>) and beSpacific.com (<http://www.bespacific.com>) and director of library and research services at Sidley Austin Brown and Wood LLP in Washington, D.C., has long been a strong advocate of customization and collaboration in portal, KM and intranet design,

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implementation and content management. "With the variables that arise in each firm concerning requirements for research, information and technology solutions, specific to practices and individual attorneys, there are several key components to keep in mind," she explains.

- Consider using dynamic, easy-to-design and launch software applications, such as blogs and wikis, that will allow you to meet certain user needs quickly, inexpensively and with a user-friendly interface.
- Such applications can be leveraged for internal purposes as well as for marketing.
- These applications encourage and promote collaboration, and therefore stakeholder involvement.

Soliciting content from end users and encouraging collaboration are imperative to ensure buy-in for KM initiatives. "Law firms will see that KM is more project-driven than concept-driven. By that, I mean that when clients, attorneys and staff members identify processes that work well or identify a need, then a KM project can be developed and implemented, and it will be more readily adopted," says Tricia Bond, reference librarian at Alston and Bird LLP in Atlanta, in Nina Platt's article "KM and the Law Firm Librarian" in the April issue of *AALL Spectrum*.

Knowledge mapping is one method to obtain accurate and effective feedback. In "Knowledge Mapping: A Practical Overview" at <http://www.smithweaversmith.com/knowledge2.htm>, author Denham Grey defines knowledge mapping as a strategy to "discover the location, ownership, value and use of *knowledge artifacts*, to learn the roles and expertise of people, to identify constraints to the flow of knowledge and to highlight opportunities to leverage existing knowledge."

"Knowledge mapping is one of the most useful strategies," says information professionals Bond and Vanhoy in their article "KM and the Law Firm Librarian" in the December 2002 issue of *AALL Spectrum*. "[T]he newest challenge ... is converging these KM projects ... into a centralized location — the firm portal."

Perkins Coie LLP of Seattle has had success with a decentralized approach towards gathering knowledge and expertise within its firm using its Plumtree portal. In a recent AALL conference program, Barbara Holt, director of library and research services at Perkins Coie LLP, described how her library ensures that the content for each legal and administrative group is both current and responsive to the needs of users. Each group appears in the portal as a "community" that offers documents, news and research tools. (In addition to legal and administrative departments, any number

of communities may be created about specific clients, client matters or projects.) Each community has a "web focal" and one or more "web specialists." The web focal is typically an attorney, manager or supervisor who is responsible for establishing the goals and vision of the group. The specialists manage the technical details of converting documents for posting and keeping information up to date. In reality, many of the specialists are really providing the leadership role of the focal as well. But having a more senior person assigned as focal ensures oversight and offers more legitimacy to decisions that are made.

Successful Portals

"[M]any portal projects still end up as shelfware, underutilized, or have only modest success" says Ellen Reilly in "Portal Best Practices: It's Time to Wake Up — Again!" in the May issue of *KMWorld*. She also quoted from an October 2000 *Knowledge Management Magazine* article: "Many companies that bought into portals as the killer application for knowledge management have found themselves instead with solutions that don't come close to delivering the expected functions or performance."

One of the primary reasons for disappointment is the confusion between "simple portals" and "full-blown enterprise information portals (EIPs) or enterprise knowledge portals (EKPs)." Is your objective to integrate desktop applications into a single Web-based interface with site search capabilities and single sign-on, or are you contemplating the implementation of collaboration and knowledge tools?

Another issue is the failure to recognize the complexity and detailed project management required by a portal. It is essential to recognize the scope and focus on best practices before diving in. Successful portals require thorough research and analysis of current and future business practices. Some questions to consider:

- How is information communicated throughout the firm?
- What methods do professionals use to share this information?
- What are the firm's business objectives?
- How will the portal achieve these objectives?
- What tools will the portal provide employees in their daily work?
- What will be our strategy prior to deployment? After deployment?
- How can we measure success or calculate a return on investment?

For more details on constructing a plan, consult "A Guide to Defining an Enterprise Portal Project" by John Quirk Jr. in the May 2002 edition of *Intranet Professional* and

Enterprise Knowledge Portals by Heidi Collins (New York: AMACOM, 2003).

Future Challenges: Application Integration, New Content, Training, Storytelling

It should come as no surprise that firms are struggling with the integration of legacy applications. Accounting and financial information is a key component that most firms recognize as essential to a well-rounded portal but have not yet released. According to Delphi Group, "Application integration remains one of the greatest challenges and common causes of dissatisfaction for portal deployments."

That's why vendors such as IBM are developing software that provides a greater degree of integration than current technologies. IBM's product WebSphere Portal Version 5 "[adds] more portal application functionality to help users feed information from one application to another," says Clint Boulton in his article "IBM Refreshes WebSphere Portal Software" in the July 28 edition of *InternetNews.com*. The product also "enables quick portal integration with backend systems via portlet builders," according to a section on IBM's Web site WebSphere Portal for Multiplatforms at <http://www-3.ibm.com/software/genservers/portal/>. In other words, information from an application currently housed on the marketing page of a portal could be seamlessly shared with accounting.

Adding new content and engaging users is also a concern among many firms: Drinker Biddle and Reath LLP is contemplating ways to "sustain freshness and maintain valuable content so that the portal remains a compelling place to find information."

Continual marketing and training are also important challenges. Hogan and Hartson emphasized the importance of one-on-one training. After deployment, the library staff noticed that though users had received training in document management, users still did not understand basic functionality. So more intensive, customized training was required, and this resulted in greater buy-in.

Drinker Biddle and Reath LLP elected to offer "on-time" training. The firm library turned the classroom training sessions into a self-help session by creating a CD that served as a portal introduction and guide. It still offers classroom-based training to those who wish to attend and learn more advanced portal capabilities.

Gathering tacit knowledge and fostering communication among practice areas were also noted as challenges. According to Kutak

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Rock LLP, “We need to do a better job at storytelling,” says Vanhoy. It’s what she terms the “electronic water cooler effect,” to encourage the development of communities of practice.

Best Practices = Lessons Learned

- **Capitalize on initial successes.**

Drinker Biddle: “The firm’s portal system has been used to house an extranet for a large and important client and its national litigation counsel group. This effort has helped to demonstrate to the firm leadership the potential for the portal to serve as an important factor in client development and retention,” says Bob Blacksberg, program director, DBReSources.

- **Keep it simple and clear.**

Hogan and Hartson: Practice area pages must be “simple and easy to use or attorneys won’t use them ... the windows can get cluttered very fast,” Bellicini says.

- **Avoid reinventing the wheel.**

Faegre and Benson LLP: “Don’t build duplicate sets of data — pool data from existing sources of data,” Platt says. “[Likewise,] don’t ask human resources to maintain their own pages when you can pull from firm data warehouses.”

- **Involve end users.**

Sidley Austin Brown and Wood LLP: “Customize links, services, subscriptions and overall data included in the site,” Pacifici says. “Continuously refresh content based upon regular communications with users to ensure value and implement new applications in anticipation of user needs.”

- **Monitor progress.**

Hogan and Hartson: Gather statistics on Web usage for budgeting purposes and also to analyze what pages are getting hits and what isn’t being used, Bellicini says.

- **Gear up for the long haul.**

Kutak Rock LLP: “Be in it because you believe in it. Don’t underestimate that it will go on for a very long time. ... You have to possess strong staying power,” Vanhoy advises. “Be prepared to take criticism — people don’t like change. Live for the ‘Eureka!’ moment.”

Content is Key

“In the real world, a portal is a door. A door by itself doesn’t provide much value, nor do we call it ‘door technology.’ It’s what the door provides access to that matters,” says Gary A. Bolles in the Dec. 23, 2002, edition of *CIO Insight*.

Whether you are continuing to develop an intranet or contemplating portal technology, it is important to focus first on content and also how a user would collaborate and share this content across the enterprise. Having mapped these “flows of knowledge,” you will be well on your way towards making a beneficial impact on users’ day-to-day workflow.

Vanhoy knew that her firm’s portal was an integral part of firm business processes when she attended a recent practice area meeting with senior partners. One of the attorneys discussed the placement of content on the practice area portal page and everyone in the room nodded their heads in agreement — no looks of confusion or questions about why or how it would be accomplished. That’s when you know the technology is inherently embedded in user workflow — the quintessential definition of success.

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