Tech Toolbox: Developing an Integrated Personal and Departmental Knowledge Management System

Law Department Management

Technology, Privacy, and eCommerce

Law departments are made up of some of the world's finest knowledge workers. Their ability to obtain, process, access, and apply the knowledge they need is a foundational skill, so anything they can do to improve their knowledge management system will dramatically impact their effectiveness.

Experience tells us that knowledge workers spend far too much time finding or recreating knowledge assets that they themselves or someone else in their own department or company already possess. This becomes such an issue that in-house counsel will sometimes even pay outside counsel to redo research we know in our gut has likely been done before simply because locating the original is too frustrating and time consuming.

During a time when many knowledge workers are suffering from overload and companies are trying to cut costs, enabling knowledge workers to access existing knowledge assets quickly and easily should be a high priority.

Content silos

One of the biggest impediments to accessing those assets is our propensity for creating content silos. This is true at almost every level.

Personal content silos

Most of us don't think of the big picture when we are storing content. So, at an individual level, knowledge workers will sometimes choose to put very similar or closely related sets of content first in one folder and then in another, later not recalling which piece is where or that they may have been given different locations. Or they will keep one asset in their email and another related one in a Slack

channel and yet another in a Word document, then later scour for the ones they need before giving up if they don't find them.

Of course, assuming those assets are digital, we could use available search functionality to locate them, but there are various problems with that too. First, although some search engines can search across different folders, applications, or platforms, most companies don't provide them. and many employees whose companies are lucky enough to have them haven't been properly trained to use those tools effectively.

Second, unless someone is atypically rigorous about applying naming conventions, they may use synonymous terms in addressing various topics that most search engines are unable to equate. As such, most typical search engines won't be able to suggest related topics that might be relevant.

There's another problem with personal content silos too, which for present purposes I will call the "sidetrack problem." When someone is working in one place and needs to find a knowledge asset in another, they not only spend valuable time navigating between them, but are also more likely to be distracted by following a red herring or being sidetracked.

For example, if someone opens their email to find a particular knowledge asset, they may get caught up processing email at a moment when they would have been far more productive remaining in the work that led them there in the first place. Sidetracking wastes time.

Furthermore, if you are one of the lucky individuals who enjoys their work enough to sometimes enter a "flow state" when you are working, getting sidetracked in this way is almost certain to knock you out of it. Even if you don't quite reach flow, you may still be in the groove enough that your work feels easy, and getting bumped out of that can really set you back. I have experienced this all too often, and it has cost me what might have been some of my best ideas.

I hate when that happens.

Group content silos

All these problems quickly become compounded in a group setting. For one, the more people you add, the more likely it is that different members will apply different logic in the ways they store their knowledge assets.

I'm sure you've had the experience where someone tries to prompt your memory of something that happened by providing a verbal cue that would have worked for *them* but doesn't work for *you.* Then we do that strange tango of trying various other cues until either the lightbulb goes on — or it just doesn't.

Well, this is like hunting through shared file folders to find a knowledge asset someone else has filed. Sure, there will be times when great minds really do think alike, but it is also often the case that if you finally manage to locate the asset, your first reaction is to wonder, "Why on earth did they decide to put that *there* or name it *that*?"

Same thing with looking for a knowledge asset in a different application. I might have the habit of keeping some things in email that a colleague might routinely keep in Teams or OneNote, so I might spend fruitless time looking for the asset in all the wrong places before either finding it or eventually giving up.

And the likelihood of being sidetracked is even greater here. You wind up hunting through the digital equivalent of someone else's treasure trove, pausing to marvel at the various kinds of knowledge assets you may find, as well as insights into their personality which have nothing to do with the work that took you there in the first place. Talk about breaking the flow!

Overcoming the silo problem

Fortunately, not only are newer and better tools being developed all the time, but there are many things law departments can do to help themselves right now without tremendous investments of time or money.

Although there are companies selling various kinds of knowledge management databases that purport to make locating and sharing knowledge assets easy, most of these are currently pretty expensive and require users to change habits that are often deeply ingrained — and we all know how arduous *that* can be.

The wonders of hyperlinks

An easier way to address the silo problem is using a tool all of us are already familiar with: hyperlinks. This simple technology is one of the most amazing tools of modern productivity. I have written about them before to enable clients to navigate quickly to the precise help they need on a particular topic, but hyperlinks have a myriad of uses beyond that, including to help individuals or their colleagues quickly find relevant knowledge assets.

Imagine if everyone in the department got into the habit of inserting hyperlinks between related documents. We do this now to a limited extent. For example, when you create a memo on a particular issue in Word (or Google Docs, or Ulysses, etc.), you habitually already include links to various websites that address pertinent topics.

Suppose you also included links directly to relevant PDFs or emails or notes or spreadsheets stored on your shared drives, so that you or your colleagues could easily navigate between those knowledge assets without needing to extrapolate the breadcrumb trail of logic you may have used (and since forgotten) to file those assets.

Of course, you would still have to locate those assets to link to them in the first place, but at least you wouldn't have to moving forward. How do you create those links? It is a little-known fact that many if not most apps have their own URL addresses called custom URL schemes that allow you to link directly to that app from within your computer or network.

Developers who take the trouble can even set up URL schemes that take you to particular parts of the app. To try use them, simply search for the relevant URL scheme for that app in your search engine.

Some apps have taken this even further. Apps like Obsidian, Notion and Joplin are note taking apps that allow you to link to almost any specific document on your computer or network. And apps like Hook and *FYI* allow you to create links to almost any document, email, etc. on your computer, so you can easily navigate between the documents you are working on and the knowledge assets you need.

AI to the rescue

And then there’s the problem of trying to find a knowledge asset when you don’t have a naming convention or can’t recall the terms they might contain. Thankfully, we are beginning to see a whole new breed of apps that are fantastic at suggesting knowledge assets to consider.

My favorite is DEVONthink Pro, which unfortunately is Mac only. It has this fantastic ability to look through all the documents you’ve installed in its database to find related documents and show them in its “See Also” drawer. Here is a video example, and another one.

As you might imagine, this can be incredibly useful when doing research or writing in cases where this cross-referencing ability would facilitate your work. DEVONthink is the note-taking database of choice for many academics for this very reason.

What works for you

There are many tools you could use to enable a friction-free approach to knowledge management, both on an individual and departmental level. Like all process improvement exercises, the first step is to consider your needs and the most irritating points of friction, and work on developing a process that will improve your workflow.

I hope this article will stimulate you to consider how you might be able to make your own knowledge management systems better. And then to do something about it.

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