

Contents

About the Authors	xxi
Acknowledgments	xxiii

PART I INTRODUCTION **1**

Chapter 1 Introduction **3**

Who Should Read This Book?.....	5
What You Will Learn	6
What We Will Cover	6
Part II: Getting Started	6
Part III: Collaborating on Documents, Online and Off	6
Part IV: Collaboration on Cases, Transactions, and Projects	7
Part V: Commonly Used Collaboration Platforms.....	7
Part VI: Developing a Collaboration Strategy	7
Part VII: Practical Issues, Tips, and Techniques.....	8
Part VIII: Conclusion	8

PART II GETTING STARTED **9**

Chapter 2 Collaboration at the Crossroads **11**

Chapter 3	
Collaboration Inside the Office	15
Routinely Communicating	16
Delegating Work	17
Managing Workflow	17
Reviewing and Approving Work	18
Producing Documents	18
Scheduling	19
Receiving Internal News and Updates	19
Chapter 4	
Collaboration Outside the Office	21
Routinely Communicating with Those Outside the Office	23
Delegating Work/Initiating Projects	23
Managing Workflow	23
Reviewing and Approving Work/Obtaining Signatures on Originals	24
Producing Documents	24
Scheduling	24
Receiving News and Updates	24
Chapter 5	
First Steps	27
Step 1: The Collaboration Audit—The Processes	28
Step 2: The Collaboration Audit—The Tools	29
Step 3: The Collaboration Audit—Painting a Picture of Where You Are	29
Step 4: Brainstorming Where You Want to Be	30
Step 5: The Client Survey	30
Step 6: Define Your Point B	31
Step 7: Determine What Your Existing Tools Can Do	31
Step 8: Research and Become Familiar with the Current Landscape for Collaboration Tools	31
Step 9: Set Some Priorities	32
Step 10: Get Buy-in for the Project	32
Step 11: Consider Your Culture	32
Step 12: Treat This as a Process	32
Sample Client Collaboration Technology Survey	33

PART III

COLLABORATING ON DOCUMENTS, ONLINE AND OFF **37**

Chapter 6

Benefits of Improving Document Collaboration and Using Document Collaboration Tools **39**

Document Integrity	41
Meaningful Asynchronous and Synchronous Review	41
Increase the Number of Eyes Reviewing Documents	42
Tracking the Negotiation and Drafting Trail	42
Metadata and Other Electronic Document Management Issues	42
Bringing New People Up to Speed	42
Training, Quality, and Knowledge Improvement	42

Chapter 7

Basic Collaboration on Documents **45**

The Table Method of Document Collaboration—Tried and True	47
Track Changes and Comments in Word—Another Collaboration Standby	49
Track Changes and Metadata	51
Redlining Tools—Benefits and Limitations	53

Chapter 8

Creating a Document Online: Getting Started with the Major Players **55**

Google Docs	56
Zoho	59
ThinkFree	60
Other Online Office Tools	60

Chapter 9

Working Simultaneously on a Document **63**

Navigating the Main Documents Page	64
Creating a Document	66
Navigating Within a Document	67
Edit Tab	67
Insert Tab	68

Revisions Tab	68
Publish Tab	69
Sharing Documents with Others for Collaborating	69
Other Features	71
Shortcuts	72

Chapter 10

Hidden Dangers, Security, and Metadata 73

Online Documents and Security	74
Automatic Backup of Documents	76
Metadata in Online Office Documents	76
Tips for Dealing with These Issues	77

PART IV

COLLABORATION ON CASES, TRANSACTIONS, AND PROJECTS

79

Chapter 11

Benefits of Collaboration in Lawsuits and Transactions 81

Break Down the Barriers of Time and Space	82
Enter Technology	83
Improve Client Service and Access	83
Get More Eyes and Heads into the Process	84
Make Electronic Discovery a Team Effort	84
Make Due Diligence a Team Effort	84
Keep Everything Together	84
Stop Reinventing the Wheel	85
Improve Training	85
Improve Accountability	85
Close Projects Efficiently	86

Chapter 12

Instant Collaboration—from Conference Calls to Instant Messaging

87

Conference Calls	88
Instant Messaging	91

Chapter 13	
How to Hold a Meeting on the Internet	97
<hr/>	
The Basic Meeting—Simple Screen Sharing	98
CrossLoop	99
Adobe Acrobat Connect	100
Other Basic Screen-Sharing Tools	102
More Advanced Screen Sharing—Real-Time Meetings	102
GoToMeeting	102
WebEx	103
Other Online Meeting Tools	103
Advanced Web Conferencing	104
Chapter 14	
Simple Project Management: Basecamp	105
<hr/>	
Keeping Notified with Basecamp	109
Using Basecamp in a Law Firm	109
Alternatives to Basecamp	110
Chapter 15	
Setting Up a Simple Extranet or Deal Room	113
<hr/>	
Extranet Features	115
Using an Extranet in Your Law Practice	116
PART V	
COMMONLY USED COLLABORATION PLATFORMS	119
<hr/>	
Chapter 16	
Email as a Platform	121
<hr/>	
Email as a Collaboration Medium	123
Technical Difficulties	123
Email Is Not a Document Manager	123
Improper Use of Technology	123
Failure to Copy All Team Members	123
Continually Restarting the Project	124
Confusion in Conversation Flow	124
Decentralization of Information	124

Email Safety	124
Email Makes Us Lazy	125
Making Better Use of Email	125
Tips for Email Productivity	126
Face Up to the Email Volume Problem	127
Perform Regular Email Triage	127
Get Things Done	127
Stop Intrusive Notifications	128
Create a Folder System	129
Use Rules and Other Automated Tools	129
Stay Near Zero	129
Learn How to Use Cc and Bcc	130
Use Care When Selecting Reply to All	130
Email Helpers	131

Chapter 17

SharePoint **133**

Chapter 18

Collaborating Inside and Outside the Office: Extranets and Intranets **139**

Extranets	139
The Basecamp Example	139
Hosted SharePoint Portals	140
Document-Sharing Extranets	140
“Temporary” Extranets—File Sharing	141
Legal Extranets	141
Electronic Discovery Extranets	143
Specialty Extranets	143
Intranets	143

Chapter 19

Adobe Acrobat **147**

Review and Comment	147
Sending a Document Out for Review	149
Email Review	149
Shared Review	150
Browser Review	151
Document Security and Control	151

Chapter 20	
Wikis: Web Collaboration	153
What Is a Wiki, and Why Should I Care?	154
Setting Up Your Own Wiki.	157
Web-Based Wikis	158
Enterprise/Internal Wikis	159
Chapter 21	
Other Web 2.0 Collaboration Tools	161
File Transfer and Sharing	161
Online Calendaring.	163
Mind Mapping	164
Blogging	165
Social Networking.	166
Chapter 22	
Specialized, High-End, and Alternative Collaboration Platforms	169
Practice Management Programs.	169
Microsoft Project and Microsoft Office.	170
CaseMap.	170
Litera	170
Mind Mapping	171
WorkShare	171
Catalyst Secure	171
Electronic Discovery Tools	171
Knowledge Management	172
Enterprise Content Management	172
PART VI	
DEVELOPING A COLLABORATION STRATEGY	173
Chapter 23	
Must-Have Features for Your Collaboration Tools	175
No—or Very Small—Barriers to Entry.	175
Reducing—or Not Increasing—the Silo Factor.	176

Common Platforms	177
Leverage Existing Software	177
Getting Data In and Out	178
Integration with Your Existing Tools	178
Accessibility and Portability	179
Security and Related Concerns	179
Easy to Learn and Easy to Use	180
Sensitivity to Legal Issues and Law Practice	180
What Your Collaborators Are Using	181
Built for the Long Haul	181
Pulling It All Together	181

Chapter 24

Collaboration Tools: Free vs. Pay	185
--	------------

Chapter 25

Involving Clients in Your Decisions and Choices	191
--	------------

Chapter 26

Determining Which Factors Will Drive Your Strategic Planning	197
---	------------

Locating Point A and Point B	197
Existing Platforms	198
Sequencing and Timetables	198
Client Needs	199
Needs of Other Collaborators—Internal and External	199
Cultural Issues	199
Budget	200
Hosted versus Internal	200
Security and Special Concerns	200
Return on Investment	200
SWOT and Other Strategic Approaches	201
The Portfolio Approach	201
The 80/20 Rule	202
Who Makes the Decisions?	202
The Written Plan	202

PART VII
PRACTICAL ISSUES, TIPS, AND TECHNIQUES **203**

Chapter 27
Getting the Word Out to Your Collaborators **205**

The Feed Concept	206
Feed Mechanisms	207
The Multiple-Channel Approach	209

Chapter 28
Ethics, Metadata, and Other Practical Issues **211**

Confidentiality	212
Privilege	214
Other Practical Issues to Watch For	215

Chapter 29
Ownership, Control, and Other Legal Issues **217**

Control	218
Ownership	219
Licensing	220
The Role of Contracts for Collaboration Tools	221
Moving Toward Different Models of Delivering Legal Services	222

Chapter 30
Potential Pitfalls of Collaboration: Where to Be Wary **223**

Losing Control of Documents and Data	224
Introducing Friction into Processes That Work Well	225
Disrupting Existing Patterns and Types of Collaboration	225
Creating More Silos	225
Using Nonstandard Platforms	226
Requiring Installation of New Programs for Each Collaborator	226
Locking in with Proprietary Tools and Formats	226
Experiencing Lack of Data Mobility	227
Dealing with Inadequate Training	227
Making Poor Decisions about Hosting Yourself or with a Third Party	227
Dealing with Inadequate Contracts and SLAs	228
Paying Insufficient Attention to Security Issues	228

Chapter 31	
Implementing Collaboration Tools	231
Break Out of the Reaction Mode	232
Standardize and Minimize	232
Understand the Collaboration Tools Landscape	232
Provide Demos and Training	233
Lead by Example	233
Eat Your Own Dog Food	233
Take a Team Approach	233
Go Where the Action Is	234
Get the Tools in the Hands of Evangelists and Influencers	234
Build on Small Successes	234
Be Guided by the 80/20 Rule	234
Expect Fast Prototyping and Beta Releases	234
Build in Feedback Loops	235
Take a Portfolio Approach	235
Know Who Is in Charge	235
Learn from Others	235

PART VIII

CONCLUSION **237**

Chapter 32	
Recommended Choices for Common Scenarios:	
From Solos to Large Firms	239
Solo Lawyers	239
Small Firms	240
Mid-sized Firm	241
Large Firms	241
Corporate Legal Departments	242
Government Law Department	243
Legal Services Organizations	243
Recommendations Based on Budget Considerations	244
No or Little Money Available	244
Modest Budget Available	244
Significant Budget Available	244

Chapter 33	
Creating a Culture of Collaboration	245
A Closer Look at Collaboration	245
Collaboration: Addressing Cultural Issues	248
Know Thyself	248
Know Thy Collaborators	248
Stay out of People’s Way While They Are Working.	249
Top-Down versus Bottom-Up	249
Build on What Works.	249
Try to Achieve Critical Mass	250
Invest in Team Building.	250
Learn about Collaboration	250
Consider Using Incentives or Penalties.	251
Remember That Culture Is a Moving Target	251
Chapter 34	
The Future of Collaboration in the Practice of Law	253
Appendix 1: Glossary*	257
Appendix 2: Collaboration Resources	263
Recommended Books on Collaboration	263
Resources by Chapter	264
II. Getting Started	264
2. Collaboration at the Crossroads	264
3. Collaboration Inside the Firm	264
4. Collaboration Outside the Firm.	264
5. First Steps.	264
Brainstorming Resources	265
III. Collaborating on Documents, Online and Off	265
6. The Benefits of Improved Document Collaboration and Using Document Collaboration Tools	265
7. Basic Collaboration on Documents.	265
8. Creating a Document Online—Getting Started with the Major Players.	266
9. Working Simultaneously on a Document.	266
10. Hidden Dangers, Security and Metadata	266
IV. Collaboration on Cases, Transactions, and Projects.	267
11. The Benefits of Collaboration in Lawsuits and Transactions	267

12. Instant Collaboration—From Conference Calls to IM	267
13. How to Hold a Meeting on the Internet	267
14. Simple Project Management—Basecamp.	267
15. Setting Up a Simple Extranet or Deal Room	268
V. Commonly Used Collaboration Platforms	268
16. Email as a Collaboration Platform	268
17. Sharepoint	268
18. Collaborating Inside and Outside the Office: Intranets and Extranets.	269
19. Adobe Acrobat.	269
20. Wikis—Web Collaboration.	269
21. Other Web 2.0 Collaboration Tools	270
22. Specialized and High-End Collaboration Platforms	270
VI. Developing a Collaboration Strategy	271
23. Must-Have Features for Your Collaboration Tools.	271
24. Free vs. Pay	271
25. Involving Clients in Your Decisions and Choices	271
26. Determining Which Factors Will Drive Your Strategic Planning	271
VII. Practical Issues, Tips, and Techniques	271
27. Getting the Word Out to Your Collaborators	271
28. Ethics, Metadata, and other Practical Issues	272
29. Ownership, Control, and Other Legal Issues.	272
30. Potential Pitfalls of Collaboration—Where to Be Wary.	272
31. Implementing Collaboration Tools	272
VIII. Conclusion.	273
32. Recommended Choices for Common Scenarios—From Solos to Large Firms	273
33. Creating a Culture of Collaboration	273
34. The Future of Collaboration in the Practice of Law.	273

Appendix 3: Tools by Category **275**

Conference Calls.	275
Email.	275
Extranets	275
Instant Messaging.	276
Personal IM Clients	276
Enterprise Instant Messaging Clients	276
Metadata Removal Tools.	276
Online Meeting Tools.	276
Online Office Tools—Documents, Spreadsheets, and Presentations	277
Open Source Software	277

PDF Creation and Management	277
Project Management	277
Redlining Tools	278
Screen-Sharing Meeting Tools	278
SharePoint Tools	278
Specialized, High-End, and Alternative Collaboration Platforms	279
Wikis	279
Web Based	279
Enterprise	279
Web 2.0	279
Bookmarking	279
Calendars	280
File Sharing and Online Storage	280
Mind Mapping	280
Miscellaneous Web 2.0 Tools	280
RSS Tools and Newsreaders	280
Social Networking	280