

## Success Story: How Our Lawyers and Staff Find Sony Electronics Legal Information as Easily as They Search the Web

*Everyone is familiar with searching on the Internet. Sony thought it was time to apply that logic in-house—without moving or tagging information.*

*By Michael T. Williams, General Counsel, Sony Electronics Inc.*

### The Challenge: Finding Information in the Legal Department

Like every other legal department, Sony Electronics is always looking for ways to increase efficiencies and decrease costs. A fundamental issue we identified was that simply finding the information we had already created or paid for was a difficult task.

We wanted to find a way to significantly reduce the time our lawyers and staff were spending looking for specific information or documents, re-creating existing documents they could not find, and researching information across the department.

Our information systems landscape is typical: multiple file shares, systems for contract and matter management and billing, SharePoint sites, along with information stored on individual lawyers' PCs and in their email as attachments. The problem was that documents stored in multiple locations are not easy to find—to find something, you had to know where to look and from there, how to navigate each storage location.

Like many legal departments, we initially tried to improve access to our information by centralizing document storage. The idea was that everyone would store documents centrally and tag them with descriptive information that would make them easy to find later. With everything in one place, organized, and consistently described, we would have no trouble finding information.

But that plan did not work. Making lawyers learn a new system, storing everything centrally, agreeing on a global organizing scheme, and tagging documents was not realistic. Lawyers questioned the value of filling out fields of data just to save a document—particularly when that work did not help them find documents later. Certain types of information (e.g., our outside counsel bills and work product) could not easily be moved into a single, central repository. Documents sent by outside counsel rarely made it outside of our lawyers' email folders. Apart from the adoption issues, it made no sense to have legal professionals doing the significant administrative work required to maintain centralized filing.

We eventually learned, through our work with MetaJure, that *65% of our documents were sitting on individuals' PCs!* Lawyers saved documents on their own desktops and as email attachments because that way they could organize for their individual practices, did not have to spend time tagging and moving them to a central repository, and could find them later within their own folders. Once we understood our real data landscape, we knew that the missing piece was an easy way to find documents across our department, including the bulk of knowledge residing on our PCs.

We had already learned that a technical solution delivers value only if people actually use it. Rather than trying to change the way our lawyers worked to fit the tool, *we needed a tool that fit the way our lawyers worked.*

### **The Solution: MetaJure Knowledge Hub**

Recognizing that the fundamental challenge was to give lawyers a tool they would actually *use*, we teamed up with MetaJure to create a practical solution. MetaJure's founders are two former Fortune 500 GCs, a former Fortune 50 legal COO, and two lawyer entrepreneurs who had already built successful legal technology companies. They knew from experience that for legal professionals, elaborate centralized systems and complex tagging schemes were not the answer.

We partnered with MetaJure to develop a new approach: rather than centralizing document storage, centralize the point of access. Our lawyers search for documents across our entire department from one interface. From the user's perspective, it's similar to and just as easy as searching for information on the web.

Because everyone knows how to search the Internet, we literally needed no training. There is no folder system or taxonomy to learn, no document tagging, no query language, and no separate login. Lawyers work in Microsoft Outlook and Word all day, and our search solution launches directly from those applications. You simply enter a keyword or two in a search bar and get results from every data storage location in your legal department.

Full-text search makes documents accessible without tagging and organizing according to a global scheme. It connects to existing storage locations and delivers comprehensive search results, regardless of where documents are stored or how they are organized. It lets lawyers continue to work and organize in their own individual ways.

There was no need for a data migration. Documents are crawled and indexed in our existing systems, and existing user access permissions are enforced. Even documents and email attachments stored on local machines are captured and included in individual users' search results. If they choose, users can also share their email attachments and locally stored documents with colleagues.

As with the Internet, the focus is not on organizing information: rather, it is on using the power of centralized search to find what you need when you need it.

### **The Benefits**

With universal search, we find information when we need it without having to organize it in advance or know specifically where it is stored. Access is immediate and global, not dependent on documents having been saved in the "right" place and properly described. Without comprehensive search, you really don't know what you don't know. Other benefits include:

#### **Improved client service**

Comprehensive search enhances our delivery of client service. When someone calls with a question, many times we can answer it while we are still on the phone. That does not happen if you need to search multiple locations, walk office to office, or wait for replies to a department-

wide email. With a single click, we are on top of our information with immediate access to all of our department's collective knowledge, status and history.

### **Efficiency**

Our job is to apply legal reasoning and business acumen to information—not to look for it. With simple, effective search, our lawyers free up time for high-value work. We do not waste time hunting for information. We do not recreate work, because we know whether it has been done or paid for before. We have maximized our ability to use and benefit from each other's work and the past work product of our outside counsel.

At the same time, the administrative burdens on everyone in the department have been reduced. Even assuming everyone uses a central repository perfectly, filing and tagging is not an effective use of legal professionals' time.

### **Current, dynamic results**

With search, we are not restricted to a static taxonomy that lags behind changes in our business, or limited in the ways we can access and aggregate information. And with no extra steps required to maintain a storage system, our search results are as current as the documents themselves.

### **Meaningful context**

Search is more than just looking for specific documents. As with Internet search, context points you to further useful information. MetaJure search results include each document's location, file type and date. Because documents are maintained in their original locations rather than moved to a central bin, you see who has a given document, how the lawyer or staff member named and filed it, and what other documents were stored with it. You can explore other related documents in its folder. In the same way, you can find internal expertise, check who has the most recent experience on a given topic, or see who worked on a project. And all of that information is captured from the documents themselves in their native context.

### **Expandable**

If your company grows by merger or acquisition, there is no need to convert the historical data of the acquired party or lose access to it upon integration. Rather, historical data can be maintained in its existing form and easily added as a new data source on the Knowledge Hub network.

### **Comprehensive information**

Global, current access to your legal department's work product is invaluable to a GC in the role of department manager. You have immediate visibility into what lawyers are working on, workloads, project status, and areas of expertise.

More generally, relying on central storage to find information injects uncertainty into every answer: you only find what someone has filed and labeled correctly. For example, we have found addenda that had

not been added to the contract management system, letter agreements living only on PCs, and valuable outside counsel work product that existed only as an email attachment.

Even former employees' information is not just saved and stored away; that work product and piece of the department's history are available with search. Running a search, you get the most relevant results, whether they were drafted yesterday by the person next door or by someone who left the company five years ago.

With MetaJure search, we have enhanced all of our systems by effectively unifying them—not integrating the documents into one system, but establishing one point of access to all of them. Each system still serves its function, but we can find 100% of our information across all of them with a single click from our desktops.

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