Wiki While You Work
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If you are looking for a better way to organize your projects, highlight useful forms and precedents, create a procedures manual or publish substantive legal content, consider using a wiki. With the rise of Enterprise 2.0 technologies and their alignment with knowledge management, questions emerge as to the best use of these new technologies and how they may best enhance existing technologies. One of the most promising Enterprise 2.0 technologies for knowledge management is the wiki.

Wikis are attractive as a knowledge management tool because they make it very easy to contribute to, and find, content. A wiki can provide a common workspace for people to create, organize and share knowledge. You can install a wiki platform inside your firewall, so it is limited to members of your firm. You can also use a wiki as a replacement for an intranet, or add a wiki as part of an existing intranet.

What is a Wiki?

A wiki is a collection of easy-to-edit webpages. Each time a wiki page is edited and saved, a new version of the wiki page is created. When a wiki page is saved, the wiki platform sends out a notification of the changes to subscribers. The wiki platform also allows you to compare changes between versions of a wiki page.

A wiki combines the features of a word-processing program, a document management system, a document comparison program and an email program into one package. A wiki has the basic features of a word processing program, with a simple editor for creating and editing content. It acts as a simple document management system for wiki pages by maintaining a library of pages within the wiki platform, including all of the versions of each wiki page. It also acts as a basic document comparison program by giving users the ability to compare changes between versions of a wiki page. The wiki has a notification process that alerts subscribers to the wiki page that changes or additions have occurred, giving users a basic communications tool. Of course, a wiki does not have all of the bells and whistles that these four programs do, but a wiki will allow you create and distribute content directly in the wiki and without leaving the platform. A wiki compresses most of the steps of the document production process into a single process.

Most wikis offer an easy to use "What You See Is What You Get" page editor that works as a simple word-processing program. You don't have to know html to create a wiki page. The wiki content is in the form of a web page, so most search engines can easily index and search the content. In addition, because a wiki page is a webpage, it is easy to insert links to other content in the wiki, on your intranet, the internet or anywhere else you can generate a URL. My firm developed a tool in our document management system that can generate a URL for a document, so we can highlight the best content from our document management system or our wiki pages.

Wikipedia

Wikipedia is the most famous wiki and what most people think of when they think about a wiki. Wikipedia.org is a free, web-based encyclopedia. The site is based on a wiki platform, open for anyone to add content or edit existing content. With over 9 million articles in more than 250 languages, and over 2.2 million articles in English alone, Wikipedia is several times larger than the Encyclopedia Britannica. Wikipedia removed one barrier for contribution by eliminating the registration requirement. You do not need to register on Wikipedia to begin adding to the content. Anyone can anonymously edit any wiki page in Wikipedia. (Wikipedia does require you to register to create a new wiki page.)

Rarely would a firm allow for anonymous editing of a wiki used within the firm. Most wiki platforms deployed inside a firm's firewall will allow a single sign-on, so the editor is recognized from their initial sign-on to the network. The wiki page will display the date and time it was last edited and the identity of the editor.

Nupedia

Before Wikipedia, there was Nupedia. The Nupedia project was started to create an online encyclopedia with articles written by experts and licensed as free content. Experts were encouraged to write articles which would then be subject to a peer review process. Nupedia officially went online on March 9, 2000. By November 2000, only two full-length articles had been published. In January 2001, Nupedia started Wikipedia as a side project to allow collaboration on articles before they entered the peer review process. By providing a less bureaucratic structure, Wikipedia quickly grew and attracted contributors. Wikipedia developed a life of its own and began to function largely independent of Nupedia, leading to Nupedia's gradual demise.

Enterprise 2.0 and SharePoint

Perhaps Nupedia reminds you of some of your knowledge management projects. Wikipedia is a powerful illustration that removing barriers and bureaucracy can increase contribution and utility. Wikis are a preview of changes in knowledge management strategy to adopt Web 2.0 technologies inside the firm: Enterprise 2.0 or as I call it, Knowledge Management 2.0. With the addition of Enterprise 2.0 tools, knowledge management moves from the collect-and-control viewpoint to the connect-and-collaborate viewpoint. Comparing Wikipedia and Nupedia reveals the potential benefits of opening up systems.

Over the past year, my firm has been planning and implementing an upgrade of its intranet to Microsoft's SharePoint 2007 platform. Wikis, blogs and other Enterprise 2.0 tools are included as part of SharePoint 2007 platform. At the outset of planning for our upgrade, we decided to actively use some of these tools to see how they worked. In particular, wikis caught our attention as a great tool for knowledge management within the firm.

Using the free, test version of PBwiki, our knowledge management department created a wiki to host the notes and status reports for our projects. Instead of sending emails, team members added notes and comments to the wiki page. Over the course of nine months, our wiki grew to contain over one hundred pages. After we implemented SharePoint 2007, we imported that wiki into SharePoint.

I have also used free, hosted versions of wikis for a variety of other projects: co-authoring an article on social networking, planning a conference, managing transactions for a client, preparing and gathering the results of a survey of law firm knowledge management leaders, and gathering definitions of knowledge management. Instead of trading information by

email, my collaborators and I were able to share information in the wiki. We had a common place to find information and we were all notified as new information was added.

When to Use a Wiki

The question is, what content should a law firm "wiki-fy"?

A wiki is an exceptional platform for collaborative treatment of documents. Ownership of the document becomes less important than the collection of the content in one synthesized place.

A great project is to wiki-fy a practices and procedures manual. Rather than using a long, static word processing document, create a more dynamic manual by putting it into a wiki format, with each section of the manual as a separate wiki page. On each wiki page, you can easily cross reference and link to other sections of the manual/wiki pages. You can also easily link to other information internally or externally. When I suggest that a group create a practices and procedures manual, one of the first questions I hear is: "How will I know when it changes?" Typically, a manual is drafted using a word processing program, saved onto the document management system, and then distributed by email each time it is revised. The recipient then prints it out or refers back to the email when using the manual. With the manual in a wiki, the notification of changes happens as soon as the change is made. Wiki-fying the manual results in the active flow of information so that the group is not stuck with a document which may quickly become stale or obsolete.

I have also had great success using a wiki to manage the transactions and internal closing agendas for a client. I created a new wiki page for each transaction. Each wiki page included some basic information about the transaction and the internal closing agenda. Instead of one person controlling the edits, the entire client team could update any closing agenda at any time. When viewing the wiki page, it always contained the most up-to-date information. As changes were made to an agenda, the wiki platform sent out a notification of the change to the entire internal client team. Without a wiki, the behavior would have been to maintain the closing agenda in a word-processing document with a single person responsible for keeping it up to date (usually the most junior person). After an edit or a group of edits, the author would have emailed the updated agenda to the client team, who would then have had to find the changes or digest a version full of the marked changes. The use of a wiki collapses the traditional document process into a shorter series of steps, thereby providing a richer flow of information and keeping the client team better informed.

We have moved the agenda for our weekly knowledge management department meetings to a wiki. Any member of the department can add an item to the agenda. We also keep notes about individual projects in the wiki. The wiki provides an easy-to-use platform for each member of the department to take notes; after all, a wiki is just another type of document. At the same time, however, the notes are also being added to a central repository where they are shared with everyone in the department. It takes no more effort to take notes in the wiki than with any other tool, but because all of our notes and comments are compiled in the wiki, we are moving towards the point of not having to communicate by email. I know that when I add content to the wiki, everyone in the department will get a notification of the new content. And because we are using a wiki, the content is easier to find and we can all feel confident that everyone is looking at the most current content and not an outdated version that has been sitting in someone's email in-box.

We have also begun moving substantive legal content into wikis. One of my first wiki-fication projects was to convert my firm's fifty-state real estate survey manual into a wiki. The first generation of the manual was a collection of folders in our document management system. Anyone could add content by adding a document to the folder. But there was little context for a document and none of the information was linked together. The second generation was a collection of html webpages. That version allowed us to add more context and link to content, but it was difficult to edit and nobody, except the author, knew when new content was added. In our latest version of the manual, we converted the webpages into wiki pages. It is now much easier to create new pages and link them together. In addition, we have divided the substantive content into smaller pieces so that we now have a main wiki page for each state, with multiple pages linked to its specific content. There are separate pages for transfer tax issues in each state, mortgage taxes, closing customs and forms and precedent documents. By dividing the information into smaller chunks, we get better search results and it makes the information easier to find and easier to digest.

This article is the fourth article I have written using a wiki. First, I set up a private, externally-hosted wiki. Then I was able to access the article anytime I had an internet connection. By using a wiki, I could easily bring co-authors, editors and readers into the drafting process.

The Challenges of a Wiki

A wiki requires a different way of working. We have grown very used to the iterative process of drafting a document and emailing it around to interested parties. With a wiki, the drafting process is more open and public. Since the content is more open, the group owns the content, rather than one individual.

I have seen none of the bad behavior in Wikipedia happening to wikis inside law firms. Since authorship is directly attributable to a person in the firm, there is none of the obnoxious behavior of vandalizing sites or making defamatory statements. You can easily and quickly see who took the bad actions, restore the prior version and discipline the offender accordingly.

In researching the use of wikis by law firms, I found one firm with hundreds of pages that encountered some organizational issues when different people wanted the wiki pages and information organized in different ways. Eventually, certain contributors were forced to bow to the collective will and come to agreement on some structures. One downside of a wiki is that it cannot be customized for each individual person. But a significant upside is that everyone is looking at the same information in the same way.

Wiki While You Work

I have found that wikis dramatically simplify workflow. The creation, distribution and review of content all happen in one easy-to-use, easy-to-deploy and easy-to-train platform.

As law firms begin implementing wikis, they will need to identify the best way to use this new tool. Wikis can simplify the production of content and the steps needed to produce the content. Although a wiki is not appropriate for all types of content, it can be a powerful addition to your knowledge management toolbox.

If you are interested to hear more about wikis, there will be a presentation at the ILTA conference on "Wikis in Law Firms" as part of the knowledge management peer group track.