Redesigning an Information Services Portal

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About us: the firm and the team

Middletons is an Australian full service, commercial law firm, with approximately 500 staff in Brisbane, Melbourne, Perth and Sydney offices.

Information Services (IS) is staffed by professionals across the three offices on the east coast of Australia. We divide our group into three teams: Client Services & Innovation, Legal Resources, and Learning.

The IS Portal: background and history

Middletons' IS implemented the FIRST Library and Information Management System (LMS), six years ago comprising the following modules:

- FIRST Administration: Windows-based client used by IS staff to manage the budget, create and maintain catalogue records and metadata;
- FIRST Online Public Access Catalogue (OPAC): web-based interface used by end-users to search the FIRST LMS database for catalogue records; and
- FIRST Messaging System: to deliver messages and alerts based on defined data conditions via email, fax and web publication.

The library package served as a traditional library catalogue with a web interface and was branded the "Information Services Portal" (IS Portal). It was heavily promoted at the launch, and subsequently with each graduate intake and to new staff.

The IS Portal was initially received well by IS and the legal staff. However in the six years following its launch no improvements were made to the system. While IS continued to add records, and made repeated attempts to raise awareness

about the value of the information held within the catalogue, it had become very clear that users were either unaware of the system or were simply not using it.

Brave new world: expectations redefined

Both the legal and information professions have been undergoing a period of rapid change.

The information profession has witnessed the rise of Google, Web 2.0 platforms, online social networks and mobile devices that can access online content. These developments have fundamentally changed users' expectations of technology. We felt this reality had to be reflected in the redesign of the catalogue.

There were also much broader issues that IS took into consideration. Since late 2007 and early 2008 nearly every law firm has been impacted by the "global financial crisis", structural changes to the industry and increased competition. Thus, we have witnessed a wave of mergers, cost cutting, and pressure on staff numbers.

We also took note of broader trends within the information profession and the corporate sector, in particular:

- libraries and hard copy collections are disappearing as companies look to save on the cost of subscriptions and floor space;
- law firms are adopting knowledge management functions, often subsuming traditional library services; and
- demand for services is increasing while headcount, budget and resources remain "flat" or are being reduced.

Thus, the IS team were confronted with a broad range of challenges which could be distilled into two key points:

- how can we ensure our services remain relevant to clients and the business?
- how can we deliver services more cost effectively?

The redesign of the IS Portal was partly a response to much broader issues and trends, and partly a strategic overhaul of the information services within Middletons.

Aligning the team to the needs of our clients

Prior to commencing the catalogue revamp, we realigned IS into three teams that reflected the needs of our clients: learning, access to legal resources, and high levels of service. This was a deliberate choice, as we wanted to ensure our services aligned with the business rather than reflected library functions (acquisitions, reference and training).

Thus the redesign of the IS Portal was handed to the newly formed "Client Services & Innovation" team which comprised the National Information Services Manager, the Sydney library manager and two staff with experience in the design and implementation of technology systems. The choice of the teams name encapsulated the belief that innovation would enhance client service.

When libraries go virtual

The physical location of staff and materials has become incidental to most users' experience of information services. Of the several thousand research requests we handle each year, the vast majority are handled via phone and email. "Foot traffic" to the library (staff actually visiting us in person) has, over the last several years, become non-existent.

For this reason the development team adopted the mantra, "The catalogue is the library", based on the assumption that most interactions between IS and its clients would in some way be mediated via the redeveloped IS Portal.

Driving away the user; how design, search and relevance can undermine

The redevelopment of the IS Portal was initiated because users had lost "trust" with the following elements of the existing platform:

- Design: the overall "look and feel" of the OPAC user interface (UI) mimicked conventions of the internet in its earliest days. It relied upon larges lists of materials and a cluttered "home page" with far too many options that confused the user;
- Search: users and IS staff frequently complained about not being able "find what they where looking for". This was as much an issue of understanding how the search operated (Google has set a high level of expectations) as our own failure to use metadata correctly to enhance search results; and
- Relevance: the design and content of the IS Portal was designed to meet the needs of all users, regardless of their role within the firm or their area of specialisation. As a consequence, users were presented with an over abundance of lists, links and content of little relevance to their individual needs.

Our requirements

The Client Services & Innovation team decided that the revamped version of the catalogue would embody the following design principles:

- simplicity and good design;
- a vastly improved search engine;
- personalisation; and
- low development cost.

A simple, short business case and budget was produced for senior management to review. It was approved, largely, because we promised low development costs.

We planned to work with our current providers, FIRST, to design a new iPortal to reflect the modern look and feel of the web.

Tools used in redesign

The development team had very clear ideas for the look and feel of the new iPortal. We turned to Web 2.0 tools and applications to help keep development costs to minimum. One such design tool was iPlotz, a web based "wire frame" tool used by software developers around the world to "sketch" out the design of new web sites and iPhone applications.
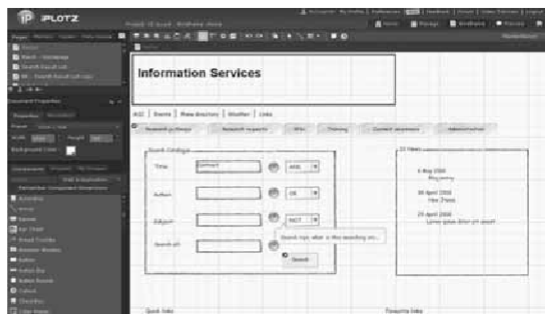
iPlotz is a virtual drawing board, allowing users to build mock-ups and wireframes of web sites onto a "blank page". We found it ideal for prototyping multiple concepts for the redesigned catalogue. For a minimal fee, we were able to start an account and get straight to work on design concepts. We also used Microsoft Paint to add detail and some visuals to our design.

The team began a series of regular meetings to work on the design, with early iterations of the revamped IS Portal starting to incorporate a more "minimalist" design:

We took this early wireframe model to users to test our assumptions, confident that they would be happy with the proposed changed.

Consultation and feedback process

Initially we used the iPlotz wire frames and discussed how the look of the new Portal with the development team. We then discussed the new design with the entire IS Team. As already stated there was a large amount of consultation with users and the entire IS team.

Once the IS Team was happy with the design concept, we then tested our design with frequent

users across the firm by using the low-tech card sorting design technique. The simplicity of card sorting allowed us to quickly discuss with busy lawyers at their desks, how the new iPortal would work. This approach was invaluable, allowing us to explore design choices within the team and a select group of users.

However, while the development team and IS as a whole were happy with the proposed direction, users were far less comfortable with the changes. Indeed, they seemed to be agitating for the retention of many of the old features of the IS Portal.

The expertise question: how much attention should we pay to our clients needs?

At this stage it became apparent that there was disagreement between the development team and users, with users frequently advocating features or design elements that seemed poor design choices to the development team.

For this reason the development team made a conscious decision to ignore the suggestions from users that they felt compromised the design principles. In fact, for a significant period of time the team did not consult users, as it was felt their advice was contradictory or reflected their own idiosyncratic use of information tools.

Instead, we concentrated on analysing usage statistics for the IS Portal and looking externally for examples of best practice. While users may have advocated for the retention of certain features, the statistics available told the development team that those features were seldom used.

We decided that while clients may be very good at articulating some of their needs, it was the role of information experts to develop and deliver solutions based on their expert understanding of technology.

Thus, the development team made it their goal to deliver to clients a tool they didn't know they wanted, but one that when it was launched would become readily adopted.

When you think you're finished, you're not

Once the development team settled on a final design, the wireframes and a document containing business requirements were sent to FIRST for coding. FIRST was very willing to offer suggestions and helpful guidance on the direction of the design process.

The final product was almost ready to launch, and appeared as below:

Once the "beta" version became available on a test server, it was decided that the location of the menu bar was both "clunky" and difficult to navigate. It was decided to migrate these from the bottom half of the page to the very top:

Even the colours were significantly changed, as it was felt the predominance of red was distracting to the user.

The final version was cleaner and far easier to navigate.

At this stage, we thought that we were progressing so well with the redevelopment of the iPortal using iPlotz that we decided to add a redevelopment of our Research Management Service (RMS) to the project. At the time, this was an in-house designed and maintained web based research service. Again, we were happy with how the RMS was working, but it did not reflect the wider changes that are occurring with the Internet.

We borrowed design ideas from Web 2.0 products such as Twitter and Yammer to give our RMS a contemporary modern feel. In particular, we wanted to design the new RMS so that it was a web-based chat tool.

The Launch

The IS Team discussed the best way to launch the new portal. A number of suggestions were raised; from holding a major launch in the boardrooms with a cake and candles to bribing the legal staff with chocolates in the break out rooms on each floor for a couple of hours during the day.

We decided to opt for a soft launch, in the usual Middletons style for new systems. We felt that this was appropriate because we had taken care to ensure the new site replicated the design of the wider web-based environment that many of our users would already be familiar with this. Also, the functionality of the system had not changed, but the ability of our users to negotiate the functionality had been improved.

A decision was taken to launch the new site just before Christmas to try and get staff on board before they disappeared for holidays. The reality was that if we could not make the launch date in early December, the next logical date for our launch would be sometime after Australia Day.

In the weeks leading up to the launch we contacted our Marketing department and planned our low key marketing campaign. All our communications used the new iSearch logo and we developed a couple of key messages for the campaign. Two weeks before the launch we posted an article on the firm's intranet informing staff that we were in the process of launching a new IS Portal called iSearch. Posters were placed in the tearooms and the IS National Manager was interviewed for the Middletons Staff news. On the day before the launch a simple branded email was sent with our key messages informing staff of the changes.

When Monday arrived, we were greeted with very few confused emails and phone calls. The soft launch policy had worked for us. Legal staff were navigating the site, setting up alerts and "favouriting" frequently accessed sites. We are continuing

to publicise iSearch in staff newsletters and push our key messages at practice group meetings and as tag lines in our alerting emails.

Issues and developments for the future

We are still developing our RMS as we simply did not spend enough time on this part of the project; our vision to develop a chat based legal research service still needs work. We did not spend enough time developing our design with iPlotz, and as a team we did not discuss the changes in enough depth. This meant that when we sent our design to FIRST we left too many holes for the developers to fill. We can put this in the lessons learned basket for the next time we redevelop iSearch. We are, however, working through this process with FIRST.

Now that we have completed the redesign of iSearch we are looking at redesigning our catalogue records to reflect the modern design principles we have used in the iSearch project. As part of this process, we are also looking at how FIRST searches. Our catalogue record redesign will take into account the data that the FIRST search software is looking for when it is searching and ordering results.

We realise that this is just a start and there are a range of issues that we need to keep on top of. The redesign is not just a one-off project; we need to continually change and redevelop iSearch so that it reflects the design directions of the web. For example, we also assume that we will need to develop an iSearch app for the ipad and iphone.

Lessons learned

IS learned a number of valuable lessons during the redevelopment of iSearch:

* a great deal of the design work can be done in-house;
* it is important to spend time discussing changes with your team and your clients;
* the more time you spend upfront in the design process, the easier and cheaper the project will be to implement;
* inspiration can be drawn from developments on the web;
* the web is all pervasive – go with a Google style search;
* the closer your design is to how the internet looks and feels, the easier it will be to train people (as they will already know how to navigate); and
* people like a simple interface.

Finally I would like to thank the entire Middletons IS Team without whom this project would not have been such a great success. Thank you, Cassandra Keen; Janice Ryan; Lea-anne Morrow; Richard Bajraszewski; Linh Ly and Patrick Faulkner.