Eversheds Sutherland International selects iManage

Following an extensive process that began in the Spring of 2019 to select a document and email management system for the 4,300 people in its international team, Eversheds Sutherland has selected iManage, we can reveal. The new system, which is an OpenText swapout and means OpenText is no longer in use among the UK top 30 law firms for document management, will ultimately be hosted both in the iManage elastic cloud with some on premises capability in order to meet client and jurisdictional requirements. Eversheds Sutherland International (ESI) has bought Threat Manager and Security Policy Manager, which were a standout feature for the selection team.

The design and implementation phase of the project will run throughout 2020.

Speaking to Legal IT Insider, IT director Will Jenkins said: “We really started in detail in around March or April last year with the objective of replacing our current DMS OpenText and making sure we have the right platform for the future to build as well as to grow and evolve.”

While ESI’s US business is an iManage customer (the transatlantic merger went live in February 2017) and that was inevitably a big factor in its favour, Jenkins says: “We evaluated the whole of the market, undertaking a full RFI, and as part of the process we tried to involve as many people from across the firm as possible. We received a huge amount of feedback from our practice groups and international operations team, our risk team, and our cyber security team and tried to make sure we fully evaluated the products. We were hugely keen to get buyer information from our lawyers and partners and make sure we had the right platform. We very much engaged with the business and the selection was very much in partnership with them.”

Included in the process was NetDocuments as well as lengthy consideration of a SharePoint/Office 365 document management system – ESI’s consulting business has developed a proprietary SharePoint DMS in conjunction with Repstor and for a long time the outside world suspected that this would be the direction the firm would go in while under the leadership of former IT head Andrew McManus. Jenkins, who took over from McManus following a team restructure, says that ultimately it was felt iManage was a better, more scalable solution for the needs of a global law firm.

The steering committee made the decision to go with iManage in around August or September last year and Jenkins adds: “Once we managed to shortlist the specific product, we’ve been making sure we have the right contractual arrangements in place.”

Eversheds becomes the latest international law firm to go with iManage and much like Clifford Chance, the decision-making process involved sponsors from across the firm. Jenkins says: “As part of the review we had a sponsor from each practice group and asked them for a review following demos.” Practice group sponsors were given a scoring system and all of the scores across practice groups were tallied up. The firm had a steering group sponsored by practice group head Paul Worth, but the group was ultimately sponsored by managing partner Keith Froud.

In terms of priorities, Jenkins said that the number one requirement was usability. “The way the iManage platform has evolved from the desktop and mobile has been great,” he said.

Second was ease of use. “For email filing we needed to make sure it could tie into existing systems,” Jenkins said.

Continued on page 2.
The extensive involvement of the firm in the DMS selection process is confirmation – as if we needed it – of the growth in status of technology in terms of law firm strategy.

The plan is to have multiple waves of go lives, with the US, Canada, UK, Middle East, Europe and Singapore going first. Dentons is still deciding whether to stagger the roll out across regions that have the biggest revenue or take a purely geographical approach.

Despite a push towards uniformity it is likely that there will be certain jurisdictions that remain on their current PMS, where adoption and market penetration of that system is high.

With regard to how that impacts upon analytics, Henri says: “We’re not just doing a software upgrade, we’re redesigning processes and taxonomies. It’s something we started a few years ago so there is more alignment around a common lexicon. We’re expanding our data warehouse and moving to an enterprise database, collecting more information from our regional platforms. We’re working with Pinnacle and Microsoft on reporting tools.”

The sheer volume of work involved in the five-year strategy is enough to make your eyes water and Dentons is in the process of rolling out Chrome River; a dev and test site in Azure, and SAP SuccessFactors for HR.

In January 2019 the firm signed a three-year deal with iManage that will see it adopt Work 10 globally. Henri said: “Our ‘law firm in a box’ hosted platform is helping us to onboard new regions. We’ve recently delivered iManage to Kenya, Hong Kong, Johannesburg Cape Town and Uganda. Next year it’s Colombia, Peru, Mauritius, and Barbados. We’ve done our first upgrade to version 10 at the front end and things are going well.”

While Dentons hasn’t selected the iManage Cloud, Henri said; “Every single new thing we’re doing is in the cloud in partnership with Microsoft. Our talent management will be SAP in the SAP cloud. In the future it’s very likely we will consider the iManage Cloud.” Henri doesn’t like the term ‘keep the lights on’ but it’s no surprise that the business as usual team is separate from the innovation team, headed by John Fernandez, who is looking to scale the team.
Henri says: “It’s difficult to mix church and state for security reasons: you need to have checks and controls.”

When we spoke to Henri in 2015 about Dentons’ growth strategy, he focussed on his mandate to pursue integration, and the firm was moving away from a regional support model towards operating along the lines of three global pillars. The first is the white glove client facing service to keep customers happy. The second is the business technology operations and ‘follow the sun.’ The third is business technology solutions – the innovation team and what tomorrow looks like.

On top of those pillars, which have been rebranded Connect, Scale and Innovate, Dentons has since added a fourth pillar: Engage.

Henri says: “We’re building this platform but it will only work if people engage with it. Every time we have a partner meeting it gets bigger and more successful but we need to find new ways to engage and maintain a dialogue.”

Bech-Bruun acquires d60 for digital launch

Leading Danish law firm Bech-Bruun is taking over the Danish software enterprise d60 and relaunching it as a partner-owned, independent company in order to accelerate the development of new digital solutions for clients. The name of the new company is .legal (as you might expect, pronounced “dot legal”).

Bech-Bruun’s plan is for .legal to become a vehicle in which to combine legal specialist knowledge with new technology. Digital legal solutions will be available on a subscription basis, irrespective of whether the buyer is a client at Bech-Bruun or another law firm.

d60 is headquartered in Aarhus and was co-founded in 2013 by CEO Brian Østberg. Østberg is in charge of sales in the new organisation, with Johannes Eyolf Aagaard heading delivery and Troels Richter development.

“TThe digitalisation provides us with a range of new possibilities to help our customers, also with their own internal legal work. Our foundation as one of the country’s largest law firms will naturally still be to deliver highly specialised legal advice, but the new element of our strategy is to develop digital solutions of a very high quality, ensuring that our customers get the maximum benefit from technologies such as artificial intelligence and machine learning”, says Christian Ejvin Andersen, managing director of Bech-Bruun.

Bech-Bruun has already entered the digital market with solutions such as BB SmartDraft, DPA Service and solutions through the software company Pactius.

CIO strategic priorities for 2020

We asked a handful of CIOs and IT directors what their top strategic priorities are for 2020. Here is what they have to say in a nutshell.

Charlotte Baldwin, chief digital and technology officer, Freshfields Bruckhaus Deringer

Regarding priorities, we have a really busy year coming up as we continue to invest in and drive forward our digital transformation, the following areas are definitely key for us:
- Commercialisation / launch of digital products and embedding product ownership and the product delivery lifecycle (PDLC) across the firm;
- Continue the relentless focus on elevating the people experience across the firm with the next phase of UX;
- 360-degree view of clients and digitalising the client experience, bringing together data, insights AI and the latest technology.

Andrew Brammer, IT and shared services director, Allen & Overy

We have three focus areas for 2020:
- Completing the global rollout of iManage 10 / RAVN search;
- Continuing to leverage legal tech to help our clients solve their business challenges;
- Maintaining our focus on information security.

Rick Howell, CIO, Perkins Coie

Our top strategic priorities for 2020 are:
- Grow revenue through the continued development of technology platforms and teams that support and enable portfolios of legal work with clients;
- Rationalize our technology around practice centric workflows that improve efficiency and predictability in legal work by completing some practice management platforms we have been working with our attorney teams to define in 2019;
- Simplify how we connect to legal and operational services and talent with a new experience and enterprise search initiative.

Andrew Powell, CIO, Macfarlanes

Our top three focus areas for the next year are:
- Information Security – never-ending updating of infosec strategy and implementation of controls, processes, training… and occasionally, technology;
- Cloud Adoption – the inevitable outcome of tactical planning around key services offered by the IT Team, how they are developed and maintained, and where the data should reside to best serve the firm and its clients;
- PMS – evaluation of the market, scoping the programme of work, and selection of new practice management system.

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Tony McKenna, Director of Information Technology, Gowling WLG

For us the three main priorities for the coming 18 months are:
- The move to elastic technologies to support the firm in the dynamic legal market we operate in;
- Continually improving the skills within our technology team to ensure we are best placed to work with our colleagues creating solutions/services to solve our clients’ problems;
- Continually improve the firm’s information security posture.

BlackBoiler patents underscore ‘solid IT strategy’

Towards the end of last year BlackBoiler announced that it has been issued several patents from the US Patent and Trademark Office (USPTO) for its AI-assisted contract review product which instantaneously revises contracts in track changes. The technology reduces the amount of time that lawyers and other professionals spend reviewing and marking up documents such as NDAs, service agreements, and other high-volume contracts.

The patents cover:
- A Method and System for Suggesting Revisions to an Electronic Document: A core component of BlackBoiler’s pre-execution technology for contract analysis. The technology suggests revisions to a document-under-analysis (DUA) and is part of a family of three patents as well as additional patent applications claiming this method.
- Systems, Methods, and Computer Program Products for a Clause Library: Houses and manages an organisation’s standard negotiation clauses, organised by contract domain.

These patents, which are quite broad, are said to underscore the significance of BlackBoiler’s IP and proprietary technology in the contract pre-execution space. Software patents are naturally controversial and, in the hands of some companies, can be a business in themselves. If you’re not familiar with the long running, and at times bitter, dispute between Litera and Workshare over metadata patents 7,895,276 and 8,060,575 it’s worth a look at some of the stories on our website - although of course those two organisations have subsequently merged.

Software innovation has benefited from the Supreme Court’s decision in Alice v CLS Bank - which found that an abstract idea can’t be patented just because it is implemented on a computer.

For example, escrow is not a patentable invention and so neither is using a computer to manage escrow debts.

Electric Frontier Foundation - which was one of the companies that asked the Supreme Court for a wider ruling on software patent eligibility in Alice - reports that R&D spending on software and internet development shot up by 27% in the wake of that decision just over five years ago.

We asked BlackBoiler’s CEO & co-founder Dan Broderick what the plan behind the patents is.

Are there existing vendors who will be affected and what is the plan now that BlackBoiler has these patents?

We don’t believe that other vendors are using automated editing technology. We’ve been told that the other major players in the space are employing marketing language that suggests they can automate editing but, in reality, they have a human in an offshore location that actually performs the work. Therefore, we don’t believe it impacts existing vendors.

We believe our IP is a valuable asset and we will continue to pursue additional IP protections, including imminent applications at the USPTO and pending PCT and European applications. It’s also important to note that BlackBoiler’s IP is not limited to the legal domain or to contracts more specifically. Our proprietary technology will work in any domain that experiences repetitive editing.

Are the patents susceptible to an Alice challenge?

Our claims are about transforming text from one state to another state, as opposed to other contract review products in the space that just compare text to text for similarity. Our patent application was issued based on the claim that our technology edits text based on a seed database of sample edited text.

Based on precedent established under Alice, some inventions’ basic thrust might more easily be understood as directed to an abstract idea. BlackBoiler’s patents are not directed at an abstract idea because they require specific features and these features improve upon existing document revision techniques. BlackBoiler’s invention is an improvement because it provides an automated method of suggesting edits to a document. Additionally, it does not merely take a fundamental practice and claim “apply it” on a computer. In contrast, tools that recognise, filter and compare certain text through mathematical correlations are abstract ideas because they are well-known functions that humans have always performed.
BigHand to appoint new CEO

BigHand’s private equity owner Bridgepoint is looking to fill the top management spot at the UK-headquartered company after the departure of former CEO Ian Churchill.

Churchill was brought in from Capita in 2015 in order to help BigHand diversify and move towards a multi-product strategy.

Since he took over BigHand has acquired DW Reporting (April 2018); Iphelion (August 2019); and PayneGroup (November 2019). As BigHand now focuses on growth in North America and Germany, developing and integrating its broader product suite, and pulling together its next five-year plan, it is understood that Bridgepoint is looking for a leader to take the company through its next growth stage.

Chief financial officer Sam Toulson, who has been with the company since 2014, is acting as interim CEO.

Charles Russell Speechlys "no immediate plans" to fill IT director role

Charles Russell Speechlys director of IT Duncan Eadie has left the UK top 50 law firm, which says it has no immediate plans to hire a replacement.

Head of IT Abba Abbaszadi is currently leading the team on an interim basis and a spokesperson for Charles Russell Speechlys told Legal IT Insider in December: "We have no immediate plans to fill the director of IT role."

They added: “Our new managing partner takes over in January and it is likely that we will look at our strategy for the IT team then.”

Restructuring and insolvency partner Simon Ridpath is taking over the managing partner role from James Carter, having been elected this summer. He will start by working closely with Carter and will formally take over the role in May 2020.

Eadie took over as director of IT in June 2018 following the departure of Robert Cohen in October 2017.

He came under fire in Roll on Friday in January after writing what the publication described as ‘anti-IT musings’ that ‘royally pissed off his own IT team’.

Writing for Legal IT Today, in an article called ‘Is technology making the IT department redundant,’ Eadie said: "As technologists we take pride in being the instigators of change in an organisation, and become frustrated when we meet resistance. ‘I’m too busy for that,’ ‘Why do we have to change?’ and ‘We’re fine as we are’ are phrases we often hear. But are these same change resistant comments now emanating from the IT function itself?"

He also warned that the typical law firm IT team "of the near future is likely to change its shape", which will affect "probably about 20 per cent of your team’s headcount".

RoF said that the piece was circulated across the firm and sent to IT staff, which caused “mutiny”.

Ok the headline is a bit unfortunate, coming as it did just before Christmas. But while Roll on Friday appeared to take side with ‘insiders’ who were unhappy with the piece, Eadie’s opinion piece makes some sense – shouldn’t IT teams who are clinging on to the status quo spend more time skills training and strategic planning for the changes coming? Asking for a friend.

MS launches O365 KM service, and it’s big

This admittedly falls under ‘one that we meant to write about earlier’ but it’s worth noting now that Microsoft in November unveiled Project Cortex, the first new service in Microsoft 365 since the launch of Microsoft Teams, which uses AI to capture content, extract information and automatically tag content.

Cortex recognises content types, extracts information and organises content into shared topics like projects, products, processes and customers. It then creates a knowledge network based on relationships among topic, content and people.

Sound exciting? It is. One person in the Microsoft press release even called it a “game-changer”, which usually gets everyone very upset in the legal sector, so we mostly avoid using that term. But it’s big.

Project Cortex securely collects content that is created and shared every day in Microsoft 365 - including files, conversations, recorded meetings and video - and it categorises the content based on its type and tags it with extracted metadata.

Advanced cognitive services capture content, extract information and automatically tag content.

- Image and text recognition identifies objects in scanned or uploaded images based on an understanding of over 10,000 attributes, and extracts text from images and PDFs.
- Forms processing enables you to pinpoint important information in forms and extract that information as metadata. So, for example, you can establish a rule to automatically tag contract effective dates by analysing the text of sample documents.
- Machine teaching, powered by LUIS ("Language Understanding Intelligent Service"), lets experts train the AI to recognise information in unstructured documents, such as contracts, proposals or training materials, which might have varied content and formatting.

Speaking to Legal IT Insider, Sheila Gormley, co-founder and director of business development for enterprise content management provider Repstor, said: “We’re very excited about it. Organisations will be able to look at their information across the organisation with the ability to also look at connected external systems and use AI to extract topics that are important to the organisation and for each topic understand the topics and workspaces for that topic.”

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“The nice thing is that it’s global. It looks at all your content and automatically uses AI but it is locked down to the permission of the user. It means that you can view topics that are important to the organisation. You can see the relevant information and the people involved.

“The other thing they have done is allow curated content to be submitted, so if you’re accessing something particularly relevant to a legal scenario you can submit it to the knowledge platform.”

Repstor’s chief technology officer Fergus Wilson told us: “This is really leveraging AI. Not just content from SharePoint or the document management system but it can be Teams: it’s really bringing that whole thing together. Nobody can compete with the investment that Microsoft is making - it’s about proactively pushing content out to people at the right time.”

You have to have Office 365 but Microsoft haven’t announced details around the licensing yet. Gormley said: “I remember going to a SharePoint conference years ago and it was incredibly disappointing that people weren’t moving to O365 but now it’s happening whether people want to or not.”

Wilson said: “The other part of the announcement is around AI in the documents: you can train the AI model against incoming documents in a way that you can extract concepts and properties - it’s going to be huge. You’re getting to the stage where you can extract information about clauses at the document level even if they are unstructured. That’s built into the platform.”

Cortex is aimed at enterprises who will obviously need to decide what level of licensing they buy.

Speaking to Legal IT Insider about the new release, industry consultant Neil Cameron said: “This new initiative from Microsoft - 365 Cortex - threatens to add AI-driven analysis and ‘understanding’ to all your Office 365 document-type’s content. They call this ‘knowledge’ - and for free. If it truly does this, better than (say) an animated paper clip - then, depending on performance and delivery (especially ‘push’) it may then challenge all vendors currently charging for this functionality to add yet more value. It may also fuel a whole new population of KM start-ups; furthermore, existing vendors will also have to decide the extent to which they want to build on, co-exist or compete with this new technology. As Joe used to say to dear old Pip, ‘wot larks, eh?!’

PwC rolls out BRYTER in Europe

Several PwC Legal entities in Europe are rolling out BRYTER’s no-code automation platform with a view to allowing their lawyers to automate complex legal workflows without any programming knowledge.

Christian Oehner, managing partner of PwC Legal Austria and new global legal tech leader of PwC said: “No-code platforms close the gap between legal professionals and product development teams and – more importantly – to the clients.”

It’s still not a scenario favoured by many law firm IT heads, who point out that even ‘no-code’ products need ongoing management and in many cases significant effort surrounding adoption. Creating a product is just the beginning. There is also an ongoing debate over whether costly lawyer time is best spent on product development, but here law firm leaders such as Hogan Lovells’ head of innovation Stephen Allen attest that BRYTER really is as easy to use as it says on the tin.

Guenter Dobrauz, partner and leader of PwC Legal Switzerland said: “Using BRYTER, we will be able to further accelerate, facilitate and drive the delivery of high-quality consulting services forged with interactive applications. We constantly work on enhancing our legal services as a firm and working with no-code platforms is the next piece in the puzzle.”

The proof will be in the pudding, and we look forward to hearing more a few months down the line. We first flagged the PwC rollout in brief in November, when BRYTER announced a $6m late seed funding round.

For more details on Oehner’s appointment as global legal tech leader see here: https://legaltechnology.com/latest-news/latest-legal-tech-hires/

You were only supposed to blow the doors off: We speak to BLM’s data science team

If you say you’ve had a discussion with a law firm data science team, then in the UK that can currently only really mean less than a handful of law firms, the grandfather of which is BLM, an insurance specialist firm at the vanguard of using data to create client solutions.

Which is why we ended up at BLM’s London office to meet with head of analytics Andrew Dunkley, business improvement director Adrian Spencer and their growing team to talk about the trials and tribulations of learning the hard way how not to form a data science team. The article appeared online in January and if you haven’t read it yet it’s worth a read - you can find it on the Legal IT Insider site here: https://legaltechnology.com/latest-news/you-were-only-supposed-to-blow-the-doors-off-we-speak-to-blms-data-science-team/
Latest legal IT news highlights

JCP Solicitors invests six-figure sum in PracticeEvolve

JCP Solicitors, which employs around 215 staff in nine offices across South Wales, has joined PracticeEvolve’s growing list of UK clients.

In a six-figure deal JCP will replace its Advanced Legal Enterprise solution with PracticeEvolve, incorporating legal accounts, workflow, document management and CRM functions.

Business resources manager at JCP Solicitors, Denise Warlow said: “It was important to us that we found a solution that we can continue to develop ourselves in-house. After a detailed selection process, which included time spent evaluating a test system, it was very much apparent that this is a robust and feature rich solution that is highly configurable, easy to use and would enable us to operate seamlessly.”

Portsmouth City Council’s (PCC) Legal Service is going to market to procure a legal case management, document and time recording system to manage the council’s legal caseload and day-to-day working performance of its legal team.

It follows a market consultation ending 29 January. PCC is about to consider the appropriate route to market and may conduct a full tender in order to select a supplier(s).

You can access the questionnaire here: https://tendhost.co.uk/portsmouthcc/aspx/

Birketts selects Peppermint CX365 case and matter management

Following a selection process that began around eight months ago, UK top 100 regional law firm Birketts has selected Peppermint Technology’s CX365 cloud-based case and matter management module, which integrates Microsoft Dynamics 365. We understand that Birketts is to swap out DPS Software, which it selected in 2015 as part of an integrated case and practice management offering with Aderant. DPS says it will be retained for plot sales. We’ll keep you posted.

Birketts are based in the East of England delivering a full range of expert legal advice on corporate and commercial, commercial property, dispute resolution and private client issues.

Peppermint’s Microsoft cloud-based tech will enable native integration with Office 365, including Outlook, and will also be fully integrated with iManage 10. Part of the appeal of the Peppermint CX365 platform is that it will facilitate the use of automated workflows and templates.

Central Intelligence: Foundation Software sees sharp Am Law 100 growth trajectory

Data integration platform Foundation Software Group says that one third of the Am Law 100 have now selected Foundation as their strategic solution for experience management, expertise location, and client development.

In November 2017 Foundation was working with 12 of the largest US law firms.

The next metric we have on record is at the start of 2019, when Foundation Software told us it was working with around 21 of the top 100 US law firms. The clients we listed at the time were Akin Gump, Baker Botts, Blank Rome, Duane Morris, Hunton Andrews Kurth, McGuire Woods, Orrick, Pillsbury, Seyfarth, Sidney Austin, Skadden, and Troutman Sanders.

Global research project to assess "the state of the global legal tech industry"

Legal technology associations across the globe are collaborating to conduct a worldwide research project to assess the state of the global Legal Tech industry.

The research is an initiative of the Australian Legal Technology Association (ALTA) and Alpha Creates, backed by research sponsors Macquarie, KPMG and the Law Society of England and Wales and Toro Digital.

Participating associations include the International Legal Technology Association (ILTA), the European Legal Tech Association (ELTA), the UK Legal Tech Association (UKLTA), ASEAN Legal Tech (ALT) and Legal Tech NZ (LTNZ).

While the report first appeared to be very much focussed on the startup world, according to Stevie Ghiassi, one of the founders of the ALTA, it’s remit will be wider, so we’ll keep you updated.

Juro to launch in the US following latest funding round

Juro is set to launch in the United States following the 2016-founded contract management platform’s $5m Series A round led by New York-based VC Union Square Ventures.

USV – the early backers of Twitter, Twilio, Etsy and Kickstarter – has previously invested in legal research platform Casetext but this is its first UK investment for years.

While the investment will fuel Juro’s growth from its London and Riga offices, CEO and co-founder Richard Mabey told Legal IT Insider that Juro has immediate plans to hire in the US. Asked how much of a factor the ability of USV to support US growth was, Mabey told us: “It was quite a factor. Our customers operate all over the world but in the United States the legal market is larger than the rest of world combined and there is a lot demand among the types of companies we work with – often fast growing technology companies – because of the pain being experienced by them in the contracting process. That pain is often compounded by the volume of contracts they are handling. If you are a fast-growing VC-backed mid-market scale up pre or post IPO the volume of contracts you are handling is large and you really can’t do without automation.”
ELTA takes Europe by the horns

It was a notably thoughtful and enthusiastic group that assembled for the second European Legal Technology Association congress in November, where the topics discussed included the ethics of AI and the future of the legal market, with my own all female panel considering how to convert lawyers to the religion of legal technology and innovation.

Hosted in Madrid, the conference kicked off on day one just for ELTA members at the offices of Eversheds Sutherland, where the last couple of sessions saw the ethics of AI come under the microscope and Ramak Molavi of the Law Technologist ask: “In future will it be the case that the less wealthy will contact a chatbot and the more wealthy a lawyer? If not, we need to think about how to do things differently because this is already something that we’re observing.”

I’d say that there is a strong argument that many people currently have no access to justice at all and technology may change that, but what was perhaps most interesting was how front and centre the topic of ethics was to this conference of vendors and law firms.

ELTA takes its lead in part from the large focus on ethics by the European Union, where the president elect of the EU commission, Ursula von der Leyen has said that in the first 100 days of her term she will put forward a team to analyse the impact of AI and prioritise investment.

Contractual public-private partnerships, which bring together large European players and SMEs, are an important instrument under the current EU European Research and Innovation Programme, Horizon 2020, and one of the 10 cPPPs is on big data/AI.

The cPPP will mobilise stakeholders in society, industry, academia and research to work towards a Big Data economy, supporting and boosting agile business actors, delivering products, services and technology, and providing highly skilled data engineers, scientists and practitioners along the entire Big Data Value chain.

Particular attention has been given to create an open environment with opportunities for involvement of SMEs, SME associations, web entrepreneurs and start-ups.

The total budget devoted to the data PPP is around €500 million in Horizon 2020. This is expected to trigger an additional private investment in the ratio of 4:1 (i.e. around €2bn).

ELTA as an organisation is conscious that its community has some catching up to do and many of the panel discussion were fairly high level but Molavi, again striking a note of realism in one of my favourite quotes of the conference, observed: “Law firms are falling into the technical solution trap - they think all problems can be solved by technology. Maybe the issue is operational, or they need a new business model or better communication. Our digital projects are 80% nothing to do with technology. It’s about changing the mindset. A solution searching for a problem is not what we want.”

At the meeting at Eversheds, the president of the Barcelona Bar Association, Maria Eugenia Gay, and ELTA president Tobias Heinling, signed the Barcelona Citizens Rights in the Digital Era Charter proposed by Gay.

Gay’s speech welcoming the bill focussed on the dangers of technology if left unchecked, and she commented: “We can use AI to ward off human rights violation, but the digital age raises huge issues, including bullying and even ethnic cleansing. Safeguards around privacy are failing. As the digital revolution continues to unfold, states can identify individuals and AI systems can categorise people and predict their future medical conditions and suitability of jobs or even their likelihood of offending, which can affect their access to healthcare and financial services.

“People most heavily impacted are likely to be at the margins. It drives us back to the fundamental principle of human right to privacy, health, and liberty: each person has the right to life. To respect that, we must ensure the digital revolution is serving the people and not the other way around. Data is power and big data is big power and it is capable of being misused. A framework is needed to ensure checks and balances. We must demand from government policies with the full range of privacy and control over personal data. Technology can only be positive if it places the individual first.”

ELTA has grown to nearly 300 delegates of which there were a great mix of law firms in attendance, including solo practitioners.

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It felt as though the largest European firms were missing, which is a shame, as their influence and experience is needed.

Heining noted to members at the start of the congress: “There is a fear among lawyers of being marginalised by technology.”

They are right to be fearful – in my opinion it helps no-one to pretend that technology will not have an impact even if, at first, around the margins. What is extremely positive is that ELTA, which at first appeared at risk of being a European only echo chamber, is embracing partnerships with the like of the International Legal Technology Association (ILTA).

It was symbolic that the first day for all attendees kicked off on 21 November at CEU San Pablo University with a panel called ‘The future of the legal market: the vision of the associations’ where ILTA’s VP of education, Marti Phillips, was on the panel alongside Marcus Schmitt from the European Company Lawyers Association; and Simon Warr from RIAD (rebranded as the International Association of Legal Protection Insurance.)

ILTA may have once regarded ELTA as a competitor but under the helm of CEO Joy Heath Rush, is rightly focussed on the holistic interests of the legal sector and it is in the interest of the sector that there is collaboration, not competition, between the two organisations.

Phillips shared the top three trends of ILTA’s most recent annual technology survey. “Focus on the people side of change – there’s a lot of change and disruption and the number one issue is change management,” she said. “You can buy the most expensive software but if your people don’t use it, it’s nothing. Get people on board.”

Cloud strategy came out second and Phillips said: “It’s not if but when. Some of the issues are from your GCs and their security requirements. You need to ask how they want to interact with you and what specifically they mean by you can’t use the cloud.”

Last but not least, ask yourself what business problem you’re solving. For the client, that is all that matters. See below Phillips takeaways from the conference.

Focusing on the client’s needs was a theme picked up by KPMG’s global head of technology strategy, Sebastian Hartmann, who on a panel discussion called ‘the vision of the technology providers and the firms’ said that KPMG has changed its entire business model to be solutions led. KPMG’s law firm has the highest growth rate of any firm in Germany in the top 25, Hartmann said, adding: “We have managed to overcome a challenge that many professional services firms have not. We’ve put aside the drag of keeping experts busy.

Phillips shared the top three trends of ILTA’s most recent annual technology survey. “Focus on the people side of change – there’s a lot of change and disruption and the number one issue is change management,” she said. “You can buy the most expensive software but if your people don’t use it, it’s nothing. Get people on board.”

Cloud strategy came out second and Phillips said: “It’s not if but when. Some of the issues are from your GCs and their security requirements. You need to ask how they want to interact with you and what specifically they mean by you can’t use the cloud.”

Last but not least, ask yourself what business problem you’re solving. For the client, that is all that matters. See below Phillips takeaways from the conference.

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"Client-centric thinking is not in lawyers’ DNA – it used to be just knowing something that made you a great lawyer. You can still be proud of that but that’s not necessarily what helps the client. We have changed our entire business structure to become solutions led.”

In a keynote Chantal Vermeire ran through the key findings of Wolters Kluwer’s Future Ready Lawyer survey – for me one of the most interesting findings was the correlation between the use of technology and profitability and you can read that survey in full here: https://landing-legisway.wolterskluwer.com/2019-future-ready-lawyer-report-legal-departments

However, my favourite keynote of the conference came from Jim Leason, who told delegates: “I’m going to bring you crashing down to what it will take for RPA and analytics to take effect. The pace of change is slow. Lawyers still like books.”

Leason’s slides showed the outcome of research by TR and Legal Geek into investment into the active legaltech startup ecosystem, where since 2014 €466m has been invested into 94 startups.

A lot of that investment is going into the contract world and the risk world. 80% of the investment has gone into 20 startups, of which a large chunk is Tessian.

Leason gave us a sneak peek at TR’s Finance Director report for 2019, which revealed that pressure on revenue is beginning to put pressure on the law firm business model. “There is an influx of legal project management and pricing roles,” Leason said, “with the purpose of looking at process improvement. Finance directors want lawyers to start standardising what they are doing and getting a grip on the cost of delivery.”

What are these people doing? “Mapping processes and understanding end to end flow. Thinking who is involved in what task. Starting to map tasks. Thinking about the type of knowledge and data.”

Firms’ ambitions around RPA and automation are impossible if they don’t start thinking about systems of record and common data standards and Leason said: “Don’t buy anything without an API.”

In a quote that I shared on LinkedIn that generated significant interest and widespread agreement, Leason said: “Tech teams are overwhelmed by point solutions. Overwhelmed by lawyers who have seen the latest magic bullet. And automation is not possible until firms really start understanding and mapping their processes.” See below some of the reactions.

My own panel focussed on how to convert lawyers to the legal tech and innovation religion. With me on the panel were Caroline Chetrit from Consulegis; Veronika Voinovian from the AnthropoLawGist and Orsolya Gorgenyi who is a partner at Hungarian firm Szecskay Attorneys and a representative for ELTA Hungary.

Voinovian has until recently advised the management of Borenius in Russia on strategy and talked to the audience about Larry Richards research into how lawyers demonstrate psychological barriers to change.

The study is worth a look and there wasn’t time to go into a huge amount of detail but Voinovian outlined the way in which Richards identifies traits in which lawyers depart from the norm and said: “The practical steps to innovation start with self-awareness and development of personal effectiveness skills.”

Gorgenyi works with young lawyers and asked delegates to focus on skills development while I challenged them on the notion that lawyers don’t like technology – they don’t like LEGAL technology, and as vendors get better at engaging the end user in iterative beta testing firms should embrace that. Firms should also, I said on the panel, create multi-disciplinary teams that can learn from one another.

All in all the conference was extremely well received and praise is due to new board member Maria Jesus González-Espejo. I was in awe of the fact that at this English-speaking conference, English is a second language for most delegates. There is no doubt that having a common language is something that has helped the UK, United States and Australia communicate and push along their technology agenda and European firms would – at the risk of sounding like an awful Anglophile – do well to think about how they communicate their efforts to the outside world.

See online at legaltechnology.com for ELTA key takeaways from attendees of the conference.

Clifford Chance publishes first scientific paper in data science for legal

Clifford Chance’s data science lab has published what we understand to be the first scientific paper in data science for legal. The paper looks at long length legal supervised document classification, the limitations that the current models impose on the length of the input text, and how to improve the results.

The paper is posted by head of data science Mirko Bernardoni; data scientist George Papageorgiou; senior machine learning engineer consultant Michael Seddon; and data scientist Lulu Wan.

Speaking to Legal IT Insider, Bernardoni, said: “When you do a LIBOR exercise or Brexit or banking you always end up as a lawyer working with hundreds of thousands of documents. Often, it’s a nightmare. You end up with so many different files. For example, in a syndicated loan it might be running for 10 years and you might have 10 different files. Probably the first problem you’re trying to solve is having the relevant documents and files grouped so that you can use machine learning tools for entity extraction.

“In this paper we focus on that initial phase: I have a huge number of documents; I have no idea where they are; what I want to identify is a syndicated loan, which is a different type of loan. I’m not going to look in the file name but within the content and we need to categorise that.”

You can read the article here: http://tiny.cc/omtcjz
Comment: The barriers to technology investment

We speak to four senior technology and innovation leaders about the partnership model and the real barriers to investment.

In November I spoke at a conference of senior corporate counsel where I strongly recommended that instead of asking their legal advisers “How are you innovating” they ask “How are you creating an environment in which innovation can survive and thrive” - for me, that’s the partnership model, or, for that matter, any practice that uses the billable hour, which, by its nature, rewards inefficiency.

But how do those involved at the coal face see the partnership model when it comes to investing in new technology? While no-one would argue that the model would be first choice for any technologist, here are four law firm heads giving their inside views on the real barriers to investment.

Bas Boris Visser, global head of innovation and business change, Clifford Chance

Obviously, the partnership model isn’t the one you’d have invented to invest in new technology. The starting point is a complicated one.

At the same time, in real life experience, the appetite of the firm to invest in technology and new ways of working and innovation in best delivery practices is very good considering that difficult starting point.

The flexibility we have today to do things like setting up our legal tech venture, Clifford Chance Applied Solutions Ltd, is evidence that the firm is prepared to make a substantial investment in technology and new business models where the return is more longer term rather than expecting an immediate return.

Typically, law firms look at short-term income but here people have accepted that if the current owners want to leave the firm in a better shape than they found it we need to invest in new ways of working and technology. We’ve invested a lot and we are convinced that the way forward is to create the right combination of our current unique selling points like e.g. outstanding legal expertise, proven experience in highly complex matters, global reach and deep long-standing client relationships with a superior way of service delivery where we always find the right resource for the right work whether that is legal technology, legal project management, data management, our service delivery centres or a highly experienced partner.

Clients are increasingly vocal about the changes they expect and increasingly team up to get more value out of the firm. They are helping each other to get better value - organisations such as CLOC are very powerful. In the past, the clients operated more on their own but that is often not the case now and they are understandably more demanding. Legal departments are being held accountable for risk and face cost pressures and more and more legal operations roles exist. We need to help our clients deal with these challenges and create more value for them.

Our best delivery programme is transforming the way we work now and this is where we invest most. We need to make sure we also invest in those areas which are further out and where it is harder to define the benefits.

In the area of legal tech solutions I sometimes wonder if the clients sufficiently benefit from the great opportunity that technology offers. The reality is that clients sometimes find it difficult to see the value of certain technologies. The benefits of a certain app need to be very substantial for it to justify a client going through a lengthy cybersecurity protocol and other adoption procedures.

With innovation levels up substantially across the board in the legal sectors clients are now also being offered such a wide variety of tech solutions from their law firms and this makes it quite confusing for clients and that stands in the way of wider adoption of technology on transactions. So as providers of legal services we need to collaborate much more to come to more standardisation around our technology offering. The tech solution is not the differentiator. It is a more cost-efficient and better process that it can result in. We need to make sure that the client actually benefits from the great opportunity that technology brings.

Related to these adoption stumbling blocks we will see much more consolidation in the legal tech market and I expect that, for every application type, only a relatively limited number of dominant players will remain over time.
We will move to a model where, rather than looking at point solutions (so due diligence in an M&A transaction or the closing checklist on a financing deal), we will move to the redesigning of end-to-end of transactions. Not just make some of the process better but the entire experience. The technology companies will want to play their part in this process and will look at what different type of tech solutions can be used on one transaction type and then try to make sure that they can offer as many of these solutions from one integrated technology platform. Such an integrated technology platform will help us a lot when it comes to redesigning end-to-end transactions and it will drive adoption of legal tech by clients and legal service providers. It will enable us to run transactions much more efficiently and better which will result in more value for clients and optimising the way of working for our people.

Haig Tyler, chief information officer, Herbert Smith Freehills

The idea of the partnership blocking investment is a very negative way of looking at it. I have been in legal for over seven years so can’t say I’m new any more but more of my career has been spent outside of legal and I wouldn’t say the partnership model (around investment) is different to the public sector or any corporation.

One of the most important things we’ve been focusing on is engagement and alignment. Whatever it is we do, whatever initiative it is we’re working on, we have people who know the business or who are clients who are driving and wanting that change. One of the biggest door openers with any technology or digital activity is that it must have that buy in, but also alignment to solving a business problem or opening up a business opportunity. Getting that connection as high up as possible and aligning to the strategic initiatives of the firm is very important.

Whatever we do is underpinned with an agile methodology. What is critical in any agile change and transformation is the product owner. This will be an accountable individual and business person who then feels they have their hands on the steering wheel. All of these things take time to achieve but we do that and do it well, which makes a huge difference to adoption.

When I entered this industry, people said “You won’t get money to invest” but I’ve not knowingly failed to get investment. We do have funding made available. Some is allocated. Some is more centralised.

We introduced last year an executive level prioritisation activity which recognises the ability to change our direction with a nudge of the tiller. So what we’ve done is ripple agile to the top. There are a number of members of the executive and practice leaders who help us make those decisions, and part of that is investment. Like most organisations, we have a gradually evolving backlog of activity and regularly prioritising that enables us to say that prioritisation goes right to the top, which sends out a very strong signal.

What’s positive is the level of engaged conversation among very senior people who wouldn’t normally be involved in these kinds of decisions.

In terms of investment priorities, the security piece is very straightforward. There’s also a lot of security turbulence - when you think of the number of times you have to update the software on phones and imagine then what that means for law firms’ big systems - it’s a huge challenge constantly happening in the background.

There’s also an awful lot around AI. There is learned AI and then basic pattern matching, which computers have been doing for years: it’s hard to distinguish where the real value is. Still, there’s a tremendous amount of interest because it has such high promise but we’re all switched on to the fact that we have to give the tyres a good kick to work out if it does what it says it does.

Jane Challoner, director of innovation and knowledge, CMS

If you’d asked me about the impact of the partnership model on investment three years ago I would have been more down beat but it’s changing, and that’s for two reasons. First, because a few years ago when we were looking at what might be happening and the level of investment needed I would have assumed that it would be much higher. Secondly, the partners now see that this type of investment is table stakes for a future-facing firm.

When the legal tech boom started we presumed that it would spiral much faster than it has and the level of investment required just to keep up, on top of existing costs like document automation and eDiscovery, would go off the charts and there would be an issue over how we would finance it. But for the majority of law firms that requirement is not really there yet. There is lots going on, legal tech teams and new roles being recruited plus lots of engagement with the legal tech vendors for both pilots and roll-outs but very little of this, to date, is on a scale that firms don’t have the wherewithal to finance - just as they have financed any other increasing operational spend over the years.

At a practice group level it can still be a challenge to tell senior partners that “We think we should support X technology or new approach” and get them to put it in their budget. Each market and jurisdiction has its own dynamics. But at the senior level at CMS, both our chairman (Pierre-Sébastien Thill) and executive partner (Duncan Weston) couldn’t be more into tech if they tried. They, and our executive committee, are working on an aggressive digital strategy.

Sometimes it’s easier for the more senior partners to see things at a strategic level (they don’t always have the hours/work pressure of the younger partners) and they see that embracing technology for CMS isn’t an aspiration, it’s absolutely essential. On the other hand, the younger partners are quickly embracing tools that give them immediate benefits in their day to day work.
Duncan Weston is firmly of the view that there will be further market consolidation and that a technology-enabled business model will define who is in the global elite. Management enthusiasm and know-how is absolutely vital to bring the rest of the partnership along.

While we have a different model to other sectors, our strict approach to budgeting and investment means that, when we do invest, we have to think carefully about what we’re doing and why, whereas in other sectors where they don’t have the partnership constraint an awful lot of money can be wasted. Companies often have reserve pools and there’s an attitude of “If I don’t spend it this year, I won’t get it next year”. So, often they have relatively little to show for the money spent.

Despite the vast amount of noise in legal tech there are still some questions about what is really delivering value for law firms - what is moving the dial. One reason why law firms are not spending more is the relative immaturity of the tech and vendors available. Too many headline products are just interoperable point solutions that only work really well in English. This is an issue for the larger global firms. There’s also still a huge amount of innovation by press release.

A fundamental problem with the various AI tools on offer is that we would love to have one clear winner so that the resource we invest is not at risk of being wasted. There are only so many things it’s going to do out of the box so you are going to have to pre-train the product - to do this well ideally you need a team that has worked with this type of tool. The firms that have made the most headway are those that have the most repetitive workstreams so it’s worth their while spending the time. But often firms don’t have a sufficient volume or the use case that comes up doesn’t give us enough time to get the necessary training done. If there was one dominant product and it worked much better out of the box (and you didn’t worry that the vendor would go under or get bought up) we would be more likely to invest.

The billable hour might have been an issue historically for tech investment centred on driving productivity but some of our practices and sectors now do very little purely on the billable hour. A lot of our legal tech focus has other client benefits beyond cost reduction e.g. it accelerates transaction time so you can do the deal faster. It may not be cheaper but the benefits the client cares about are doing the deal very quickly or with less risk. Workshare Transact, for example, allows you to reduce the risk of mistakes in a completion and you have a full bible ASAP. A solution like Lexis Draft lets you pick up minor errors. Our many legal apps give us a new way to provide advice at the point of need. These might not be earth-shattering benefits but that they still really improve service delivery. Collaborative products are also really attractive to both clients and lawyers, given the deluge of emails we all face and the swing to mobile working.

Having your own ALSP is something I’m watching closely but some have flashed and fizzed. Where you have a really strong personality with a vision driving it or a particular use case it can work brilliantly but what happens when that person leaves or you have no real burning platform?

Ben McGuire, innovation and business change director, Simmons & Simmons

Blaming the partnership model for a lack of investment in technology is an over-simplification: there are many variables that make technology adoption tricky and effecting change is difficult for a number of reasons.

One of the biggest barriers is the technology estate of law firms - it’s no secret that law firms haven’t invested a lot over the last 10 to 15 years so they have a bit of catching up to do. Some are more advanced than others, and while I would count Simmons amongst these, that remains a challenge for us.

Coupled with that, a lot of the technology platforms on offer remain fairly immature. Also, they are point solutions and they are built based on assumptions of our estate and information that isn’t necessarily true, but also on assumptions of the way we work or the market we operate in that aren’t accurate - they don’t recognise the different levels of market and demand.

The fact they are point solutions and don’t speak to each other means that interoperability sits with us, the buyer, and that’s a further barrier; not insurmountable but it slows the process.

My team supports extremely complex transactions which require several technology solutions and the burden sits with the law firms to stitch platforms together. If those solutions are not capable of being easily integrated then that slows the process further.

Blaming the partnership model assumes that partners do not wish to change their firms and the sector for the better - this is not my experience at all. The partners I work with want to deliver the best service possible to clients and totally recognise the requirement to change.

An example of this is our service excellence program that has seen all our fee-earners across all our offices in the network undergoing training designed for their practice group and market to create standardisation in how we plan and scope and review work and the tools that allow them to do that. While this training was designed and its delivery supported by my team, it was led by partners.

Law firms, clients and third party providers all share responsibility for effecting change and we need to collectively address the barriers to adoption and new ways of working in each of our organisations: for me the core of this debate is how we value legal services and the solution will be found here - we are wasting our time if we focus solely on a single structural aspect of our market, such as the partnership model, without looking at how we most effectively work together to create value.

The partnership model does have an effect on the way we train and mentor and one thing we need to be wary of is continually creating new lawyers that are a facsimile of their mentors/supervisors: I work in innovation and change and I’m looking for new streams of value, not just new skills, but people who think differently and have the freedom and tools to do so. That can be hard to effect after five years of training and partner supervision that is based solely on the incumbent populations’ experience.
What’s Hot & What’s Not: Wins & Deals

UK & EMEA  Tikit have had a great start to the year. Leading regional law firm, Coffin Mew, have adopted their Practice and Case Management Solution, P4W, for their user base of 200. As have East Midlands based Straw and Pearce, for 60 of their employees, and Timms Law, for 67 of their users. Both the firms will be utilising the comprehensive legal aid functionality provided by system. Warner’s Law user base of 131 employees will also be adopting P4W, as well as Tikit’s CRM system; Tikit Connect.

UK railway owner and manager Network Rail has selected Office 365-based legal matter management solution Custodian for Legal from Repstor in collaboration with Konexo Global, Eversheds Sutherland’s newly rebranded alternative legal and compliance services division. Formerly marketed by Eversheds Sutherland as ES Unity, Network Rail will use the system across its legal team for everyday matter lifecycle management. It said that it chose the software because it delivered the legal matter management and collaboration functionality that it needed on top of the Office 365 platform, which Network Rail has re-cently invested in company-wide. The company was also keen to exploit Microsoft Teams. As well as structuring the way people store and access documents, Custodian for Legal provides Network Rail with mat-ter-centric document and email management as well as matter lifecycle management from intake and triage. Commenting on the Network Rail win and the wider success of the Rep-stor-Konexo alliance, Graham Richardson, head of Konexo Global and a partner in Ever-sheds Sutherland, said: “This is yet another prestigious win for Custodian for Legal, coincid-ing with our rebranding and the launch of the new Konexo web site. Our partnership with Repstor continues to go from strength to strength, and this is down not just to our com-bined commitment to solving practical everyday productivity issues for in-house and pri-vate legal teams, but also the shift in the market to technology-enabled service efficiency. In the digital age, legal departments need to move with the times to meet business targets and add new value for clients. Custodian for Legal helps them do that.” Sheila Gormley, director of business development at Repstor, added: “We are immensely proud of our af-filiation with Konexo and excited about the next chapter as Konexo expands its alternative legal services business, which puts technology right at the heart of service transformation. We’re doing some great business together, and the future looks bright for our powerful joint proposition in Custodian for Legal. We continue to invest heavily in our Custodian platform, in line with evolving market needs and advances in technology. For instance, clients can now access Repstor Mobile, while Custodian for Microsoft Teams allows users to exploit the full potential of MS Teams in a controlled, manageable way, without risk of undermining organisations’ information compliance controls.”

In a big UK win for FileTrail, 300-lawyer firm Keystone Law has selected GPS Policy Management tool to automate records retention in compliance with the GDPR. The EU’s General Data Protection Regulation requires that organisations keep personal data only so long as it is necessary for the purposes of pro-cessing it. While most law firms have taken steps to destroy data they no longer need, the ongoing process of tracking how long information should be retained and confirming when it should be disposed can be time-consuming and subject to error, particularly as the volume of data stored by law firms continues to grow. Keystone Law, a UK top 140 firm which uses NetDocuments as its docu-ment management system, selected FileTrail GPS Policy Management after eval-uating several options for automating records retention and disposition for GDPR compliance. “As an agile law firm we’ve worked to automate business processes wherever we can. After reviewing several products, it was clear that FileTrail provided the best solution for automating document retention,” said Maurice Tunney, director of technology and innovation at Keystone Law. “FileTrail is user-friendly, flexible and configurable, and we were impressed with how well it integrates with NetDocuments.” FileTrail GPS automates work-flows to enforce information governance and retention policies on an ongoing basis.
The Liberate Outlook add-in will provide access to matters, matter history and emails / document production without the need to leave Outlook. “Thirsk Winton completely understands the business benefits of cloud technology and is judiciously developing its IT infrastructure on that basis,” commented Jon Wainwright, sales director of Ascertus Limited. “This kind of forward-thinking outlook will benefit the firm as cloud-based solutions are fast becoming the norm. With a reduced need to incur capital expenditure, the new system will genuinely give Thirsk Winton the flexibility and agility to grow, in keeping with its ambitious business development strategy.”

City of London law firm Ashurst has formally launched a new flexible resourcing platform, Ashurst Advance Reach, working in collaboration with law companies Cognia Law and Elevate. The move sees Ashurst piece together the in-integrated client service ranging from top end legal advice to alternative managed legal services. It builds on the existing capability of Ashurst Advance Delivery, the firm’s own Glasgow-headquartered alternative legal services function. While Ashurst announced in the summer that it is working with Cognia Law, the collaboration with Elevate is entirely new. The partnership with Cognia will in-clude access to its managed flexible resourcing platform and pool of legal practitioners in the UK and Europe. The Ashurst Advance Reach platform will enable the firm to source contract lawyers who can be engaged to supplement Ashurst’s practice areas as well as allowing clients to access technical expertise for secondments. The service will be offered initially in the UK and Australia and, over time, will be developed into a platform for the firm’s global network of offices. Ashurst Advance Reach will be led by Alexa Crawford as senior operations manager and will form part of the alternative resourcing arm of Ashurst Advance, led by head of alternative resourcing Iain Brown. Brown said: “By giving our practice groups access to high-quality lawyers on a flexible basis we can source required skills on demand and maintain a productive, lean business model without sacrificing our ability to respond to spikes in demand from our clients, at the same time as maintaining the wellbeing of our lawyers when workload increases. We see collaborations between law firms and innovative legal service providers like Cognia Law and Elevate as strategically important in creating value for our clients across a broader spectrum of their legal needs and we believe such collaborations will increasingly define the future of the legal market.” Janet Taylor-Hall, CEO of Cognia Law, commented: “The ability to provide innovative, flexible approaches to staffing is a crucial component in supporting clients as they shape and build the workforce of the future.

Continues from page 14.

When documents are received or created by the firm, the correct policy is au-tomatically assigned according to pre-defined rules. Prior to the end of the re-tention period, FileTrail GPS triggers workflows for the review, approval and disposition of specific records, and sends notifications to the appropriate stake-holders throughout the cycle. “The FileTrail system will free lawyers from hav-ing to worry about when files need to be disposed of, significantly reduce ad-ministrative costs and enable our IT and information governance teams to work more efficiently and effectively in supporting the business,” added Tunney. “By investing in technology to achieve greater efficiencies, Keystone Law is enabling its lawyers and staff to focus on what they do best,” said Darrell Mervau, pres-ident, FileTrail. “We’re delighted to work with Keystone Law on implementing FileTrail GPS.”

North-East London law firm Thirsk Winton LLP has upgraded and migrated its privately hosted iManage Work email and document management solution to the iManage Cloud with the help of Ascertus Limited, migrating nearly one million documents in the process. The firm has for a number of years had a cloud technology-led IT strategy based on the Microsoft Azure platform. Elabo-rating on the firm’s business rationale for its move to the iManage Cloud, Jason Winton, founding partner, said: “As a growing law firm, we can now very accu-rately predict costs. We pay on a per user basis and scalability is simply not an issue, unlike previously where, with every new head, we needed to ensure that we had the increased computing power, server capacity and so on. All those issues now rest with iManage and Ascertus, we simply focus on our core activity of delivering legal services. We now always have the latest version of iManage Work, and maintenance and support are all bundled up together. There is a great deal of reassurance that comes from not having to worry about these complex, time-consuming and distracting issues.” Thirsk Winton chose Ascertus for the migration based on its previous experience with the company. “Ascertus was an obvious choice,” said Winton, “Our first implementation of iManage Work as a privately hosted solution was undertaken by Ascertus. Ever since then, they have been supporting the solution for us and will continue to do so - they are our ‘go-to’ partner for anything iManage. The team there is knowl-edgeable about the iManage offering and are easy to get on with. These are important considerations in business-critical projects.” As we first wrote in April, Thirsk Winton has moved to Linetime Liberate for its practice manage-ment and these two core back-end systems are now integrated. Liberate will be used to support the firm’s fee earners, providing time recording, ledger enquiry and matter management.
Continues from page 15.

It has been a pleasure to leverage our next generation managed flex resourcing model to support the development of the Ashurst Advance Reach platform."

Swedish firms Vinge and DLA Piper Denmark have purchased contentCrawler from DocsCorp to OCR all image-based documents (TIFFs, JPEGs, PDFs) within their document repositories. French firm August & Debouzy will deploy pdfDocs from DocsCorp to help better manage the process of creating and editing PDFs. Norwegen maritime law firm Nordisk Skibsrederforening and CMS Luxembourg will both benefit from having compareDocs from DocsCorp as their document comparison solution going forward.

Norwegian law firm Arntzen de Besche has teamed up with PSA Consulting to automate its digital client onboarding solution using Sysero’s workflow automation technology. The EU Money Laundering Directives, combined with an increased focus on data protection, requires law firms to create structured and documented processes for capturing client information. Arntzen de Besche will use PSA Consulting’s Custodian Client Onboarding solution, powered by Sysero’s automation technology, to streamline client onboarding and acceptance.

“We have been looking for a solution that could improve our anti-money laundering process and integrate the client onboarding process with our ERP system,” says Geir Taule Dotzler, the firm’s financial manager. “Custodian Client Onboarding enables us to align the system to our workflow, and we believe it will improve the quality of our customer data and the anti-money laundering process.” The new onboarding solution will use a built-in risk matrix automatically to assess a new client against Money Laundering Act requirements. Any client that falls outside the requirements will be automatically routed to a simplified workflow for further assessment to ensure compliance and, once approved, automatically created in the firm’s integrated ERP system. Every step of the process will be documented for internal quality control and compliance protection. “Digital onboarding solutions are increasingly key to creating service differentiation, and we’re thrilled to be working with PSA Consulting to help one of Norway’s leading firms further improve their working practices,” says Phillip Ayton, director at Sysero. “Using Sysero’s automation technology, Arntzen de Besche will not only be able to reduce accep-tance time, but also reduce risk by ensuring compliance.”

Top 200 law firm Greenwoods GRM LLP has chosen electronic document bundling from Zylpha for use with its existing Visualfiles case management software. By automating the bundling process with Zylpha the practice can save considerable time and resource, allowing staff to spend more time han-dling clients’ cases. Greenwoods’ team strives to deliver efficient and high qual-ity services to its clients. Used in conjunction with LexisNexis Visualfiles, Zylpha’s bundling software contains everything that Greenwoods GRM needs to create their bundles. It can be accessed from a single-view dashboard-like screen, which makes it clear, concise and easy to use when creating even the largest, most detailed bundles.

According to Jackie Wood, the firm’s head of IT, Zylpha makes a real difference. “By automating document bundling, in conjunction with our Visualfiles case management system, we have reduced bundling preparation processes from hours to minutes. In addition, we have also reduced the physical amount of paper used and storage required. These are significant benefits.”

RIAA Barker Gillette (UK) LLP is implementing Eclipse’s practice management solution, Proclaim. Established in 1981, the West End law firm is part of the RIAA Barker Gillette global alliance, with affiliated offices from New York to Beijing. The firm provides a raft of specialist services, including corporate and commercial, dispute resolution, employment, family, private client and real estate. As a mid-tier law firm offering a wide range of services, RIAA Barker Gillette (UK) required a solution that could be rolled out across all departments enabling maximum efficiency. Proclaim’s compliance features and integrated document management and accounting systems made it the ideal choice. Touch-Point+, Proclaim’s self-service portal, includes an app that allows the firm’s clients to access information from their mobile devices. Alex Deal, managing partner of RIAA Barker Gillette (UK), commented: “We’re delighted to be moving to the Proclaim platform - we’re confident the new system will have a massive impact on efficiency within our business. Proclaim’s flexibility impressed us and will enable us to integrate with our preferred software providers for postcode look-ups, digital dictation and ID/AML checks, making the transition to a new practice management system even smoother for both our clients and our team.”

Some DocsCorp news in brief: Norwegian firms Haver Advokatfirma AS and Advokatfirmaet Wiersholm AS have both chosen pdfDocs to create and edit PDF content. British firm Stone King LLP has also selected pdfDocs, as well as cleanDocs to prevent metadata leaks and emails going to the wrong recipients. Danish firm Advokatfirma Bech-Bruun has taken the DocsCorp suite of desk-top products to help its staff better manage the production and safe distribution of documents: cleanDocs for metadata removal and recipient checking; compareDocs for document comparison; and pdfDocs for PDF creation and edit-ing. Finally, Dutch firm Ploum has chosen cleanDocs. With 150 staff based in their Welsh HQ, Capital Law operates internationally with expertise ranging from banking to construction, energy, real estate and the public sector. Faced with a practice management system no longer suited to achieving their future goals the firm embarked on a lengthy selection process, ultimately deciding that Linetime’s Liberate platform was the best all-round product to deliver on their requirements. It was felt that Liberate’s Microsoft SQL database and full suite of applications could help the firm go to the next level in terms of efficiency, productivity and quality of customer service. Liberate is to be rolled out to all users across all areas of the business, including finance and the CRM department. Of particular interest was the ability for users to reside within Outlook but retain the ability to perform automated time re-cording and case management functions.
Liberate will enable the standardisation of processes, accommodate file sharing and team working while assisting with compliance with the GDPR and other aspects of risk management. Rhys Davies, Capital Law’s IT director, said: “As the firm continues to grow from strength to strength, we need a practice management system that can grow and develop with us. We chose Linetime’s Liberate because we believe it can make a significant improvement in our time recording, file administration and business intelligence. We’re looking forward to working with the Linetime team to implement the system in the summer of 2020.” Phil Snee, development director at Linetime, added: “We are pleased to announce the addition of another high calibre member to the Linetime and Liberate fraternity. It has been a long-term strategy of Linetime to ensure that the system will cater for all types of legal work, including the more complex and ad hoc areas. We remain committed to a policy of continuous but calculated product development and look forward to Capital Law benefitting from this work in the medium and longer term.”

UK top 50 law firm Stephenson Harwood LLP has selected Litera as a core transaction management platform. The win announcement notably makes no reference to Transact or Doxly, the transaction management platforms that Litera has acquired and absorbed in the UK and US respectively as it pieces together a one-stop-shop productivity suite. Litera’s transaction platform enables legal teams to organise, track and collaborate online during a deal. Stakeholders can create checklists, interact with and track all versions of documents needed for closing and get real-time status updates on the deal progress. Tammy Samuel, partner, head of rail and head of finance at Stephenson Harwood, said: “We pride ourselves on putting the evolving needs of our clients at the heart of our approach to providing legal services. Investing in Litera’s transaction management software is just one example of the ways in which we do this. The new technology will support a more efficient and smooth transaction process, allowing legal teams to collaborate in real-time while ensuring that all conditions precedent are collated and tracked in a timely and cost-effective manner. It will also assist us in streamlining our post-contract process and production of transaction bibles.” Haley Altman, Litera’s general manager of transaction management, who founded and sold Doxly to Litera, said: “We’re excited to extend the reach of our global services by partnering with Stephenson Harwood, one of the largest and most innovative law firms in the UK. Our mission is to provide a simpler, more collaborative process for law firms and their clients at every step of the deal process.”

North America HSJ Lawyers LLP selected pdfDocs from DocsCorp as its PDF creation and editing tool. Leitner, Williams, Dooley & Napolitan, PLLC and McKercher LLP will both deploy cleanDocs, a robust application with a single Outlook add-in that prevents accidental information leaks and data breaches, along with compareDocs for comparing documents. Lane Powell PC has pur-chased cleanDocs server to ensure sensitive metadata is cleaned from emails even when using mobile devices.

BigHand has acquired PayneGroup to further strengthen its template management and metadata management offering in North America, bringing with it 700 US clients, albeit there is overlap with BigHand’s existing client base. PayneGroup’s founder Donna Payne, who has run the business for 25 years and was among the first to market with her metadata management solution, is to step away from the business. PayneGroup follows BigHand’s acquisition in August of UK template management business Iphelion, and complements its existing template management solution BigHand Create. The PayneGroup team will join the BigHand team immediately, working from their existing Seattle office. Together the teams plan to meet with all Payne-Group and existing BigHand clients in the coming weeks to continue with a client-led innovation strategy. Speaking to Legal IT Insider, BigHand’s group CFO Sam Toulson said: “We’re buying PayneGroup to enhance our product suite and because of the increased market share it gives us. Both support staff and fee-earners are increasingly embracing template management as part of the drive towards greater efficiency.” Eric Wangler, president of BigHand North America, said in a statement: “We have seen a huge uptake of our template management solution in the past several years emphasising the demand from the market for tools like this.”
Continued from page 17.

Kane Kessler PC, a New York City law firm, has selected and implemented NetDocuments as its document and email management platform. Before selecting NetDocuments the firm’s technology committee had defined several key requirements, including the ability to search easily and accurately for content, link content to specific practice areas and organise content by document type and practice area. Data security and protection, which were the most salient concerns, convinced them to select NetDocuments.

In order to ensure that the needs of the users were met, Kane Kessler partnered with EIM International, a long-time NetDocuments integration partner. They established focus groups across each of their departments incorporating various users, from managing partners to legal assistants. This collaboration was maintained throughout the planning and project phases. The team identified practices and preferences which led to firm-wide adoption of the NetDocuments platform. According to the firm, selecting a cloud solution went a long way to address specific security requirements. Ultimately they realised that NetDocuments would fulfil these needs since they are cloud-built providing Kane Kessler’s users the technology to manage client work best. “One thing that has always impressed us about Kane Kessler is the desire of the firm’s attorneys to roll up their sleeves when it comes to technology selection, advocacy and adoption,” said Debra Parrish, executive director, EIM International.

“Right from the beginning, the firm’s managing partners provided the executive buy-in necessary to make this entire project a success.” Since the firm’s NetDocuments roll-out, feedback has been extremely positive. Users are able to work more efficiently while complying with information governance policies.

Wilson Allen, provider of consulting services and software that enables professional services firms to enhance business performance, has announced that Perkins Coie LLP, an international law firm with more than 1,000 lawyers, has selected Wilson Proforma Tracker software to speed bill generation, distribution and review, and The firm produces about 20,000 paper and PDF pro formas a month. Manually reconciling this volume of draft bills can significantly complicate and extend billing cycles. The firm was looking for a solution to dig-itsie and automate its existing paper-based process. In addition to integrating with its Elite 3E practice management system, the firm sought a solution with a user-friendly interface and built-in workflow tools that would let it effectively increase process standardisation and efficiency. Prior to evaluating Wilson Proforma Tracker the firm had considered investing in existing resources in building a custom solution. "We had a lot of confidence in Wilson Allen based on our experience working with them to support our Elite 3E sys-tem, including implementation, customisation and upgrades," said Trevor Varnes, CFO at Perkins Coie.

One platform, unlimited possibilities.

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SAFE
READY
PROVEN

Business priorities are ever evolving to meet the needs of your employees and to exceed client expectations. We provide the tools you need to accomplish the priorities of the present while establishing the framework to prepare for the necessities of the future.
Continues from page 18.

“To ensure that Proforma Tracker would be a strong fit for our firm and the complex client billing requirements we often face, we conducted thorough due diligence, including connecting with similarly sized peer firms that had already adopted the product.” Wilson Proforma Tracker will integrate with Perkins Coie’s Elite 3E practice management system, providing access to real-time data enabling the timely and accurate preparation and validation of pro formas. An intuitive user interface will allow Perkins Coie to track and manage all stages of the billing life cycle, while dynamic, configurable workflow rules will enable collaboration and approval of pre-bill edits of time and expense details by lawyers and support staff.

Another DocsCorp sweep-up as Minnesota-based firm Felhaber Larson has chosen contentCrawler to ensure all image-based documents in its iManage document management system are automatically converted to text-searchable documents. Oregon firm Farleigh Wada Witt has selected compareDocs for its accuracy and reliability in quickly finding changes in document versions. New Jersey firm Sherman, Silverstein, Kohl, Rose & Podolsky PA opted for pdfDocs for PDF creation and editing and cleanDocs to help prevent confidential information leaking out of the firm through metadata or simply emailing the information to the wrong person. Pennsylvanian firm Lavin, Cedrone, Graver, Boyd & DiSipio has deployed three products from the DocsCorp suite: contentCrawler, pdfDocs, and cleanDocs. Finally, in Florida, Tripp Scott PA has purchased cleanDocs, compareDocs and pdfDocs.

iManage has announced that transatlantic law firm Womble Bond Dickinson, with more than 1,000 lawyers based in 27 UK and US locations, is using iManage RAVN to unlock greater insight into its people, financial data and associated relationships to facilitate improved financial operations. The firm is a long-standing user of iManage Work for secure document and email management, so when reviewing their approach to knowledge management and enterprise search, they naturally turned to iManage. They have now implemented a new knowledge management application built on iManage RAVN to provide universal search capabilities. RAVN utilises machine learning to find, analyse and identify organisation information buried in disparate systems regardless of location, to better understand search queries and to provide relevant search results quickly.

Over the coming year the firm expects to take advantage of more advanced aspects of RAVN, including automatic identification of how its US and UK locations work together to facilitate improved financial operations. “We see immense potential in the way iManage RAVN can bring together data from time and billing systems, fee earner biographies, work product history and other pieces of information to help surface experts and expertise across the organisation,” said Paul Harvey, head of knowledge and legal training.

“Harnessing that hidden knowledge will enable us to work more efficiently and better serve our clients,” he continued. “Our firm has never put into practice a search system this powerful” said Bill Koch, chief knowledge officer. “The fact that our lawyers can so quickly locate material knowledge and, in turn, make that knowledge actionable is a game changer - both in how we operate internally and in how we serve our clients,” he added.

“Wombre Bond Dickinson is a forward-thinking practice using iManage RAVN Insight to drive innovation within the firm,” said Nick Thomson, general manager at iManage RAVN. “Investing in new ways of cultivating knowledge and leveraging iManage RAVN’s seamless integration with iManage Work lets leading firms keep pace with their clients’ needs and focus on delivering the high value services they expect.”

South America - iManage has announced that Licks Attorneys, one of Brazil’s most respected litigation firms, has implemented iManage Cloud for its document management system. With seven data centers around the world — including one in Brazil — iManage Cloud ensures fast, reliable performance when end users are searching and accessing files. “To support our lawyers in delivering the best possible legal services to our clients, we needed a secure, world-class, cloud-based system that our attorneys can access on any device, any time, anywhere — and iManage Cloud fits the bill perfectly,” said Raoni Carneiro, IT manager at Licks Attorneys. “iManage Cloud delivers noticeably faster performance than our other cloud solutions. Our lawyers have seen a significant improvement in their ability to find documents.” With iManage Cloud, Licks Attorneys gains access to iManage Work 10, a document and email management system. “The Work 10 user experience has been fantastic,” added Carneiro. “The system is easy to learn, easy to use and very easy for our professionals to find their important documents and emails, saving them valuable time.
Licks Attorneys worked with iManage partner Docwise on its move to iManage Cloud, ensuring that the data migration from their previous cloud system was seamless. Additionally, Licks Attorneys values the Portuguese language support offered in Work 10. “We are primarily a Brazilian firm, so having a product like Work 10 that offers Portuguese language support is very beneficial,” said Car-neiro. “It makes navigating the product and using it on a daily basis that much easier for our professionals.” “Savvy global firms like Licks Attorneys are de-manding more from their DMS vendors,” said Dan Carmel, chief marketing of-icer at iManage. “They don’t want to have to sacrifice performance or integral features like local language support that can encourage widespread user adop-tion. By selecting Work 10 delivered through iManage Cloud, Licks Attorneys has access to the industry’s leading work product management capabilities, bringing together the experience today’s professionals demand with scalable, reliable performance.”

APAC New Zealand firm, Lane Neave Lawyers, will be making use of content-Crawler from DocsCorp to ensure every document in its iManage DMS is text-searchable. Gilbert + Tobin, who has offices in Sydney, Melbourne, and Perth, will now utilise the metadata cleaning and email recipient functionality of cleanDocs from DocsCorp. Wallmans Lawyers in Adelaide and Frenkel Partners in Melbourne will both deploy pdfDocs from DocsCorp to create, edit, bundle and secure their PDFs.

New Zealand firm James & Wells has selected Aurora North PracticeLink for IP prosecution management. James & Wells is New Zealand’s largest privately-owned intellectual property practice, and one of Australasia’s leading in-dependent patent and trade mark firms. “As we expand our practice across the Australasian market we want to ensure that we have the most advanced tech-nology systems in place to provide a robust, productive and efficient environ-ment for our lawyers and staff, particularly when working remotely,” said Tim Walden, managing partner. “Our partnership with Aurora North is a core part of our vision to upgrade our systems and fully automate critical IP prosecution processes and document workflows to support the firm’s next phase of growth.” James & Wells moved to paperless IP management processes over six years ago, using CPA Global’s First to File. The firm is now in the process of implementing Aurora North PracticeLink to-gether with Inprotech, the IP practice management solution from CPA Global, and the iManage document management system to streamline and automate the user experience further. “In planning the migration of our practice manage-ment and document management systems we realised we needed an IP prose-cution workflow solution that could help bridge the gaps so that our lawyers and staff didn’t have to wrestle with jumping across multiple applications, man-ually distributing documents via email and constantly chasing others to check on status,” said Tizio Panara, the firm’s information systems manager. “After a thorough investigation we identified Aurora North as the most knowledgable partner in this domain. PracticeLink is the ideal software solution that will integrate our systems and processes to provide our practice with a better way of working by centralising IP document management, data integration and team collaboration.”

PracticeLink provides a “one stop” work portal - connecting multiple applica-tions used by law firm IP practices, and integrating docketing information, doc-uments, email, invoices, financial information and more. With PracticeLink, IP practitioners and staff can see all the information they need to perform tasks at each stage of the matter lifecycle, with clear insight into upcoming deadlines and the status of items requiring further action, review or approval, as well as links to the tools they need to execute each task. “In the fast-moving world of IP prosecution, firms that are able to respond quickly to client and government agency queries are well-positioned to deliver a superior client experience,” said Christopher Kave, founder and principal, Aurora North. “By using Pract-iceLink, James & Wells is streamlining IP prosecution management for its IP practitioners and staff, regardless of their location, and enabling them to focus on delivering maximum value to their clients.”

Some more quick DocsCorp news as New Zealand firm Simpson Grierson has purchased contentCrawler to search for and find all image-based documents in its iManage document management system, automatically converting them to text-searchable documents. Meanwhile, Australian firms Holding Redlich in Melbourne) and trade mark and patent attorneys Wrays in Perth have both se-lected pdfDocs to manage their PDF workflows.

Phoenix Business Solutions, a global, strategic advisor in information and document management, has been selected by Australian commercial law firm Mullins to upgrade its document management system to the latest iManage Work 10 and migrate to the iManage Cloud. Brisbane-based Mullins em-barked on a major digital transformation project to review and upgrade key components of its IT applications and selected to migrate to the iManage Cloud for its connectivity, scalability, security and agility. Phoenix was chosen as the strategic advisor and implementation partner due to its global reputation, experience of managing successful digital transformation projects for law firms and expertise in delivering a complete offering from de-sign, implementation, onboarding, training through to 24/7 support. Migrating to the iManage Cloud embraces Mullins culture of collaboration with their stra-tegic growth plans. Stephen van Dorp, CFO & COO at Mullins, said: “Migrating to the iManage Cloud and Work 10 gives us the flexibility for our teams to work more productively with secure, easy access from any device, in any location, at any time. It really is a big leap forward for us and we have chosen Phoenix as our strategic partner as they have the most experience and expertise with the iManage solution. Security of data is always a top priority and the iManage Cloud security creden-tials are undeniably the market leader in this space. Moreover, the Work 10 suite offers advanced threat-based detection which analyses, tracks and reports any malicious behaviour coming into or out of our systems.” Thomson Reuters Elite has announced that Deheng Law Group, one of China’s leading legal services providers, will be adopting 3E. As part of its effort to harness the power of technology to modernise operations, the firm will also be implementing a number of other Elite solutions, including 3E MatterSphere, 3E Data Insights and 3E Workspace.
Deheng Law Group, operating under the two well-known law firm brands of Beijing DHH and Shandong Deheng, has more than 2,000 legal services professionals across its 60 domestic and international offices and provides the full spectrum of commercial legal services. The firm was founded in 1993 as one of China’s first partnership law firms and has since grown to become one of the largest legal service providers in China. With the goal to develop into a first-tier international law firm, Deheng Law Group selected 3E after a comprehensive market review. During their selection process it became clear that 3E was the best solution to meet the breadth of the firm’s needs. With a focus on development in scale, practice and internationalisation, the firm will utilise the 3E platform to improve the quality and efficiency of legal services to clients, as well as internal compliance and management. For Deheng Law Group, as a firm with international footprints, both 3E and MatterSphere are able to support multiple languages, currencies and jurisdictions, essential capabilities for the firm as more offices and partnerships are established outside of China. Additionally, the adoption of Data Insights will enable users to easily extract data out of 3E and use the power of Microsoft Power BI to provide robust visualisation tools and actionable insights that empower and accelerate data-driven decision-making. Finally, Workspace will enable the firm to have financial management, matter management and business development insights accessed in a single place as well as via mobile.

Movers & Shakers!

UK & EMEA  Anthony Barrett has joined Enable Business Solutions to head up their sales in the UK. Formerly at LexisNexis, Barrett is a well-known figure in the UK legal market and over the past 12 years has also held roles at nQueue Billback, Phoenix Business Solutions, Hubbard One and TimeKM. Barrett will play a key role in meeting Enable’s growth goals for its Microsoft Word-based pitch software PitchPerfect and time capture solution Reve-nueManager. David Lumsden, Enable’s CEO, said: “Tony’s track record, experience and contacts in the profession are of the highest calibre and we are delighted to have him on board. He brings with him incredibly strong knowledge and experience which will be vital as we continue our ambitious plans to grow and develop innovative solutions for our clients.” Those clients include Reed Smith, Baker Botts, Gibson Dunn, Linklaters, Clyde & Co and Stibbe. Barrett said: “I have worked with some of the best global IT suppliers over the years and am excited to be joining Enable. Enable has quickly established itself as an international market leader with PitchPerfect and I am confident will go on to be a global provider of must-have legal solutions.”

Former Thomson Reuters Elite EMEA sales head and Converge Technology Specialists chief commercial officer Peter Gill has joined client lifecycle management platform Engage Solutions Group, which was acquired in 2016 by a team led by Rekoop founder Phil Wedgwood and is expanding its horizons from industry to the professional services sector. Gill joins both CEO Wedgwood and chief technology officer Philip Ashworth, who held the same role at Rekoop. Engage was founded in 2014 as an employee app and since 2015 has had sales across blue chips in retail, transport and health - clients include Ford Retail, Veolia, Allied Bakeries, the NHS and Liverpool Football Club. Gill joins to help spearhead the professional services sector launch and he told Legal IT Insider: “We’ve been speaking to trusted people in legal about the client lifecycle - not just the matter lifecycle. The question is how do you up-sell, re-sell, cross-sell and create a referral programme, how do you reward loyalty? Other businesses are communicating better, high value social media-based content. Then you have to look internally at colleague engagement: how easy is it for employees - not just fee-earners - to self-serve things like holiday requests, pay-roll, learning and development, one-to-ones and welfare? Firms work in silos: how do they manage process improvement and change. Do they have the ability to gather feedback? There is a newer generation of people listening and learning and encouraging them to do things differently. How can they make sure they are attracting and retaining talent? This is about helping the client experience and internal engagement by bringing it to life.” Wedgwood said: “For me, having stepped out of legal for two years what’s nice is that we’re not a legal vendor any more, we go across all the key sectors and are looking to launch in professional services. So far it’s been a real breath of fresh air and what’s interesting is that coming back into the sector the same vendors are still doing the same things.” The app will provide a feed for push notifications, a learning and development portal in which all employees can watch training videos or courses, quizzes and tests. The events feed will show them what is coming up and the messaging channel, which looks like WhatsApp, means they can share pictures and videos within a firm’s firewall. The “connect” feed is a searchable directory of all employees at the firm and Gill rightly says: “Many firms don’t know who or how many employees they have.” An awards section enables firms to reward excellent service and can be linked to a rewards scheme. And a news feed delivers personalised news. The app, which has a centralised command and control console called Engage Hub and a multi-purpose API, can surface information from e.g. the case management system to give the client the ability to check on matter status, make payments, or leave feedback.

Clyde & Co has appointed Austen King as its first global head of data & analytics. King joined in September from Barclays, where he was head of large hold-ings data operations.
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In this newly formed role, King will oversee and facilitate the cross-functional delivery of the firm’s global data strategy, which seeks to transform the man-agement and use of data within the organisation. The role will involve working with the firm’s legal staff and in-house Data Analytics Lab, which is led by part-ner Mark Wing and which applies machine learning skills to legal issues to de-velop new products and deliver innovative services to clients. King will report to the firm’s global chief information officer DiAnna Thimjon, and work in close collaboration with global head of legal technology, Nadine Bairle. Clyde & Co launched its Data Analytics Lab in December 2017 in partnership with University College London. It is an initiative led by partner Mark Wing and staffed by Clyde’s legal, data science and strategy staff, and students from UCL’s computer science department. At the time of the Lab’s launch Wing said: “A large part of the value that law firms provide to their clients is the knowledge and expertise of their lawyers. As a global firm we have heaps of knowledge but the question we always challenge ourselves with is how we harness it as quickly and efficiently as we can for our clients. Because much of our knowledge is stored as data, having a data analytics lab provides us with another mechanism for unlocking insight, value and solutions for our clients. We think there is great potential in this project and we are delighted to be able to work with the leaders in their field at UCL. As the lab develops it is our aim to also involve clients in the work. “Overall then, we are really impressed with LEAP and Zylpha combined.”

Konexo, the global alternative legal and compliance services provider, is pleased to announce the appointment of Babar Hayat as head of product, technology innovation and transformation. Hayat joins Konexo - a division of global law firm Eversheds Sutherland - from Thomson Reuters where he was senior director of product strategy and legaltech innovation. His appointment brings expertise across software, product development and innovation, across both the legal and financial services sectors. Hayat is well-versed in meeting client needs in innovative and strategic ways by developing and delivering new legaltech solutions for client service provision. Hayat will focus on developing Konexo’s use of data and insights, increasing Konexo’s ability to leverage sophisti-cated data insights, to drive decision-making and support strategic evolu-tion and change product delivery. Graham Richardson, partner and head of Konexo, commented: “We are excited to welcome Babar to Konexo and he’ll join our team in early January. In this new role, Babar will work to drive innovation and the delivery of strategic legaltech solutions for our clients as we con-tinue to grow our offering rapidly.” Hayat said: “I am proud to be joining Konexo, a new, sophisticated and dynamic proposition in the alternative legal and compliance services sector.

“Overall then, we are really impressed with LEAP and Zylpha combined.”

“I am looking forward to using my expertise in product management, software and strategic development to support Konexo in offering a truly cutting-edge and intelligent technology-driven service for our clients.”

North America In a big name US hire for law firm intelligence platform Foundation Software Group, Allen Matkins’ former chief information officer Adam Stock has joined as vice president of product strategy. Foundation says that Stock’s hire is intended to help drive product strategy, helping law firms to leverage their intelligence to improve client service and win new business. Foundation’s platform includes integrated applications for experience man-agement, expertise location and client management. At Allen Matkins, Stock served as chief marketing officer & client services officer before taking on the chief information officer role. He is a recognised name in the sector: a founder of the Standards Advancement for the Legal Industry (SALI) Alliance and an ar-chitect of the Legal Matter Specification Standard (LMSS) that aims to define a common interchange standard for describing legal matters. Stock also co-created the LMA Legal Marketing Technology conference and is a fellow of the College of Law Practice Management. Prior to working with law firms Stock worked at global Silicon Valley technology companies, including Adobe Systems and Electronics for Imaging. “Adam has been a pioneer in law firm marketing and technology circles for the past 20 years,” observed Silvia Coulter, Profes-sional services revenue growth expert and principal at LawVision.

“He’s experience in-house at a global firm and a highly-recognised regional firm, aligned with his rare combination of vision and action, will be invaluable for guiding and executing product strategy at Foundation as the company contin-ues to identify opportunities to build on its firm intelligence platform.” “Adam’s experience building innovative solutions will be extremely valuable in his new product strategy role,” said Nate Fineberg, CEO and co-founder of Foundation Software Group. “He has a depth of understanding of legal data, and its poten-tial, that few others possess. A trusted voice in the legal marketing and tech community, he’ll be able to connect immediately with our customers and engi-neers to inform and iterate new and valuable additions to the Foundation Firm Intelligence platform.” “Tackling disparate silos of data has been a key chal-lenge for law firms,” said Stock. “Foundation is delivering solutions today that the industry has been talking about for years. I’m excited to drive even more value for law firm customers.”

Women in eDiscovery, the non-profit organisation that brings together wom-en interested in technology related to the legal profession, has named Patti Zerwas director of the South Central region. Since its inception in 2007, Women in eDiscovery has grown from 30 members to thousands of members in 30 chapters worldwide.
Cocalis added: “An increasing number of corporate teams and law firms are looking for creative ways to transform how they work to improve their efficiency and value with technology-enabled solutions. This is where Morae has made their mark with exceptional solutions that place them in a great position for growth. I am thrilled to join the team and look forward to rolling up my sleeves and helping the company and its customers achieve even greater success.”

Hanzo, a company specialising in the contextual collection of dynamic web data for eDiscovery and compliance, has announced the appointment of Brad Harris as vice president of product. Harris will be responsible for expanding the company’s product vision and for developing innovative solutions that address growing data management challenges for corporate legal and compliance departments. These include the preservation, retention, governance and risk management of modern enterprise collaboration data, including Slack. “Hanzo’s mission is to eliminate billions of dollars in litigation costs by giving control of enterprise data back to corporate legal and compliance teams,” said Keith Las-ka, CEO of Hanzo. “Brad’s extensive experience in legal technology, broad understanding of market needs and focus on creating value for enterprise clients make him the ideal person to help drive the next phase of Hanzo’s growth.” Harris has over 30 years of experience in high technology and IT, including the last 15 years in the field of eDiscovery. At Zapproved, Harris was responsible for driving the company’s growth in the corporate legal segment, advising clients on best practices for data preservation and eDiscovery, and managing the company’s product development strategy. Harris has been at the forefront of furthering best practices in the industry and elevating the skills of corporate legal teams, serving as chair for such events as the PREX Conference and Cascadia Sessions. Harris is a frequent author and speaker on eDiscovery, an active member of several The Sedona Conference working groups and teaches as an Adjunct Professor at Lewis & Clark Law School. “I am tremendously excited to work with Hanzo’s pioneering team of technologists. The innovative legal hold solution Hanzo’s technology team developed for Slack is truly solving an acute problem, and it’s only just the start for enterprises looking for innovative and best-practice approaches for gaining control over their enterprise collaboration data and associated litigation costs,” said Harris.

Reynen Court, a legal technology platform backed by a group of 18 law firms, has hired Martin Levenglick as chief legal officer and head of corporate development. Levenglick, a corporate partner at the VLP Law Group in New York, joins the Amsterdam-based outfit just after it launched in beta testing mode.

Andrew Klein, a former Cravath, Swaine & Moore associate turned serial entrepreneur serving as founder and CEO of Reynen Court, said in a statement that Levenglick’s hire will help his project work with law firms and application vendors to devise a new contracting model for the derivatives industry.
Continued from page 23.

“We expect Martin will greatly accelerate our ability to take costs and time out of contracting for new legal technology,” Klein said. “And his steady and experienced hand helping to guide us in future financing activities, the pursuit of strategic alliances and other key corporate and transactional opportunities will be enormously valuable as we continue to grow.” Reynen Court said that Klein and Levenglick worked together more than 20 years ago when the latter was a partner at Orrick, Herrington & Sutcliffe in New York. Levenglick served as outside finance counsel to Klein’s first technology company, Wit Capital Group Inc, an internet-based investment bank that sold a stake in itself to The Goldman Sachs Group Inc. While a partner at VLP, Levenglick also advised Reynen Court on its Series A financing led by Clifford Chance and Latham & Watkins.

“Over several decades I have watched with pride as a series of companies Andy created applied technology and innovation to take costs out of traditional business functions,” said Levenglick in a statement. “Reynen Court has the potential to play a profound role in the modernisation of the legal industry. I am thrilled to become a member of what by any measure is an extraordinary team.”

ZERO, provider of the artificial intelligence email management solution, today announced it has hired David R. Robinson as its new VP of Product. Robinson brings to ZERO more than 25 years of focused experience developing advanced legal technologies. Among other achievements, he has been instrumental in developing some of the leading time capture products currently in the marketplace. He joins ZERO at a time when the company is growing rapidly and broadening its product focus to encompass intelligent automation of administrative tasks across the legal workflow. In his new role Robinson will be responsible for spearheading new time capture initiatives and expanding the existing ZERO product. ZERO has already made a significant impact by being the only solution to capture time that lawyers spend interacting with client email from their mobile devices, an important capability as lawyers do increasingly more billable work on smartphones and tablets. ZERO integrates with some of the leading time entry and capture solutions to support more streamlined time capture and entry workflows for users. Robinson has spent much of his career designing, building, implementing, selling and managing intuitive time entry and capture software solutions in the legal and professional services space. He was the third employee at ProSoft (later acquired by Sage), where he was charged with building Carpe Diem and helped the company expand its client base from a handful of customers to more than 350. Robinson continued his work on time capture systems at Advanced Productivity Software (APS), where he managed all aspects of the DTE time entry product line. Most recently, he spent 12 years in progressively responsible roles for Intapp, beginning as the product manager for the Time Builder time capture product line, and moving on to roles as principal consultant and senior solution consultant for Intapp Time, Intapp Pricing and Intapp Terms/Compliant Time.

“I was immediately drawn to ZERO because of their customer-centric focus, their unique ability to capture billable client interactions on mobile devices and their deep expertise in AI and machine learning,” said Robinson. “ZERO’s development of innovative products is rapidly establishing a new paradigm for law firms and lawyers that optimises mobility, accountability and efficiency at every level. I look forward to leading ZERO’s time capture efforts and returning to my entrepreneurial roots.”

“David’s track record bringing industry-leading time capture concepts and products to the marketplace is unmatched,” said Alex Babin, CEO at ZERO. “A primary focus at ZERO is using advanced technologies to enhance significantly the existing time entry and capture systems that firms are currently using. I can’t imagine a better candidate for this position, and I can’t wait to start working with him as we continue to solve real problems in law firms with unobtrusive, intuitive products that deliver high-impact, measurable results.”

**Holland & Knight to select ZERO**

We revealed exclusively in January that Holland & Knight is to select ZERO after a lengthy pilot, which CIO Matt McKinley tells us unexpectedly revealed that the email management and time capture tool is likely to generate increased revenue or at the very least be cost-neutral.

The Florida-headquartered Am Law 100 firm began testing ZERO over a year ago. McKinley told Legal IT Insider: “We got wind of ZERO and started a proof of concept. We had ZERO come to an all lawyers meeting and they set up a booth to talk to attorneys. ZERO got a lot of interest.”

The first pilot involved around 30 people but pilot two has involved users “in the hundreds” at the firm, which has around 1,300 lawyers. The firm is still concluding a second pilot but McKinley says the selection is “definitely happening,” and a decision on the timing of a full rollout is likely to be made at the partners’ meeting in March.

He adds: “Our attorneys said that ZERO makes it easier to do legal work within their email. It prompts them in the context of email with action items. It’s a very useful tool.”

Holland & Knight is taking a mobile first approach and its use of ZERO on the desktop is expected to be limited at first. ZERO has a reputation for being expensive – we spoke to one US head of KM just this week who said the cost is a deterrent – but interestingly McKinley told us: “One of the unexpected benefits that was not in my spec is that ZERO will add a revenue stream. I was willing to pay a fee without recovery but at worst it will be cost-neutral and we think it will increase revenue as a result of the emails getting filed and through increased revenue streams,” however he added, “Once we get through the second pilot we will know more.”
DWF to acquire managed services business Mindcrest for US$18.5m

DWF is to acquire legal and managed services business Mindcrest for US$18.5m (£14.2m) in cash and shares, with the transaction expected to complete in the next 4-6 weeks subject to conditions.

Mindcrest specialises in services including litigation support, contracts, compliance and legal analytics for large international corporate clients. The Chicago-headquartered company employs over 360 people, the majority of whom are located in Pune, India, where it has operated for over 15 years, along with a small presence in New York and London.

Mindcrest’s business model combines project management, process, workforce management, technology, analytics, reporting and metrics on every project. Its operations are supported by a high quality people proposition delivered through ‘Mindcrest University.’ In the financial year to 31 December 2019, Mindcrest is expected to have sales of US $12.1m.

The acquisition in intended to help DWF expand its managed services capability, including document review and legal process outsourcing.

DWF floated on the London Stock Exchange main market in February 2019. It said at the time that it would invest up to £10 million in additional IT systems, including a portion of that to contribute to the development of the group’s global platform for managed services.

Happy Privacy Day – Fines Quadrupled in 2019 v. 2018

US and EU data privacy authorities levied over a $1 billion in fines last year compared to slightly less than $250m in 2018. Keith Lipman, founder and president of Prosperoware in January looked at the widening net of data privacy and cyber laws; the requirements that most privacy laws have in common; the steps that law firms and companies must take to comply; and the policies that must be in place to avoid you having “a really bad day.”


We are hosting an exclusive GC privacy dinner and discussion at Boisdale, Belgravia on 25 February and have a space: if you would like to attend please email caroline.hill@liti.co.uk
Events for your diary!

If you’re a CIO/Innovation head and a senior purchaser/influencer of technology or legal IT and haven’t yet signed up for #GlenLegal you need to urgently contact Lucy Cheesewright on lucy.cheesewright@legalitlabs.com as we are nearing capacity. Lucy is also arranging a number of high level dinners, roundtables and other events so drop her a line to find out how you can organise a campaign for next 18 months.

Quote/Unquote

"Exercise is bad for you, ditch the bloody detox."

So says Orange Rag editor Caroline Hill, who has broken her ankle in two places running with her dog, which proves that getting fit in January is a bad idea. Getting to events will be tricky in the short term but please pick up the phone/Skype to say hi/give sympathy or (more likely) laugh at her.

legalit insider

The next Insider newsletter will be published on Wednesday 26 February.

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