

legal insider

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PracticeEvolve acquires Linetime

Fast-growing Irish and Australian legal practice management solution provider PracticeEvolve has acquired Linetime in order to accelerate its penetration of the UK market, we can reveal.

Linetime will become one of the Australia Technology Innovators (ATI) group of companies. ATI is the parent company of PracticeEvolve, LEAP Legal Software and InfoTrack.

Linetime's Leeds office will become PracticeEvolve's global hub and the combined company – which will maintain both products side by side – will focus on both mid-tier and top tier firms. CEO David Boland said: “The head office will house all UK product development and dedicated client support teams to ensure both Linetime and PracticeEvolve clients are well supported and our fast-growing legal-tech products are launched to market ahead of competitors.”

Boland in 2003 founded Documatics, which last year rebranded as PracticeEvolve as it launched in the UK and became part of the ATI Group. Since launching in the UK it has signed up around 1,000 new users.

Speaking to Legal IT Insider about the acquisition, Boland said: “We went to Australia with a fresh approach and grew very quickly to the point where ATI group acquired us to push us into the mid-tier. That growth has continued in the UK and we can adapt quite quickly in different jurisdictions because we can adapt easily to new rules. But we were coming up again and again against Linetime, which wasn't a product we could knock because it has lots of sophistication and some firms love PracticeEvolve and some love Linetime – often it just comes down to a feeling.” Both companies have around 7,000 customers. *Story continues on page 20*

“Kennedys without the lawyers” – global firm launches tech company

Kennedys has launched a technology company called Kennedys IQ to house and deliver its tech-led client products, which it refers to as ‘Kennedys, without the lawyers.’

Kennedys IQ will be headed by former director of IT Mike Gilpin, who going forward will be Kennedys IQ's commercial director. Gilpin's role is being filled by Matthew Haynes, who joined the firm in 2015.

The global UK-headquartered law firm has set up Kennedys IQ to focus on client product development rather than on the firm's internal efficiency, saying it “recognises that the future of legal services is not just about legal advice.” The new platform will help clients manage insurance claims in less time and immediately house six tools that Kennedys has launched over the past few years to automate much of the claims process. Those tools are Incident Manager; Fraud Detector (formerly Ki); Portal Manager; Defence Lawyer (powered by KLAiM); Settlement Negotiator (formerly Cybersettle); and Recovery Manager. *Story continues on page 19*

#GlenLegal20 speakers and agenda!

We are in countdown to our #GlenLegal20 CIO and heads of innovation conference on 29-31 March and pretty much at delegate capacity but if you have not received an invitation and think you ought to, now is the time to shout!

The conference – or do we call it unconference? will revolve largely around workshops and discussions relating to the topics that are at the top of your list of priorities today. *See the back page for more*



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Neil Davison joins Ascertus as CTO

Farrer & Co's IT director Neil Davison is leaving the UK top 100 law firm to join document and information lifecycle consultancy Ascertus, starting in the second week of March. Davison takes on the role of chief technology officer and will head Ascertus' 16-strong professional services team, including helping with the strategy for its product portfolio and services.

Davison has been at Farrer & Co since 2008 and has worked in law firms for 23 years, including Norton Rose (now Norton Rose Fulbright); Freshfields Bruckhaus Deringer; and Reynolds Porter Chamberlain (now just RPC). At Farrer & Co he has led the shift of the firm's entire infrastructure into Microsoft Azure, becoming one of the first law firms to do so. He also rolled out cloud document management system NetDocuments in 2014, well before many, if not most, law firms had a cloud roadmap.

Ascertus specialises in iManage implementation and support and the move, yet to be formally announced, has already raised eyebrows, given that Davison is leaving a NetDocuments shop.

Speaking to Legal IT Insider about the impending move Davison addressed the topic head-on, commenting: "I'm worried that people will think there is an unconscious decision to move away from NetDocuments, which is not the case at all. After 23 years in legal I wanted a change, but I didn't know what that was. I spoke to lots of people and I got some really positive messages. I liked the people at Ascertus and got a really good feeling about them. That's the way I tend to work, and it felt like a really good fit."

He adds: "As an IT director you go through a cycle of change and then the same thing happens again after three, four or five years. I've done that a few times and I fancy something new. I've done so much in the last few years with the move to Azure and the cycle of change had come to an end. I had a feeling that it's time to look for something new and different and it would have been so difficult to go to another law firm: at Farrer I've had so many opportunities and it would be a difficult act to follow."

At Ascertus Davison will be working with both law firms and corporates and he said: "I'll be working closely with sales and going out to big clients. My experience might assist them, and we'll also be looking at different products that complement our existing suite as well as offering a strategic consultancy. I'll be exploring ideas with Roy [Russell] over the coming months."

Russell told Legal IT Insider: "Neil has got great insights after all the years he has worked in legal at law firms Norton Rose Freehills, Freshfields Bruckhaus Deringer, RPC and Farrer & Co - you can't get better than that."

A spokesperson at Farrer & Co expressed sadness that Davison is leaving the firm but would not comment on whether head of IT systems, Andy Beech (a strong favourite to succeed Davison), will step into the role.

Clifford Chance data scientists form AI boutique

The head of Clifford Chance's data science team and a senior machine learning engineer have left the magic circle law firm to form their own boutique AI company, we can reveal.

Mirko Bernardoni and Michael Seddon have launched Fiume, which will help law companies and legal teams create business-tailored data products.

Particularly as more law firms and departments move towards Microsoft O365 and cloud services Fiume intends to help them with "AI as a service" to create ad hoc applications around their business processes.

Seddon said: "We want the client to realise the potential of ad hoc AI products. You don't need to do it as an enterprise solution - in other industries you take a specific product or idea and use it to deliver an ad hoc product in weeks not months."

While law firms struggle with the fact that historical data is often unavailable or incomplete and that knowledge is wrapped up in the head of the most senior lawyers, Bernardoni says: "What we propose in the first point is to build a system that helps you go faster and in the meantime collects data. Law firms normally put their data in a spreadsheet but if you provide an application that includes advanced search lawyers start to get involved because they see the value."

At Clifford Chance the pair have been using deep learning for natural language processing in the classification of large documents and recently submitted the first scientific paper in data science for legal. The paper looks at long length legal supervised document classification, using LIBOR repapering as an example.

Their ambition is to help firms or corporate legal teams to create a platform of integrated solutions and workflow in this area, and Bernardoni says: "You need a set of tools and you need to have everything in a way that, if the client changes and has different requirements, you can use the same set of tools quickly without needing to go back to IT."

Another area of interest to the pair is using AI and machine learning to extract information from court transcripts during long-running cases, and Bernardoni said: "We can start building basic systems for knowledge depending on the client's goals."

In terms of IP, Bernardoni said: "You get the IP for the application, the training model and the data pipeline, including the source code; the only small piece we retain the IP for is the generic model."

Bernardoni added: "We develop the final product. If you have something else that's good, we can integrate it. If your maturity is not enough, we can up-skill your team."

Your clients are demanding more... ...deliver more

"We have moved away from a transactional approach to one that is constructed around the needs of our target clients. The Peppermint Technology platform is very much part of that shift as it provides a single shared view of the client. It enables us to understand our clients better through the recording and sharing of information across the organisation."

Andrew Clinton
Managing Partner

asb | law



Peppermint Technology is a cloud software company offering the full suite of legal applications built on Microsoft Dynamics 365. Available individually or in combination our solutions include Case & Matter Management, Client Engagement, Practice Management and Document Management.

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In terms of who the client is, both Seddon and Bernardoni say lawyers are becoming very clued up as to the advantages that tech provides and are fully aware of changes in the industry. Seddon says: "The sheer fact that firms are creating innovation partner roles speaks highly of the fact they recognise the opportunities and are very positive about this kind of work."

The move is a blow to Clifford Chance, which is one of the earliest law firms to form its own data science team. Bernardoni said: "The work done in Clifford Chance, which we will always be thankful for, helped us to realise that the legal industry didn't fully embrace digital transformation as other industries did".

He added that the move was as a result of seeing the opportunities to leverage their skills in "helping other firms and companies to achieve the same astonishing goals obtained at Clifford Chance."

Anthony Vigneron, director of legal technology solutions at Clifford Chance, told us: "I'd like to thank Mirko and Michael for their contribution to the advances of our broader data science team over the last two years, and look forward to continuing to work with them and wider teams as we invest to take our capabilities to the next level."

Hall & Wilcox begins sharedo rollout

Leading Australian firm Hall & Wilcox is about to go live with the first phase of its slicedbread sharedo rollout, starting with its workers' compensation practice in Queensland on 9 March. Sharedo will replace a mixture of case management systems but mainly Caseflow, an Australian system.

The firm selected sharedo in February 2018 and has since been engaged in mapping out its workflows across the firm. The analysis led to the realisation that sharedo would need to be further adapted to accommodate the various laws and procedures across each of the eight states/territories in Australia, with client solutions director Peter Campbell commenting: "We knew that going in but we underestimated the effort involved and sharedo had to change their product a bit - to their credit they stepped up and wore that but it introduced more of a delay."

Volume insurance accounts for around 50% of the work undertaken at Hall & Wilcox and the firm selected sharedo because it wanted "something a bit more next-gen", meaning "a true web product with modern architecture," Campbell says. "In other industries they have workflow systems coming out of their ears but in legal the market isn't mature, and some generic tools don't cope while some systems in the industry do the job, but not well. Sharedo is a modern system but suits the industry." The go-live on 9 March will see 45 users in the firm's workers' compensation practice move onto sharedo and Campbell says: "We don't want to go live with too many people at first but that's the whole team."

The process analysis leading up to this point was conducted by a couple of analysts that Campbell has worked with for nearly 12 years, and he observes: "In legal lawyers typically want to take a short cut and just start. They come up with the idea of wanting to automate and transform the way they work and that's fine unless you actually try to transform the way they work."

"Luckily, in this firm the teams we worked with gave us time because there is no replacement for sitting down and walking through the workflow."

Hall & Wilcox conducted workshops with its lawyers to enable the analysts to get to know their processes and then, later, to learn the various paths to follow. Campbell said: "They came out saying 'there are too many paths, it's so hard.' Then they realise that, of the 15 different paths to follow, there is a lot of commonality - it's a process."

What has worked well is involving the knowledge and precedents teams so that they are not only involved in the set up but know where they fit in the process.

With any impending go-live there is some nervousness but Campbell says: "We're really excited and want to make sure that sharedo is a success."

"We now have a queue of people asking when the next one is because they understand that there is no alternative in this market. What is happening here has probably already happened in the UK: insurers are ramping up their requirements and ramping down their price. The lawyers realise that the way clients want to us to interact is changing - we still have to be great lawyers but it is becoming more complicated, with special billing requirements and KPIs."

"It's no longer about providing just great legal advice. You must be consistent, meet the needs of procurement and provide a great user experience. The only way we will survive and thrive is if we have the best platform to do that."

We'll revisit the sharedo rollout later this year.

Upgrade deadline looms for MS 2010 and 2013!

Microsoft has confirmed that, as of 13 October 2020, users of Microsoft Office 2010 will no longer be able to connect to its Office 365 service, and there are also implications for Office 2013 users.

Microsoft Office 2013 may connect to O365 services from 13 October 2020, however, it is not supported and Microsoft states that it will be removing authentication protocols used by Microsoft 2013.

Writing on the Legal IT Insider website in February, Stephen Brown, IT consultant at Lights-On, looked at the potential impact and here are a few of the dates/facts you need to be aware of. Heads up: if this isn't already on your roadmap, it's probably time to start panicking.

For that article in full see: <https://legaltechnology.com/upgrade-deadline-looms-for-firms-using-microsoft-office-2010-and-2013/>



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Linklaters and Legal Design: The 101

We speak to Linklaters' head of innovation Shilpa Bhandarkar and Meera Klemola, co-founder of legal design agency Observ, about using legal design to redesign contractual processes and output.

Last year Linklaters announced that it had reengineered its training contract offer letter using the principles of legal design, becoming the first law firm we know of to publicly use legal design to rethink its contractual process and output. Perhaps more significantly, the firm, led by head of innovation Shilpa Bhandarkar, said that it is also looking towards legal design to increase the access, usability and effectiveness of its core documents for clients.

The original letter was a traditional Microsoft Word document, similar to the format of most other training contract offer letters in the market. The revised letter? A digital version that removes the need to print, manually complete and scan back, meaning it is more environmentally friendly, efficient and on brand for younger lawyers looking for firms to differentiate themselves.

So how did they get there?

First a very quick 101 in what legal design is not. After the revised training contract was made public, Bhandarkar says: "There was a perception that we had redesigned the contract as in made it pretty but what actually happened was we thought through and made changes to the entire contract process."

Klemola adds: "The word 'design' means that people usually think of the aesthetics - they focus on what they can see and the colours, but the reality is that it is a very holistic process. Of course you are trying to design something better for trainees, but people don't realise when you take an holistic view you are identifying all of the the people involved in the contract process - not just the end users but the graduate recruitment team who are dealing back and forth to the team that prepares that letter. And by understanding what works for each stakeholder you don't just achieve a more efficient outcome, but the processes become seamless across every touchpoint - it's just as much about creating business efficiency as a better experience for the user."

One of Bhandarkar's biggest surprises was the number of different touch points or users that the training contract had within the firm - five, including graduate recruitment and HR. Klemola says: "It comes down to education and understanding of who the stakeholder is. It's also about partnership and collaboration. We got all the stakeholders involved in the process."

The process

For a couple of weeks, the innovation team and Observ engaged in workshops with graduate recruitment, training and development, graduate recruitment partners, trainees in the firm and LPC students who hadn't started, as well as the innovation team and branding and marketing. Bhandarkar says: "Big firms can do things quickly if you get the right people involved - it's key to get the right people."

They posed an open question at the workshops: If we weren't limited by what we know of offer letters and employment contracts, what could a new generation of training contract offer letters look like?

Were people sceptical? "There was healthy scepticism," Bhandarkar says. "The way the workshops were run wasn't about what colour you like but what information are you looking for when you open the contract. It would have been less useful if there was no scepticism - meaning there would have been less useful feedback if everyone was already on board."

As an FYI, in these days of conference overload it is interesting to note that legal design was introduced at Linklaters as the result of a conference. A "creative and forward thinking" managing associate in Linklaters' Singapore office was writing a client newsletter and looking for a more engaging way to present it. Bhandarkar says: "He mentioned it to [former] BD director Charles Thornhill who was just at a Janders Dean conference where Meera was speaking." The firm ran a workshop in Singapore, Hong Kong, Indonesia and, eventually, London.

The tech angle

After the legal design workshops Linklaters identified that a technology solution would be appropriate and involved the tech team led by chief technology officer Bruna Pellicci. Klemola says: "You need to work hand in hand together. There is a good quote from David Cairns, who says that creating technology is the easy part but designing it so that people will want to use it is the difficult bit."

Bhandarkar added: "We were focused on people first, then process and then technology. Technology if no one uses it has an RoI of zero, so we needed to know what people wanted and design it to fit that use."

She adds: "RoI is the biggest thing: how much quicker is it? Is the internal team much happier with fewer steps? What is the feedback? When you say 'RoI' people assume that it has to be financial but what you need is a return that is measurable. That may not mean monetary, but it doesn't mean it's not valuable. I like the discipline of measuring for each project."

The Outcomes

There have been three big changes to the training contract as a result. The first is that the tone of the contract is what Bhandarkar describes as “much more Linklaters” in speaking to its graduates. More personal but still formal.

The layout has been changed and reordered to reflect better the key information that people need and steps they are required to take depending on who they are and what stage they are at.

The contract has changed from a Word/paper-based document to a digital PDF with inbuilt eSignature to reflect better the preference of future trainees, who may be travelling and find it difficult to print, sign and scan the contract back.

The training contract was the first that we know of where a law firm has openly used legal design and Bhandarkar said: “For me the training contract was to prove that legal design could be used on a legally binding contract where we had a very clear deadline - we wanted to prove the value.”

Klemola said: “Legal design works not just for documents but to complete e.g. onboarding of a new client. The first port of call is to understand the benefits but then, once the team gets collaborating and understands the process, you realise you can use legal design to solve more complex problems.”

What now?

Linklaters ran a process in November using its ideas platform, the Ideas Pathway, to get ideas for the next legal design project. It's in the process of implementing one of the ideas, which is under wraps but came from three corporate lawyers in the same practice group but in three different offices. We'll do a big unveil shortly!

Thomson Reuters adds Legislative Insights to Westlaw Edge

Thomson Reuters in February introduced Legislative Insights, a new tool in Westlaw Edge that provides actionable data relating to proposed federal legislation.

Driven by a proprietary machine learning and natural language processing methodology from Skopos Labs, Legislative Insights uses more than 250 factors to assign a Probability of Enactment score to each bill. Additionally, a tag is generated for relevant industries that will likely be impacted if the bill is passed.

“Legal professionals want to exhibit a deep level of understanding of their clients' businesses and operations,” said Lisa Mulrooney, director of Product Development at Thomson Reuters. “Legislative Insights on Westlaw Edge enables users to deliver greater value through deeper insights and strengthen their trusted partnership with their clients.”

The algorithm weighs multiple factors, including the text of a bill as well as political and external variables. A text example could show an environmental bill would be more or less likely to pass with the terms “climate change” included compared to a bill where “global warming” is used.

Oz Benamram to join Simpson Thacher

Our revelation at the start of February that high profile chief knowledge officer Oz Benamram is to join Simpson Thacher & Bartlett was well received, with many keen to wish him well on social media. We wish Oz the best of luck in his new role as first ever CKO.



Quote/Unquote

“Lawyers want you to automate and transform the way they work and that's fine unless you actually try to transform the way they work.”

Hall & Wilcox's client solutions director Peter Campbell, on the difference between rhetoric and reality in most firms. See page 3.

Startup Corner: Verbit + SimplyAgree

Verbit: The Vital Statistics

Verbit, the Tel Aviv-based AI-powered transcription platform, in January closed a \$31 million Series B funding round led by growth equity firm Stripes. It currently combines artificial intelligence with a network of 15,000 human professional transcribers. The latest investment round means Verbit has raised \$65 million in total and we asked Tom Livne, CEO and co-Founder of Verbit, to talk vital statistics.

Tom congratulations on your latest funding round, for readers who aren't familiar with Verbit please tell us a bit about your offering.

Verbit serves customers in the legal industry, as well as higher education institutions. We assist deposition and court reporting agencies by providing them with an AI-based solution that delivers error-free, reliable transcripts within quickest time frames. Verbit's technology helps to fill the gap left by the growing shortage of stenographers available by providing word-for-word transcripts to serve as the official record in proceedings and litigation. Verbit is also being used by a variety of universities and online and distance learning institutions, including London Business School, Stanford University, Harvard University, Coursera and Udacity.

Can you give us a peek under the hood at the technology you are using?

Verbit harnesses a hybrid model combining artificial and human intelligence to provide a smart and automated transcription and captioning solution. The solution incorporates Automated Speech Recognition (ASR) technology and utilises a support network of 15,000 human professional transcribers and editors to correct errors and make necessary revisions. These edits then flow back into the self-learning AI machine. The technology is built on three models - linguistics, acoustics and contextual events - which help Verbit's machine learning algorithms get smarter over time. These models help to identify specific terms and speakers, reduce noise and intake current events and relevant content to improve precision for clients.

\$31m is quite a sum, what will you use the money for?

We will use this latest investment to further accelerate Verbit's rapid growth, including expanding to new industry verticals, increasing the number of languages available and continuously innovating its speech recognition technology.

What are your key growth targets?
Our key growth target is to continue increasing our annual revenue.

Tell us about/a bit more about your new markets strategy?

Right now, we are focusing on the legal and higher education industries.

And your strategy more generally moving forward?
Moving forward, we will continue to provide top-class customer success and 24/7 support to our clients while providing them with the top-tier solution.

What are your growth metrics since you were founded?

In the past 12 months, we have doubled our valuation and tripled revenue.

What is your ultimate ambition/end game?

Verbit's ultimate ambition is to go public on the NYSE.

Verbit's vital statistics:

Founded: 2017

Founders: Tom Livne (CEO); Eric Shellef (CTO); Kobi Ben Tzvi (VP Engineering)

Number of staff: 100 employees; 15000 Transcribers

Key Clients: Harvard, Stanford, vTestify and Coursera

Key competitors: Rev, eScribe, 3Play Media

Investment rounds: Series A (January 2019): 23M; Series B (January 2020): 31M

Revenue: Verbit has "tens of millions of dollars in revenue."

SimplyAgree: A turbo-charged eSignature tool

Within the past month we saw the announcement that signature and closing management tool SimplyAgree is now available through Reynen Court's solution store, enabling law firms to deploy it as a pre-vetted app.

We asked co-founders Will Norton (CEO) and Sam Beutler for the low down on the Nashville-headquartered company.

How would you describe your company to a friend?

If our friend is a deal attorney, then SimplyAgree is a signature and closing management tool that automates the most time-consuming and tedious aspects of closings, like signature packets and closing binders. But for everyone else, you can think of us as a turbo-charged eSignature tool, customised for the unique workflows of transactional attorneys.

And if you had to describe it to a techy?

SimplyAgree is built to be a lightweight, extensible platform that is responsive, easy to use and allows us to quickly innovate for our clients. We use a Javascript client-side application to provide a reactive user experience and a Python backend to take advantage of a flexible REST API and advanced machine learning. SimplyAgree integrates with common law firm technologies such as NetDocuments, iManage, OpenText, Sharepoint, HighQ and DocuSign. We also use Kubernetes to containerise the application and support deployment in many different environments, including on premises.

When were you founded?

SimplyAgree was founded in late 2016 with the initial product release in the fall of 2017.

By who?

Not surprisingly, SimplyAgree's co-founders were both former transactional attorneys who experienced the inefficiencies of deal closings firsthand. Will Norton, SimplyAgree's CEO, practiced in the venture capital and emerging company group at an Am Law 100 firm, while Sam Beutler, SimplyAgree's chief product officer, was a corporate M&A attorney.

What is your growth strategy?

We believe there are significant opportunities to automate transactions - particularly for the most complex transactions. While a good number of firms have adopted diligence automation tools, many are looking for the next opportunity to innovate. We want to help transactional legal professionals embrace automation technology in other areas of their deals, starting with the expensive and manual processes around closings.

Have you received investment?

SimplyAgree raised two rounds of seed capital - in 2017 and 2019 - totalling over \$1.5 million.

Who are your target clients?

SimplyAgree works with law firms that have sophisticated M&A, emerging company, venture capital, private equity, commercial finance or commercial real estate practices. These include everything from Am Law 100 and Global 100 law firms to sophisticated boutique transactional practices. If a firm does a lot of deals, SimplyAgree can help!

Have there been any key changes in direction since you were founded?

In its infancy, SimplyAgree wanted to be a full-service, front-to-back transactional platform. However, we quickly learned two things from our customers: the biggest pain points in transactions were all around the closing, and law firms had major concerns about getting users to adopt new technology. So early on we made the decision to focus on a flexible but easy-to-use tool for signing and closing transactions - and we haven't looked back.

What are the key challenges you face in your market? The market for software solutions in transactional law is challenging, because historically it's been underserved. While this creates incredible opportunities for improvements, it also means that it takes time to educate the market about how to incorporate these solutions into their practices and the ultimate RoI. Fortunately, we love having those conversations with law firms!

What are the most exciting developments you've seen in your market in the past year to 18 months?

The most significant development for SimplyAgree and the market in the last year or so is the advent of containers for legal software. Tools like Docker and Kubernetes make it possible to install cloud-based software in any environment - public cloud, private cloud or on premises. This means law firms don't have to choose between using the best available technology or sacrificing user experience to meet security requirements. Companies like Reynen Court are accelerating this development by helping educate and support law firms on how they can use containerisation to streamline their procurement process.

Tell us something that people don't already know about the company?

SimplyAgree's cofounders grew up 10 minutes apart in the same town in Nebraska but did not meet until they connected in Nashville to create SimplyAgree!

Eversheds Sutherland appoints partner to fill tech innovation role

Eversheds Sutherland in February appointed Rachel Broquard, a partner in its corporate group, to the newly created role of service excellence partner, which is an evolution of the tech and innovation role formerly held by Andrew McManus.

Client-facing technology will be a key part of Broquard's responsibilities, but with a broader remit to include client service excellence, legal project management and knowledge in the client context. She will also lead on the firm's innovation agenda.

While there is a growing blurring of the lines between lawyers and techies, the appointment of a partner to this kind of senior role will, nonetheless, take many by surprise. It came after a competitive process and Eversheds Sutherland said that Broquard has been instrumental in developing a number of their client technology offerings, including the firm's flagship M&A project management tool, DealMaster. DealMaster is a proprietary transaction management platform, launched in 2015, for multi-jurisdictional M&A transactions.

We asked Eversheds Sutherland's managing partner, Keith Froud, how the role that Broquard takes on has changed and why the firm selected a partner to fill it. He had this to say:

"The role has evolved. Andrew was very focused on client tech. Rachel's role is a more holistic approach to client service excellence, where pure client tech is a key element but she will be coordinating other key elements such as LPM and Knowledge in the client context.

"As regards Knowledge, Rachel will be liaising closely with our core KM team, leading our strategy as to how we use Knowledge in our client relationships.

"Again, technology is key to all of these things, and Rachel is very tech savvy. She's one of those people I call gold dust - lawyers who really 'get tech'.

"As part of her role Rachel will be working very closely with our IT team, including certain of our client tech specialists who will report in to Rachel direct.

"The fact that we chose a partner reflects the breadth of the new role. Rachel is very client-facing, has a legal background and a multitude of skills. Increasingly, this kind of multi-skilled approach will be the norm going forward."

Broquard wasn't immediately available to speak about the new role but said in a statement: "I am delighted to have been appointed to this role - a first for Eversheds Sutherland - with a focus on service excellence, and am looking forward to close collaboration with our clients and many colleagues across the firm."

On the sofa with Deane Price, president & CEO of Aderant

Hi Deane, what's on your high priority to-do list at the moment that you can share with us?

My top two priorities now are around our clients and our people at Aderant. For our clients, in 2020 we want to help our existing Aderant Expert clients take on our new software. We have come out with completely new software over the last several years around our billing and accounts payable applications. All of our new Expert clients are taking the new applications because they are in a change management exercise already swapping out their practice management systems. But our existing clients are not in a forced change, so we need to help them take on the new software. As it relates to our people, we are very focused on engagement. Engaged employees will perform better and help drive better business outcomes. We are pleased that we score in the top 1/3 of companies globally with goals to improve to top quartile.

What have you accomplished lately that you're really proud of?

The acquisition of iTimekeep and OCG Live is really exciting and I am proud that we were able to bring the great products and people into Aderant. We have been eying them up for years and they have really built great products and we can't wait to introduce them into the UK and EMEA markets.

And anything you're not proud of?

My living room. I started a re-decorating project in September, pulled up carpets and then never got the inspiration to go any further. I walk by every day and see a mess of old furniture in a room with no rug. Ugh.

What are the two or possibly three areas of real progress you see in the legal sector?

In my opinion, the move to the cloud is the biggest change in the legal technology sector. The industry was really lagging other verticals but is really starting to move at a noticeable pace. We are very excited to help them with this move.

And where do you see the most extreme examples of lack of progress – extra points if you can say how you would change them!

The fear of change is very strong. To conquer your fear of change and transform your business you need a comprehensive plan. Spend the proper amount of time understanding the motivation, researching concerns and putting the proper systems in place.

If you have to pick one of these words as an agent of change what would it be and why? Process, mindset or passion.

I think of change as a process. You have to identify and build a strong case for change, engage stakeholders, create buy-in and communication plans and all of that has to overcome the resistance to change in order to be successful.

What is your career highlight to date?

I started a company with two other individuals when I was 33 years old with a 3 year old and a 6 month old. What was I thinking? It was totally not the right time, but the opportunity was one of those one-time chances. We did a management buy-out of an acquisition gone bad.

Who is your biggest influencer and why?

I've got two biggest influencers; they were the men I started the company with. They were older than me at the time and really helped guide me.

What's your favourite drink?

I'm currently into Old Fashions but I'm not a fan of the calorie count.

If you could hang out in a bar with one person, dead or alive, who would it be?

I'm not much for hanging out in bars, but if I did I'd like to hang out with Thomas Jefferson.

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SKILLS 2020

For the past 15+ years, Oz Benamram has hosted the Strategic Knowledge and Innovation Legal Leaders Summit (SKILLS); a private conference that attracts senior knowledge management and innovation leaders from the largest law firms in the world.

In February 2020 the event, hosted by White & Case and sponsored by Intapp, was full of discussion about “old” and “new” KM, legal tech and innovation, collaboration and the continued importance of great talent.

Benamram, who for a short while longer will be chief knowledge officer at White & Case but is moving to take on the role as first-ever CKO at Simpson Thacher & Bartlett, shared a few takeaways from the closed-door session.

Speaking to Legal IT Insider he said that the biggest surprise, aside from how willing people are to share and how much the group has grown (participation was limited to one person per firm this year), is the shift back to “build not buy”. “It is surprising how many firms invest in building their own legal tech,” he told us. “It seems wasteful to me.” Here are the highlights and key findings of the summit.

Defining Innovation

- Just like “knowledge”, the definition of “innovation” is vague and a challenge. Innovation is often looking at traditional KM in a different way.
- Innovation is often looking to reduce lawyers’ administrative burden or advise clients on operational issues.
- Whether or not “innovation” is in your formal title, it belongs everywhere and is everybody’s challenge - someone cautioned that once you take on “innovation” in your title it can become a burden to bear.
- Talent management - Firms need to invest in upskilling current staff and hiring for new skillsets e.g. data analyst, product managers. Encourage recruitment of out-of-the-box thinkers as well as associates who have something in addition to fantastic legal skills.
- Building a budget - if “innovation” scares law firm management, put money aside for R&D marked as “special projects” or “ideas management”.

Collaboration

- KM folks need to joint venture with other business services to achieve ends.
- Knowledge can be the hub function in the firm, working with IT, marketing, data groups, BD and L&D. It’s not just about technology, but also about process improvement, which is deep work but can deliver real value and efficiencies.
- Changing culture - getting client and lawyer buy-in is essential. The number of firms giving billable credit is increasing, e.g. lawyers can elect to work on innovation projects, firms award spot bonuses for new ideas (have criteria ready to judge those new ideas!). Perception is as important as reality - awards help; client interest helps.

The Big 4 (friend, not foe)

- The Big 4 are looking to fill legal clients’ unmet needs - typically low-value work or advisory services around operational and technology needs - not steal work from firms.

- Firms should actively consider how to partner with other service providers to meet client requests. There are collaborative service models and managed services, e.g. contract review, tax services. The Big 4 can also give firms the ability to scale.

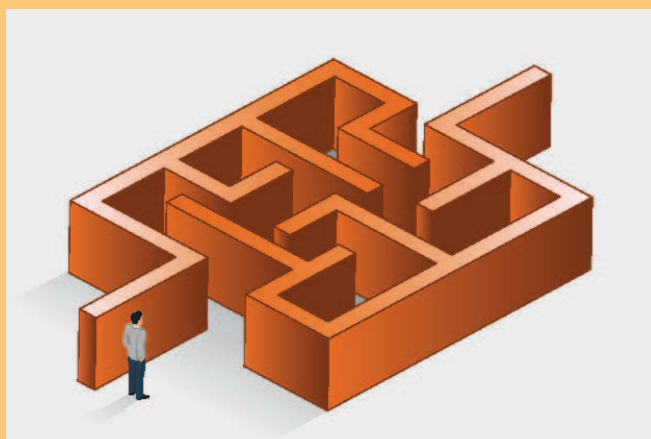
- Understand the enterprise model of the client, how the legal department fits, and how we might serve them.

Data

- Firms are bringing in data-related roles for e.g. litigation-settlement prediction, deal intelligence systems, matter pricing, etc.
- There is still a strong need for true data scientists, not just data-minded professionals.
- Data and IG team can be secret weapons for KM - they’re often embedded in the practices and already helping with business/client intelligence.
- Data is becoming more and more important, and records/info governance will have their day again. #bringbackboring!

Recession

- Smarter firms will take the time, when lawyers are less busy, to get them more involved in KM, working with legal tech, upskilling, building client relationships, etc. so that the firm is stronger for the rebound.



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What's Hot & What's Not: Wins & Deals

UK & EMEA 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 with Microsoft Dynamics 365. We understand that Birketts has swapped out DPS Software, which it selected in 2015 as part of an integrated case and practice management offering with Aderant. 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. Birketts lists as priorities in its selection the ability to create fully digital matter folders for all work types across the business and support for a modern workplace strategy by enabling partners to access services securely anywhere, anytime, from any smart device. Peppermint is moving all of its four modules (CMS/MMS; DMS; Client Engagement; and PMS) to Dynamics 365. As Peppermint CX it was available online and on-premises, but its move to CX365 signals the fact that, while it continues to support its existing on-premises customers (the majority of its 60 customers are in hosted private cloud), all new customers will be in the Microsoft cloud. The last of its four modules to switch will be PMS, which as of around June/July will be hosted in Microsoft Azure. **Tom Wagstaff**, director of technology & innovation at Birketts, which, incidentally, last year selected OnePlace as its cloud CRM, said: "We are genuinely excited about working with Peppermint and believe that our collaboration will bring benefits to our lawyers and clients alike. The importance of having a versatile case and matter management solution has never been more pertinent and we believe CX365 will allow us to remain competitive and deliver an even higher quality of service to our current and future clients."

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 PwC's new global legal tech leader (see below) said: "No-code platforms close the gap between legal professionals and product development teams and - more importantly - with 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. **Doctor Guenther 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."

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. Furthermore, it quickly became clear that the flexible, innovative and motivated team at PracticeEvolve would be very easy to work with. This gave us confidence for a successful project and a sound, longstanding relationship. PracticeEvolve was recommended to us by our outsource provider, Quiss Technology, who have worked alongside us throughout the selection and due diligence process."

London-based law firm **Fladgate LLP** has enhanced its digital business with a new high-performance enterprise wireless solution from WiFi experts **Redway Networks**. The new solution provides fast, reliable WiFi connectivity with four levels of network access for users, which Fladgate says has improved flexibility and collaboration for staff and the visitor experience for clients. Fladgate is a UK top 100 law firm that specialises in advising international corporate, institutional and private clients throughout their business cycle and personal life. **Chris Stedman**, head of IT at Fladgate said: "Our existing wireless network was less than satisfactory, with dropouts in parts of the office. Our firm is committed to supporting agile working and ensuring a high-quality client experience so an upgrade to a superior wireless network was an investment to support both commitments." Fladgate initially got in touch with Redway Networks to conduct an on-site wireless survey. Stedman said: "I had heard really good reports about Redway so booked one of their Ekahau-certified engineers for an on-site survey to find out what could be done to improve our WiFi." After conducting the survey, Redway identified several issues with the firm's existing WiFi, including a poor initial design with substandard channel planning, overlapping coverage and too few access points broadcasting too loud and on the wrong frequency. Stedman said: "We had a whole mish-mash of issues compounded by the fact that, because of our location, we have interfering WiFi above, below and all around our offices." Fladgate's staff use collaboration zones within the office with laptops and other mobile devices connected to the network and Redway also identified that these areas had the weakest WiFi coverage, which didn't support the firm's flexible working strategy.

Stedman said: "Once Redway had identified these issues it was obvious that our existing wireless couldn't support collaborative working for staff or the user experience for clients, so we decided to replace our existing WiFi straightaway." After a full product consultation from Redway, a new **ExtremeCloud IQ WiFi 6** solution was selected as it offered high-efficiency WiFi with the highest levels of wireless encryption and could be managed remotely. Stedman commented: "Extreme met all our requirements and I especially liked the fact that Extreme Networks has the ISO/27011 technology platform certification, which is a code of practice for security and vital to us."

UK top 50 law firm **Freeths** has selected **Phoenix Business Solutions**, now a **Morae Global Corporation** company, to swap out Lexis Axxia for the **iManage Cloud and Work 10**. This project is part of a "comprehensive technology refresh" - involving the ambitious roll-out of slicedbread, Aderant and iManage Work 10. Freeths has 1,000 users in 13 UK offices. The firm says it was looking to replace its outdated legacy system with a best-of-breed document management system that would integrate seamlessly with Aderant, which it selected in February last year in place of Axxia. After "an extensive tender process", chief technology officer **Richard Hodgkinson** and consultation partner **3Kites** selected Phoenix Business Solutions to install and integrate iManage Work 10 and iManage Cloud, together with Phoenix's proprietary technology Workspace

Control. Morae's Phoenix team is entrusted with designing, testing, piloting and rolling out the iManage DMS, including user training and coordinating integration with the Aderant systems to achieve seamless technology integration across all of Freeths' systems. Hodgkinson said: "iManage's best of breed DMS provides a solid foundation for Freeths' ambitious growth plans. I am confident that Morae's real understanding of how modern lawyers work, their deep experience with the technology, and tried-and-tested implementation methodology will keep this time-critical project on track to great success for the firm."

Established regional law firm, **Harding Evans Solicitors**, has adopted **Tikit's P4W** for their user-base of 160 employees. The firm has offices in Newport and Cardiff and delivers a specialist range of legal services to commercial and private clients.

National law firm **Stephensons Solicitors LLP** has become one of the first law firms headquartered in the North of England to roll out artificial intelligence technology, **Settify**. Settify is an online system that is accessible by clients via the firm's website or by email invitations sent by the Stephensons family team to new clients before their initial meeting. It uses artificial intelligence to provide clients with instant customised, helpful information directly relevant to their family law matter, and collects a full brief of their initial instructions in a safe and secure manner. The technology is designed to provide family clients with everything they need at the start of their divorce proceedings at a time and place convenient to them. The technology also means that clients ultimately save on costs as Stephensons has all of their information up front without the need to go through everything again during an initial meeting. **Victoria Gethin**, head of family law at Stephensons Solicitors, said: "Over 100,000 people get divorced every year in England and Wales and the process can often be complex and time-consuming. Stephensons is constantly looking at ways to improve this experience for our clients. Settify presented clear and tangible benefits for our clients and also seamlessly blends with our own internal processes. We're proud and very excited to roll the technology out and gauge the reaction from our clients." **Max Paterson**, a former Australian family lawyer and co-founder of Settify, said: "Many modern clients now expect a helpful, user-friendly way to commence working with their lawyers online. The family law team at Stephensons is already regarded as one of the strongest teams in the North of England and we are delighted that they have demonstrated a true commitment to innovation by adopting Settify."

North America **Holland & Knight** has confirmed that it is to select **ZERØ** after a lengthy pilot, which CIO **Matt McKinley** told Legal IT Insider 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 ZERØ over a year ago. McKinley told Legal IT Insider: "We got wind of ZERØ and started a proof of concept. We had ZERØ come to an all-lawyers meeting and they set up a booth to talk to attorneys. ZERØ got a lot of interest."

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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 ZERØ 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 ZERØ on the desktop is expected to be limited at first. ZERØ 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 ZERØ 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.” Email management is not entirely new to Holland & Knight, but McKinley says: “As far as integration with our back-end is concerned it’s brand new. We used the iManage integration but it required a lot of interaction on the user side. With ZERØ you can turn on automatic filing or wait until it learns your behaviour and then take off the training wheels.” Whilst accuracy rates are (rightly) the focus of much attention when it comes to tools that replace human efforts, McKinley says: “ZERØ is better than 90% - which is better than asking your secretary to do it - but I’m not concerned if it’s not 100% accurate because the email [wrongly] filed is still in iManage and we can find it. The email just needs to be filed. If it sits inside Exchange, it’s not secure.” ZERØ says it can process an unlimited number of emails “with 99% accuracy”.

Balfour Beatty has engaged **Reveal Data** as its preferred provider of eDiscovery services in the United States, in a massive win for the 2008-founded eDiscovery software and services vendor. The construction giant spent much of 2019 identifying and implementing new tools and functionality for electronic data processing, discovery and review. Balfour Beatty selected Reveal Data’s eDiscovery solution because it allows for the self-performance of eDiscovery processing, data analytics, utilisation of sophisticated artificial intelligence models for technology-assisted review and a consolidated document review platform that can be used across their US business. “When starting this process I knew we needed a platform that was cloud-based and easily scalable. We sought to find the right balance of ease of use while having access to intuitive yet robust artificial intelligence and visualisation tools,” said **Aaron Bath**, national director of litigation management at Balfour Beatty US. “Reveal’s platform has the flexibility to interact with our data in a manner we are accustomed to while harnessing the platform’s muscle to improve our efficiency, lower our costs and better leverage our documents.

Reveal’s consulting expertise and training team developed a bespoke workflow addressing the unique needs and challenges of the construction and infrastructure space.” “Reveal is uniquely positioned to fulfil Balfour Beatty’s eDiscovery needs. The company needed an eDiscovery solution that conforms to the many different requirements of discovery,” says **Wendell Jisa**, chief executive officer at Reveal. “Reveal allows for companies like Balfour Beatty to adapt as their discovery needs shift with every case, because of our 19 data centres, support and highly scalable, cloud-based eDiscovery and investigation solution.”

Law firm business intelligence provider **Iridium Technology** has merged with **Data Fusion Technologies** (DFTech) to create a company of around 70 employees with over 250 law firm clients. The Iridium BI product offerings will now include DFTech’s **Intellistat** and **Steere** products. The company continues to be named Iridium Technology and will be led by Iridium’s CEO (and founder) Tom Jones, who stays in that role. Jeff Suhr, president of DFTech, joins Iridium as senior vice president. Randy Steere remains an independent executive consultant. The merger follows Iridium’s acquisition last year of Decision Pace Inc. **Jones** said: “Law firms are under pressure to improve pricing, profitability and service delivery. This combination enables both companies to continue at the forefront of innovation for firms looking to leverage data and analytics to drive better decision-making and improved performance. Adding the **Intellistat** and **Steere** product lines puts Iridium in the position of having the broadest BI and financial analytics product footprint of any business partner to the legal industry.” **Suhr** added: “I’ve always believed that our intense concentration on BI and financial analytics has allowed us to build better products for our clients. Iridium, which has always been laser-focused on BI and profitability products solely for law firms, clearly feels the same way. I am convinced that law firms in need of improved data access to firm performance metrics are best served by specialists who focus exclusively on BI and financial analytics. That makes Iridium the perfect partner for us and makes this merger a big win for our clients.”

AbacusNext, a technology provider for legal, accounting and compliance-focused professionals, has launched an integration between **HotDocs** and **AbacusLaw**. The integration, which was originally previewed at Legalweek New York 2020, provides firms with the ability to assemble error-free documents automatically using the client, calendar and case information already in the AbacusLaw system. Users of AbacusLaw with HotDocs now have the ability to complete entire documents with one click, or start with the information already in AbacusLaw and enter more information using an interactive HotDocs interview. Firms using AbacusLaw with HotDocs have reported significant time savings, increased accuracy and reduction of costly, embarrassing and potentially license-threatening malpractice claims.

"We received very positive feedback on the integration at Legalweek and look forward to sharing this with attendees at ABA TECHSHOW next week," said **Scott Johnson**, chief executive officer at AbacusNext. "This is a pivotal moment for the company, as it marks the first integration between two of our flagship products. For our legal customers, it signals a change in the way firms manage and assemble their documents. We are excited to bring this to the market and make it available for all firms to use."

APAC iManage has announced that **MinterEllison** - an international law firm headquartered in Australia and regarded as one of the Asia-Pacific's premier law firms - is using **iManage RAVN** to streamline an enormous document review project for one of its clients. This innovative approach and use of technology are bolstering the firm's reputation for coming up with creative solutions to pressing client challenges. The project - which involves a financial services institution undergoing remediation - requires MinterEllison to review more than half a million documents over a six-month period to identify which items need further follow-up by the client. "The data we received from the client was largely unstructured and uncategorised," said **Matthew Franks**, AI and emerging technologies lead at the firm. "From a review perspective, that meant our reviewers would have to look at every single document in that set of half a million files." iManage RAVN provided a smarter way forward for the firm. iManage RAVN is an award-winning artificial intelligence engine that powers products like iManage Insight and iManage RAVN Extract, which can automatically understand, organise and extract key data points from within documents.

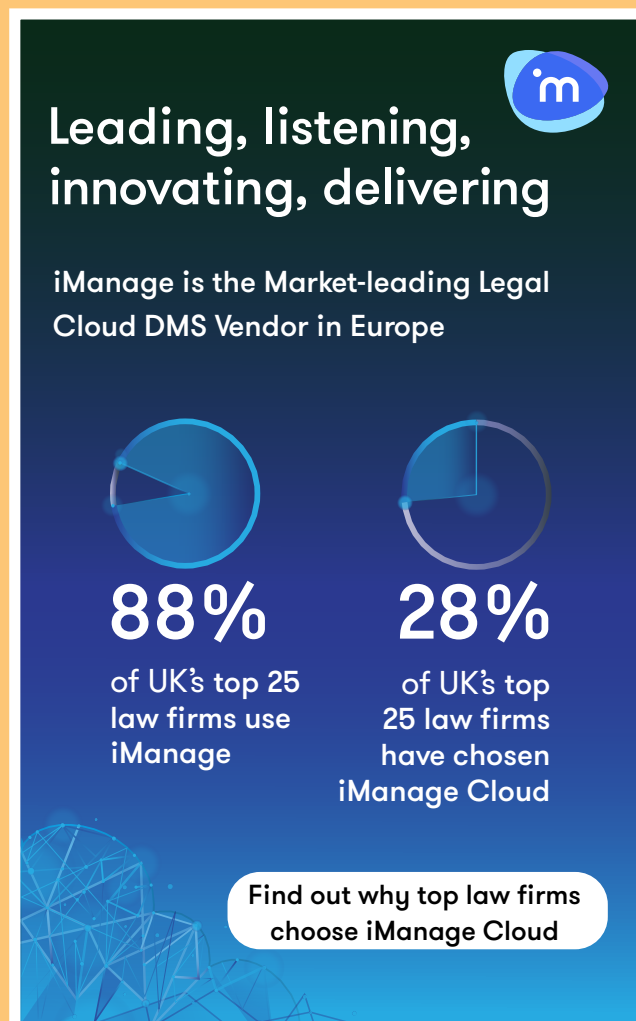
"As the client sends over batches of documents we can use RAVN to classify them automatically as a particular type of document," said Franks. "That lets us immediately identify the documents that are relevant to our review and filter out the irrelevant ones." After documents are classified, they are passed along to a specific review form that extracts the key bits of information for that particular document type. When MinterEllison's reviewers log into the firm's review platform, the most relevant documents have already been surfaced and presented to them for review, with all key pieces of data present. Using iManage RAVN to assist with the review process allows MinterEllison to approach the task in a much more efficient, and cost-effective, manner. "If we were doing this review process entirely manually, we would need significantly more full-time employees working on it," said **Gary Adler**, chief digital officer at the firm. "RAVN will reduce the number of people we'll need to use on this project, which we estimate will create close to \$2,000 in savings per day for our client across the six-month period. This efficiency aligns with our digital transformation strategy of providing better value to clients while empowering our lawyers to focus on higher-value activities, rather than laborious tasks that are better handled by AI."

The MinterEllison legal operations team focused on process, people and technology to help create an end-to-end, automated solution that it could use for document review projects. Local iManage partner **Phoenix Business Systems** assisted with the RAVN implementation. "The market notices innovation, and rewards it accordingly," said **Nick Thomson**, general manager, iManage RAVN. "Taking advantage of RAVN has allowed MinterEllison to offer their client a solution their competitors couldn't. This does more than serve as a powerful marketplace differentiator - it allows MinterEllison to be a true partner to its clients, delivering innovative solutions and exceptional outcomes."

Quote/Unquote

"Initially I looked at the UK market and felt quite confused, there were loads of different products, but I looked at Australia, which had just four products, so that's what made me go there. That and Home and Away."

PracticeEvolve's founder and CEO David Boland discusses the more comical strategy behind his expansion from Ireland to Australia almost two decades ago.



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Movers & Shakers

UK & EMEA Not a hire as such, but **PwC** has appointed **Christian Oehner** as its global legal technology leader, based in Vienna, following the transition of former head Doctor Gunther Dobrauz to a global role in the financial services team. Oehner is managing partner at PwC Austria. In his early career he was an associate at Freshfields Bruckhaus Deringer and has worked as a consultant at The Boston Consulting Group as well as a partner at leading Austrian firm Wolf Theiss. He is a legal tech evangelist for Disruption Disciples in Vienna. In an interview with German legal magazine, Juve, Oehner says that he was appointed as global legal tech leader because of his combination of legal and technical expertise. The global legal tech team includes around 20 people across Europe, the UK and Australia, and Oehner told Juve: "It is my job to expand this team."

iManage has appointed **Penny Orme** as commercial director for **iManage RAVN** globally. Orme, who was previously VP of sales at Apperio, will be focused on feeding into the overall business strategy, enabling the sales teams and driving new business. Orme's CV includes 13 years at Merrill Corporation, latterly as head of sales EMEA. Commenting on the appointment on LinkedIn, RAVN's general manager **Nick Thomson** said: "Yes!! Let's go!!"

Professional services knowledge and content platform **Mondaq** has appointed **Tim Harty** as its new CEO. Harty has been engaged by Mondaq as a consultant for the past nine months. Before joining Mondaq he spent 19 years at Thomson Reuters holding various product and general management positions where, most recently as global head of actionable intelligence, he led the launch of an AI-enabled data privacy solution built in partnership with IBM Watson. **Charles Aspinwall**, co-founder and director at Mondaq, said: "The breadth and depth of Tim's knowledge and his commitment to the continued success of Mondaq make him the perfect fit to further strengthen our management team. Tim will lead and build our team as we move into our next phase of growth."

Eversheds Sutherland has appointed **Rachel Broquard**, a partner in its corporate group, to the newly-created role of service excellence partner, which is an evolution of the tech and innovation role formerly held by Andrew McManus. Client-facing technology will be a key part of Broquard's responsibilities, but with a broader remit to include "client service excellence", legal project management and knowledge in the client context. She will also lead on the firm's innovation

agenda. Eversheds Sutherland said that Broquard "has long combined frontline transactional work with a passion for innovative client service solutions, often with a technology angle, and has been instrumental in developing a number of Eversheds Sutherland's client technology offerings, including the firm's flagship M&A project management tool, DealMaster". DealMaster is a proprietary transaction management platform for multi-jurisdictional M&A transactions launched in 2015. We asked Eversheds Sutherland's international managing partner, **Keith Froud**, how the role that Broquard takes on has changed and why a partner was selected to fill what is ostensibly a tech role. He had this to say: "The role has evolved. Andrew was very focused on client tech. Rachel's role is a more holistic approach to client service excellence, where pure client tech is a key element but she will be coordinating other key elements such as LPM and Knowledge in the client context. As regards Knowledge, Rachel will be liaising closely with our core KM team, leading our strategy as to how we use Knowledge in our client relationships. Again, technology is key to all of these things and Rachel is very tech savvy. She's one of those people I call gold dust - lawyers who really 'get tech'. As part of her role Rachel will be working very closely with our IT team, including certain of our client tech specialists who will report in to Rachel direct. The fact that we chose a partner reflects the breadth of the new role. Rachel is very client-facing, has a legal background and a multitude of skills. Increasingly this kind of multi-skilled approach will be the norm going forward. Broquard added: "I am delighted to have been appointed to this role - a first for Eversheds Sutherland - with a focus on service excellence, and am looking forward to close collaboration with our clients and many colleagues across the firm."

IP technology company **CPA Global** has announced that **Paul Woolf** has joined the business as group CFO and chief operating officer. Woolf will join the board and become a member of CPA Global's executive committee with global responsibility for finance, legal, commercial and regional businesses in the US, EMEA, APAC and ANZ. Before joining CPA Global, Woolf was CFO at Mitie Group plc. He brings broad leadership experience in both privately-owned and listed businesses, including previously acting as CEO at Virgin Active Health Clubs, CFO/COO at Birds Eye Iglo, CFO at The Automobile Association, and various finance and operational roles at Dell Computers. Woolf's appointment closely follows the completion of the integration of MDC and the ipan/Delegate businesses into

the CPA Global group. To leverage these newly-extended capabilities and deliver the next phase of its five-year plan to bring about frictionless IP, the group has been organised into two core divisions: software and services. Simon Webster, group chief executive officer at CPA Global, said: "Last year we celebrated our 50th anniversary as a business and, as we look ahead, CPA Global is ideally positioned to author the future of the IP industry, empowering our customers as the world's largest provider of IP software and services. Paul will play an important role in helping us to deliver our vision and we look forward to welcoming him to the CPA Global family." Woolf added: "CPA Global has gone through a transformative period of growth and reorganisation, now with 3,000 people serving over 12,000 clients, and a very bright future ahead. Intellectual property is central to successful innovation and invention and it's inspiring to become part of a company which is at the forefront of helping power the ideas, and professionals, that are critical in shaping the future across the global economy."

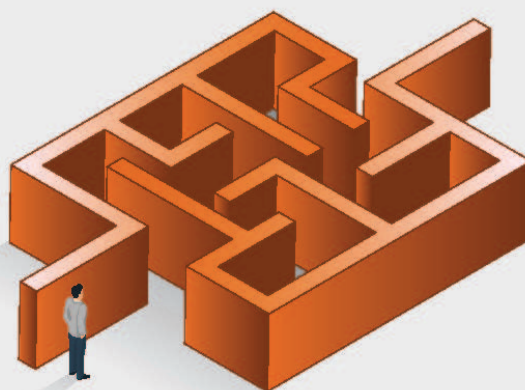
North America Axiom's managed legal services spin-off, **Factor** - formerly Axiom Managed Solutions (AMS) - has hired **Varun Mehta** as CEO as it positions itself for significant growth. Mehta was on the founding team of Clutch Group which, in 2017, merged with Morae Global, where he served as president. Since his departure from Morae Global, Mehta has been an active investor and advisor to companies of different size and scale across the legal, risk and compliance sectors, most recently advising Bodhala, a fast-growing legal tech provider supporting corporations in the analysis and optimisation of legal spend. The appointment follows the announcement last week that AMS had rebranded as Factor as it distances itself from the Axiom brand and plans to expand its market leadership, with a recommitment from its owner/ investors Carrick Capital and Benchmark Capital, who sold Axiom to Permira last year. "As someone who has competed against the Axiom Managed Solutions business in the past, I have long admired and respected what they built, especially their leadership in delivering sophisticated legal managed services," Mehta said. "The company's leadership always had an intellectual curiosity and a true passion for developing a better model - unlike much of the industry, which seemed to be focused on winning the next contract."

As a result, Factor begins its journey with an excellent client list and a reputation for taking care of their people and clients, which has become the gold standard in the industry." During his tenure at Clutch Mehta served as CRO and co-led the business's transformation from a staff augmentation firm to an industry leading, tech-enabled legal services firm that grew more than 350% over a three-year period to over 500 employees and seven offices across the globe. "As we embark on Legal Innovation 2.0, Factor is well-positioned to serve the massive gap between highly-skilled yet expensive law firms and the more commoditised work-streams in the LPO and ALSP category,"

Mehta added. "With Factor's deep experience transforming legal services through a combination of expert lawyers, smart technology and well-informed processes, we will focus on serving as a business enabler to general counsel and the businesses they represent."

Litera has made further industry hires as it looks to bolster its capability, particularly around its transaction management business. **John Lofy** joins as vice-president of key accounts and **Katrina Jasaitis** takes on the role of director of adoption. **Joanne Woolford** has been taken on as lead strategic growth consultant for North America.

Lofy was previously vice-president of client management at HighQ and Thomson Reuters. He will be responsible for leading Litera's key accounts programme, driving their growth and retention and building strategic partnerships with the world's largest law firms. Jasaitis worked as a consultant at Foley & Lardner. She will be responsible for creating and executing Litera's adoption strategy to enhance the customer experience and maximise their RoI. Woolford previously worked at the Practising Law Institute and HighQ. She will be responsible for strategising and planning adoption of the transaction management platform across firms.



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These recent hires follow closely behind Tunji Williams, former CEO of DealWIP, Ian Kujawa, formerly with NetDocuments, and Judy Releford, formerly with BigHand. **Avaneesh Marwaha**, **Litera** CEO, said, "Our strategy for being a truly global vendor is accomplished through hiring people with a wealth of experience and expertise in the legal technology field. We're experiencing exceptional growth right now and are finding that employees are more than willing to join a company that is expanding into new markets and actively investing in its workforce."

Anne Reavis has joined **Wilson Allen** as a CRM consultant. Reavis will work as part of Wilson Allen's US-based CRM team in a strategic consulting role to support the successful delivery of CRM implementation and transformation projects. Reavis joins Wilson Allen from Womble Bond Dickinson (US) LLP, where she served as director of business intelligence with responsibility for Womble's business intelligence, CRM and e-marketing platforms. Reavis also acted as the project lead for evaluation and migration of its 20-year-old CRM platform to OnePlace. She brings nearly 15 years of legal technology expertise to her new post. "We see law firms placing increased emphasis on CRM in 2020 to support their business development strategies. As such, we anticipate a huge upswing in activity for our CRM team and wanted to get ahead of demand by hiring Anne," said **Michael Warren**, VP of Wilson Allen's CRM practice. "Her understanding of the drivers and challenges related to large-scale CRM projects and how to navigate them successfully will be of great value to our clients and our team." Wilson Allen's CRM team has completed more than 200 CRM projects for law firms worldwide and calls 43 of the UK Top 100 and 30 of the AmLaw 200 law firms clients.

Automated contract management provider **Evisort** has appointed Silicon Valley tech sales veteran **Mark Stephenson** as chief customer officer, a newly-created position. His hire comes one month after Evisort closed a \$15 million Series A funding round led by Vertex Ventures and M12, Microsoft's venture fund, with participation from Amity Ventures and Serra Ventures. Evisort's business objectives are to scale to \$100 million in annual recurring revenue and maximise profitability, and Stephenson's leadership is said to be essential in achieving these goals. Overseeing marketing, sales and customer success, Stephenson will have complete accountability to build strategy and execution around the full customer lifecycle. He will help clients optimise use of Evisort's "google for contracts" software-as-a-service (SaaS) contract analytics solution. Before joining Evisort, Stephenson and his team scaled up Avi Networks, leading to its acquisition by VMWare. "I look forward to working with Evisort's leadership to build a world-class team and establish lasting customer relationships," said Stephenson. "My CCO role underscores Evisort's total focus on providing new AI technology enablement for contracts. Our mission is not to sell per se, but to provide a valued service to rapidly drive business productivity around contracting. Evisort can deliver contracts at the speed of business - improved business productivity awaits!"

Relativity has appointed **Beth Clutterbuck** as its new chief human resources officer. Clutterbuck, who has held senior HR roles at companies including Deliveroo, has relocated to her hometown of Chicago to join the Relativity team. Clutterbuck has held human resources leadership positions across four countries and five industry sectors, including technology, financial services, biotechnology, manufacturing and media. In her former roles at Cloudearch and Deliveroo she oversaw the building of the global people strategy and underpinning scaffolding to drive the rapid scaling of these high-growth technology firms. Additionally, she held talent-focused roles at NBC Universal International and HSBC. "Beth is an inspiring person with a fantastic track record of developing strong human resources functions across a diverse set of industries. She is exactly what we need to deliver an incredible experience to our employees," said **Mike Gamson**, CEO at Relativity. "I'm looking forward to working with Beth especially as we continue our work to make Relativity a talent-first organisation over the next five years." "Relativity's workforce has grown so quickly, providing an incredible opportunity to responsibly and effectively scale the organisation on a global level," said Clutterbuck. "I am excited to hit the ground running with the entire team to deliver a great employee experience around the world and am even more excited to have the chance to contribute to building an incredible tech community right here in Chicago."



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South America EY has appointed **Daniel Santiago Acevedo Sanchez** as senior manager for legal operations services, charged with developing **EY Law's** capabilities in legal ops/legal tech for in-house legal teams in Latin America. Sanchez said: "In an era of digital transformation and customer-centric business models across all industries, why do legal in-house teams still operate in an old-fashioned way? I'm thrilled to join the EY Law team as Senior Manager for the Legal Operations Services unit where I'll have the opportunity and challenge to bring and to develop our EY Law capabilities in legalops/legaltech for all in-house legal teams in Latin American countries. We believe that nowadays the corporate legal function needs to be considered as an enabler of the business strategy and, to achieve that, legal in-house teams need to transform their way of operating through an holistic approach that considers people, processes, data and technology. Transforming the corporate legal function is not about buying new shiny tech every time; it is about understanding why you do the things that you do and finding better ways to do it." Sanchez will join a team that includes Seth McNary and Joe Borstein. Sanchez was formerly head of innovation and project management at top Latin American firm Galicia Abogados (Mexico). Before joining Galicia Abogados he was head of the business transformation department at Gómez Pinzón Abogados and was previously head of the quality and projects department in Posse Herrera Ruiz (Colombia).

APAC Oon & Bazul's general manager and head of business development, **Malik Anwar**, has joined **Clarilis** as director of Asian operations. The UK-headquartered company says that South East Asia, and Singapore in particular, is a key jurisdiction in the roll-out of its platform internationally. Clarilis was one of eight legal technology vendors selected last year to join the Department for International Trade's first ever legal tech mission to Singapore. "The mission was designed to coincide with the Singapore Week of Innovation and TeCHnology (SWITCH) in November, with various activities planned including presentations by Singapore's globally acclaimed Future Law Innovation Programme (FLIP). The eight vendors were given the opportunity to showcase their technology at an event hosted by the British High Commission, with the aim of promoting legal tech that adds value to the legal industry. Clarilis counts both corporate legal departments and leading private legal practices amongst its customer base - including Addleshaw Goddard, Baker McKenzie, GoCompare, Gowling WLG, Herbert Smith Freehills, National Grid, Slaughter and May, TLT and Travers Smith. Anwar said: "It's an exciting time to be joining Clarilis as they extend their global reach to Asia. Clarilis has quickly established itself as the market-leading platform and managed service within the UK and the platform is already used by a number of firms in multiple jurisdictions worldwide. It is no

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secret that the Singapore government is committed to creating a first-class Smart Nation by harnessing and leveraging technology, networks and data to create solutions and innovations across the country. Clarilis South East Asia is poised to leverage and contribute to this growth in Singapore and SEA.” **James Quinn, CEO and co-founder of Clarilis**, added: “It’s great to welcome Malik on board to lead our Singapore office and South East Asian expansion. Malik has a strong background in business development and has worked with a wide variety of businesses across the region, in particular working with global organisations to test-bed and commercialise their technologies in Singapore. His appointment comes at an interesting time for the SEA market, where there’s a strong focus on legal technology that can drive efficiencies in the delivery of legal services.

“Kennedys without the lawyers” - global firm launches tech co

Continues from front page

The new company and platform has been launched partly in order help to better leverage Kennedys’ tech offerings and data and partly to help clients to understand what that offering is.

Speaking to Legal IT Insider ahead of the launch, Gilpin said: “In 2012 we started to promote our ‘less law’ approach and launched a set of products to support insurance claims in our target markets. Client feedback on those products was outstanding and we quickly found ourselves talking to the most senior people within our client. We have continued to grow the proposition and have added new solutions and grown the team, as well as securing government funding for investment in novel technology.

“We began to realise that the client was looking at us and saying, ‘What are you?’ You’re offering these services, but you don’t typically get that from a law firm.’ We saw an opportunity to create a new business – Kennedys IQ – which is a software and services company that is completely separate from the law firm. It demonstrates our commitment to our clients in that we are creating a solution that will live for a long time and continue to evolve, which our clients find reassuring.”

Much like when Clifford Chance launched Applied Solutions, which houses solutions such as its white labelled contract automation service CC Dr@ft, partners within Kennedys have struggled to sell and price its software offering and Gilpin said: “One thing that holds innovation back is that lawyers don’t understand how to sell technology and don’t know how to value it. They can attribute value to the legal process but not the technology and for the longevity of the sector it’s important that we can realise the value of the products.”

Kennedys IQ is made up of 30 people split between the UK and Kerala, India. The platform will be used to develop further products as well as lead bespoke work with select clients across different jurisdictions. It is envisaged that the solutions will be either subscription-based or, more commonly, pay per use.

Kennedys will continue to have an internal R&D team as part of its IT function, but Kennedys IQ will be the client facing entity.

Gilpin was instrumental in the creation of Linklaters online advisory service Blue Flag, which was launched 20 years ago. He said: “What I find interesting here is that Kennedys thinks differently and recognises the need to cannibalise their own business, because somebody is going to do that, and we want to be there first.”

Deloitte Legal partners with Conception X

In a move that promises to tie up domain expertise with venture science, Deloitte Legal has become the exclusive legal and professional services partner of technology entrepreneurship programme Conception X, a venture builder that trains PhD students to create deep tech startups.

Through the university-as-an-incubator premise, PhD students in tandem with their degree will apply their original research to help solve future problems within the legal sector and other industries. It was launched in UCL Engineering but is now open to PhDs from all top universities.

Of more interest, students will be paired with mentors from across Deloitte Legal and Deloitte Ventures to help identify application areas for nascent technology – what’s interesting is the recognition that PhD students often conduct research without a clear application area, and it will be critical that they do work alongside a Deloitte domain expert if this partnership is to have real-world relevance rather than be just another attempt to create technology in a relative vacuum.

While the Conception X programme lasts nine months, a spokesperson for Deloitte told Legal IT Insider that the partnership programme won’t have the same time limitations, and Deloitte is working with Conception X on a long term basis through its Deloitte Legal Ventures startup programme launched in December.

PracticeEvolve acquires Linetime

Continues from front page

Boland added: "We're looking at a new age in the UK and the products we compete with were designed in a different era. What we see with Linetime is a product and client-base that would take us 10 years to achieve."

Both products can be hosted in the cloud and are fairly well matched in features.

Interestingly, Boland says: "We have no plans to merge the two companies: we will have the different products side by side."

He adds: "Our experience is that both products are great but for me its about creating a situation where I'm not completely pigeon-holed with one product in the market." PracticeEvolve CEO, David Boland says "The legal market represents one of the most dynamic and exciting opportunities in global technology today. Bringing Linetime into the ATI group of companies alongside the calibre of PracticeEvolve, now positions us as one of the UK's strongest globally-backed teams, and equips us to service both mid-tier and top-tier firms, demonstrating our unrivalled commitment to the UK legal profession."

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."

Legal IT Insider, in association with Prosperoware hosted a privacy discussion on the 25th February that included GCs, CDPOs & CISOs from the following corporations:

John Lewis, Tata Global Beverages, Ascential, Santander, Colt, AIG, Adecco, AAM Europe, Coca Cola & Crown Estates

If this is topic close your heart and you would like to engage with this discussion please contact jeremy.hill@legalitlabs.com

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#GlenLegal20: Agenda and speakers!

We are in countdown to #GlenLegal20 and pretty much at delegate capacity but if you have not received an invitation and think you ought to, now is the time to shout! The conference – or do we call it unconference – will revolve largely around workshops and discussions relating to the topics that are at the top of your list of priorities today including:

‘The Killer App’: As vendors look to create one platform that you can live in, delegates and vendors will discuss whether there is one application that is going to drive a single source of data and collaboration, and what does that look like?

‘Standardisation and interoperability’: Consolidation among legal vendors is going to continue and comes with the promise of single sign on and greater simplicity, but what is required right now in terms of interoperability between different point solutions? Sarah Blair, IT director at Thorntons, is leading this conversation with the Scottish Law Society and Chris Bull is leading the UK’s development of Standards Advancement for the Legal Industry (SALI). Together they will lead this discussion with delegates and vendors where we try to make progress in that dialogue.

We will be unveiling further sessions, speakers and vendors in the coming week. Contact lucy.cheesewright@legalitlabs.com for more information.



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