



# Legal IT Insider

*aka*

*'The Orange Rag'*

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# Top Stories

# Pinnacle acquires Enable - and it's a Tikit reunion

As we first revealed this week, global legal technology consultancy [Pinnacle](#) has acquired Microsoft Gold partner [Enable Business Solutions](#), which was founded by former Tikit founder Liam Flanagan in 2013. The tie-up will see Enable's two products, PitchPerfect and RevenueManager, embedded within the consultancy and managed services capability of Pinnacle. It is hoped that the move will accelerate the joint company's global expansion, bringing together its risk, finance and business development expertise.

The entire Enable team including Flanagan and CEO David Lumsden will join Pinnacle, which was formed from the three-way merger of Pinnacle, Opes and Athenian in 2018. Pinnacle has over 100 people based in the UK, Continental Europe and North America.

The acquisition is something of a Tikit reunion – Pinnacle's finance director Giles Coates, CEO Mike Bailey, chairman Neil Renfrew, and risk practice lead Christopher Young all worked at Tikit together with Flanagan and Lumsden.

Speaking to Legal IT Insider, Bailey said: "We've known Liam and David for years and this is a real opportunity. We have grown organically and didn't think of ourselves as an acquiring business but when we got into the details there is a real strategic fit and it opens up lots of possibilities."

He added: "One thing that we've learned from the merger in 2018 is that by bringing like-minded people together you get where you need to go faster. I don't think we could have achieved what we have in the last two years on our own in terms of scale and capability. Together with Enable we will be able to further accelerate our offering, which makes the expanded business extremely exciting."

Pinnacle helps law firms to implement and manage software from Thomson Reuters, Intapp and Peppermint. While in the UK it is focussed heavily on finance and risk, in the United States Pinnacle has made inroads in business development working with Intapp's OnePlace for Marketing CRM solution (led by US CEO Bob Beach, who joined from NexLaw Partners in 2018.) Unusually the UK-headquartered company is looking to build out on the US success, and the plan is to leverage Enable's BD-focused technology to further grow that customer base globally.

PitchPerfect helps firms to insert content directly into Microsoft Word and PowerPoint without upsetting their rigid wizard functionality. As a result of the acquisition, Enable says it will accelerate planned investment in PitchPerfect's product support and development capabilities. PitchPerfect has key clients in North America, the UK, Europe and Australia, including international firms Reed Smith; Gibson Dunn; Baker Botts; and Clyde & Co, leading Australian firm Gilbert & Tobin, and leading Irish firm Arthur Cox.

RevenueManager, meanwhile, helps businesses to reduce lock up through the enforcement of time recording policies, working alongside and complementing most leading time recording applications.

Pinnacle is strong in consulting and managed services but has not developed its own products and Bailey said in a statement: "Through the acquisition of Enable we will now have two of our own industry leading software solutions that will fit seamlessly into our strategy of being able to help our existing and future clients (both international and domestic) to improve profits and efficiencies as well as manage risk. The acquisition also provides a platform for the launch of Pinnacle's UK business development and experience consulting practice, both areas where we are particularly strong in the US."

Pinnacle's managed services offering accounts for around 15% of revenue, under which firms outsource their Thomson Reuters 3E and Intapp work to Pinnacle. It has a three-year managed services agreement with a large international law firm and plans to expand this area further, including looking at further acquisitions.

Flanagan said: "I have known Mike Bailey and the other directors of Pinnacle for many years and know that they will continue to support and develop our industry leading solutions to meet our clients ever evolving and complex requirements."

## RPC Swaps out OpenText eDOCS for iManage Cloud

UK top 50 law firm RPC has selected iManage Work 10 as its cloud-based document management system, swapping out its legacy OpenText eDOCS DMS. The international law firm has 850 legal professionals spread across offices in London, Bristol, Singapore, and Hong Kong.

RPC selected iManage in 2018 but put the project on hold thanks to a number of transformation projects on the go. It ran another competitive selection process this year and IT director Ben Denison, who joined from the Serious Fraud Office at the start of 2020, said: "We decided iManage really is the best fit and that's in terms of the tech being right, but also the fact that the iManage offering gives us the ability to buy SaaS. One of the key things with a distributed workforce is you want to restructure in line with that. You do still have this equipment on premises, and sometimes that is for performance reasons, but people are remote. Going with iManage gives us a consistent offering across all of our offices."

The move to iManage Cloud is part of RPC's wider strategy to modernise its technology infrastructure. Denison said: "There are positives to come out of the pandemic, especially for technology, which we're more reliant on than ever before. We are trying to do things differently and modernise and the pandemic has given that momentum."

He adds: "In RPC there is a recognition of the need to use better technology and a desire to transform and I've always had support at the highest levels, including from the senior partner, who has a number of technology clients."

One of the things RPC liked about iManage is the location of its datacentres and Denison says in a statement out today (22 February): "iManage's global data center locations and advanced scaling abilities ensure that all of our users across the UK and APAC will have a seamless, responsive user experience with no performance issues. It's important that our people are able to easily access and share documents and data from any location and any device at any time. iManage Cloud will ensure we continue to deliver the highest level of client service."

Another attraction, Denison says, was that, given that iManage is used by a majority of the top 50 law firms, that lateral hires will be familiar with the system and that it will be easier to find people who can train on the system.

Adopting iManage Cloud also reduces the burden of IT management, an important consideration for RPC. Updates are rolled out automatically, equipping users with the latest capabilities. Remote cloud management also eliminates many of the costs and challenges associated with in-office IT maintenance.

## Forsters goes live on NetDocuments

**And continuing the DMS theme, UK top 100 law firm Forsters LLP** has gone live with its NetDocuments document management system (DMS) implementation, despite the challenges presented by COVID19.

The implementation, first announced in July 2019 at selection, is part of a broad transformation drive kickstarted when Forsters' management brought Janders Dean (now part of Morae Global) in to introduce a change management strategy that put cloud technology at the forefront.

Verlata Consulting, a certified NetDocuments partner, led the remote implementation of NetDocuments during the UK COVID-19 lockdown restrictions. We're told that within the first week of the implementation of NetDocuments, Forsters has been able to add 26,773 documents and 46,620 emails to the new DMS.

"NetDocuments' robust enterprise search and machine assisted filing means our employees can find the information they are looking for in a matter of seconds. In addition, the high-levels of security provided by NetDocuments gives us peace of mind that documents are being shared safely," said Stables, who joined in 2018 as part of the transformation drive. He added: "Both Verlata and NetDocuments have been extremely supportive during the implementation, and we are confident that we now have a cloud document management platform that will scale with our business needs."

NetDocuments' native integration with Microsoft Office365 allows it to be used within Office365 applications, which NetDocuments says has quickly boosted user adoption.

Jason Mills, director at Verlata said "COVID-19 certainly introduced some additional challenges in the project, especially as we were working from a different time zone, but the NetDocuments true-cloud platform, coupled with the fully engaged Forsters team meant we were able to go live and get fantastic adoption across the firm from day one".

Guy Phillips, vice president of international business at NetDocuments said: "Legal firms can find themselves spending significant amounts of money running and maintaining on-premises legacy technology. Forsters' implementation of NetDocuments is a fantastic example of how a true-cloud platform can enable firms to become more agile, productive and secure."

Forsters is one of London's leading real estate and private wealth law firms, and the company was recently recognised in *The Times'* Best Law Firms 2021 listings.

## DAC Beachcroft to adopt Thirdfort to automate client onboarding process

International law firm DAC Beachcroft is automating the identification and verification part of its new client acceptance process through the use of Thirdfort, which is currently being piloted across the firm's eight offices in England and Wales. Following the conclusion of the pilot, DACB says it intends to roll out the new automated identification and verification process to its offices across the remainder of the UK and internationally.

Instead of requiring new clients to provide certified proof of identity and address and then carrying out time-consuming verification processes to confirm that identity, DACB will give clients the option to go through an automated process. Using the Thirdfort app, clients will quickly and easily be able to upload the necessary documents for verification and fraud checks.

"The client due diligence process can be time consuming for everyone involved," said DACB's Managing Partner David Pollitt. "Through automation, we can save our clients the time and effort it takes to come into our offices to get their ID certified or to visit another qualified professional, who will likely charge a fee for the service. This technological innovation will save our clients time and money and enable us to start work for them even faster."

Thirdfort – which first came to prevalence within Mishcon de Reya's startup incubator MDR LAB (Mishcon is an investor) - uses document scanning and facial recognition technology to streamline the essential checks usually carried out by DACB's lawyers. Through the app clients

are asked to take a photo of their ID along with a selfie and a video. Thirdfort matches the client to the ID and verifies its authenticity. Clients can then easily upload additional documents such as proof of address, which are again checked for authenticity. Once the verification process is complete, a comprehensive summary of the evidence and an audit trail of anti-money laundering (AML) compliance is provided.

"We are continually striving to find digital solutions to improve client experience and are acutely aware that our ways of working will be forever changed post-pandemic," said Andrew Keith, DACB's chief operations officer. "We, along with our clients, are likely to be less office-based in the future, so relying on face-to-face meetings in the office to obtain and certify ID will become increasingly inconvenient. With this new technology, our clients have more flexibility and choice when it comes to engaging with us."

## Equity management: Morgan Stanley strikes a deal with Wilson Sonsini

Financial services giant Morgan Stanley has entered into an agreement with top US firm Wilson Sonsini Goodrich & Rosati to take over the stock plans of thousands of startups using Wilson Sonsini's proprietary capitalization management software. The companies will migrate to Morgan Stanley's global stock option administration platform Shareworks, which offers equity management solutions for private and public companies.

"Morgan Stanley intends to be the leader in capitalization management for private companies and early stage startups, helping them to manage the complexities of their equity and employee stock plans," said Jed Finn, head of corporate and institutional solutions at Morgan Stanley Wealth Management. "This agreement, along with the acquisition of Solium and the Corporate Services business from E\*TRADE, are a part of our long-term strategy to be the premier provider of financial solutions to workplace employees. We are confident that Wilson Sonsini's clients can also benefit from our broader Morgan Stanley services and offerings."

Deals of this kind around proprietary law firm technology are rare, particularly where clients are involved. Gilbert + Tobin sold its proprietary legal verification software to Litera in October 2020, and in 2018 NetDocuments acquired Chapman and Cutler's Closing Room transaction management platform.

David Wang, Wilson Sonsini's Chief Innovation Officer, said: "Wilson Sonsini has been a pioneer with innovative applications that simplify and accelerate complicated legal processes. Our capitalization software was among the first in the industry and the only one developed by a law firm. As we continue to evolve how we serve as trusted legal and strategic advisors to our clients through their entire lifecycle, we are excited about the opportunity to provide an even more efficient and technology-driven capitalization management experience for our clients with a state-of-the-art solution like Shareworks."

## Board advisers: Jae Um joins Reynen Court and Richard Punt joins Flex Legal

Reynen Court has appointed Jae Um, former executive of Baker McKenzie and founder of insights firm Six Parsecs, to its advisory board.

Um brings over 10 years of industry experience and will help Reynen Court's team through its next growth stage as it revolutionizes the way law firms and in-house legal departments source and safely deploy new technologies.

Reynen Court's platform is a marketplace in which law firms and in-house legal departments can quickly find and evaluate new technologies, test and deploy them and strategically manage them.

"The legal environment is extraordinarily complex and an inefficient market for both service providers and technology companies", said Um. "With the explosion of new technologies, legal practitioners and businesses have more choices than ever, but increasing balkanization is actually raising ecosystem barriers like interoperability and tech stack fit. To keep up with the pace of business, the legal industry needs new, innovative intermediaries like Reynen Court, who add real value to the whole ecosystem from the middle out: by reimagining the entire try-to-buy paradigm."

And Richard Punt has joined the advisory board of Flex Legal, Flex Legal is an online platform that connects interim paralegals and lawyers to law firms and in-house legal teams. Currently managing director of legal strategy & market development at Thomson Reuters, Punt (a keynote speaker at ILTA>ON) leads the strategic development of digital solutions for law firms and in-house legal teams. Previously, Punt spent over four years as CEO of Allen & Overy's global consultant lawyer platform, Peerpoint, and also led the development of the firm's legal technology strategy. Prior to Peerpoint, he was Managing Partner for Clients & Markets at Deloitte.

Mary Bonsor, CEO and Co-Founder of Flex Legal said: 'Adding Richard to our Board is hugely exciting for Flex Legal, his wealth of knowledge and experience will really help us to continue to scale the company and we are really looking forward to the impact he will have in the company's direction and strategy.'

Punt added: 'Flex Legal is playing a really important role in enabling professionals to take control of their futures from the very start of their careers. Mary, James and the team have built a terrific business and I am really pleased to have the opportunity to work with them through their

next stage of development.'

The platform is home to more than 5,000 paralegals and 300 lawyers and has an ever-growing customer base and team.

## Allens launches inaugural legaltech accelerator

Leading Australian law firm and Linklaters alliance partner Allens has announced the participants in its inaugural legaltech accelerator. Seven startups developing solutions in document automation, smart contracts and AI-driven knowledge management have been announced as the first participants in Auctus, which received over 120 applications for its eight-week virtual programme.

The final seven were chosen from a shortlist of 15 who pitched their offering to a panel of expert judges from Allens and Collective Campus, which was engaged to help attract and source potential accelerator candidates.

The startups – which are headquartered in four different countries – will now work with mentors and experts from Allens on their legal, growth and innovation strategies as well as attending masterclasses, testing and receiving feedback on their products from the firm, and participating in facilitated strategic introductions to Allens' extensive networks. For some startups, we're told that there may be opportunities to discuss further strategic engagement with the firm or potential investors at the conclusion of the accelerator.

'Our first cohort of startups blew us away with the potentially transformative solutions they're building to some of the most pressing issues faced by our firm and our clients,' said Penelope Barr, Allens' head of legal product lab.

'We are excited by the potential of our first group of startups to not only add to our own legal tech offering, but to meaningfully contribute to the Australian legal landscape more broadly.'

The startups are:

- Avvoka: a next-generation document automation, negotiation and analytics tool for in-house legal, law firms and business teams;
- BuildSort: a smart legal contract platform initially targeting the construction sector;
- Hutly: a smart contract platform that is simplifying contract management with a way for general tenancy agreements to be completed, issued, tracked, and digitally signed in minutes;
- Inpact: an AI-powered enterprise software platform that turns contracts into structured, easily-analysable data to uncover new business insights;
- Summize: a lightweight assistant to the contract lifecycle which creates instant, easy-to-read summaries of uploaded contracts;
- Syntheia: an end-to-end knowledge solution that helps to collect, manage, share and apply knowledge from documents and experts; and
- Wage Buddy: a legal technology platform that simplifies Australian Fair Work Awards by analysing, interpreting and codifying Awards to facilitate automated reasoning.

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#TalkingTech

# Latest Webinars

A TalkingTech Live Webinar Exploring advances in social media evidence collection for eDiscovery and investigations.



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A screenshot of a presentation slide titled "ILTA Litigation and Practice Support Technology Survey". The slide features a bar chart titled "Web and social capture tools used in the past 12 months". The chart compares four categories: Adobe Acrobat, Snagit, Purpose-built Capture Tool, and Other/Unknown. The y-axis represents percentage, ranging from 0 to 80. A red video player overlay is centered on the chart, displaying a play button and the text "Video content can't be viewed offline". A teal "VIEW ONLINE" button with a right-pointing arrow is also visible. In the bottom right corner of the slide, there are three small video thumbnails showing participants in a webinar.

Tool	Percentage
Adobe Acrobat	52
Snagit	46
Purpose-built Capture Tool	25
Other/Unknown	38

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# Linklaters

*Yes, we have an entire section just for Linklaters this month, given the raft of news coming in from the magic circle firm over the past few days. Contact us if you think your law firm ought to bag the same spot in the next issue.*

## Linklaters appoints German COO as director of legal operations

Linklaters has appointed its German COO, Stefan Schwarz, as director of legal operations, following the resignation of Stewart Chippindale at the end of last year. Schwarz will be the magic circle firm's first functional head based outside of the UK.

The director of legal operations role was created in June 2019 to head a 400-strong function that brought together four existing teams:

- Alternative Legal Services – including paralegals and Legal Project Managers to technology specialists and contract lawyer Re:link – led by global head of alternative services, Jas Mundae
- Innovation – led by head of innovation Shilpa Bhandarkar
- Knowledge and Learning – led by global head of knowledge and learning Rachel Manser
- Matter Pricing – led by global head of pricing Peter Sawko

Schwarz joined Linklaters in 2007, and before serving as Regional COO in Germany, he worked in the firm's strategy team in London. Schwarz will perform this role based from Düsseldorf.

Gideon Moore, firmwide managing partner, said: "Clients more than ever are looking for innovative solutions and our Legal Operations function plays a critical role in meeting this demand. I'm looking forward to working with Stefan as he leads the next chapter of our Legal Operations journey and collaborates with our exceptional lawyers around the world to deliver value for our clients."

Private practice law firms are increasingly mirroring their clients' legal operations function in a bid to 'sing from the same hymn sheet.' Other major law firms to introduce a legal operations role include Baker McKenzie (the role was first filled by David Cambria in 2018) and Herbert Smith Freehills. HSF launched its global legal operations function in 2018, led by director of legal operations, Ian Gilbert. That function, too, brings together the firm's legal project management, pricing, legal process improvement and innovation teams into a single unit to provide a more efficient and joined up service to clients.

## Linklaters launches homegrown doc automation platform CreateiQ

Linklaters on 23 February formally unveiled its new client contract automation platform, CreateiQ, which has already been applied to digitise the ISDA master agreement in the derivatives space.

CreateiQ has been hard coded by Linklaters' technology arm, Nakhoda, and is not based on third party tech. It leverages the knowledge of Linklaters lawyers in the contract drafting process and creates structured data at the point of contract creation.

While Linklaters stresses that CreateiQ is not derivatives specific, the showcase work done recently is in digitising the ISDA master agreement, which is central to every swap trading agreement. Subscribers sign up to individual document packs and there are both flat fee and volume-based pricing options.

The master agreement can be automatically created up to the point that negotiation is required, without needing to be customised. We're told that there are now nearly 30 companies in the Fortune 500, and eight of the 10 world's largest banks by assets using the platform.

In a joint Linklaters/ISDA demonstration on 9 February, the ISDA community was told that the Nakhoda team has been working with lawyers to categorise and tag content, for example, all termination events under the master agreement. It has broken them apart to work out variations so that two clauses in the agreement with similar tags are actually identical.

In a live demo, Linklaters senior attorney Heather Smith showed how the document automation boxes and drop-down menus are on the left, and the master agreement on the right. The selections such as whether you are doing business a 'principal agent' or 'umbrella agent' automatically change the standard ISDA wording accordingly. The appropriate appendices are added according to your selection.

This type of document automation has been available for years and in that sense this breaks no boundaries, what is different is that it is developed and sold by the tech arm of a magic circle law firm working in tandem with a client. Complex automation has historically suffered from a lack of input/time and continued expertise. The fact that Linklaters has its own tech arm and is working hand-in-hand with an invested client means, in theory, a more effective and regular exchange of information.

What is also helping to push the envelope is the capture of metadata for future reference and analysis and Smith said: "This creates structured data. For each event where you are choosing a party within the ISDA master agreement, each is a label that creates structured data which is computer readable."

Both sides to the negotiation fill in the form to the extent they are able, and Smith said: "There is a built-in approval functionality that will automatically trigger an email saying, 'take a look, this is not our standard term.'"

In the demonstration, ISDA's director of product development, Andrew Kayiira, highlighted how a dashboard shows the stage that negotiations are at and where the documents are, meaning ISDA Create can also be used as a superficial transaction management platform, although there is no intention for it to stand on the toes of deal platforms.

Commenting on the launch of CreateiQ, Shilpa Bhandarkar, CEO of Nakhoda, commented in a statement: "As a leading global law firm, we are uniquely placed to understand the challenges our clients face in each stage of the contracting process.

"With CreateiQ, we have built a single workflow that brings contracting into the digital age, saving our clients significant time in the drafting, negotiation and execution of contracts and allowing lawyers to spend much more time on high value work."

Stuart Bedford, corporate partner (London) and Nakhoda board member, concluded: "We built the platform to be both sector and document agnostic and we have already had discussions with clients in a range of industries about automating their documentation. Examples to date include procurement contracts, customer agreements, leases and intra-group finance and supply agreements to name but a few.

"We believe that CreateiQ has a significant role to play in the digitisation and automation of the negotiation of legal documentation at scale."

In this space other firms such as Allen & Overy are also working to automate finance agreements with the Loan Markets Association, but in that instance they are working with third party tech vendor Avokka. The Magic Circle are leading in setting up separate tech arms through which to sell subscription-based tech products. A&O has been doing it for years and Clifford Chance in 2018 launched Applied Solutions – one of the products being sold is white-labelled document automation solution CC Dr@ft, which uses Thomson Reuters Contract Express.



## Shilpa Bhandarkar, CEO of Nakhoda, talks ISDA Create

*Nakhoda's CEO helps us to dive a little deeper into ISDA Create, which has now automated the ISDA master agreement. ISDA Create is underpinned by Nakhoda's new document automation platform CreateiQ - which is hard coded and involves no third party vendors.*

**Is ISDA Create/your document automation capability built internally or what external tech are you using?**

It's all internal and bespoke. We couldn't find anything that did what we needed it to do – both in terms of functionality and user experience. The latter is a big focus for us, as we want the platform to be intuitive for the lawyers and business teams using it for their contracts.

**How have the master agreement team overcome some of the complexities experienced by others in automating complex agreements?**

It's the combination of ISDA as a forward-thinking client plus tech-savvy Linklaters lawyers, plus our Nakhoda start-up that has allowed for this to happen.

ISDA has a powerful digital strategy, and that vision has played a key role. Then you combine that with Linklaters lawyers drafting and designing contracts, knowing that they need to be digitised, while also sharing what data points are useful for wider organisational. Finally, having a start-up integrated into a law firm gives us access to all of that intelligence so that we can then design and test and redesign and retest till we get it exactly right.

**How do you envisage the platform will be used – will extend to transaction management?**

I think there is so much to do in the automation and negotiation space that we're not currently looking to be a full transaction management solution. But because everything is digital, it lends itself to interoperability – which is key.

**Will it integrate with Teams? Does the uptick in use of Teams by clients present a challenge or opportunity or neither?**

It doesn't integrate with Teams. There is commenting functionality but that's more for audit trail purposes than the wider use

cases that Teams lends itself to.

**How will it be kept updated? One of the historical issues of automation has been a lack of resource and often the people who are in charge move on etc. As you have Nakhoda is that no longer such an issue?**

Exactly. We have our own development team / capability as well as a team of legal engineers to help with digitising new document types.

**What is your revenue model for this?**

For ISDA Create, subscribers sign up to individual document packs. There are both flat fee and volume based pricing options. We've tried to cater to different needs depending on the size of the institution and their needs.



 Microsoft

# Microsoft

NORDSTROM

NORDSTROM

# Microsoft 365 for Legal

So, Microsoft has launched a Microsoft 365 and Teams Deployment for Legal initiative that includes a four-phase plan to help law firms overcome privacy barriers and a dedicated team to support and accelerate law firms' 365 journey. Here are all the details courtesy of our chats with the MS team, who, fyi, are very personable.

The initiative, which is being led by Microsoft senior modern work solution specialist Jon Kefaloukos, has been put in place to enable law firms to get around enduring concerns over putting client-matter data in the Microsoft Cloud, given that – in rare and extreme cases – Microsoft can be subpoenaed by the US government to provide customer data without reverting to a customer first (blind subpoenaed).

Enthusiasm for the new initiative is high, as are the number of questions that people have as to what this really is and what it means. Kefaloukos is keen to stress that it is not a new legal vertical but nonetheless, he and his team of subject matter experts from across Microsoft Teams; Office365; SharePoint; OneDrive; Security; Compliance and Windows 10 have created a deployment vision and proposed action plan to help law firms drive organisational change.

The Microsoft team includes Iris Childress – corporate escalation manager for M365 deployment for legal; Michelle Gilbert – M365 Deployment for Legal Office 365Collaboration Lead; Rahul Varrier – Sr. Teams Engineer for M365 Deployment for Legal; Corey Buzzell – M365 Deployment for Legal MTC Co-Leads; and Paul Edlund – Sr. Architect at the Chicago MicrosoftTechnology Center. Microsoft is working closely with ILTA and in particular CEO Joy Heath Rush on a series of webinars starting 17 February.

The four-phase approach to getting Microsoft 365 deployed doesn't just focus on Teams, although Teams has most 'brand equity'.

Phase one is about enabling people to leverage instant messaging and chat in Teams and leveraging Teams' meeting functionality. At this stage firms can turn OneDrive and SharePoint off so that there is no document sharing in Teams/Office 365 to avoid client matter data concerns. Outlook still drives communication and lawyers are still using their document management solution only.

Speaking to Legal IT Insider, Edlund said: "If that is the law firm's desired end state they can stay there forever." Kefaloukos added: "We have heard from firms that want to stay in that phase one area." There are a number of still largely cloud averse elite law firms that we bet will not get past this phase.

However, the reality is that the priority of the majority of law firms is to advance beyond this point. For those being asked to join clients' Teams and collaborate on the platform, phase one is a starting point not an end goal.

## Phase 1

Instant Messaging/Chat in Teams, custom retention policies for deletion

- Teams meetings
- Group calling (VOIP)
- Basic presence in Teams
- Outlook drives communication
- OneDrive and SharePoint are off

Phase two sees all of the phase one Teams functionality plus DMS integration into Teams. Security and compliance tools are in place for data protection and governance.

At this point OneDrive and SharePoint are on where firms choose that path, allowing real-time co-authoring, sharing and collaboration. You can block documents and client matter data from being shared in SharePoint.

Kefaloukos says: "Phase two is where we are starting to help law firms modernise. They are leveraging Teams and Channels. They start to turn on collaboration in a way that enables security and compliance tools to mitigate risk, protect files and encrypt data. If they want to leverage the DMS they can but Teams becomes the hub."

Prosperoware has been working closely with Kefaloukos and his team, including providing guidance on the support that law firms need. Prosperoware's founder and CEO Keith Lipman said: "You're turning this on at the user level – so you can say 'this user has OneDrive or SharePoint or they don't.'"

Prosperoware is used for provisioning to ensure that documents are stored where they need to be and treated in compliance with information governance policies.

## Phase 2

- All of phase 1 functionality
- DMS native integration into Teams
- Security and compliance tools in place for data protection and governance (DLP, ethical walls)
- OneDrive and SharePoint on where appropriate
- Native cloud DLP plus double key encryption/retention
- Outlook and Teams for comms

Phase 3 will see firms collaborating in real time with clients and leveraging PowerBI data visualisation and dashboards, plus Office365 app integration into Teams, eg Planner and Whiteboard. At this stage it is envisaged that Outlook will be for targeted communication.

## Phase 3

- Federation with select partners, clients for external chat capabilities
- External/guest access for real-time collaboration with clients in Teams
- PowerBI data visualisation, dashboards and integration in Teams with DLP built in
- Power App, Power Automate workflows built into and flowing through Team
- PSTN calling, Telephony for select users
- Outlook for targeted communication

In Phase four – which Microsoft points to as 'what digital transformation looks like' – nearly all business processes are flowing through Teams. Chatbots and Power Virtual Agents are enabled, and all business operations and financial insights are flowing through Teams with PowerBI, Power Platform, and 'Aderant or Elite.'

## Phase 4

- Nearly all business processes are flowing through Teams
- Chatbots, Power Virtual Agents enabled
- PowerApps, Power Automate workflows with advanced third-party applications integration

- Client dashboards, client-focused Teams, cusotmised channel helping to support client needs
- Business operations, financial insights and client insights flowing through Teams with PowerBI, Power Platform, and Aderant and Elite.

While the Microsoft team are cautious about calling the four phases a legal roadmap and there are no new product features, they now have customisable modules and options that were not available eight months ago.

And while the pace of development in Teams means it's hard to keep up, Edlund said: "We're trying to create better notifications to show what has changed and what is new."

## **Encryption**

While Microsoft's compliance team reviews all data requests to ensure they are valid, and there are very limited circumstances – such as nation state threats – where the US government has the right to blind subpoena Microsoft, this has nonetheless been the biggest barrier to law firms moving to Office365.

Safeguards against that include:

- Auditors are notified if Microsoft requests access to an encryption key.
- Microsoft is not often served with blind subpoenas and if it is, it has form for fighting back.
- Microsoft is working on homomorphic encryption, which is a special type of encryption technique.
- In the interim you can encrypt data at rest so that it is opaque to the rest of the platform.
- If a file is encrypted twice, once with a key that the cloud is aware of and once with a key in the customer data centre, Microsoft has no access. Data is only legible to the customer. This is only intended for the most sensitive of data. Co-authoring and many of the benefits of M365 and Teams break with double key encryption.

## **Plan of action for Microsoft 365 for Legal**

The proposed action plan for firms and Microsoft partners interested in exploring the 365 and Teams legal deployment vision is:

- Contact your account team or deployment development manager (Let them know you have interest in Microsoft 365 E3 or E5, or Microsoft 365 for Legal Initiative.)
- Engage a "Microsoft 365 for Legal" Briefed Consultant (Microsoft Gold Partners)
- Schedule a Microsoft Technology Center Briefing
- Pursue Two, Parallel Workstreams with your Account Team (technical validation workstream and business validation workstream.)

***Talking point: Kefaloukos was a professional gamer before life at Microsoft: yes, he got paid to play and travel the world. Don't tell the kids.***

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# Security

# Egress DLP report shows 95% of organisations suffered data loss last year

Egress on 23 February published its Data Loss Prevention Report 2021, which shows that 95% of organisations suffered data loss in the past year. Over eighty percent (83%) of respondents said that they had experienced email data breaches. But perhaps most surprisingly, 35% of IT leaders polled said they have faced litigation from data subjects.

The report was conducted by independent organization Arlington Research among 500 IT leaders and 3000 remote-working employees in the financial services, legal and healthcare sectors within the UK and the US. Of those polled, 40% said they have experienced client churn from data loss.

The report focuses heavily on the impact of remote working, finding that 74% of IT leaders believe that remote working will make it more difficult to prevent data leaks via email in the future. More than half of IT leaders (59%) reported an increase in email data loss linked to the pandemic.

Speaking to editor Caroline Hill in this 10 minute video, Egress' CEO Tony Pepper explains that a big part of the explanation for the data loss is the more challenging working environment at home, which often leads to more mistakes (either in misaddressed emails or sending the wrong attachment to the right person.)

You can watch that video here: <https://legaltechnology.com/video-egress-dlp-report-2021-35-of-organisations-have-faced-litigation-from-data-subjects/>





# Wins and Deals!

## UK

UK top 50 law firm **RPC** has selected **iManage Work 10** as its cloud-based document management system, swapping out its legacy OpenText eDOCS DMS. The international law firm has 850 legal professionals spread across offices in London, Bristol, Singapore, and Hong Kong.

RPC selected iManage in 2018 but put the project on hold thanks to a number of transformation projects on the go. It ran another competitive selection process this year and IT director Ben Denison, who joined from the Serious Fraud Office at the start of 2020, said: "We decided iManage really is the best fit and that's in terms of the tech being right, but also the fact that the iManage offering gives us the ability to buy SaaS. One of the key things with a distributed workforce is you want to restructure in line with that. You do still have this equipment on premises, and sometimes that is for performance reasons, but people are remote. Going with iManage gives us a consistent offering across all of our offices."

See our latest news section for the full story.

**DocsCorp** has acquired **Docuble** (previously **Word Exchange**), which enables law firms to easily fix styling problems in Microsoft Word, including achieving consistent house style and sorting out those often hugely irritating issues with numbering. Docuble also brings with it print management software docublePrint. The products have been renamed styleDocs and printDocs.

Docuble is a UK-based company that was founded in 2009 by former managing director Sarah Hanfrey. Hanfrey as well as director Tim Suiter and their small team are joining DocsCorp – Hanfrey will continue to lead the development of StyleDocs and Suiter joins as product manager.

UK top 100 law firm **Forsters LLP** has gone live with its **NetDocuments** document management system (DMS) implementation, despite the challenges presented by COVID19.

The implementation, first announced in July 2019 at selection, is part of a broad transformation drive kickstarted when Forsters' management brought Janders Dean (now part of Morae Global) in to introduce a change management strategy that put cloud technology at the forefront.

"NetDocuments' robust enterprise search and machine assisted filing means our employees can find the information they are looking for in a matter of seconds. In addition, the high-levels of security provided by NetDocuments gives us peace of mind that documents are being shared safely," said Stables, who joined in 2018 as part of the transformation drive.

See our Recent News section for the full details.

International law firm **DAC Beachcroft** is automating the identification and verification part of its new client acceptance process through the use of **Thirdfort**, which is currently being piloted across the firm's eight offices in England and Wales.

Instead of requiring new clients to provide certified proof of identity and address and then carrying out time-consuming verification processes to confirm that identity, DACB will give clients the option to go through an automated process. Using an app, clients will quickly and easily be able to upload the necessary documents, with verification and fraud checks then carried out by FCA-regulated security technology supplier Thirdfort.

"The client due diligence process can be time consuming for everyone involved," said DACB's Managing Partner David Pollitt. "Through automation, we can save our clients the time and effort it takes to come into our offices to get their ID certified or to visit another qualified professional, who will likely charge a fee for the service. This technological innovation will save our clients time and money and enable us to start work for them even faster."

Thirdfort – which first came to prevalence within Mishcon de Reya’s startup incubator MDR LAB (Mishcon is an investor) - uses document scanning and facial recognition technology to streamline the essential checks usually carried out by DACB’s lawyers.

Following the conclusion of its pilot in England and Wales, DACB says it intends to roll out the new automated identification and verification process to its offices across the remainder of the UK and internationally.

Virtual dispute resolution platform **Opus 2** has acquired chambers management software supplier **Bar Squared**, which is used by more than 240 chambers and 11,000 barristers and clerks worldwide. The acquisition aims to improve collaboration between solicitors and barrister in the run up to trial.

While many barristers worldwide already use the Opus 2 platform to collaborate with law firms and their clients, the acquisition enables the Opus 2 and Bar Squared teams to make this collaboration more seamless.

Speaking to Legal IT Insider, Opus 2 founder and executive chairman Graham Smith Bernal said: “We prefer to grow organically but this was a good opportunity to acquire a company that is not only in a similar space and delivering complimentary products, but one that has been developing their client offering in tandem with us, and really leveraging feedback from clients.”

The Bar Squared team are all joining Opus 2 and newly-appointed CEO Martin Coen said that they will now work on their joint go to market strategy and proposition.

**Osborne Clarke** has partnered with security solutions provider **NetMotion**, as the firm adapts to the needs of its remote workforce.

The international legal practice, with offices in Europe, Asia and the USA, uses the NetMotion platform, (including both best-in-class VPN & Zero Trust Network Access functionality) to give fee earners a completely secure environment to access company resources. This also allowed users to avoid application time outs and re-authentication whenever connections dropped or switched.

Myles Manning, client interface and solutions manager at Osborne Clarke said: “As an IT team, we used to support 25 offices globally. With the shift to remote working due to the pandemic, we’re now effectively supporting 2000 offices globally. The Mobile IQ part of NetMotion’s offering is the perfect piece for us, as now we know exactly what’s going on. NetMotion instantly gives us real insight into the overall user experience.”

UK law firm, **Roythornes Solicitors**, has put measures in place to optimise service delivery for its lawyers and clients by converting its **BigHand Voice** licenses to the full legal workflow solution.

The legal-specific workflow tool allows tasks to be sent to a central workflow with all the required instruction upfront. Tasks are then automatically routed to the right skilled resource, at the right cost to the firm. The centralised view of work can be accessed by desktop or mobile devices to allow lawyers to check on the progress of their work at any time. Team managers have a clear view of outstanding work and resource capacity, and can easily move work between teams to maximise service and utilisation.

Jonathan Swan, IT Director and partner at Roythornes, said: “When enforced remote working came into place, we needed a way to capture and track the work that our lawyers sent to our support staff in order to streamline and optimise the process. We were already users of BigHand’s digital dictation and could see how the full workflow solution would help us to gain visibility over all types of support tasks including copying, bundling, archiving and document amendment – most of which have traditionally been handed to the support staff whilst in the office.”

UK top 200 law firm **Wright Hassall** has chosen **Linetime** as its united practice management solution.

Established in 1846 and employing over 250 people, Wright Hassall says it thoroughly reviewed the market, looking to bring a disparate number of systems and databases into one solution. The firm identified the

inefficiencies inherent in managing different databases, setting itself the challenge to find a progressive technology provider offering an all-in-one solution to support fee earner effectiveness, improve business information and connect the services required by the firm.

Linetime, recently acquired by **PracticeEvolve Group**, offers rich enterprise level software featuring Practice Management, Document Management and Accounts Management to over 110 mid-tier firms nationwide, a number which continues to grow.

James Hamilton, Head of IT at Wright Hassall comments, "We have to work towards a single source of the truth in terms of databases. Having distributed databases and multiple suppliers is impractical and inefficient, when working to be a leaner operation. Managing different software, databases and servers is resource heavy and all the work that goes into connecting them together requires technical and management resource to maintain the systems and generate performance reports. Our aim is to use their time to focus on projects that help grow the business."

**ScribeStar**, a digital ecosystem that improves efficiency and reduces the cost and time required for document production for capital markets transactions, today announced a partnership with **Reynen Court**.

ScribeStar will feature its capital markets offering in the Reynen Court Solution Store, making it available for containerized deployment to law firms and corporate legal departments through the Reynen Court platform.

"We are incredibly excited that ScribeStar, as a leading capital markets solution provider, has joined our family of vendors helping to speed the sourcing and deployment of solutions through our platform," said Christian Lang, Reynen Court's head of strategy. "I have no doubt ScribeStar's unique offering, focused specifically on generating efficiencies in capital markets documentation drafting, will be a key solution for our platform and provide significant value add to our community of legal users."

**Spitfire Network Services Ltd**, which provides telecoms and IP engineering solutions to UK businesses, has announced details of its deployment of 3CX as a solution for law firm, **DPP Law**.

Since 2016, DPP Law Ltd have been using Spitfire Network Services' 3CX PBX phone system, which was originally adopted when the firm was relocated.

Fast forward to 2020, DPP Law like many other law firms faced the challenge of making the shift from having the majority of its employees working from offices to remotely. However, as Financial Controller Roger Posener explains, DPP Law was well prepared.

"We actually preempted this shift when we put new systems in place to ensure people could work from home or anywhere, they wanted. With fee earners needing to meet clients or attend court or police stations, this ability to ensure connectivity at all times was critical. Employees were able to access 3CX via their smartphones and we had no issues whatsoever. Once the lockdowns came, this transition had already taken place, so the shift was seamless. The only difference was that more people were using 3CX from home," he said.

3CX is an IP telephony solution originally developed for Windows but now also available on Linux distributions. Spitfire is a 3CX Titanium Partner and supplied the 3CX system hosted 'in the cloud'. The 3CX system uses SIP trunks for Voice over IP (VoIP) telephony instead of conventional ISDN phone lines.

## EMEA

Dutch firm **Van Campen Liem** has purchased **compareDocs Enterprise** from **DocsCorp** to ensure all its staff can quickly and easily compare documents for changes. The Enterprise version can output the comparison report and the Original and Modified documents to a 3-Pane View, so you see all the documents on a single or dual monitor setup.

Independent top-tier Netherlands firm **Houthoff** has partnered with **StructureFlow**. It is the first Dutch law firm to implement the visualisation tool that helps professionals to model and collaborate on legal structures and transactions.

Houthoff's lawyers are using StructureFlow to visualise complex structure diagrams as well as to conceptualise the strategy of legal projects, like M&A transactions, tax projects or litigation processes.

"Not every lawyer is a PowerPoint hero. StructureFlow has helped our team think fast and visualise complex structures "on-the-fly" to achieve a professional chart without spending an afternoon aligning squares and connecting lines. And the fact that you can share the work product across teams in one click makes the entire workflow from idea to end-result exceptionally smooth and efficient," said Steven ter Horst, Head of Innovation & Knowledge at Houthoff

To learn more about StructureFlow and demo their software, please visit <https://www.structureflow.co/>

## **NORTH AMERICA**

**Brown & Streza LLP (CA)** has selected **pdfDocs** from **DocsCorp** to provide its staff with a PDF management tool with editing, collation, redaction, OCR, and bundling capability. It also integrates out-of-the-box with their Worldox document management system.

**Weintraub Tobin**, a prominent California full-service law firm with locations across the state, has rolled out **compareDocs** for legal document comparison and review. compareDocs was chosen because of its ability to compare different file formats and produce consistent results and because its integration with Worldox adds value to the firm's document management system.

On the decision to move to compareDocs, **Caleb Gibbs** – director of IT, said, "Our firm was already using document comparison software, but we switched to compareDocs because we saw it would deliver better results in terms of accuracy and efficiency."

Legal professionals at Weintraub are using compareDocs to mark-up changes between as many as five versions of a Word, PDF, Excel, PowerPoint, or image-based file. They have convenient access to comparison via the DocsCorp ribbon in Word and within the firm's Worldox document management system.

**Sterne Kessler Goldstein & Fox** has implemented **DocSolid's Airmail2** Digital Mail Room and companion Digital Records Room for direct delivery of daily mail and matter files to the firm's document management system, iManage Work 10.

DocSolid's Airmail2 Digital Mail + Records Suite digitises a firm's paper-based Mail Room and Records Room. It provides scanned delivery of sensitive and time-dependent mail and file requests via the document management system (DMS), enabling firms to govern, secure, and distribute information efficiently, per policy and individual client guidelines.

"We have re-vamped our scan capture solution set with DocSolid and Airmail2," said Shawn Mitkowski, CIO at Stern Kessler. "The operational productivity, tight iManage integration, and innovative roadmap of the Airmail2 system drives our firm's digital transformation."

"To be efficient, secure and always-on for our clients, Sterne Kessler needs attorneys work-ready at home or back in the office," said Robert Burger, COO at Stern Kessler. "That means we need to be digital. DocSolid's new Airmail2 solutions are built for these times, to move paper into our digital processes and disciplines."

Leading IP management provider **Anaqua** has acquired global IP cost estimating software provider **Quantify IP**.

Anaqua says it will invest in each of Quantify IP's flagship offerings, Global IP Estimator and Portfolio Estimator, and offer these solutions both standalone and integrated with Anaqua's IP management software platforms. Global IP Estimator helps IP practitioners generate worldwide future-cost estimates for trademark, patent, design, and utility model applications. Portfolio Estimator helps IP practitioners calculate worldwide costs for an entire patent portfolio or trademark portfolio.

"Our goal is to continue delivering the most comprehensive IP management solutions that address the diversified needs of IP practitioners today and tomorrow," said Bob Romeo, CEO of Anaqua. "We want to make sure customers have the right tools for their situation, practice, company, and strategies, that will bring the most value to their work processes and portfolios. With deep roots in IP cost estimating software, Quantify IP complements Anaqua's robust set of IP management solutions by providing IP practitioners with more insight into their IP spend."

**Evisort**, the intelligent contract management platform, on 23 February announced \$35M in Series B funding following a year of 4x revenue growth, bringing its total funding to \$55.5M. Global growth equity investor General Atlantic led the round, with participation from existing investors Amity Ventures, Microsoft's venture fund M12, and Vertex Ventures. General Atlantic's Operating Partner and former GE CIO Gary Reiner will join Evisort as a board member. The company will use the funds to grow its customer success team, expand its platform to include more workflow-specific offerings, and continue to push the boundaries of its pre-trained AI.

See our M&A and investment section for more on that.

And **Stout**, a global advisory firm providing legal management consulting services, recently joined NetDocuments' Corporate Legal Partnership Program.

As a Corporate Legal Partner, Stout brings extensive experience and a proven methodology for implementing document management systems within corporate legal departments. As Stout also implements other legal technologies such as matter management, electronic billing, contract lifecycle management, workflow, and legal hold, they bring a unique perspective on optimizing a department's legal technology roadmap with seamless integration between systems.

Stout will lead NetDocuments implementations including process design and enhancement, migration, deployment, and training with a focus on successful rollout. "Stout played a key role in increasing our user adoption by drafting clear communications around the changes, providing tailored usage guidelines for each practice area, and holding post rollout office hours for hands-on assistance," said the Legal Operations Director at a Fortune 1000 technology company.

"We are thrilled to add a reputable global advisory firm like Stout to our Corporate Legal Partnership Program," stated Reza Parsia, VP, Strategic Partner Management, NetDocuments. "As an increasing number of legal departments join the NetDocuments family, it is vital that we have reliable partners such as Stout that understand corporate legal operations and can help our corporate customers make the most out of their NetDocuments investment."

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# Movers and Shakers!

## UK and EMEA

**DW Reporting** founder Dan Wales has joined 'operators for operators' fund **Bryce Catalyst** and taken on a role as chief growth officer in transaction management platform **dealcloser**, in which Bryce Catalyst recently invested \$1.75m.

Wales has become an investor and is part of the advisory team in Bryce Catalyst, which focuses on high growth sectors including cyber security, legal technology and regulation technology. The company was founded by CEO Cary Burch and COO Erik Baklid – both themselves operators who are raising money to help others like them. In addition to funding, Bryce is providing on hand support, which is where the likes of the chief growth officer role comes in.

"Bryce Catalyst has many opportunities for growth right now, and the addition of Dan to our advisory team is a huge win for us," said Baklid, who was previously CEO of Ayfie. "With close to 10 years experience advising law firms on technologies, operational efficiencies and profitability gains within the Business of Law, enabling a focus on legal operations transition, Dan fits in perfectly with our strategy."

Wales founded business intelligence and pricing company DW Reporting in 2013. It was acquired by BigHand in 2018. At BigHand he was the driving force behind the creation of a new enterprise strategic sales and account management function that focuses on the largest global law firms.

The **EY legal function consulting team** in EMEIA has bolstered its numbers with the hire of **Corinna Codd, Maria Passemard, and Keruschka Sunmugam**.

Codd is an associate partner in Zurich. She led the global legal strategy & operations function at Novartis before moving into consulting and founding her own practice advising legal functions. Passemard is now a senior manager in London, who joins from Lawyers on Demand, where she led the legal operations & technology consulting team. Prior to this, Maria was the Legal COO for The John Lewis Partnership, where she led the transformation of the legal operating model at the UK retailer, including the implementation of a workflow and case management platform and the restructuring of its internal and external resourcing model. And Sunmugam joins as a consultant in London. She is a qualified lawyer, who built a career in legal operations across a variety of in-house and law firm project management and paralegal roles before taking over legal operations management at trainline.com and, most recently, at fintech scale-up, Liberis.

Online deal platform **Legatics** has appointed former head of software engineering for BBC News, **Steve Wheeler**, as CTO.

At the BBC, Wheeler was responsible for leading the BBC World Service and BBC Weather online products. Prior to this he was head of technology at CrowdBnk Ltd during the company's high growth stages.

Legatics said that Wheeler will lead its efforts with its commitment to delivering a best-in-class transaction management platform. This strategic decision to bring Wheeler's level of experience to the company is the first in a move to expand the engineering team so Legatics can accelerate feature delivery for its clients.

Legatics CEO, **Anthony Seale**, said: "Delivery of an exceptional product has always been critical to the success of our business, as well as our customers' who depend on us every day to deliver their legal work. I'm delighted to have such a brilliant engineer who has had such a prominent career at the BBC leading our technical team."

Legal tech scale-up **Apperio** has appointed a high-growth technology entrepreneur and a leading private equity specialist to its board to help drive its growth and geographical expansion.

David Eldridge joins the SaaS-based legal spend analytics and matter tracking platform as chairman: he has more than 25 years' experience in the technology industry. He co-founded and led marketing technology company Alterian, listing on the London Stock Exchange in 2000 and overseeing five acquisitions in the UK and US before

selling the company to SDL plc. Since 2011, David has held advisory and board positions with high growth technology and data businesses.

Joining as a non-executive director, Neil MacDougall has spent 20 years at mid-market buyout firm Silverfleet, leading the buyout of the company from Prudential in 2007. Neil was Silverfleet's Managing Partner between 2004 and 2019 and became Chairman in 2019. In 2020 Neil was appointed as Chair of the British Private Equity and Venture Capital Association, the industry body for the private equity and venture capital industry in the UK.

**Zylpha** has appointed **Miranda Evans** as Marketing Manager for its widely acclaimed 'Pay As You Go' document bundling software. Zylpha says the move reflects the software's recent sales success as the market leading choice for law firms and practices of all sizes, including: Dovaston Law, Bell Lamb & Johnson, Joanna Connolly Solicitors, Mulcahy Smith and Allard Bailey Family Law.

In her new role, Evans will seek to build upon this success through a broad range of digital marketing strategies and major partnership opportunities.

**RAVN Systems** co-founder **Peter Wallqvist** has joined **Leading Point** as chief product officer and investor. He joins the digital transformation company to help the business scale their products and support the launch of their Regtech and ESG solutions on their modellr™ platform.

Peter Wallqvist was CEO of RAVN Systems, one of the earliest and most pioneering Legal AI and cognitive computing companies. After RAVN was bought in 2017 by the US-based document management solutions provider iManage, Wallqvist acted as their VP of strategy and global practice director. He said: "I'm excited to be able to apply my knowledge and experience to a company with such a deep understanding of its core market, a track record of collaborative transformation and innovative data solutions."

## **NORTH AMERICA**

And there's more news on the other side of the pond from **Bryce Catalyst**, an investment company focused on high growth sectors including cyber security, legal technology and regulation technology, which has hired **Leon Hounshell**, chief product officer at **EarthLink**, to its advisory team.

Hounshell is known for his expertise in bringing innovative products to market and at EarthLink was responsible for the expansion of data and security products and EarthLink's internet of things strategy. According to LinkedIn, he has been working with Bryce Catalyst since October last year.

"Bryce Catalyst's operators for operators approach fits nicely into my wheelhouse," said Hounshell. "I believe my background in both cyber security and the start-up space will allow me to help the team make knowledgeable decisions when working with these in-demand companies. I look forward to bringing my expertise to the team and being part of the continual rapid growth of Bryce Catalyst."

Bryce Catalyst, which recently hired Dan Wales as an advisor, is currently raising \$100 million through an SPV (special purpose vehicle) to invest into software companies focused in cyber security, legal technology and regulation technology. Demand for these companies is predicted to increase over the next several years. In anticipation for the capital raise and demand, Bryce Catalyst has several pre-vetted investments in its pipeline.

Atlanta-headquartered legal and professional services outsourcing IT solutions provider **Intelliteach** has rebranded as **Frontline Managed Services (FMS)** and hired ex-**Thomson Reuters** senior director of innovation, **Carlos Gamez**, as chief revenue officer.

FMS' appointment of Carlos Gámez as CRO is intended to leverage his experience driving strategic growth across global markets. He also brings experience on the buy-side of IT and financial management solutions having previously held in-house and law firm roles as a practicing intellectual property attorney.

"Carlos shares our commitment to a transformative, client-focused approach to our continued growth and innovation in service delivery and to provide value to our clients at every front of their business," said Naidoo. "We are excited to welcome him to help lead us into the future as we work to connect firms with administrative, financial and IT managed services in ways that were never previously imagined."

In his new role, Gámez is responsible for revenue-generation and strategy, including overseeing the sales organization, marketing and partner channels to execute company strategy in line with evolving client service needs.

"It is an exciting time to join Frontline Managed Services, especially as last week's rebrand highlighted the company's success to date and future direction – to continue revolutionizing its services for even more growth in the legal industry," Gámez said. "I'm grateful for this opportunity to help lead these efforts and look forward to working with Frontline Managed Services clients and partners."

**Reynen Court** announced at the start of February that **Jeroen Coenen** has joined as chief marketing officer to "further develop the company's dialogue with the significant communities engaged on both sides of its legal technology platform." Coenen will also serve as a member of Reynen Court's executive team.

"Jeroen is a marketer with over 20 years of international marketing and communications leadership experience in the technology industry", said Reynen Court founder and CEO Andrew Klein. "We are very pleased to welcome him to our family. Jeroen will be an important addition to our team as we deepen and broaden our relationships with law firms, legal departments and application vendors in pursuit of our mission to establish a true, vibrant and open marketplace for legal technology."

Prior to joining Reynen Court, Coenen held senior positions at HP, Salesforce, Microsoft and, most recently, Mambu, where he held the role of VP Marketing.

"The practice of law is at the cusp of a digital transformation. Law firms and in-house legal departments are seeking approaches to foster innovation, strengthen areas of specialization and increase collaboration, all while ensuring greater cost efficiency", said Coenen. "By offering a platform that makes it fast, easy and secure to discover, test, adopt and manage new technologies, Reynen Court has the potential to truly transform the legal industry. Their timing seems incredibly right, so I'm excited to be part of this journey."

**FileTrail** has hired legal technology industry veteran **Bill Belmonte** as a senior strategic account manager. Belmonte joins FileTrail's growing account management team in North America, which now includes Kurt Anderson, who joined last fall, as well as Keith Schneider, who joined in March 2020.

In his new role, Belmonte is responsible for supporting FileTrail customers in New York City and the Northeastern United States. He brings more than 25 years of experience in legal technology, with extensive experience in document management systems. He has held senior positions in sales and consulting at companies including ZERØ, eSentio, American LegalNet, Phoenix Business Solutions (now Morae Global), Younts Consulting and iManage/Interwoven. Belmonte has been certified in NetDocuments DMS implementation and is an iManage Work 10 Certified System Engineer.

"Bill is highly regarded by law firm CIOs and COOs for his knowledge of the business of law and his understanding of how firms can use technology to achieve their business objectives," says Darrell Mervau, president, FileTrail. "His in-depth technical expertise in document management systems including both iManage and NetDocuments is also a plus for our customers, who value the way FileTrail helps to integrate their DMS with physical records and other electronic information repositories."

**Lexicon** has named **Jerome Elenez** as its new chief marketing officer. Elenez will oversee all marketing and sales efforts, including strategy, customer research, digital, traditional marketing, public relations, communications, and account management.

Elenez has worked for respected brands worldwide, including McDonald's Corporation, the Dallas Cowboys, and the Dallas Mavericks. He is tasked with increasing the brand presence and revenue for the Lexicon's law-firm customers.

"Jerome is a seasoned marketing leader who has a long track record of demonstrated performance across global brands," Lexicon chief executive officer Scott Brennan said. "We're eager to have him take the reins as CMO. He has the experience and expertise in brand evolution to accelerate Lexicon's next phase of growth and position in the legal practice management market."

A group of five women are seated around a large wooden conference table in a modern meeting room. They are engaged in a discussion, with some looking at laptops. The room features a large wall-mounted screen, a white decorative light fixture, and a window with a view of an office building. The text 'M&A + Investment' is overlaid in the center of the image.

# M&A + Investment

# DocsCorp acquires Docuble

DocsCorp has acquired Docuble (previously Word Exchange), which enables law firms to easily fix styling problems in Microsoft Word, including achieving consistent house style and sorting out those often hugely irritating issues with numbering. Docuble also brings with it print management software docublePrint. The products have been renamed styleDocs and printDocs.

Docuble is a UK-based company that was founded in 2009 by former managing director Sarah Hanfrey. Hanfrey as well as director Tim Suiter and their small team are joining DocsCorp – Hanfrey will continue to lead the development of StyleDocs and Suiter joins as product manager.

To date the company's reach has been limited to the UK but speaking to Legal IT Insider, DocsCorp CEO and co-founder Dean Sappey said: "We are able to get this to our customers across the world, which Docuble don't have the resources to do." He added: "Tim and Sarah and their team are doing the same jobs but we have sales and marketing support so they can focus on the product."

According to Sappey, DocsCorp looked at a few document restyling options but says: "This was by far and away the best product. We started showing it to customers in December and two customers have already bought it and a bunch of very large law firms are interested."

He says: "It fixes the styling problems in Word: if you want to change the template to match your house style, or there is an error in the numbering, it fixes it in one click. The geeky people love it but so does your average lawyer, who can't get numbering to work and just wants something that fixes it without having to know why – that's what people want software to do."

Word Exchange rebranded as Docuble in March 2020 and Sappey tells us: "From all the knowledge they had they completely rewrote the styling product. You learn a lot from the first version and sometimes you get to the point where you have to start from scratch. They were able to do that because the tech has changed."

He adds: "Whenever we look at product, we try to find new, fast tech rather than software that has been round years. We want something new and modern, so we're not stuck with legacy tech."

This follows the acquisition of document production vendor Verowave, which at first glance appears to overlap with Docuble but Sappey says: "Verowave is about creating a document from scratch and personalising the detail and language from a standard library. Docuble is where you might have received a document from a client and need to reformat it, or you have an old document that needs to be restyled. The two work together and there is very little overlap; they do different things at different parts of the document lifecycle." The add-ons all live in the Word toolbar.

The addition of Docuble means the DocsCorp document productivity platform now delivers template management, document assembly, document styling and repair, numbering, document comparison, PDF editing, metadata cleaning, email recipient checking, print management, document bundling, and bulk OCR processing.

Docuble will be available as a separate product to customers, who will be able to add it to their enterprise deal, added into the Word tool bar.

Hanfrey told Legal IT Insider: "Although Word has become more stable, getting a document into the right shape for a lawyer to work efficiently still takes Word skills and time. Who has time to fiddle with documents? On top of this, many firms report difficulties in hiring people with advanced Word skills."

"Our goal with styleDocs is to solve this problem as Microsoft would. More than just applying styles and numbering to a document in a single click, we can transform any document to your firm's branding and make it behave as it should.

"We are very excited to be working with DocsCorp. As part of an expanded technical team, we will take the product to market as a modern and innovative document formatting and repair solution for law firms globally."

## New M&A tables show legal tech deals up 147%

Legal IT Insider was in February given the first peek at the brand-new legal technology and GRC M&A tables from [Spark](#) – a dashboard for legal and regulatory solutions launched by legal tech analytics company Legalcomplex.com. Legalcomplex.com was co-founded by data wizard Raymond Blijd, who previously worked for Wolters Kluwer.

The M&A tables show us that the total value of disclosed legal tech investments is up 147% since 2019. The volume is up 31%.

The largest acquisition going back to January 2020 was CPA Global's acquisition by Clarivate Analytics in July 2020 for a whopping \$6.7bn. That is not so closely followed by Flexera's acquisition by Thomas Bravo for \$2.65bn. Salesforce's acquisition of Vlocity is next at \$1.3bn, followed by the \$715m purchase of Conga by Apttus and then Apax Partner's \$193m acquisition of MyCase.

It is also clear that the number of deals each month is increasing. January 2021 doubled from nine legal M&A deals in 2020 to 19 in the past month. The number of GRC deals in the same period has risen from six to 16. You won't be surprised to hear that most M&A happened in contract tech.

Blijd is also founder of non-profit platform Legalpioneer.org, established five years ago in March, where you can search for businesses and startups in the legal sector. The Legalpioneer dataset started, Blijd tells us, with the question 'who will beat law firms' and contains data on new legal tech companies each month.

You can take a look at Spark here: <https://www.legalcomplex.com/spark/>

## Evisort raises \$35m Series B

And Evisort, the intelligent contract management platform, on 23 February announced \$35M in Series B funding following a year of 4x revenue growth, bringing its total funding to \$55.5M. Global growth equity investor General Atlantic led the round, with participation from existing investors Amity Ventures, Microsoft's venture fund M12, and Vertex Ventures. General Atlantic's Operating Partner and former GE CIO Gary Reiner will join Evisort as a board member. The company will use the funds to grow its customer success team, expand its platform to include more workflow-specific offerings, and continue to push the boundaries of its pre-trained AI.

Enterprises have been racing to digitize contract management due to a convergence of three factors:

- Remote work has made manual contracting processes all but impossible
- New regulations have dramatically increased the risk of non-compliant contracts
- Pandemic-hit businesses are eager to find hidden cost savings and revenue in their contracts

Evisort's contract management solution addresses all three factors. Unlike most contract management solutions which merely streamline processes, Evisort's cloud-native, end-to-end platform has helped enterprises do business faster and uncover millions of dollars in potential cost savings and new revenue hidden in their contracts. For example, one customer was able to recognize hundreds of thousands of dollars in unfulfilled rebates because Evisort identified discount clauses in thousands of vendor contracts and issued a notification through the finance system before the vendor invoices were paid.

This intelligent approach to contract lifecycle management (CLM) has secured Evisort 4x revenue growth over the past year and helped win or expand seven Fortune 500 or global clients in banking, healthcare and enterprise tech, including Microsoft, NetApp, Molina Healthcare, and Fujitsu.

"In this ever-shifting regulatory environment, it's hard to know what information in contracts will be important tomorrow. Evisort makes it simple for our teams to train custom algorithms so we can react quickly as our compliance needs change. We're able to track new information across hundreds of thousands of contracts without any manual effort," said Tom Orrison, Director of Legal Ops at Microsoft.



# eDiscovery news

Here's all your #eDiscovery sector news from the month. Grab a coffee, there's a lot.

## UK

**Onna** has launched a UK-hosted instance of its eDiscovery and Knowledge Integration Platform.

This expansion provides Onna's customers with the ability to host data within the Onna platform in line with UK data residency and data protection regulations such as GDPR. Customers who have operations in the UK will now be able to utilize Onna's powerful connectivity and data management functions, safe in the knowledge that their data is being hosted in the same country.

For Onna, this is the first regional instance of the technology outside of North America and brings the Onna technology offering to a more international customer base.

The addition of the UK operation will be available from February 2021 and will be hosted in the Google Cloud Platform region in London, UK.

Russ Grant, vice president of revenue at Onna, commented, "The UK instance of Onna brings our eDiscovery technology closer to customers in the UK, and allows us to meet their data residency requirements in line with the data protection and privacy rules in the region." He added, "We are providing our customers with more choice. If they do not wish to have any data transferred to the US for processing or hosting, they now have the option to use the Onna UK instance. This will allow customers engaged in eDiscovery and data management projects on content hosted in the UK the ability to undertake this work without having to worry about the legal implications of transferring this data to the US."

## North America

New eDiscovery vendor on the block **Veristar** announced at the start of February that it is acquiring contract analysis and eDiscovery provider **Planet Data**, accelerating the firm's offerings and solutions for corporate legal departments and law firms. Planet Data Solutions, Inc. will sell its assets to Veristar. Planet Data's Exego software division will operate under a separate Exego LLC.

"We are excited to be joining forces with the outstanding Planet Data team," said Veristar company founder, CEO and president, Rick Avers. "Acquiring the deep bench of litigation support professionals at Planet Data greatly enhances our current capabilities and positions Veristar for continued growth. We also are excited to leverage the powerful Exego platform and its proven track record of reducing client costs."

The Planet Data team will operate under the leadership of Rick Avers. Dave Cochran, COO at Planet Data, will become president of Exego.

Terms of the deal are not disclosed.

**FTI Consulting** at the start of February announced the Company's Technology segment has expanded its partnership with **Relativity** to provide its cloud-based e-discovery solution **RelativityOne** in Canada.

In Canada, organizations are facing myriad new e-discovery challenges, particularly around Canadian Competition Bureau investigations and complex supplementary information requests in the merger clearance process. As part of the Competition Bureau's efforts to increase antitrust oversight in the digital age, it recently announced a cooperation framework with the U.S., UK, Australia and New Zealand, further raising the regulatory stakes for multinational companies seeking M&A approvals in those countries. Experts expect this to lead to an uptick in the volume, cost and complexity of conducting e-discovery in response to global merger investigations.

"In many countries, increased regulatory enforcement and oversight are on the horizon for 2021. As we help our clients prepare for a likely increase in merger control investigations and other high-stakes e-discovery matters, we

are adopting the solutions necessary to ensure they have access to the most sophisticated and efficient e-discovery tools available," said David Meadows, a Senior Managing Director in FTI Consulting's Technology segment. "Relativity has helped us provide improved e-discovery outcomes and cost savings for clients worldwide. The addition of RelativityOne in Canada strengthens our SaaS portfolio and flexibility in addressing any e-discovery challenges our clients face."

**Relativity** announced at Legalweek that it will add redaction solution **Milyli's Blackout**, to **RelativityOne**. Moving forward, the solution offering automated image and native redactions will be known as RelativityOne Redact, embedded into the simply powerful user experience with Aero UI and available as a standard feature in March for all RelativityOne customers at no cost.

"We are excited to bring this landmark application to RelativityOne customers as it truly unlocks the full power of RelativityOne's user experience," said Mike Gamson, Chief Executive Officer at Relativity. "In the world of e-discovery and compliance, data privacy is of paramount importance, and fully integrating a comprehensive application like RelativityOne Redact provides our customers with the strongest solution for complex redaction in one secure cloud platform."

"RelativityOne Redact will allow us to offer a more streamlined approach to redaction for our attorneys, saving our firm time and money while reducing margin for error. This feature is critical to us," said John Hogan, director of litigation support at DLA Piper. "Relativity continues to provide the industry-leading tools we need to strengthen our e-discovery capabilities so we can focus on what's most important to us – serving our clients."

**Thompson Knight**, the Dallas-based, full-service law firm, has engaged **Reveal** to supply end-to-end solutions. Thompson Knight will take full advantage of Reveal's platform, which includes processing, early case assessment, AI, review, production functionality and customizable API-enabled back-end, along with visual analytics.

Reveal recently merged with Brainspace and you can read that story here: <https://legaltechnology.com/reveal-and-brainspace-merge-backed-by-200m-from-kl/>

"Reveal's unique set of artificial intelligence and analytics tools allow our attorneys to navigate and identify key documents very early in the eDiscovery process, thus providing great value to our clients," says Kevin Clark, litigation support manager at Thompson Knight. "With the addition of NexLP and Brainspace to complement their already robust review technology, Reveal is at the top of the list when it comes to innovation in the legal technology industry."

**Hanzo** has announced the beta release of **Hanzo Hold for Google Workspace (G Suite)** with select customers, with general availability in April.

"Hanzo Hold for Google Workspace is born from customers requesting easy-to-use solutions for managing discovery for both Google Workspace and Slack collaboration data," said Senior Product Manager, Dave Ruel. "Through Hanzo Hold, we're providing enterprises one interface to control the data preservation and collection of these collaborative platforms and we're providing customers solutions to simplify the unique challenges of dynamic, complex data sources — saving time, training costs, and the need for multiple systems."

**And last but not least HaystackID** has unveiled a new portfolio of 3.0 security enhancements.

"The need for secure remote work has never been greater. But every matter has different policy and security needs, and we are adapting our technology accordingly," said HaystackID chief information security officer and president of forensics John Wilson. "For those organizations needing the most secure technology out there, 3.0 provides them with that extra protection ensuring that only the authorized user can access their data."

The new offering from HaystackID consists of three different customizable packages. For those needing the most secure protections, the elite level uses biometric AI technology and features the latest in webcam identity

verification technology, including the detection of unauthorized users/objects (cameras/phones) and tracking of the user's movements and focus. All three levels ensure connection, communication and compliance with the most stringent legal and regulatory security and privacy requirements.

"Security has always been an essential part of our remote review. But since we first offered it in 2014, we have had to adapt to rapidly changing security risks," said Matt Daimler, HaystackID's senior vice president and general manager of review services. "Now increased cyber threats and exponential growth in remote work due to the pandemic have driven the need for even greater protection. Our 3.0 platform is the next step in that evolution using cutting-edge, next-generation technology."

HaystackID's 3.0 enhancements provide a layered approach to review security, ensuring access to a tailored set of features for remote review requirements. The technology generations include:

- First generation > Adaptation – Secured the connectivity through infrastructure.
- Second generation > Integration – Coordinated security and communications protocols and processes.
- Third generation > Optimization – Uses latest technology and extended security to compliance.

Last month, HaystackID launched its ReviewRight Protect service to provide companies with faster, more efficient data breach discovery and review.



Zoom snafu of the month  
(possibly year)

# "I'm not a cat"

Compared with some of the Zoom embarrassments since the start of COVID19 this is not the worst but it's definitely up there with the funniest (and the cutest): Texas lawyer Rod Ponton on Tuesday (9 February) appeared in the 394th Judicial District Court before Judge Roy Ferguson, as a kitten.

The video, which has gone viral, was shared by Judge Ferguson on Twitter with the comment: "IMPORTANT ZOOM TIP: If a child used your computer, before you join a virtual hearing check the Zoom Video Options to be sure filters are off. This kitten just made a formal announcement on a case in the 394th (sound on)." [#lawtwitter#OhNo @zoom\\_us](#)

He added a couple of hours later: "These fun moments are a by-product of the legal profession's dedication to ensuring that the justice system continues to function in these tough times. Everyone involved handled it with dignity, and the filtered lawyer showed incredible grace. True professionalism all around!"

The clip shows the judge saying: "Mr Ponton, I believe you have a filter turned on in the video settings."

The best part is the panic in the kitten's eyes as Ponton says: "I've got my assistant here trying to remove it," before adding: "I'm prepared to go forward with it. I'm here live, I'm not a cat."

You can watch the video here: <https://youtu.be/KxLPGPupdd8>

The Zoom mishap has largely been treated in good humour, which may be thanks in part to some of the far worse virtual courtroom dramas that have preceded it. At the end of January this year, Peruvian lawyer Hector Cipriano Paredes Robles was caught on camera having sex during a virtual remand hearing.

And let's not forget Flushgate: in May 2020 the Supreme Court was holding arguments over the phone – a historic judicial moment that received less column inches than the sound of a toilet flushing during the proceedings.



# Comment



*These two excellent pieces of thought leadership featured on legaltechnology.com in February and are well worth a read. Remember, we don't charge for editorial/comments and we don't post crap ones. To send in your own ideas email [caroline.hill@legalitlexicon.com](mailto:caroline.hill@legalitlexicon.com)*

# Why the legal sector needs to take a step forward in technology adoption

*By Doug Hargrove, managing director of legal at Advanced*

The legal system has now introduced a number of emergency measures to keep the courts operational during the pandemic. It's a smart move, and in fact is the only sensible option, if it is to tackle the worrying backlog of around 54,000 cases waiting to be brought to court. However, in order to really address the problem and start reducing the waiting list, the profession will need to make significant changes to the way it embraces and uses technology.

The UK government's measures include installing Plexiglass in courtrooms and jury deliberation rooms. Nightingale courts have also been established across England and Wales, in Portakabin units and within town halls, theatres, a hotel, a cathedral, university and inside the Ministry of Justice's own London headquarters. This drive to ensure that everyone can operate safely and effectively when they have to be present in court has been vital to getting the judicial system up and running again. It's been especially important as some existing premises, including crown courts in Oxford and Norwich faced closures because of Covid-19 outbreaks.

Improvements to video technology to facilitate remote proceedings, wherever possible or practical, are already helping them go more smoothly and will continue to facilitate the continuation of business as usual within the courts. The Lord Chief Justice, Lord Burnett, told the service that it is important to keep footfall in the courts to a minimum, advising judges that individuals should only be required to appear physically in the court room when absolutely necessary in the interests of justice.

Virtual hearings are not without challenges though. A recent study by the Nuffield Family Justice Observatory (NFJO) found that professionals and family members agreed it was more difficult to deal sensitively and with empathy when interacting via technology and clients can end up feeling less adequately supported by their legal advocate. Technical issues such as connectivity and audio feedback have also been highlighted as barriers to an effective hearing. It points to a need for the legal profession to work together, and make further investments if they are to keep the system running while ensuring fairness and justice at all times.

By taking a more digital approach to case management, courts will have faster access to information and evidence that could in fact help speed up many hearings. This would also help to mitigate some of the other issues with technology that are currently being experienced. Without the right systems in place, we could face an administrative nightmare in which documents and files are out of date, damaged, corrupt or even lost. It's far quicker and more reliable to create and share digital documents using specialised software than with traditional applications.

Everyone who has access to a bundle receives automatic edits and amends and there is no chance someone might be left with an outdated copy. It's easy to highlight, index and bookmark in digital documents and with applications that use Optical Character Recognition (OCR) technology to allow text searchability, saving time in trying to locate certain information under pressure.

What's more, it ensures the security and portability of documents safely in these times when many of the parties involved are working from various addresses – including working from home – rather than from central offices. This is essential when we consider the multiple Nightingale courts now in operation. Security for confidential and personal data is of course the number one concern and failure to protect documents can leave a firm exposed to

reputational and financial damage. Unlike paper bundles, digital documents are stored on highly secure servers using cloud technology that helps ensure compliance to data protection regulations.

However, technology alone will not keep the wheels of justice turning. The legal profession as a whole has to learn to adapt and embrace new ways of working in order to make these measures truly successful and a template for more efficient working in the future. This will incur additional burden and costs, both in recruiting and training new staff to take on some of the heavy lifting. Where recruiting and training isn't a viable option, engaging a document production specialist company may offer a more cost-effective solution.

For a profession steeped in tradition and conventional practice, the Covid-19 pandemic might be just what our legal system needs to help drive a more efficient, streamlined, secure and compliant service that is resilient and ready for the future.

*Doug Hargrove joined Advanced in 2013 and has over 25 years of senior management experience in software companies in the UK and globally.*

## Knowledge Management for Post-Pandemic Resilience

*By Dave Wilson, founder and managing director of Tiger Eye*

Lawyers often work in high pressure environments, dealing with highly sensitive data and frequently complex cases. Working from home, there can be a feeling of disconnect from the people they work with – particularly if there is difficulty accessing the information and documents needed. In these cases, they can become overwhelmed. When there is no designated space for lawyers to share ideas with others, the feeling of disconnect worsens and they can feel disillusioned. The pandemic has brought many of these struggles with collaboration to the fore, and the situation at hand is gradually moving Knowledge Management up the priorities lists for several firms.

Videoconferencing, instant messaging and emails cannot mimic the dynamics of being together in the same room. There is no virtual replacement for the buzz of energy felt in a brainstorming meeting. There is no way to replicate the spontaneity of stumbling upon an idea over lunch. You cannot virtually tap your colleague on the shoulder for help, for tips, or to share a thought. With a dispersed workforce, business leaders realised that collaboration is vital, and they have adopted communication and collaboration tools at an – dare I say it – unprecedented rate. But, whilst we have adjusted relatively quickly and relatively effectively, it's become clear in recent months that with the onset of Zoom fatigue and homeworking burnout, many methods for virtual collaboration are not equal to their office-based counterparts.

The mundaneness of the at-home office can stifle creativity, and it can be hard for workers to think beyond immediate task lists. With this, innovation hits a screen-shaped wall. As Google C.O.O. Mark Golan recently explained: "People are very efficient doing their work at home in their home office, once they know what they are doing. The problem is when you have to decide what to do next." Many firms have felt this and have taken steps to spark creativity and reconnect their staff. For instance, here at Tiger Eye, we were inspired by Helene Russell's Random Virtual Coffee Chats, arranging catch-up calls with our network to fuel casual conversation, think differently, reflect – and potentially, innovate. Yet, with technology acting as the middleman in any interaction in the WFH environment, most every conversation has an element of awkwardness that we cannot escape.

The Immediate Future

But if 2020 has taught us anything, it's just how imperative flexibility is to a business. Working from home is surely here to stay in some capacity, but blended working is on the horizon for many firms. Once again teams will have to adapt.

Knowledge Management is not just essential for quality management but is also key for effective time and cost management – and these are all things that will once again need to be reconsidered as we step out of lockdown and into this new way of working. Businesses will have to meet the knowledge demands of different working styles, so that colleagues in the office can still share and access knowledge as efficiently as their at-home peers. Be warned – this may seem like a simple switch back to the way things used to be, but it is an entirely new challenge, as hybrid working offers new opportunities for knowledge to fall through the cracks and inefficiencies to creep into lawyers' working lives.

Building a flexible, reliable knowledge strategy suitable for the blended working world will require extensive planning, versatile technology, and sheer determination. Connection issues and access to information systems, networks and drives will perhaps be less of a struggle when we return to the office, but the true challenge for lawyers in the hybrid working environment will be efficiently locating critical know-how, as there will be yet more silos for knowledge to get trapped within. With virtual and in-person opportunities for knowledge sharing readily available, the recording of knowledge could prove to be no easy task. Ensuring that knowledge collected from video calls, team meetings, client chats and mentor meetings are all recorded in a way that is easily accessible for all will be a new challenge for KM teams to rise to. How can we record lessons learned from case reviews and learning outcomes from meetings in a flexible, accessible way? How can communities of practice adapt to meet the different working environments of those within them? Without effective strategies supported by flexible, comprehensive IT systems, mission-critical data will fall through the cracks.

Yet, blended working will be a crucial time for knowledge sharing and the formation of ideas, as we can once again feed off of the energy of others and interact without barriers. A recent study undertaken by Microsoft, Boston Consulting Group and KRC Research recorded that businesses across Europe reported drops in levels of innovation, with an average decrease from 56% to 40% when working from home. But it's easy to see how this move to blended working, with the ability to see colleagues face-to-face, could kickstart innovative thinking again. So, it's more important than ever that KM rises to meet the challenges of the immediate future, to grasp this unique opportunity for innovation.

### Post-Pandemic Working

Firms will also need to use the lessons learned and knowledge gained from the crisis to help their planning and recovery efforts for the next stage of working: life after the pandemic. It is essential that if they are to look ahead, they must be able to look back, too, and KM provides a means for adapting to external change, and driving change from within, for true resilience.

A law firm's knowledge library has the potential to offer significant competitive advantage in the fiercely competitive market the recession will fuel. Whilst pressures to cut costs will likely mount in the months to come, finding savings will be more difficult than during the pandemic, when travel expenses and office overheads were reduced by necessity. What's more, without effective Knowledge Management firms could risk reputational damage by offering a slower service than that of their knowledge-sharing competitors. With clients expecting ever more bang for their buck, it's easy to see how vital KM will be for firms wishing to compete.

Yet, more than efficiency and value for money, clients will be looking for the personal touch in their legal services. Fortunately, more than just acting as a search and retrieval tool, Knowledge Libraries have the potential to build and reinforce effective relationships with customers for post-pandemic resilience. It is only by piecing together past experiences and interactions with clients that firms can grasp a view of the customer experience they offer. It is only by understanding what clients want that firms can offer it to them – be it client-facing KM, self-serve portals or something entirely new. It is only when a firm has their collective experience at hand that they can meet

customer demand and anticipate future needs.

But KM is also essential for relationships within internal teams. Without KM we forget, we repeat, and we do not learn. Without KM, newly onboarded staff begin their journey overwhelmed with information but with little actionable knowledge – and they feel disconnected from peers, who have no formal space to share with them. Without KM, we risk our teams becoming overloaded in 'reinventing the wheel' with every case – and we risk them feeling undervalued, as their past contributions are not appreciated. Facilitating knowledge transfer and recognising proactive sharers helps to ensure that staff feel connected to the company and its mission – building a positive work culture where innovation can flourish. Bridging divides across departments by connecting peer to peer builds resilient bonds and empowered teams. Prioritising KM shows an investment in the expertise of those within the business, and it builds trust between the firm and the teams within it. Put simply, Knowledge Management is focused on people and it builds relationships that last.

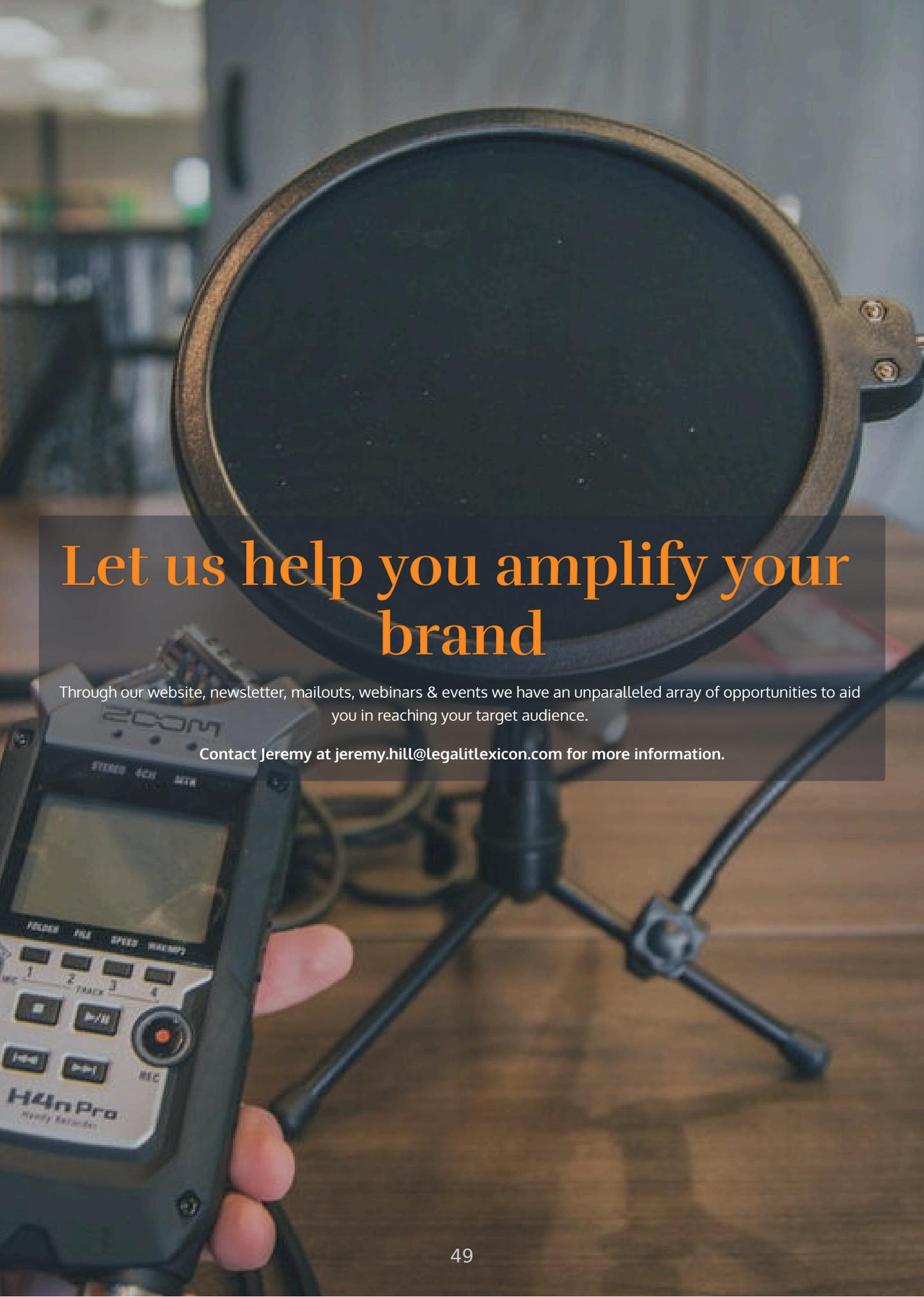
#### Know Now or Never

Knowledge Management will be vital for resilience in the post-pandemic world, but it needs to be a strategic priority now so that firms aren't left scrambling when the economy starts to rebound.

It is only by managing knowledge effectively that we can manage risks, avoid mistakes, respond to opportunities and make better decisions. Beyond the maintenance of documents and best practice guidelines, Knowledge Workers are strategic thinkers who are uniquely positioned to understand how what the firm already has – its valuable expertise – can be leveraged to solve client challenges in the years to come.

Just as we have remained agile in lockdown, inventing new products and approaches to service delivery, revising strategies and 'pivoting' to new needs, we will have to continue to be flexible beyond the pandemic. Knowledge is constantly evolving, and it is crucial that we evolve with it. But we will continue to learn and continue to rise to new challenges – and KM will be our platform for continuous growth.

*Dave Wilson has vast experience within the legal technology industry, spending most of his career focusing on Work Product Management. In 2005, Dave worked to forge partnerships with key industry players (including iManage, Litera, DocsCorp and more) to build Tiger Eye – an organisation dedicated to helping professional services organisations to enhance the way they work with their documents, emails and knowledge.*



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Contact Jeremy at [jeremy.hill@legalitlexicon.com](mailto:jeremy.hill@legalitlexicon.com) for more information.

## The Future is Bright, the Future is the Orange Rag

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