



# Legal IT Insider

*aka*

*'The Orange Rag'*

*Issue 341, April 2021*

# Hi and welcome to the April edition of The Orange Rag!

Well, we've made it to April and life for some of us is starting to feel a bit more normal, although most of you are still working largely from home with the odd "very weird" foray into the office. One CIO this week complained about the background noise because three people were in the office; oh how we laughed.

This month the recurring theme is practice management systems, with Oracle relaunching its global PMS and Peppermint winning UK Top 200 firm Rosenblatt, which has agreed to adopt the entire Peppermint Suite. It is swapping out OpenText eDOCS and Thomson Reuters Elite Enterprise, according to our UK Top 200. In our top story we take a look at the raft of recent departures at TR, which has appeared since 2018 to be in a state of constant flux, and we question the speed of development of HighQ and 3E Cloud.

On the subject of the UK Top 200, the 2021 version is available on the site - we have updated the three main columns and will be finalising the remaining columns in the next couple of months with your input. Get involved, it's for everyone's benefit.

Keep checking in each day with us at [legaltechnology.com](https://legaltechnology.com) for all the latest breaking stories and send your news to [caroline.hill@legalitlexicon.com](mailto:caroline.hill@legalitlexicon.com)



*Caroline Hill, Editor-in-Chief*



# Thomson Reuters Sees Double Digit Departures Across HighQ and Elite

Thomson Reuters has since September 2020 seen over 10 senior legal departures, including the last of the HighQ senior executives and a number of senior Elite sales staff. The exits come as insiders tell us that TR is a ship constantly in flux and that there is disappointment at the speed of integration with HighQ, which was acquired by Thomson Reuters in 2019. Questions are further being asked as to the progress that TR Elite is making in rolling out TR Cloud. TR strenuously denies all of the above.

While the pandemic caused a pause in departures that naturally occur in a large organisation - and there may be an element of people playing 'catch up' subsequently - exits within the last eight months in the legal professionals vertical run well into double figures, including, most recently, Stuart Barr, former chief product and strategy officer at HighQ, who is the last of the HighQ C-Suite to leave.

Others in the public domain who have left TR include Carlos Gamez, who left in January 2021 for Frontline Managed Services (formerly Intelliteach); Andy Wishart, co-founder and CTO of Contract Express and a driving force behind the acquisition of HighQ, who left for CLM platform Agiloft in January; Scott Norby, senior sales manager for Elite, who left in the tail end of 2020 for ECFX; Val Reece, director of legal professional services at Elite, who left for sa.global in December 2020; and Vinnie Scarinci, director of sales at Elite, who left in September 2020 for sa.global. There are six further senior legal departures that are not yet in the public domain.

The departures are set against a backdrop of multiple senior leadership changes and a new Change Programme designed to streamline the business that was introduced at the start of 2021. It aims to transition Thomson Reuters 'from a holding company to an operating company, and from a content company to a content-driven technology company.'

One ex-TR employee told us:

**“Thomson Reuters is one of those organisations that never settle.” Another said: “Change is constant at Thomson Reuters, they are always switching things up. There was a new CEO, CPO and CTO in the last 15 months.”**

He is referring to the arrival of CEO Steve Hasker and the appointment of CFO Mike Eastwood in March 2020. Leadership hires since then include chief product officer David Wong, chief operations and technology officer Kirsty Roth, and president of corporate sales, Sunil Pandita.

The Change Programme follows a wholesale restructure in 2018-19 that saw TR overhaul its business completely. It sold its finance and risk business and restructured the remaining company along customer-focussed segments. Four senior executives left as part of that restructure, including US chief strategy officer Brian Scanlon; president of the legal business Susan Taylor Martin; president of the global growth organization Gonzalo Lissarrague; and chief communications officer Gus Carlson.

Despite the volume of change, it is fair to say that remaining senior executives including the likes of head of legal professionals, Paul Fischer, have been with TR for many years. Furthermore, within legal professionals, the heads of the customer segments and large law sales have stayed constant. You can find many of them listed here: <https://legaltechnology.com/thomson-reuters-wholesale-restructure-the-facts-you-need-to-know/>

Responding to the allegations of flux, a spokesperson for TR said:

“Starting from our position of strength as the market leader, we are transitioning from a holding company to an operating company. We have a very talented and capable team of long-tenured Thomson Reuters executives and new talent to execute our program to deliver a best-in-class customer experience with new and innovative ways to serve our customers.”

There are further suggestions that insiders are unhappy with a lack of progress in integrating HighQ within the TR platform, although there is no question that HighQ is central to TR's strategy.

During TR's investor day in March, Andy Martens, SVP & global head legal product and editorial, said:

“We are seeing strong traction with HighQ adoption, particularly in the UK and with Large Global Firms, that are on the leading edge of adopting new technologies.”

The roadmap is to expand across jurisdictions and penetrate smaller firms in the US, and Martens pointed out that within twelve months of the acquisition, TR integrated Practical law insights and Contract Express document automation capability into HighQ, commenting:



“This software solution has been very well received by our customers.”

One explanation for the discrepancy in some of the feedback we have received is that HighQ had a ‘move fast and break things’ culture that is at odds with a larger corporate such as TR. A CIO at a large UK law firm said:

“HighQ was small, hungry, and energetic, and that is always a risk.”

When it comes to Elite, the pandemic has been unhelpful in its bid to convert sunsetted Enterprise and Envision PMS clients to 3E, and the competition is fierce. However, to date the 3E Cloud has been unavailable to large law firms, which is at odds with an increasing demand for a SaaS PMS product.

Thomson Reuters in March unveiled a raft of enhancements to HighQ, 3E, and Marketplace, and the latest version of HighQ includes over 60 new customer-driven features. See the press release on that for [more](#).

The spokesperson for TR told us:

“HighQ, foundational to our legal workflow solutions strategy, and Elite, the industry-leading financial and practice management solution for larger law firms, are critical to the journey our customers are on, and we’re prioritizing our significant investment in these products.”

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“In 2020, HighQ grew at 24% organically and we are investing heavily in our multi-tenant cloud-based position in Elite, which we are confident is ahead of the competition. Our leadership in our legal software go-to-market teams remains strong, established and connected to the C-Suite across our entire portfolio with deep product knowledge and experience. Our focus is on our customers and helping legal professionals work more efficiently, effectively and collaboratively. We are grateful for the trust our customers put in us as we continue to lead the digital transformation of the legal profession.”



**The 2021 UK Top 200 Is  
Out Now!**



At last, we have launched the UK top 200 2021, which has been updated for the three primary categories – practice management, document management, and client relationship management.

We will be updating the remaining columns throughout the course of the next couple of months and ask that all IT directors or reports engage with us and send your updates, which will make life a lot easier and quicker!

If there are any errors in the existing tables, you know where to shout. If you want to heap praise on us or provide further information, it's [caroline.hill@legallitlexicon.com](mailto:caroline.hill@legallitlexicon.com)

You can find the new table here: <https://legaltechnology.com/top-200/>



# Other Top Stories

# Clio achieves unicorn status with \$1.6bn valuation

In what is rightly being labelled by Clio as a 'historic moment in the growth of legal technology', the Canadian-headquartered legal practice management vendor this week announced that it has achieved unicorn status with a valuation of \$1.6bn, after raising \$110m in its Series E.

“This investment is indicative of the explosive demand for legal technology that empowers lawyers to be cloud-based and client-centered,” said Jack Newton, CEO and founder of Clio.

The funding round was led by funds and accounts advised by T. Rowe Price Associates, Inc. and also included OMERS Growth Equity and Newton continued:

“The support from T. Rowe Price funds and accounts and OMERS Growth Equity will enable us to continue to create a more equitable and accessible legal system by making it easier for clients and law firms to work together through cloud-based technologies.”

The past year has accelerated the shift to cloud technology driven by the need for law firms to find new ways to deliver services to clients. However Clio forecasts that the move to digital-first law firms is a permanent one as consumer expectations and behaviours change.

Clio says that it will use the funding to further invest in its platform, strategic acquisitions, and partnerships aligned with the company's mission to transform the legal experience for all. The funding will also expedite Clio's plans to grow its workforce by 250 employees—an increase of 40 percent—in 2021, with a focus on bolstering its product and engineering teams to continue innovating and evolving its product offerings.

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“Clio has significant growth opportunities given the company’s innovative product offerings and leading market position in the legaltech space. We look forward to collaborating with the team and working to accelerate the company’s efforts to improve technology offerings to the legal industry,” said Andrew Davis director of private investments at T. Rowe Price Associates.

Having secured US\$6.6B across over 900 companies globally, legaltech is one of the fastest-growing sectors for investors. Funding has grown exponentially over the last few years, with total investments skyrocketing from US\$1B to US\$2.2B between 2018 and 2019. Clio’s 2019 \$250m Series D, led by TCV and JMI Equity, was an integral part of that growth.

For the latest legaltech deal data on see our exclusive tables supplied by Legalcomplex.com – see the Legaltech M&A section of [The March Orange Rag](#)

For a full list of unicorn companies see CB Insights list [Here](#)

## Everlaw announces CAGR of 67% and 140% growth in UK revenue

California-headquartered cloud eDiscovery and litigation vendor Everlaw on 27 April announced a banner year of corporate growth: the company reported compound annual revenue run rate growth (CAGR) of 67% over the past three years, including a 140% increase in UK revenue year-over-year.

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“The legal industry is experiencing a period of rapid transformation, and legal teams are starting to recognize the robust potential that cloud-based technology has for collaborative litigation to discover the needle-in-a-haystack pieces of information needed to argue and win cases,”

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said Everlaw CEO AJ Shankar. “Everlaw’s steady growth and strong customer adoption is a testament to the power of modern ediscovery and Everlaw’s ongoing commitment to uncover the truth and advance justice.”

Everlaw is used by 76 of the Am Law 100, and in the past year signed new contracts with Am Law 200 firms like Jones Day, Reed Smith and Wilson Sonsini Goodrich & Rosati. The company has also expanded its enterprise accounts, solidifying engagements with Lime, Snowflake and Vail Resorts.

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“Everlaw has been an integral part of Lime’s growth as we surpassed a landmark milestone of 200 million rides this year,” said Jesse Murray, head of trust and safety at Lime. “Gaining greater autonomy over our data and litigation workflows has completely changed our legal framework and the way our business runs. We’re looking forward to our continued partnership with Everlaw as they scale and carry this momentum into the next chapter.”

# UK top 100 law firm Foot Anstey launches ‘Ingenuity’ to turn client problem solving on its head

UK top 100 law firm Foot Anstey has formally launched a new platform for real estate clients, which will help them to manage and analyse their property portfolio in real time. It is the first product launched under the brand Ingenuity, which has seen Foot Anstey rethink its approach to client problem solving and adopt a design-thinking led process.

The real estate portfolio product management product has been in development for two years. The firm is using HighQ but also looking at leveraging Microsoft Dynamics 365 and further developing the platform.

Instrumental in delivering the new product is client solutions lead Tara Walsh, who told Legal IT Insider:

“The portfolio management product is the first in real estate that we’ve launched, and we have others in development. It was borne out of the recognition that when you’re managing a large portfolio as a landlord or tenant, to manage it strategically is about having the data you need right there – that was quite apparent when talking to clients who are, for example, large retailers.”

Foot Anstey developed Ingenuity to 80% and worked closely with a number of clients to refine the product before launch.

It works by extracting key information from leases and deeds, such as key dates; access rights; and how much rent is paid and puts it into a database from which Foot Anstey can set up notifications and alert clients of key decisions coming up in the next 12 months. Walsh says:

“What everyone wants is a single source of truth in any given time. One





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of our retail clients does a lot of acquisitions. They need to know where we are in the process and when they can kit the property out.”

She adds:



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“At the beginning of the pandemic one client said, ‘We need to look at our portfolio and review what is coming up for renewal and break clauses to work out how we navigate this.’ We were able to extract the data quickly to say, ‘This is what is coming up, here is the information, how do you want us to manage it?’”

Head of the real estate group at Foot Anstey, Martin Hirst, told Legal IT Insider:



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“Previously all the data was there but was hundreds of pages long and you still had to trawl through it. But if you capture it as you go, from a management perspective you can track when the break clauses and expiry dates are, which has been extremely useful.”

Analytics are on the roadmap and the firm is actively looking at how it helps clients to visualise the likes of its financial and employment data, including making predictions when combining the two.

Speaking to Legal IT Insider about the run up and backdrop to this launch, chief technology officer Dave Bloor said:



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“Innovation is at the core of how we work. Our model was quite

“structured but not delivering the results we wanted, so we flipped it on its head. We get clients with challenges coming in all the time and need to understand their challenges. It’s not a case of ‘can I have a portal’ but ‘you want something, but why? How do we help you problem solve in a way that may also enrich our relationship?’”

The result was Ingenuity, which started out with the back to basics that many law firms still struggle with.

“We got into a room with our clients and took them through a design thinking process,” says Bloor. “We tied that back to opportunities and how we are delivering services as a business, and we brought it together, so we are now co-designing client solutions with clients.”

Bloor says that from a standing start the firm now has 20 clients across the full Ingenuity product range and that clients are recommending the firm to others based on the new approach.

Foot Anstey has long been singled out for its innovative approach to client service delivery, including being recognised a number of times by the Financial Times Innovative Lawyers Report. Despite this, one of the challenges of the project initially was winning hearts and minds, with Walsh observing:

“Lawyers and law firms more generally look at technology and say, ‘It may not be suitable for the work I do.’”

Hirst says:

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“One thing that has helped is having Tara sitting within real estate. She sits in the heart of the group and that has really helped to shift mindsets.”

Bloor adds:

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“It’s getting people to step out of their comfort zone and bring in as broad a team as possible. It’s about saying, ‘We have an agenda, but we don’t know the outcome.’ To have the courage to say, ‘We have a team that want to have a conversation and our agenda is to work out how we can work better and help you more.’ Seeing that change is brilliant and people are more confident than before to have a broader conversation.”

## UK-listed firm Rosenblatt selects entire Peppermint suite

UK Top 200 listed law firm Rosenblatt has selected Peppermint Technology’s CX365 solution to underpin its growth strategy, we revealed in April. The AIM listed law firm will implement Peppermint’s entire modular product suite – including case & matter management, client engagement (CRM), document management and practice management. According to Legal IT Insider’s UK top 200, Rosenblatt is an OpenText eDOCS and Thomson Reuters Elite Enterprise customer.

This announcement follows hot on the heels of the news at the start of April that Royds Withy King has selected Peppermint for CMS, CRM and PMS. Royds is an iManage 10 customer.

Peppermint is built on the Microsoft Power Platform and Dynamics 365 and Rosenblatt’s investment in CX365 will ultimately provide a single cloud-based solution. Barry Roche, managing director of Rosenblatt said:

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“The legal services sector is becoming increasingly complex and we see technology as a strategic enabler of continuously strong performance.”

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“Peppermint’s suite of business management modules will help us improve and accelerate our processes, utilise automation to minimise administrative tasks, and empower our decision making with data-driven insights.”

He added:

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“As we broaden our group’s business offering, we are confident that the flexibility and scalability of Peppermint’s products will support us effectively in our journey”.

Peppermint is gaining significant traction within the mid-market to large law sector and this selection of its entire CX365 solution by a UK top 200 law firm represents huge confidence in the company, which since 2018 has been led by CEO Gary Young, who has brought in an experienced senior team. In June 2020, Peppermint won UK London Stock Exchange-listed law firm DWF as a client of its case and matter management system.

Jason Fry, IT director at Rosenblatt said:

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“It was important for Rosenblatt that we chose a technology partner who understood our needs as a law firm and our position as a growing PLC. Peppermint gives us an agile, cloud-based solution that is built on a trusted technology platform. It works hand in hand with our Microsoft productivity tools and gives our teams flexible access through whatever



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means they prefer, including on mobile devices. I am confident that, whatever the next market challenge or opportunity is, my team and I are well placed to support the business with a robust technology offering.”

According to the UK top 200, there are now just five OpenText document management clients.

A stack of books with a red cover and a yellow bookmark, with a pen and a notebook in the background.

# **Wins and Deals**



# NORTH AMERICA

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The funding round was led by funds and accounts advised by **T. Rowe Price Associates, Inc.** and also included **OMERS Growth Equity** and Newton continued: "The support from T. Rowe Price funds and accounts and OMERS Growth Equity will enable us to continue to create a more equitable and accessible legal system by making it easier for clients and law firms to work together through cloud-based technologies." See our Top Stories section for more.



AmLaw 50 firm **Akin Gump** has expanded its partnership with leading CRM system **LexisNexisInterAction**. The firm will transition to the hybrid cloud interface, leveraging all of the new technology and features offered to their users. InterAction will be accessible to all lawyers and advisors. Akin Gump, which has used InterAction in its marketing department since 2007, selected the solution as its firmwide business development platform after a competitive market review and an in-depth analysis of multiple software providers.

"We will be leveraging advanced integrations with leading solutions in areas such as email marketing, alumni management, experience management, and more" said **Aleisha Gravit**, chief marketing and business development officer for Akin Gump. "Our goal is to build a streamlined interface that provides our lawyers with insight on every current and potential client from a holistic view with centralised data."



New legal tech collective **LexFusion** in April announced that **CoParse**, **Kira**, and **Hotshot** have joined as member companies, bringing the number of members to 10. The new arrivals follow LexFusion's recent announcement that **Casey Flaherty** has joined from **Baker McKenzie** as chief strategy officer and third co-founder.

LexFusion is a 'go to market collective' launched in April 2020, which is assembling non-competitive providers across most, if not all, mature categories in the market. The other co-founders are legal tech veterans **Joe Borstein** and **Paul Stroka**, and LexFusion's existing members include **Agiloft**, **Factor**, **HaystackID**, **Frontline**, **Litera**, **Ping** and **Priori Legal**.

Speaking to Legal IT Insider, Borstein said: "Sales teams typically consist of 25-years old who will grow in expertise and knowledge, but we know that a call from a sales person is not the same as a call from Casey, who built a 60-project legal project management team, consulted for **Microsoft** and built a practice in an Am Law firm. I built a

1,500 strong ALSP. We're super passionate, so when a firm talks to us, it's not about a bunch of point solutions, it's much more productive than that.

"Often people have no idea who to call: we massively save them time and effort."



eDiscovery leaders **Consilio** and **Xact Data Discovery** (XDD) have agreed to a merger of the two companies.

The united company will operate as a global technology-enabled service provider and eDiscovery leader.

The combined company will operate under the Consilio name and will consist of over 4,000 employees and active review professionals serving clients from more than 70 global regions across 11 countries. The company's global operations will support small, mid-size, and large clients, regardless of how complex their challenges may be.

"This is a significant step for Consilio and XDD to bring together our respective strengths to deliver a more complete experience to the whole spectrum of client needs," said **Andy Macdonald**, the Chief Executive Officer of Consilio who will continue as CEO of the combined company. "Joining our companies together will provide exponential growth opportunities for our clients. We believe our employees' experience is directly connected to their ability to provide world-class service and solutions for our clients."



**Nelson Mullins Riley & Scarborough LLP** has deployed **Repstor** for Teams to support its transition to Microsoft's online communication and collaboration site, which the Am Law 100 firm says is on course to become the primary workspace for client matter management and file sharing as well as a quasi-intranet replacement.

Repstor will provide the client matter-centric management for content, as well as privacy and information compliance controls.

Nelson Mullins is headquartered in Columbia, South Carolina, and is one of the largest law firms in the US with 26 offices across the country. While it had identified the transformative potential of Microsoft Teams before the pandemic struck, like many firms, the barrier was a lack of inherent support for matter-centric ways of working and organising content.

"We had been a Skype environment previously, and wanted to move to Teams for all aspects of communication anyway having rolled out Microsoft 365 across the firm. But the difficulty was that Teams doesn't have matter-centricity built in," said David Worth, Nelson Mullins' CIO. "To get buy-in from our attorneys and prevent chaos as they tried to organise and find the right Teams for collaboration by client or matter, we needed a more intuitive and controlled user experience."



No-code service automation platform **BRYTER** has announced a \$66 million Series B funding round, which will help to accelerate its international expansion. The raise comes only eight months after the company's Series A round, bringing the total capital raised to date to over \$90 million.

The investment round was led by New York based investment firm **Tiger Global**, with participation from existing investors **Accel**, **Dawn Capital**, **Notion Capital** and **Cavalry Ventures**.

The capital will be used in particular to accelerate BRYTER's expansion in the US, where BRYTER opened an office last year and has since seen rapid adoption, currently supported by a team in New York, with, we're told, more to come.

BRYTER's CEO and co-founder, **Michael Grupp** said: "BRYTER is all about helping organizations streamline their service, internally and externally. We're excited to have the customer validation to be able to raise significant funding so soon after our last round, to take our vision to more customers, particularly in the world's largest software market, the US. We want more businesspeople to learn about how we can change their working lives and we're pleased to have the backing of leading investors and industry greats to take BRYTER to more organisations."



**ZERØ** has entered into partnership with **OpenText**: OpenText Mobile Time Capture for eDOCS by ZERØ is now available by contacting [SolExPartners@opentext.com](mailto:SolExPartners@opentext.com).

ZERØ offers AI-powered predictive email filing that will provide OpenText eDOCS clients a new level of productivity. Its key benefits include email filing, security against data loss prevention (DLP), and ambient time tracking with draft narrative.

"Effectively and efficiently managing information is critical for our customers in law firms, consulting, accounting, and corporate legal departments to increase productivity and ensure compliance and security requirements are met," said **Serge Savchenko**, vice president, legal technology at OpenText. "OpenText Mobile Time Capture for eDOCS by ZERØ provides OpenText eDOCS an AI-based application capturing billable revenue on mobile email to enhance mobile time capture."

"We have become a trusted partner to many of our clients and we continue to find ways to leverage technology and business partnerships with companies like OpenText to make knowledge workers more efficient and effective." said **Alex Babin**, CEO and co-founder at ZERØ.



Contract lifecycle management (CLM) platform **Ironclad** has acquired clickwrap transaction platform **PactSafe**, the leading clickwrap transaction platform (CTP).

Founded in 2014, Ironclad enables businesses to execute and manage contracts digitally, and manage contract data post-execution. PactSafe, founded in 2012, is the leader in clickwrap agreements, covering high-volume, high-speed, online transactions like terms of service and privacy policies.

"The synergy between Ironclad's vision and PactSafe's vision was uncanny. Both of our companies believe that businesses can be fundamentally improved by creating a new, digital standard for the market," said **Jason Boehmig**, CEO and co-founder of Ironclad. With this acquisition, Ironclad becomes the *first* company in the CLM space to cover all contracting use cases, from highly negotiated agreements to click-to-accept."

Ironclad recently hire **Mary O'Carroll** as its chief community officer, see our movers and shakers section for more on that.



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"The legal industry is experiencing a period of rapid transformation, and legal teams are starting to recognize the robust potential that cloud-based technology has for collaborative litigation to discover the needle-in-a-haystack pieces of information needed to argue and win cases," said Everlaw CEO **AJ Shankar**. "Everlaw's steady growth and strong customer adoption is a testament to the power of modern ediscovery and Everlaw's ongoing commitment to uncover the truth and advance justice."

See our Top Stories for more.



**Reynen Court** in April announced the launch of a new full-service offering, with **Womble Bond Dickinson**, a firm of 1,100 lawyers in 26 offices across the U.S. and the U.K., the first firm to sign up for the new model to speed up their sourcing, testing and acquiring of new cloud-based technologies.

The Reynen Court platform helps firms and law departments source, test and buy, deploy and manage best-in-class software applications. Until now, the company's platform has been available only on a 'self-managed basis,' where firms and departments bring their own infrastructure (in a data center or virtual private cloud), install the Reynen Court platform, and then deploy and manage containerized third-party software applications in one or

several secure private clouds under their exclusive control. In contrast, we're told that the new full-service offering provides turn-key access to a solution that enables organizations to access the same benefits of the platform (and the standardization it embodies) without requiring them to provision and manage their own private cloud, platform and application deployments.

"From the time we first met Reynen Court, we felt strongly they could make a substantial contribution toward our innovation initiatives as we work to accelerate our ability to source and test new practice-focused applications," says **Bill Koch**, chief knowledge officer at Womble Bond Dickinson (US). "Like everyone in our industry, we see no end to the onslaught of new technologies, and Reynen Court will allow us to cut through the noise so that we may rapidly adopt technologies that improve our efficiency and facilitate purposeful interactions with our clients. The value of the time we expect to save represents a multiple on the investment we are making in a full-service Reynen Court subscription. We are excited to get started and have already identified a number of applications that we intend to pilot straight away."



**Neota Logic** and **IKnow LLC** have entered a new partnership to deliver knowledge management (KM) solutions on Neota Logic's no-code platform.

IKnow is a knowledge management consultancy and **Dr. Bernard L. Palowitch, Jr.**, Iknow's CEO and president, said: "Neota's platform provides our experts with easy-to-use development tools to enable them to create AI applications quickly. I envision immediate use cases in areas such as diagnostic evaluation, recommendations generation, process automation, and complex document generation."



**Lewis Roca** has selected the **Aurora North PracticeLink** platform to centralize and streamline core processes and data within its IP practice.

Lewis Roca is an Am Law 200 law firm serving clients throughout the U.S. and globally. The firm's top-ranking intellectual property practice includes patent, trademark, copyright, and IP litigation.

The firm initially engaged Aurora North to conduct an assessment of its IP operations, following an earlier project focused on automating subject matter conflicts analysis for its IP practice. As part of the assessment, **Brian Aitchison**, Director of IP Consulting at Aurora North, identified opportunities for the firm to improve efficiency within its IP operations.

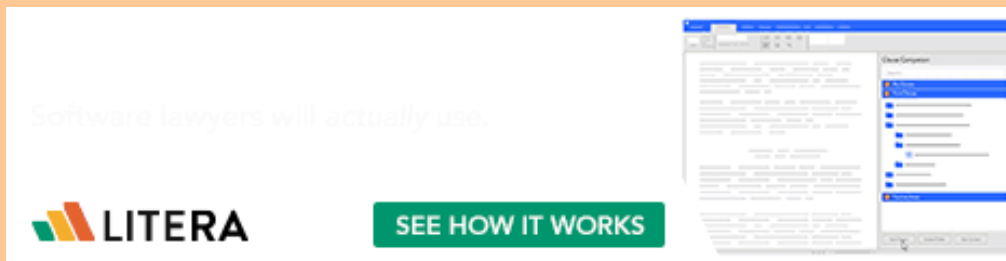
"We valued Brian Aitchison's pragmatic analysis of our patent and trademark prosecution processes," said **Andrew Johnson**, CIO, Lewis Roca. "Improving efficiencies by upgrading our docketing procedures and enhancing the value we deliver to clients were top priorities for our IP practice, and Aurora North provided us with a step-by-step guide to achieving those objectives."



Hot on the heels of its recent acquisition of **DocsCorp** and **Foundation Software Group**, **Litera** on 13 April announced that it has entered into an agreement to acquire **Clocktimizer**, which helps law firms to automatically categorise their billing narratives into activities and task codes.

Clocktimizer will join Foundation in Litera's new law firm intelligence business unit. The acquisition of Foundation saw Litera shift for the first time from the practice of law to the business of law, and the acquisition of Clocktimizer is said to accelerate Foundation's ability to help law firms unlock the value of their data.

Interestingly, Foundation was in talks to partner with Clocktimizer before its acquisition by Litera in January. Speaking to Legal IT Insider, global director of business and strategy, **Haley Altman** said: "Once we had done the acquisition it was totally obvious why: there is a synergy there with overlapping customers. It's incredible to see how the data can flow and how it will enrich the data for customers."





# UK AND EMEA

UK Top 200 listed law firm **Rosenblatt** has selected **Peppermint Technology's** CX365 solution. The AIM listed law firm will implement Peppermint's entire modular product suite – including case & matter management, client engagement (CRM), document management and practice management. According to Legal IT Insider's UK top 200, Rosenblatt is an **OpenText eDOCS** customer.

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**Slaughter and May** in April announced that it will implement visualisation tool **StructureFlow** across the firm. StructureFlow, which was founded in the UK, helps users to produce digital diagrams and plans to help visualise complex legal structures and transactions.

StructureFlow completed and won the Magic Circle firm's first Collaborate legal tech incubator programme in July 2019, beating five other cohort members to secure a successful pilot with the firm. Slaughter and May says it will now be rolling out the technology on an ongoing basis.

Since commencing the pilot, the technology has been trialled on live transactions by lawyers in the corporate, financing, financial regulation and tax practices.

We're told that the pilot showed that the use of StructureFlow enabled users to produce structure diagrams and steps plans more quickly, easily and professionally than they could using more traditional tools. StructureFlow has been used on a wide range of matters, including the documentation of group structures in due diligence reports, mapping out funds flows for deal completions and mapping out the parties and contracts involved in a joint venture.

Slaughter and May clients are also using the technology and reaping the benefits. **David Westgate**, group head of tax at Derwent, said: "We have been using StructureFlow with Slaughter and May on the structuring of a complex joint venture and redevelopment. The diagrams are clear and easy to interpret as well as showing multiple steps. We can see a wide range of use cases for the tool and look forward to using it going forward."



UK top 50 law firm **Eversheds Sutherland** has selected **Aderant Drive** to create secure collaboration portals for their clients. Drive, which integrates with SharePoint online, gives clients real-time insight into matters, budgets and invoices.

"Drive's integrations were a big selling point for us," said **Jonathan Thurmond**, director of solutions and decision support at Eversheds Sutherland. "The simplicity of creating and maintaining the sites on familiar technology meant we didn't have to pull the rug out from under our clients."

Aderant Drive has a large library of connectors that centralize disparate firm data including document management systems (DMS), customer relationship management (CRM), and financials to allow firms like Eversheds Sutherland to more transparently collaborate with clients. While the firm still utilizes their legacy solution, they turn to Drive when a client requires additional security. "More and more of our collaboration spaces will end up in Drive, but right now we're doing everything on a per-request basis," said Thurmond. "If a client requests more insights, we're happy to help them."



Belgian law firm **Liedekerke Wolters Waelbroeck Kirkpatrick** is adopting 3E from **Thomson Reuters**.

As part of the multi-product deal, the firm also will be adopting eBillingHub, Advanced Financial Reporting from Thomson Reuters, and partner solution **Cosine Matter Planning**.

Based in Brussels, Liedekerke was founded in 1965 and is one of Belgium's foremost business law firms. We're told that the deployment of Excel® and web-based budgeting and forecasting application Advanced Financial Reporting will significantly enhance the firm's capability for financial analysis and reporting of operating expenses, fee earner revenue, fee earner compensation, and capital expenditures. The adoption of partner solution Cosine Matter Planning will help maximize the capabilities of the 3E platform through more accurate resourcing, pricing, and profitability of matters.

In addition, the deployment of Excel® and web-based budgeting and forecasting application Advanced Financial Reporting will significantly enhance the firm's capability for financial analysis and reporting of operating expenses, fee earner revenue, fee earner compensation, and capital expenditures. Finally, the adoption of partner solution Cosine Matter Planning will help maximize the capabilities of the 3E platform through more accurate resourcing, pricing, and profitability of matters.



**Simply Conveyancing**, ranked among the UK's top property law and conveyancing firms, is live on legal workflow and case management solution, **Lexis® Visualfiles**. Simply Conveyancing, which is ranked by Land Registry statistics in the top 1% of conveyancing companies in the UK by volume, says it has invested in the platform to help meet its ambitious business growth targets and achieve its vision of becoming the safest, most trusted, and easiest conveyancing firm to deal with.

In this first phase, nearly 120 lawyers are using Visualfiles across the full range of legal services including buying and selling, remortgages, declarations of trust, lease extensions, equity release and transfer of equity. Simply Conveyancing leveraged Visualfiles' 'out-of-the-box' Conveyancing Accelerator; a suite of modules that gives rapid access to best practice workflows, to fast-track implementation and project go-live.

**Paul Tennant**, CIO at Simply Conveyancing, said: "We were working to a considerably compressed timescale and the Accelerator presented us with the most practical path forward to ensure a significantly quicker project 'time to value'. Rather than reinventing the wheel, we decided to use the out-of-the-box workflows as the foundation, which of course, we will now enhance and refine to our unique proposition. This approach is already paying dividends. Our lawyers have benefitted from process efficiencies from day one."



Following recent Nordic successes, **Prosperoware** has entered into partnership with Finnish IT consulting service provider **Beveric**, which joins Prosperoware's growing channel of partners.

The partnership allows Beveric to offer Prosperoware's cloud provisioning, governance and business continuity solution CAM to their client base in Poland, Finland, and the Balkan states. Beveric is an **iManage** reseller partner and regarded as an expert in Microsoft technologies. One particular focus of the new partnership will be helping clients and potential clients to overcome the governance, provision and security concerns around Microsoft Teams, which during the pandemic has taken off within law firms as a means of internal and external collaboration, with all of the challenges that entails.

Beveric's business development manager, **Kai Hinnno**, said: "The Microsoft 365 integration is especially valuable in conjunction with other collaboration systems. We can do so much more for the customers now in a much shorter timeframe," adding: "Other point solutions do not compare."

The partnership follows news we shared back in October that **Borenus**, one of the largest law firms in Finland, had become the first Nordic firm to select CAM, alongside its roll out of the iManage Cloud.



**London Legal**, a UK-based boutique service provider, is expanding the firm's eDiscovery offering with the addition of Relativity's cloud-based solution, **RelativityOne**.

London Legal developers can now deploy, manage and build in the cloud and focus their efforts on greater customisation for partnership clients rather than infrastructure and maintenance. RelativityOne's elastic environment enables London Legal to scale resources and storage to meet data demands and effectively control client costs. By servicing customers through a SaaS platform, London Legal has access to the latest advancements in RelativityOne. Features like Aero UI, a simplified interface; Collect, an integrated Office 365 data collection tool; and Redact, an advanced redaction feature to automate workflows and reduce review time.

"This new offering reinforces London Legal's commitment to provide solutions tailored to its customers' unique needs. With the adoption of RelativityOne, their customers can now innovate faster with a customisable and extensible cloud platform backed by the power of integrated artificial intelligence," said **Steve Couling**, managing director and VP Sales, EMEA at Relativity. "We look forward to building our relationship with London Legal and helping them ensure the most pertinent information is highlighted early and accurately within litigation, bringing costs down and increasing efficiency for their customers."



**KETTLER**, a multifamily developer, real estate investment, and property management company, is using **Contract Logix'** contract lifecycle management (CLM) platform to digitally transform the way it manages contracts across more than 20,000 properties in the Northeast, Mid-Atlantic and Southeast regions. KETTLER has automated and digitized its pre- and post-execution contracting processes and workflows, enabling the optimization and acceleration of its overall contract lifecycle management.

"Procurement, negotiation and other phases of the CLM process at KETTLER can be complex, but we love how easy the Contract Logix platform makes managing our contracts with automation and control. We were able to configure the system to meet the needs of our 170 users, eliminate tedious manual processes, and optimize workflows to drive business efficiency and compliance," said **Cyndi Gordon**, senior director of procurement and contract management at KETTLER.



**BigHand** this month announced record-breaking results for global client support and North America sales for its recently completed fiscal year.

The leading legal software supplier says it was the resilience and engagement of its staff that led to record sales and record revenue in North America, the successful acquisition of Resource Management leader **Mason & Cook**, and impressive customer satisfaction scores.

We're told that BigHand has experienced a dramatic increase in demand for its legal-specific workflow solution: global client base for this solution has grown by over 40%, with the largest increase seen in North America.

**Sam Toulson**, CEO at BigHand said: "As a business we recognize the importance of our people to our success, and worked hard to ensure communication was open and people initiatives were put in place to support our culture throughout the pandemic. The resilience and professionalism of our people combined with our loyal customer base is undoubtedly what has propelled us forward this year."



**Benelux** leader **NautaDutilh N.V.** has extended its partnership with **Ascertus Limited** for support and maintenance of the **iManage** knowledge work platform for document and email management.

Ascertus, which provides document and information lifecycle management solutions to law firms and corporate legal departments across the UK and Europe, is supporting the integration and smooth running of the iManage interface across all the major enterprise applications deployed by the law firm. The company also supports over 900 users of iManage across the firm's six offices including Amsterdam, Brussels, London, Luxembourg, New York, and Rotterdam.

**Sijmen Vrolijk**, head of ICT at NautaDutilh, said: "Ascertus is one of our top technology service providers and is our lead integrator for the iManage stack. The team is extremely knowledgeable about iManage, which is important, but what makes the relationship a success is their professional, problem-solving-led approach to technology deployment and support. We have great confidence in the advice they give us to ensure that our technology is secure and future-proof."

And in a further European win for Ascertus in April, **SEGES**, Denmark's prestigious Agriculture & Food Council, is live on iManage Work, for document and email management in the iManage Cloud with the solution delivered virtually by UK-based Ascertus Limited as the implementation partner.

Deployed in SEGES' legal function that comprises four departments spread across Aarhus and Copenhagen, users now have a centralised 'knowledge bank' where information on all cases and matters are stored. The solution is also assisting the department with GDPR compliance.

SEGES chose Ascertus as the implementation partner based on the company's outstanding reputation in the Danish legal industry for expertise in iManage solution deployments.

The legal department at SEGES is benefiting from a structured approach to document and email management, with iManage Work serving as a "knowledge bank" for the professionals. Lawyers can easily search for and find the latest and most relevant documents pertaining to the cases and matters they are working on – alongside other knowledge assets such as court verdicts. They can access and reuse complex contracts, rather than recreating them from scratch every time. **Jonas Valhøj Kleffel Nielsen**, legal & tax department manager at SEGES said: "This capability is important as we will be able to quickly secure new business opportunities by reducing the time to complete deals."

The advertisement features a white background on the left with the text "Lexis® Create" in black and red, followed by "The perfect legal document at your fingertips." in red. Below this is a black button with the text "Find out more" and a red play icon. On the right, there is a photograph of a person's hand holding a smartphone, with a digital overlay of various legal icons (scales, documents, people, etc.) connected by lines, suggesting a networked legal system.

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A close-up, shallow depth-of-field photograph of a person's hand gesturing while speaking. The hand is in the foreground, slightly out of focus, with fingers spread. In the background, a wooden desk holds a laptop, a notebook, and a smartphone. The background is blurred, showing a person's face and a dark wall. The text "Product Launches" is overlaid in white, bold, sans-serif font.

# Product Launches

# LexisNexis launches Microsoft-based drafting hub Create

LexisNexis UK on 12 April formally launched Lexis Create, which aims to create a single hub for fee-earner drafting within the Microsoft environment, avoiding the need to switch platforms.

Fee earners can access the LexisLibrary, precedents and drafting notes from within Lexis Create, as well as build and share a bank of clauses that can be accessed in the right-hand pane of the screen. There is an inbuilt calculator for checking the likes of currency conversions and users can redact information within Create.

Perhaps the loudest music to knowledge managers' ears is that Create has an in-built proofreading function that validates the legal status of citations and recommends alternatives if needed. We're told that it also picks up missed definitions, recognised terms, skipped numbering or inconsistent identifiable information.

Lexis Create, which integrates with iManage Work 10, is being launched in the UK and will shortly launch in Australia and New Zealand. We're told that it has a different focus and use case to Lexis for Microsoft Office, which is a US product. However, as part of launching Lexis Create in the US, Lexis will explore how to align Create and Lexis for Microsoft Office, where there are significant overlaps.

Speaking to Legal IT Insider, LexisNexis UK's director of solutions, Danielle McCormick, said: "When our users are creating a document or writing a piece of advice, they want to mix their art with our intelligence: those are two primary needs, no matter who we speak to; they want actionable insights. They say, 'help me because I'm having to switch context and go to different browsers or apps,' and what is fantastic about Create is that it solves those problems."

Create, which is a new standalone product sold per user licence, has been in beta and McCormick, who started at Lexis in 2018, says: "We have spoken to hundreds of users." The response, she says, has been very positive and a number of firms are already signed up.

Lexis has since 2013 sold Lexis Draft, which lives in the toolbar and helps fee-earners to draft faster by checking for inconsistencies, all within Word. It appears unlikely that customers will use both products but Lexis told Legal IT Insider: "For those that elect to continue to use (or to choose) Lexis Draft, we will provide the ongoing support to offer them this flexibility."

Lexis has yet to calculate a rough ROI of using Create, but McCormick says: "We know there is a huge time saving because it avoids the context switching problem and a lot of that time is around trying to find what you've drafted."

McCormick, who is a former lawyer, added: "The product manager is also a lawyer, and we had an engineer who is a lawyer working on it, so it really is a by lawyers for lawyers solution."

For more information, visit [www.lexisnexis.co.uk/Lexis-Create](http://www.lexisnexis.co.uk/Lexis-Create)

With regard to Create living in the Microsoft environment, McCormick said: "We know the majority of our users are embedded in that environment. Lexis Create has modern architecture based in Microsoft Office 365 and it features in Word and Outlook."

When drafting a contract, many lawyers will find a contract they have drafted and are happy with and edit it. McCormick said: "We give them the ability to save snippets of contracts in their bank and mix it with our bank – our guidance and drafting notes give actionable insights and they can insert them with one click. They can also share their prior drafting, so if they have drafted a clause on Brexit and want to share that they can do it easily and they can tag it and date it."



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# Oracle relaunches global PMS

Oracle in April formally launched its global legal practice management system alongside new implementation partner Frontera Consulting, which has spent the last eight months configuring the ERP to ensure it handles all of the critical requirements of a law firm.

For those of you who have followed Oracle's recent journey into the legal sector, this is a re-launch, after Oracle first came to market with PwC in 2019 on what is referred to internally as a 'soft launch.'

Legal ERPs live and die by their ability to handle law firm billing, including alternative fee arrangements and rate exceptions. Leading the work for Oracle and Frontera is ex-Fulcrum/Thomson Reuters Elite/Intapp VP Jake Laliberte, who told Legal IT Insider: "We spent eight months configuring the solution to provide functionality to streamline the billing process; enhancing client account reporting, delivering dashboards and key metrics specific to legal, and making sure it handles all critical requirements of a law firm. We also configured the core billing solution to handle every kind of alternate fee arrangement and rate exceptions, thus eliminating the need to use RecVue."

RecVue was used to take care of the likes of alternative fee arrangements, although Laliberte says: "When we dove into the fee arrangements and functionality, everything we needed was in the application. We didn't have to customise one piece of technology."

"Everything that has been done is now leverages core Oracle functionality and Oracle-recommended design for reporting, dashboards, workflows, and extensions."

Laliberte adds: "ERP typically builds a layer to help with all the functionality, but we have baked it into Oracle: there is no layer. All the billing functionality leverages core Oracle. That's really important. The others can't upgrade every three months but because ours is all baked in it's easy to transition or to migrate – it's a

Interestingly, the GPMS does not include time recording or risk, where it will integrate with best of breed providers such as Intapp and Elegity.

says that the Frontera system could be acquired by firms as small as 75 fee-earners, with an ambition to install it within four months. Frontera is already speaking to a firm of around 125 fee-earners.

This is something that could not have been achieved by PwC from a costs perspective, although we're told that PwC remains a long-term Oracle partner and may be involved in any large law ERP implementations.

It is worth noting that Kemp Little was the only firm to sign up to the inaugural system: the future of that project is uncertain given that Kemp Little has been acquired by Deloitte.

The legal sector is much in need of new competition in the, to date, lack lustre practice management sector. Appetites towards the cloud for PMS are (slowly) shifting, and Oracle has the advantage that it works with some of the world's biggest banks. Watch this space.

**repstor** 

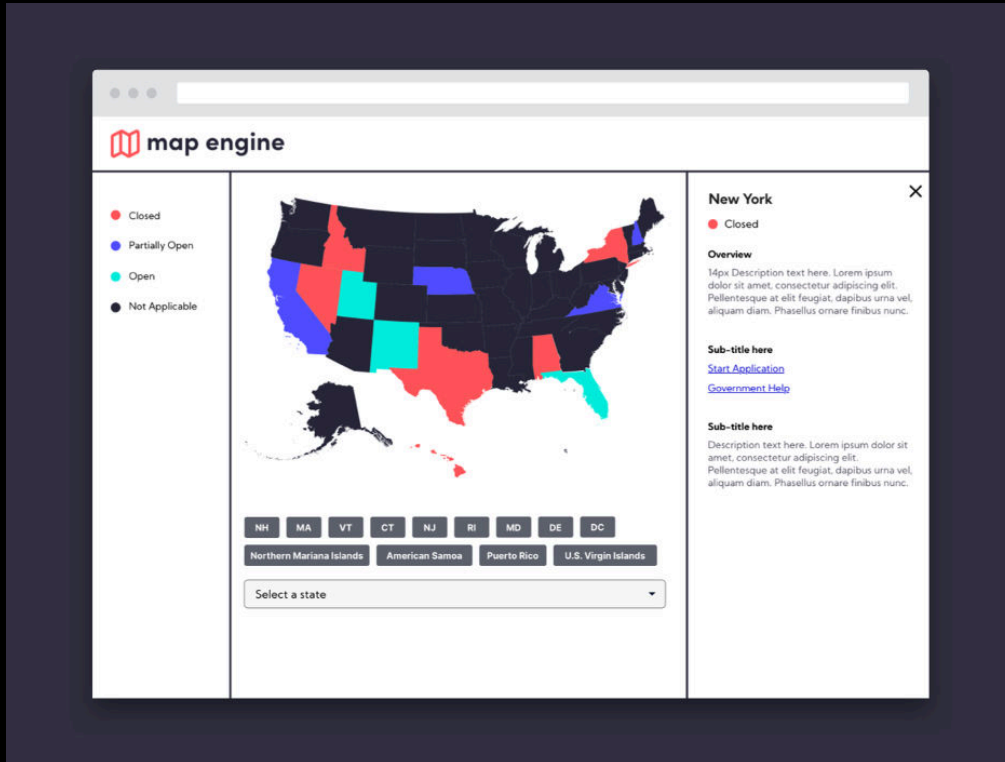
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totally different approach.”

Oracle on 15 April hosted a launch party during which the new system was demoed at a high level. Much of the work in the past eight months has focused on fee-earner billing, and a new user interface allows fee-earners to do their own reviews in real time and create dashboards to easily keep on top of billing.

# New Map Engine brings costs effective way to leverage state data



Maine-based legal tech product design and development agency Theory and Principle has collaborated with Sente Advisers to launch a tool that can easily turn a spreadsheet of jurisdictional data into an interactive map.

We're told that Map Engine is the result of requests from law firms to find a simple and inexpensive way to leverage their state survey data.

The user is provided both a link to a unique URL to share the map and a code snippet to embed the map in their websites, blog posts, or client portals. Maps can be secured with a passcode or made available publicly.

"When Sente Advisers came to us with their idea, we set to building the simplest, most attractive map visualization tool on the market," noted Nicole Bradick, CEO of Theory and Principle. "Working with Sente and several prominent law firms, we took care to fully understand the firms' needs and use cases. Our first version of this application is designed and built to instantly provide value to firms delivering all kinds of 50 State Survey data."

Map Engine is currently available to visualize data related to the United States and its Territories. The product will soon include maps for Canadian Provinces and Territories, European Countries, and US Federal District Courts. Additional map templates for State Counties, Greater Municipal Areas, and other regions

Ryan McClead, the CEO of Sente Advisors, said: "A number of our law firm clients were looking for an easy way to generate maps from the voluminous state survey data they were collecting. The options on the market were either too expensive, unnecessarily complex, or ill-suited to their particular use cases. We saw an opportunity to fill a real market need, so we turned to Theory and Principle to help bring Map Engine to life."

will be added over time, and as requested.

The product is sold on an annual subscription basis, which includes an unlimited number of maps from a single template (i.e., U.S. States and Territories). Each additional template will be a subscription add-on.

A preview of the application as well as a demo video can be viewed at [www.mapengine.io](http://www.mapengine.io).

# LinkSquares unveils new feature set

Contract lifecycle management provider [LinkSquares](#) has unveiled new features to help legal teams identify key insights from specific terms and clauses across contracts.

Building on [LinkSquares 50+ Smart Values](#), LinkSquares has introduced 73 new Strategic Values tailored to specific business focus areas or initiatives such as leasing and California Consumer Privacy Act requirements (CCPA/CCPR), as well as key obligations, renewals, and terms and conditions. The new Strategic Values are dedicated values for LinkSquares customers to use to quickly track and uncover insights, respond to business needs or create custom reports or dashboards.

"The modern legal department needs to bring the same agility and data-driven counsel as its counterparts across the organization," said Danielle Sheer, General Counsel of Bottomline Technologies (NASDAQ: EPAY). "LinkSquares is a great tool to capitalize on AI systems to deliver accurate results faster to our sales and development teams, earning executive recognition and giving our business the strategic edge to adapt to a rapidly-changing industry."

LinkSquares (HQ Boston) has also unveiled a new Salesforce application and DocuSign integration. The DocuSign integration in LinkSquares Finalize will allow legal teams to recapture time spent tracking down contract statuses and signatures. The LinkSquares Finalize native application for Salesforce ensures sales teams have the flexibility to create, review and approve contracts within the platform and workflow of their choice.

# FileTrail unveils Teams Connector

Texas-headquartered information governance provider FileTrail has unveiled a Microsoft Teams Connector in its latest product update.

Users in matter-specific Teams channels now have access to their FileTrail workspace, showing all documents for that matter in any repository to provide a more seamless experience.

Darrell Mervau, FileTrail's president said: "Our latest product update is a game-changer for Teams users and another testament to our talented development team. The growth we're achieving among large law firms and global corporations speaks to the increasing importance being placed on compliance both here in the U.S. and abroad."

FileTrail recent relocated from California to Texas and the most recent FileTrail staff additions include expansions to its development team, as well as additions to its sales and client support and implementation teams.



# Brightflag launches Outlook integration

And there's more Microsoft centric news from New York, as AI-powered legal spend management and matter management software Brightflag this week announced the launch of its Outlook integration, limiting the need to transition between tools.

With the new integration, Outlook users can now sync emails, attachments, and notes directly into a legal matter managed in Brightflag without leaving their inbox. Once in Brightflag, they can also search through this information by keyword without switching back to Outlook.

"Considering the volume of emails and attachments circulating around most legal departments, every bit of extra speed can exponentially increase productivity," said Brightflag CEO Ian Nolan. "With our latest integration, Outlook users will now find that relevant correspondence is either already there or easily retrieved when managing matters in Brightflag."

# CloudNine releases updates to CloudNine Review

CloudNine has released updates to CloudNine Review that will allow its customers to receive 10x faster imaging and the next generation in self-service productions.

Highlights of the CloudNine Review Release include self-service production; accelerated service levels and enhanced user experience.

"Our customers continue to perform simple and complex productions via Review's self-service features while leveraging CloudNine's Services team as an accessible resource," said Jacob Hesse, VP of Product. "We also provide production services to our clients, should they need it, which sets CloudNine apart from other providers."

A close-up, shallow depth-of-field photograph of a person's hand gesturing while speaking. The hand is in the foreground, with fingers slightly curled. In the background, a person's face is blurred, and a laptop is visible on a wooden desk. The overall tone is professional and collaborative.

# Movers and Shakers

# NORTH AMERICA

**Mary O'Carroll** is leaving **Google** for contract lifecycle management vendor **Ironclad** and handing over the reins as president of the **Corporate Legal Operations Consortium** to **Mike Haven**, associate general counsel and head of legal operations at **Intel**. **Haven** has been CLOC board member since March 2019.

Head of legal operations at Google since 2008, O'Carroll is joining Ironclad as chief community officer, where she will be building a movement within the CLM space. She said on 22 April on LinkedIn: "I am starting something new. About 13 years ago, I was given the amazing opportunity to stand up a legal operations function at Google, at a time when the field barely existed. A few years later, I was part of a small band of like-minded misfits from in-house departments that created CLOC (Corporate Legal Operations Consortium), where I would eventually serve as President. These two great organizations, Google and CLOC, have defined much of my personal and professional life for well over a decade.

"Today, I am so happy to be joining a new group of amazing, talented radicals who share my obsession for industry transformation. I am excited to announce that I am starting as Chief Community Officer at Ironclad, Inc."

CLOC, meanwhile, has announced that O'Carroll will stand down as president and Haven will take on the role effective 1 May 2021.

**Onit** has appointed **Brad Rogers** as senior vice president of strategy and growth. Rogers has more than two decades of transformation leadership experience in organizations including **Bank of America**, **GE** and **JPMorgan Chase**. He previously served as chief operations officer and chief of staff for advocacy and oversight at a Fortune 100 global financial services company with more than \$1 trillion in assets under management and 14,000 employees globally. While there, he had a leadership role in building legal operations capabilities designed to drive productivity and cost reductions. At Onit, Rogers will focus on developing, executing and sustaining corporate strategic initiatives that advance its aggressive growth trajectory and innovation.

"Brad is a respected thought leader in our industry and has developed a stellar track record of accomplishments in digital and legal operations transformations. He also has in-depth knowledge of Onit platforms and products, as he has used our technology for years to execute his vision. I enjoyed working with him as a customer and look forward to his contributions to our strategic endeavors," commented **Eric M. Elfman**, CEO and founder of Onit.



**BRYTER** has appointed **Eugene Shim** as its new vice president of sales following its latest \$66m Series B.

Based in Boston, Shim joins BRYTER's team at a time of rapid development for the company, which says that his experience and extensive network will help drive growth for the business, particularly in the North American markets.

Shim said: "Designating Automation as a corporate priority has become more of a 'when' than an 'if'. Growing business demands, developer shortages and now virtual working environments are forcing companies to allocate human resources more effectively. The future leaders in this space will be those who offer a platform that is truly tailored for business users, while powerful enough to meet complex business requirements. I am excited to be joining BRYTER to help accelerate our growth, particularly in the US corporate market. Our platform is leveraged by citizen developers to create mission-critical applications that accurately transfer their expert knowledge. The recent funding reflects confidence in our future growth and affirms that our clients realize value while freeing up time for strategic initiatives."



**Martin Catania** has been named president of **Keno Kozie**, which is now part of **HBR Consulting**.

Catania has been with Keno Kozie for over 20 years and has held leadership roles in the engineering, help desk and administration departments of the firm. In his new role, Catania manages all staff and operations of the firm, works closely with HBR leadership in setting strategy and direction and ensures Keno Kozie is evolving as needed to keep up with the ever-changing technologies and requirements of the firm's worldwide client base.

"We look forward to working with Martin in his expanded capacity as we leverage the combined Keno Kozie and HBR offerings to maximize client benefit," said **Chris Petrini-Poli**, executive chairman of HBR. "He is at the heartbeat of our clients experience with technology in his historical role overseeing user support and enabling technologies. Our clients expect only the best, and Martin provides just that."



**Casey Flaherty** has joined new 'legal tech collective' **LexFusion**. Flaherty has been announced as the third co-founder – alongside **Joe Borstein** and **Paul Stroka** – and takes the role of chief strategy officer. Flaherty was most recently director of legal project management at global law firm **Baker McKenzie** and has held in-house roles including corporate counsel at **Kia Motors**.

He is co-founder and principal of **Procertas**, which was one of the first organisations to promote competency-based technology training.

At LexFusion, Flaherty will be engaging legal departments and legal service providers in LexFusion's go-to-market operation.



**Wolters Kluwer Governance, Risk & Compliance** (GRC) has appointed **Raja Sengupta** as executive vice president and general manager of its **ELM Solutions** business, effective May 3, 2021. He replaces **Jonah Paransky** who is stepping down from the position after four years to pursue outside career interests. Sengupta previously led Wolters Kluwer GRC's Lien Solutions business.

"Corporate legal professionals are increasingly leveraging technology solutions and analytics to manage risk and drive operational efficiencies," said **Richard Flynn**, CEO of Wolters Kluwer GRC. "Raja is a customer-focused leader who has combined data driven insights and advanced technology to create market-leading solutions for customers ranging from the largest global banks to start-up businesses. I am excited that he will now bring this approach and expertise to serve our corporate legal and insurance customers and their law firms".

Prior to Wolters Kluwer Sengupta served as General Manager of **American Express Merchant Financing**. He started his career as a management consultant in **Mitchell Madison** Group's New York office. Subsequently, as global head of Banking & Financial Services Practices at **Inductis LLC** (now part of EXL Service), he played a critical role in the firm's growth, positioning it as a reputable player in big data analytics.

Stroka said: "Casey has a unique ability to speak directly to those in the legal field about their needs, their pain points, and their unbounded opportunities to deliver excellence, especially as an increasing number of law departments and firms come to terms with the imperatives of digital transformation. Today, as Casey officially joins LexFusion, I am even more confident we can meet our clients' needs as trusted advisors filtering out the noise in an ever more crowded marketplace."



**Exterro** has hired **Ray Pathak**, former COO at **Nymity and TrustArc executive**, as their new vice president of data privacy solutions.

"Ray's experience as a privacy professional stretches more than 15 years, and his career features a unique combination of in-depth privacy operational experience and a stellar business skillset," said **Exterro** CEO **Bobby Balachandran**. "He's built, managed, and led privacy programs effectively on both the B2C and B2B sides. As a leader in product sales, marketing, and customer success at Nymity, Ray helped the company achieve explosive growth from 2015 to 2019. He brings a wealth of knowledge and proven expertise to the task of shepherding Exterro's growth in data privacy."



**Rupert Murray** has rejoined **nQ Zebraworks** business development team, handling the northeastern United States. In a statement, the company said: "Rupert joins a long list of former employees who have found their way back to nQ Zebraworks, and we couldn't be happier that he has returned." Murray has spent more than 35 years working with some of the world's leading legal tech providers, including nQ, LexisNexis, Xerox and Iron Mountain.

**Hanzo** has appointed **Paul Suh** as chief financial officer. Suh, who is based in New York, has experience of SaaS-based systems and was previously CFO at fintech company **Back Office**.

"As we set our sights on the next stage of growth, we are making significant investments in organizational structure so that we can efficiently bring to market the innovative best-in-class solutions our product and engineering teams have been delivering," said **Keith Laska**, chief executive officer of Hanzo. "Paul brings a strong track record of successfully raising capital and scaling businesses. We believe with Paul's appointment, we have an exceptional management team in place to accelerate revenue growth, profitability, and market expansion."

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# UK and EMEA

**Frans Post** has joined **Venturis Consulting Group** as a partner. Post has held roles including chief finance officer at **Clifford Chance**, **Mourant** and **De Brauw Blackstone Westbroek**. At Venturis he will be helping law firms to restructure their finance teams and systems. He has particular interest in data, practice performance dashboards, and pricing and profitability tools.

According to a statement from Venturis, Post, who will be based in Amsterdam, will be helping clients with everything from profit optimisation to the restructuring of finance teams and systems.



**Addleshaw Goddard** has hired TLT legal analyst **Matt Edmonds** as senior legal technologist, starting in May. Edmonds has been at TLT for eight years, starting out as an office assistant before becoming a legal assistant and then legal analyst.

Edmonds said on LinkedIn: "I had an amazing sign off from TLT last week after my (nearly) eight-year tenure. I'm so grateful for the opportunities and memories and looking forward to the next chapter."

**Kerry Westland**, who is head of innovation and technology at Addleshaw Goddard, said: "Looking forward to welcoming you to the team."

Speaking to Legal IT Insider, Ballheimer stressed that Factor works in partnership – not competition – with his previous firm and he said: "The proof of the answer is that A&O has a captive in Belfast and still works in partnership with Factor: it's a complimentary offering."



DWF has hired Jordan Owen to lead its Global Entity Management service. Owen joins DWF from KPMG, where she spent the last five years as a senior manager in the Global Entity Management team, which she helped establish. Prior to that, she was at Eversheds for five years.

The new service will allow clients to outsource the day-to-day management of their global entity portfolio, with complete assurance of compliance with local laws and regulations and price certainty. Owen will work alongside DWF's existing and established UK Company Secretarial team, led by Laura Forbes.

Owen said: "DWF's strong identity and a clear global presence is definitely a key attraction to joining the business. My experience and drive, together with DWF's reputation in the market, will allow me to create a thriving global offering for clients. I look forward to getting started and working with the team."



**Allen & Overy** has hired **Oliver Jeffcott** as legal technology solutions analyst, where he will be using his experience as a qualified solicitor to drive service improvements.

Jeffcott, who has been an associate at **Bolt Burdon Kemp; Slater and Gordon;** and **Blake Morgan**, in 2018 founded online claims platform **Litem** to help injured cyclists settle their case for free.

His hire follows that of legal engineer **Ana Burbano**, who joined A&O as legal technology solutions analyst in February.

And A&O's global managing partner **Andrew Ballheimer** is joining the board of **Factor** in the latest big name hire for the alternative legal services provider rebranded from **Axiom Managed Solutions**.

Factor will be leveraging Ballheimer's knowledge and experience of the legal sector: he stepped down as managing partner in April 2020 after 35 years in private practice, including 15 years in senior management roles at A&O.

During Ballheimer's time in management, A&O launched its Belfast shared services centre; it's flexible resourcing arm **Peerpoint**; and its legal innovation lab **Fuse**.



Lauren Colbeck has joined Access Legal as head of product. Colbeck joins from Peppermint Technology, where she spent three years as head of product management for the legal sector. Previously, Lauren spent over a decade in product management at Experian.

Colbeck said: "The advantage of Access having multiple divisions outside of the legal sector is that I can benefit from a wider pool of resources, expertise and best practice to bring even greater insight into our legal offering and ensure we continue to offer the innovation that ambitious law firms need. And, as we evolve and move towards a single sign-on solution in the form of Access Workspace for Legal, we are in a position to bring something truly unique to firms trying to stand out in an increasingly competitive market."

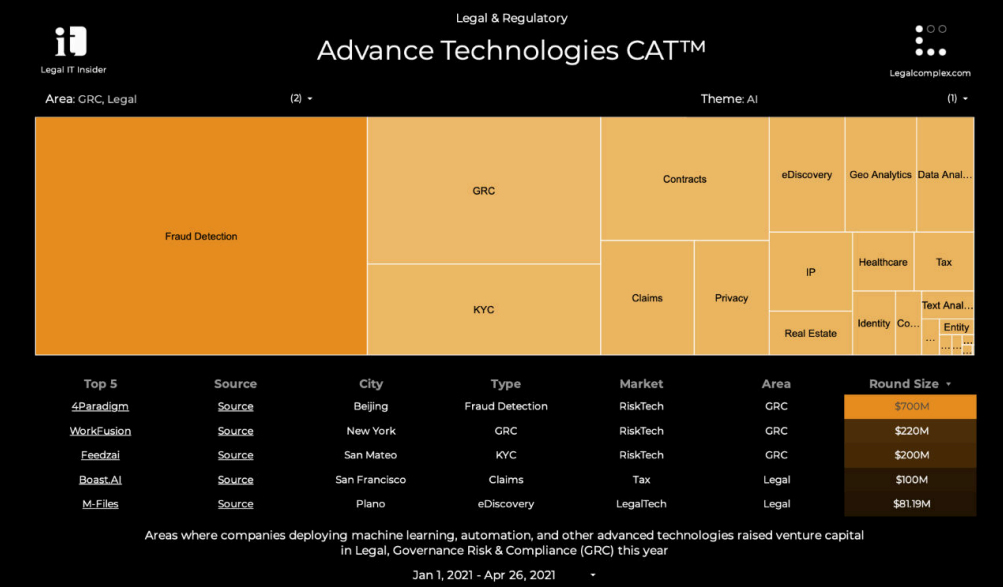




A close-up photograph of a person's face, specifically their eyes and nose, peering over a fan of US dollar bills. The bills are held by two hands with metallic, shimmering nail polish. The bills are fanned out, showing various denominations including \$20 and \$100. The text "Legal Tech M&A" is overlaid in white, bold, sans-serif font across the center of the image.

# Legal Tech M&A

# Which advanced tech receives most VC cash?



Here is the latest exclusive data provided to Legal IT Insider by Spark – a dashboard for legal and regulatory solutions, launched by legal tech analytics company legalcomplex.com. Legalcomplex was co-founded by data wizard Raymond Blijd, who previously worked for Wolters Kluwer. He says: “This month we were curious to know which areas using advanced technologies received the most venture capital. The advanced technologies are machine learning, automation, or text analytics usually deployed in Contract review, eDiscovery, or Patent research. This time we took a broader look at Governance, Risk, and Compliance (GRC) space as well as Legal technology companies.

“This year, fraud detection took the bulk of venture capital pushed by a \$700 million round from 4Paradigm located in Beijing. The key areas where advanced technologies receive capital are to audit and screen customers and vendors. These screenings aren't limited to crimes such as anti-money laundering, they also extend to employees' background and remote monitoring.

“Notable this year was Geo Analytics. Tomorrow.io received a \$77 million round in March to provide a view of where, when, and how the weather will impact businesses. The weather is especially relevant in exploring risk or dealmaking in industries such as construction, insurance, and logistics & supply chains. Remember, weather conditions caused the Ever Given to block the Suez Canal resulting in a potential \$1 Billion settlement under maritime law.”

See the diagram above for more.

# Bryter secures \$66m Series B

No-code service automation platform BRYTER at the start of April announced a \$66 million Series B funding round, which will help to accelerate its international expansion. The raise comes only eight months after the company's Series A round, bringing the total capital raised to date to over \$90 million.

The investment round was led by New York based investment firm Tiger Global, with participation from existing investors Accel, Dawn Capital, Notion Capital and Cavalry Ventures.

The capital will be used in particular to accelerate BRYTER's expansion in the US, where BRYTER opened an office last year and has since seen rapid adoption, currently supported by a team in New York, with, we're told, more to come.

A group of leading enterprise software executives and entrepreneurs also joined the round in recognition of the platform's huge potential, including Amit Agharwal, CPO of DataDog, Lars Björk, former CEO of Qlik, Ulf Zetterberg, founder and CEO of Seal software and former ServiceNow global SVP James Fitzgerald. They will act as consultants for the company and assist in US go-to-market development.

Founded less than three years ago in 2018, BRYTER has rapidly become the leading no-code automation platform for enterprise services. It helps business experts within global organizations turn enterprise services into interactive, self-service applications that are available for everyone across the organization, through virtual assistants, chatbots, self-servicing and other applications. Its customers range from consumer-facing businesses like McDonald's and Telefónica, through leading professional service firms PwC, KPMG and Deloitte in Europe, to banks, healthcare and industrial enterprises.

BRYTER's CEO and co-founder, Michael Grupp said: "BRYTER is all about helping organizations streamline their service, internally and externally. We're excited to have the customer validation to be able to raise significant funding so soon after our last round, to take our vision to more customers, particularly in the world's largest software market, the US. We want more businesspeople to learn about how we can change their working lives and we're pleased to have the backing of leading investors and industry greats to take BRYTER to more organisations."

John Curtius, a partner at Tiger Global, said: "BRYTER has all the characteristics of a top-tier software company: high quality product that solves a real customer pain point, a large market opportunity and a world-class founding team. The feedback from BRYTER's customers was resoundingly positive in our research, and we are excited to see the company reach new heights over the coming years."



# Clio raises \$110m Series E

Clio has raised \$110m in its Series E, as part of which the legal practice management vendor has announced that it has achieved unicorn status with a valuation of \$1.6bn.

"This investment is indicative of the explosive demand for legal technology that empowers lawyers to be cloud-based and client-centered," said Jack Newton, CEO and founder of Clio.

The funding round was led by funds and accounts advised by T. Rowe Price Associates, Inc. and also included OMERS Growth Equity and Newton continued: "The support from T. Rowe Price funds and accounts and OMERS Growth Equity will enable us to continue to create a more equitable and accessible legal system by making it easier for clients and law firms to work together through cloud-based technologies."

See our top stories for more details.

A close-up photograph of a stack of books. The top book has a red cover and a yellow bookmark is visible. Below it is another book with a red cover. The pages of the books are aged and slightly yellowed. To the right of the books, a blue pen and a notebook are partially visible, but they are out of focus. The background is a plain, light-colored wall.

# Job Of The Month

# Commercial VP

**Legal Technology Company**

**UK Based**

**Package in region of £100k to £200k + Equity + Benefits**

Our client is an innovator of legal technology and provides tools to Law Firms to grow in a digital world. Creating ease of use systems for Law Firms and their clients is the ultimate goal within this very modern and proactive organisation and now they are looking to recruit a very important part of their team, a Commercial VP.

In this role as Commercial VP, you will be a commercial leader to own the short, mid and long term sales, marketing, partnerships and customer success strategies and you will be responsible for strategic leadership around revenue, targets, goals and hiring in the commercial side of the business.

This is a key hire for the organisation, and they are looking for a high calibre individual who has extensive Legal Technology/Legal Market experience and ideally also SaaS experience and knowledge too.

**Key attributes for the role will include:**

- Sales Success - The organisation wants to see want to see closing experience and hunger for this activity
- Visionary – Be able to develop existing processes into a scalable revenue model
- Goal Orientated – Setting goals for teams based on budgets and forecasts, scenario planning.
- Commercial Acumen – Spotting opportunities, defining market and regional expansion opportunities
- People Development – Create Management structures, how to incentivise teams, provide tools to management to improve performance and processes
- Adaptability – Ability to deal with amending goals as situations develop

This role is likely to be based remotely for the remainder of the year and therefore the location of the individual is not restrictive to any area although UK is preferred. The position offers a package which is flexible, and negotiable based on experience and would fall into a figure of £100,000 to £200,000 + equity options, plus benefits. How the base and OTE are made up is negotiable.

To apply in the strictest of confidence for this role, please contact Mark Lennard at Lewis Paige who are the recruiting agency appointed for the position. Please contact Mark Lennard on 020 3800 1270 or email your CV to [mark@lewispaige.com](mailto:mark@lewispaige.com)

**To promote your senior roles in The Orange Rag, Contact [jeremy.hill@legalitlexicon.com](mailto:jeremy.hill@legalitlexicon.com)**

# Comments

We have had some fantastic comments on the Legal IT Insider website throughout April, here are the highlights, plus our featured-in-full comment of the month.

# Ideas from Microsoft Ignite 2021

Peter Buck, the former VP of product strategy at NetDocuments, with a focus on AI and machine learning.

He says: "Ignite 2021 was a fifteen-billion-dollar bag of innovation that eclipsed hundreds of competitive products. Let me explain. Starting first with financials, then explore the rise of application builders, review my bag of Ignite innovations, and finish with the competition."

If you didn't already read Peter Buck's comment for Legal IT Insider on Microsoft Ignite, you can read it here: <https://legaltechnology.com/comment-ideas-from-microsoft-ignite-2021/>

## The Managed Services Boom – Past, Present and Future

Jeff Catanzaro, executive vice president at Integreon says that in 2020, delivery of managed services for corporate legal experiences a tremendous boom.

But the pandemic was not the only catalyst, and Jeff looks back at what's stimulating increased appetite for managed services, including the age old adage 'do more with less'; and the increase in regulatory and compliance issues.

You can read his comment here: <https://legaltechnology.com/comment-the-managed-services-boom-past-present-and-future/>

## Has the Legal Industry Reached a Client-Centred Tipping Point?

Tim Dinehart, chief operating officer at ABC Legal Services, looks at whether the pandemic has been the catalyst the legal market needed to embrace technology and pivot towards a new client-centred paradigm.

He looks at some of the uses of newer technology and how it is being applied to improve efficiency.

You can read that here: <https://legaltechnology.com/comment-has-the-legal-industry-reached-a-client-centered-tipping-point/>



# Practice analysis as a tool to manage the future

Pieter van der Hoeven, co-founder and CEO of Clocktimizer (which has just been bought by Litera) looks at the rise of the law firm practice manager (sometimes disguised as a legal project manager) and the fact law firms are beginning to embrace resource management. How can they make the most of new tools to support them?

You can find out here: <https://legaltechnology.com/comment-practice-analysis-as-a-tool-to-manage-the-future/>

## Poor Document Quality – Does it matter?

**Our comment of the month, featured here in full, is by Joanne Humber, marketing consultant at LCT4. Jo got a fantastic reaction on LinkedIn, when she asked:**

**Poor Document Quality – Does it matter? (Spoiler alert: yes, yes it does.)**

"I recently posted on LinkedIn my experience of receiving a badly formatted document that I had been sent by the solicitor acting for the people buying my house. It was truly a disgrace and if I were their client, that is the last time I would instruct them.

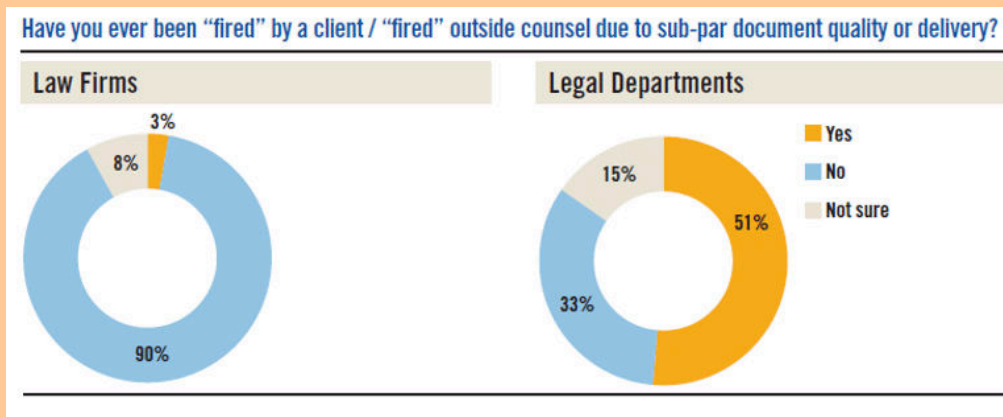
However, on talking to others in similar situations it would appear that I am not alone. The quality of documents is so poor in many cases that it is positively laughable. A friend told me that she received an important legal document from her corporate lawyers full of metadata for another firm. In my case, the five pages were formatted in columns so the only way I could have completed it was by printing it, handwriting my answers and scanning it. It was in Times New Roman and created in Word 97-2003! As it was a Word document, I could change it myself, deal with the nightmare of their multi-level numbered paragraphs and could then answer their questions and return it online. Would they have noticed if I had amended the text as well, I wonder?

My experience of working with law firms delivering IT projects over the past 25 years or so should have made me less surprised. I had hoped that things might have improved. My speciality is training delivery, of course, but this is not just about training – it says more about the lazy, arrogant way that law firms think they can carry on charging huge fees for poor quality work.

Some time ago a survey of law firms showed that few believed that poor document quality would lose them a client, however the clients surveyed disagreed and said that they would fire a firm for poor documents.

90% of law firms said they have never been fired; 51% of legal departments said yes, they have been fired solely for poor document quality or delivery.

2012 ALM INTELLIGENCE AND MICROSYSTEMS – IDENTIFY DISCONNECT BETWEEN LAW FIRM / LEGAL DEPARTMENT COLLABORATION



Does anyone really believe that this situation has improved? With lawyers working from home, without desk-side support and still needing to improve their skills, it is almost inevitable that poorly laid out precedents and other documents are being used over and over. Over-use of Save As...maybe?

LTC4 has provided extensive guidance by providing industry-accepted standards for efficiency. Their Learning Plan “Working with Legal Documents” is designed to provide a structure for training delivery with the goal of achieving a more competent workforce – both among lawyers and their support staff. All the LTC4 Learning Plans are workflow-based, ensuring that they reflect the way people actually interact with the software they use every day. Security awareness, proper management of documents and emails, effective collaboration and communication are also included in the set of 9 Plans which can be found via their website [www.ltc4.org](http://www.ltc4.org). LTC4’s Certification of competence is also offered and can give added reassurance to clients.

LTC4 is also taking the lead in an unprecedented collaboration called the Effectiveness Project. As the legal world moves toward productization and efficiency, clients, legal professionals and those who evaluate their fees are met with the same challenge time and again: How do we know that the time invested in creating legal documents matches the value received?

Legal professionals and legal technologists have sought to address the problems hinted at in this question through automation. But jumping to automation offers a solution before naming the problem. The release of this Project’s milestone document and supplemental materials should rattle a few cages and let’s hope it will lead to law firms looking again at their documents and the skills of those who are working with them.

Law firms need to much more closely monitor the quality of the documents they create and distribute to clients and should enforce a policy that ensures out-of-date precedents are never used.

Overall, the legal industry must invest much more time and energy into effective technology training. It can now be delivered in a variety of ways and take up very little time. In spite of the mistaken idea that modern software is so intuitive that training should not be needed, from my experience there are far too many legal professionals who simply do not have the basic skills they need to do their job competently.”



**We regularly feature great external comments that are on the website because, guess what, they are good, not because we are paid to post them. If you have an idea for content, please**

**contact:** [caroline.hill@legalitlexicon](mailto:caroline.hill@legalitlexicon)



# **#TalkingTech with Legal IT Insider**

# VIDEO: The Insider with Caroline Hill – Guest Chris Grant

Chris Grant has seen all sides of law firm innovation, having worked at Barclays, helping to oversee law firm panel pitches, and at Barclays Ventures Eagle Labs, where he was lawtech director.

Here he talks to Legal IT Insider editor Caroline Hill about the progress (or lack of) – when it comes to law firm innovation, and how innovation must fit in with service delivery and be aligned to client demand.

BARCLAYS VENTURES  
LAWTECH ECOSYSTEM



This video content can't be  
viewed offline

The Insider with Caroline Hill

Featuring Guest: Chris Grant, LawTech Director at  
Barclays Ventures

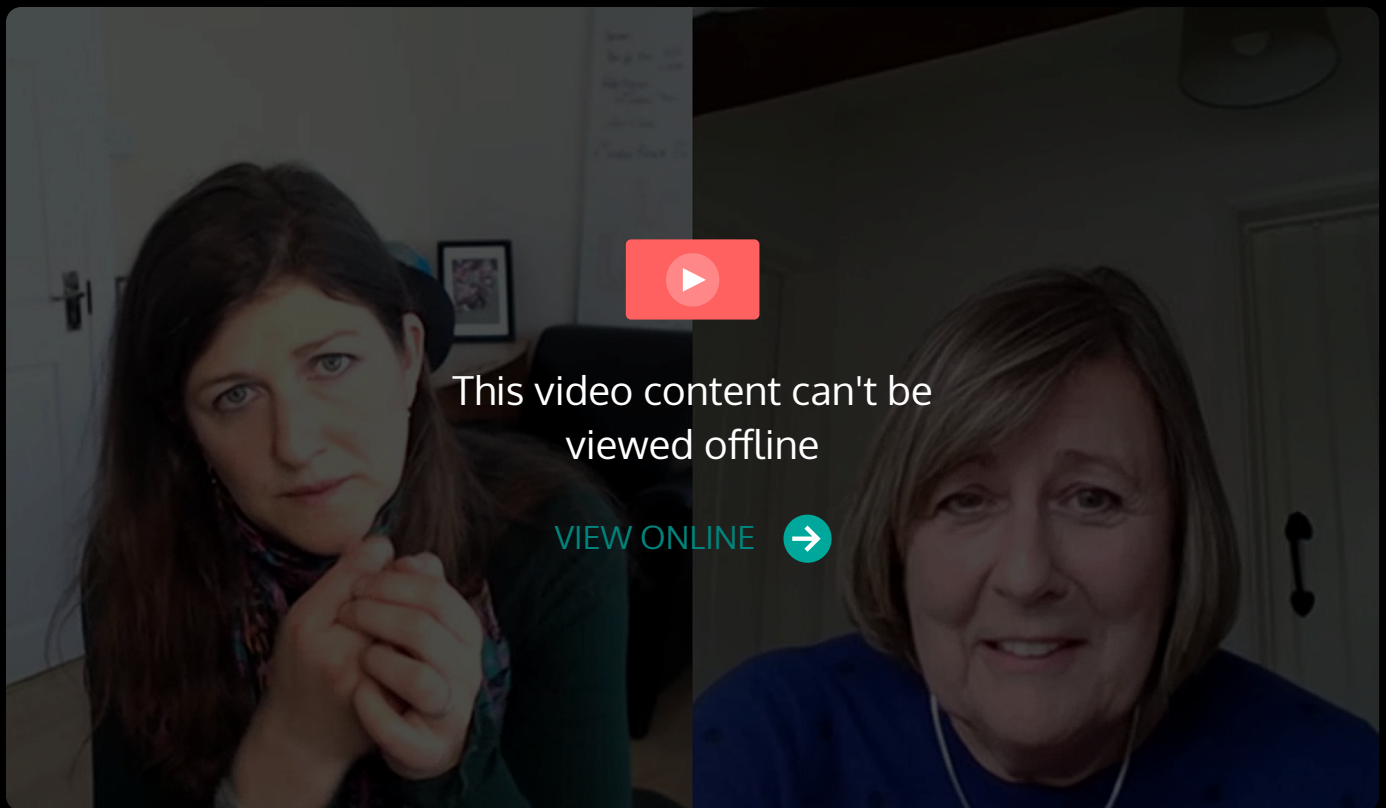
[VIEW ONLINE](#)



legal*i* insider

# VIDEO: The Insider with Caroline Hill – Guest Joanne Humber

Legal technology competence is top of mind and agenda, and there is no-one who knows more about it than Joanne Humber, who is the face of global legal tech competence body LCT4. The two discuss progress - and lack of progress - in this fascinating 30-minute conversation.



The background of the page features a professional microphone with a black mesh grille and a brass-colored rim, mounted on a black tripod stand. In the lower-left foreground, a hand holds a Zoom H4n Pro digital voice recorder. The recorder is black and silver, with a small LCD screen and various control buttons. The text is overlaid on a semi-transparent dark grey rectangle in the center of the image.

# Let us help you amplify your brand

Through our website, newsletter, Collabor8.IT, webinars & events we have an unparalleled array of opportunities to aid you in reaching your target audience.

Contact Emma at [emma.griffiths@legalitlexicon.com](mailto:emma.griffiths@legalitlexicon.com) for more information.

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

The Next Newsletter Will Be Published On  
Wednesday 26th May

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If you would like a pdf of the issue, please email [emma.griffiths@legalitlexicon.com](mailto:emma.griffiths@legalitlexicon.com)

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