



# Legal IT Insider

*aka*

*'The Orange Rag'*

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# Welcome to The June Orange Rag

Our top story this month is that UK top 100 law firm Osborne Clarke is building a sizeable software engineering teams, with IT head Nathan Hayes telling us that the firm is entering a “new chapter” for technology and that its buy strategy no longer meets requirements. The firm, which is in the process of rolling out Microsoft Office 365, is also running a proof of concept in which it is using Teams for matter management: one partner recently codified an entire matter in Teams Planner, as OC evaluates what its core collaboration tech should look like going forward: enterprise or legal tech?

You could argue that what OC is doing around Teams ought to be the headline. Around six months ago the London-headquartered firm formed a consulting group, which includes IT trainers, business analysts, project managers and legal tech managers who are lawyers, who together with the knowledge group are helping to develop matter plans and bake in best practice. To put it in perspective, many other firms are still at the stage of panicking about how to structure a Teams deployment in order to prevent it turning into the Wild West.

But the very visibly accelerated cultural acceptance of the public cloud means that we will be having these conversations more often.

On the subject of the public cloud – and yes, of course, it’s another Microsoft story – June saw iManage adopt Azure as its global cloud platform and attain co-sell ready status. This demonstrates that iManage is not only a key customer but a significant Microsoft partner. It now has an app for Teams that will enable iManage users to search for documents within Teams.

Just throwing this out there: is Microsoft’s news in June that it will end of life Windows 10 – supposedly its last ever operating system – a warning about having all your eggs in one basket? I’ll leave that one hanging for now but take a look in the June Orange Rag for more.

In our latest new tech alert and second exclusive of this June issue, leading Canadian law firm BCF has gone live on brand new automated accounts payables solution XPENS.AI, which is officially launching today (23 June).

XPENS.AI, which integrates with TR Elite 3E and Aderant, starts with optical character recognition (OCR) scanning of invoices, but then takes things a step further by interacting with the firm’s database and looking at historical allocation. We speak to the founders and serial investor Dan Wales, who says it’s the last piece of the puzzle in his investment portfolio.

And last but not least, thank you to Justin Edwards, founder and director of ITS Recruitment, for this month’s in depth ‘view from the recruitment market’, in which he shares with us some of the biggest trends and shifts in legal IT hiring. Interestingly, Edwards says that the “Great Resignation” that was being predicted by some print news media (due to disaffected staff feeling put upon during lockdown or people re-evaluating their lives and changing career) has not materialised thus far.

As always we want to hear from you – if you’ve got any news, serious or light hearted (goodness knows we all need a bit of a laugh!) email me on [caroline.hill@legallitlexicon.com](mailto:caroline.hill@legallitlexicon.com)

Remember - we don't charge for editorial contributions - none of the comments or editorial content appears here other than because we/I think it is good. And if you disagree, I'm all ears.



*Caroline Hill, Editor-in-Chief*





TOP STORIES

# Exclusive: Osborne Clarke to build software engineering team in "new chapter" for tech

In what is being described as a new chapter for technology at Osborne Clarke, the UK top 100 law firm is to build a sizeable software engineering team, saying that the pure 'buy' approach to technology is no longer sufficient to achieve and retain a competitive advantage.

OC in April hired Anthony Kay as head of IT software engineering, tasked with building a team of five to six people in year one, with the intention to build the team out further. The roles will include full stack developers and UX designers, in what is hoped will be a fully rounded set of skills. Kay has worked as a senior contract software developer at Deloitte, Allen & Overy and Chambers and Partners.

Speaking to Legal IT Insider about the new team, OC's IT director Nathan Hayes said:

“We are forming a new chapter for technology at Osborne Clarke. Until recently we have taken a buy approach in terms of our IT strategy. There are lots of great IT vendors now, in fact more than you can shake a stick at if you include start-ups, and industry consolidation is helping to mature those businesses and their offerings. But the rate of change means that a 'buy' strategy alone no longer meets our requirements, as technology becomes a more important and pervasive part of what law firms deliver.”

He adds:

“Technology is increasingly critical to success. It used to be supporting tech and there was little competitive advantage to be had but that is changing, and if you are leveraging your own technology, you can deliver and retain competitive advantage to your business. This is coming about because of the sea change in law firms and the minds of lawyers: they are much more attuned to the value that technology can deliver in terms of developing practices and opening up new revenue streams and new service lines – there is a real opportunity here.”

The arrival of Kay and the new team will mean a new balance between buy and build that Hayes says opens up all sorts of possibilities, commenting:





"There are lots of vendors providing great technology but there are gaps and some technology is not meeting our needs, so having the capacity and capability to plug those gaps and build a competitive edge is great."

How far the team goes depends on how much work they have, and Hayes is reluctant to put a final number on it saying:



"We are going through the three-year plan now."

One area of focus will be integration work and Hayes says:



"The integrations from vendors are pretty poor in some cases and we will be making sure that we are able to leverage our common data model so that data can flow around the business and to clients, and we are able to surface the information we need."

However, he adds:



"The real opportunity is how we engage with each other and our clients and in developing out our collaboration platform: we are increasingly moving away from email to online platforms and databases, which allows us to start trapping data, and visualising and exposing data."

OC has built its collaboration platform 1.0 which is based on HighQ and is now starting to build 2.0. While Hayes says no decision has been made as to the tech at the core of the platform, the proof of concept is being run in Microsoft Teams. The firm is rolling out Microsoft O365 and is in the process of moving to Exchange Online and Hayes says:

“We are going through an evaluation process: do we move to an enterprise stack or continue with legal technology to build the platform at its core?”

OC is about 20% through rolling out O365 and has an E5 licence, with Hayes commenting:

“I can’t see any law firm going with anything less because of the compliance tools.”

The firm has had a very extensive Teams roll out including building a matter management system that forms the basis of the POC for Collaboration 2.0. Hayes says:

“Yes of course we had the telephone and conferencing bit done in about a month after Covid, but the collaboration side is the fascinating bit, and using Teams sites we have done a heck of a lot of work around that.”

Around six months ago OC formed a consulting group, which includes IT trainers, business analysts, project managers and legal tech managers who are lawyers, who together with the knowledge group are helping to develop matter plans and bake in best practice, with Hayes observing:



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“The consulting group is spending a lot of time with the business and engaging directly with legal teams to understand what the problem statements are.”

Hayes says:



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“There are two ways of delivering a legal service: managing it in terms of case and then matter. Very simply, case is about high volume, and matter about high value and you need the capability to do both of those two work types. As law firms we do case well, but matter is a different beast and that is what we are going after. We are building in the appropriate tasks to deliver matters more efficiently.”

One partner recently codified an entire matter in Teams Planner and Hayes said:



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“The partners know about Teams because Microsoft is doing a wonderful job of promoting it.”

The growth of a software team goes against the train of thought that law firms ought to be left to focus on practising law, not becoming developers themselves but Hayes says:



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“Then you are entirely at the mercy of third parties and only able to deploy the technology that’s available to others. Technology to date has enabled law firms to be able to operate better than they would






have, but now it's about adding and retaining competitive advantage and you can't always do that with other people's tech as it's harder to protect your IP."



Exclusive: BCF first to go  
live on automated AP  
solution XPENS.AI

Leading Canadian law firm BCF has officially gone live with brand new automated accounts payables (AP) solution XPENS.AI, which is officially launching today (23 June).


Fully integrated with BCF's Thomson Reuters Elite 3E legal practice management system, we're told that XPENS.AI facilitates the complete automation of the AP process. Much like other automation solutions on the market, XPENS.AI starts with optical character recognition (OCR) scanning of invoices, but then takes things a step further by interacting with the firm's database and looking at historical allocation.




"We have been hoping for a solution that would help us with the overall AP process for a while now. After an evaluation of the solutions available, we decided to partner with XPENS.AI to help with the processing of invoices to free our team from repetitive and low-value tasks such as data entry. We feel we are in a time where we should leverage all available tools out there to help us improve our overall productivity, and data accuracy,"

said Susan Da Silva, CFO of BCF, which has around 500 employees, including 300 legal professionals.

XPENS.AI is co-founded by CFO Dominic Larose, who has worked as an accountant for 20 years, and in legal – including as finance director for BCF - for 10 years. Speaking to Legal IT Insider he said:



"I started this business two years ago, knowing what the process and pain points were inside a law firm. I found AP to be a very clunky process and personally I don't like low value-add tasks. There are tools for OCR scanning, but we found that the quality of the data that comes out of the scan is basically not usable if you want to achieve full automation, where you are trying to emulate what a clerk does."



"We think of it as an easy task but in fact it brings in the concept of tax compliance, accounting standards, firm policy and historical allocation. What we are trying to do is grab the raw OCR data and make sense of it."



**We process it to achieve full automation."**

He adds:



**"Technology is now to a point where we can achieve that. Ten years ago, it wouldn't have been possible."**

Larose's co-founders are machine learning specialist Marc-Andre Lavoie, and CEO Ugo Cloutier, who was previously a new business SME consultant. They are joined on the board by DW Reporting founder turned investor Dan Wales, who has taken on the role of chief growth officer.

Wales told us:



**"In the real world, other systems read the content and send it to the PMS, but there are questions around the accuracy of that and it often relies on manual review and adjustment. What we are able to do is take that a step further. As well as reading the invoice we interact with the database and look at historical allocation. The level of accuracy is high, and we are eliminating the need for manual processes to get to final review so you can upload an invoice for processing."**

Wales, who started out as an AP clerk, says:



**"I had no interest in what happened to that invoice because I had 100 invoices to get into the system, and that's where the accuracy tends to**



go down as well. We're not here to replace AP clerks but to give them more value-added tasks."

Wales now has a number of board level appointments and investments both under his organisation Oliella Partners and with Bryce Catalyst. He said:



"I was looking for the final piece of the jigsaw that's involved in the real bread and butter of a firm. XPENS.AI talks to Elite and Aderant and what they are doing really excites me."



A laptop screen is shown in a close-up, slightly angled view. The screen displays a dashboard with several data visualization elements. At the top left, there's a line chart with two data series. To its right is a table with columns for dates and values. Below the line chart is another line chart. In the bottom left, there's a world map with a legend indicating 'Desktop' and 'Mobile' usage. On the right side of the screen, there's a large blue circular graphic. The text 'OTHER TOP STORIES' is overlaid in a white serif font on a semi-transparent dark grey rectangular background that spans across the middle of the screen.

# OTHER TOP STORIES

# ASIC confirms Nuix IPO investigation as CEO and CFO depart


The Australian Securities and Investments Commission confirmed in June that it is reviewing the disastrous Nuix \$1.7bn IPO, following a week that saw chief financial officer Stephen Doyle terminated and CEO Rod Vawdrey announce his retirement from the beleaguered company.

Appearing before the Australian parliamentary joint committee on 18 June, ASIC chairman Joe Longo said that the regulatory body was very aware of market concerns over the IPO – which has subsequently seen its value crash - and is conducting a review.

Nuix lodged a prospectus with ASIC on 18 November but between 23 and 26 November, ASIC received three complaint letters from a law firm on behalf of an anonymous client. ASIC reviewed the prospectus and decided that it was not misleading or deceptive and did not contain material omissions. You can read Longo's opening statement [here](#).

But it was an investigation by The Sydney Morning Herald, The Age and The Australian Financial Review that raised questions over Nuix' governance and the quality of its financial accounts going back years.

Nuix has said in a statement that it has in place robust processes to measure forward indicators of performance, and that it is committed to the highest standards of corporate governance, commenting:



“Financial forecasts at the time of its IPO and subsequent updates have been thoroughly explained in the company's market disclosures, including Nuix' IPO prospectus..” adding: “The prospectus was the subject of a thorough due diligence process involving leading law firms, internationally recognised accounting firms, and top tier financial and investment banking advisers.”

However, Nuix announced on 15 June that Doyle is being terminated by mutual agreement. The Australian software company has appointed Chad Barton as interim chief financial officer, to take effect from today (21 June). Barton was most recently the CFO of The Star Entertainment Group. The company has initiated an executive search for Doyle's permanent replacement.

The termination was swiftly followed by the announcement that CEO Rod Vawdrey has given notice that he is to retire. He will continue in the role while an international search is conducted for his replacement. Chairman Jeff Bleich said:



“Rod’s decision reflects his deep commitment to Nuix and love for the company. Rod has agreed to remain at least through the announcement of end of year results, and throughout the process required to find the right replacement to ensure the smoothest possible transition.”

Nuix has also ended its consultancy arrangement with former chairman Dr Tony Castagna, who local papers report is being investigated by the Australian Federal Police as to whether he complied with the Corporations Act. Dr Castagna received \$80m when Nuix listed and the investigation by the SMH, The Age and AFR alleges gaps in the company’s records surrounding his stock options.

The SMH, AFR and The Australian are among the local publications to reports that class action firms are investigating potential shareholder lawsuits. Quinn Emanuel, Phi Finney McDonald and Banton Group are said to have confirmed their interest.


# IT heads roll eyes as Microsoft indicates Windows 10 to be retired

IT heads across the legal sector have been rolling their eyes after it emerged that the 'last ever' version of Windows looks set to be retired in 2025.

The revelation first came in a new support document that shows Windows 10 Home and Pro will be supported until October 14 2025.


When Windows 10 was launched in July 2015, Microsoft said there would be no new updates for either Home or Pro versions.

Commenting on the news on LinkedIn, Jason Plant, who is lead enterprise architect at DLA Piper, said:



"Oh well done Microsoft, just a business gets in to a cadence of evergreening and managing their desktops on the last ever version of Windows. Windows 10 to be retired in 2025, as new OS unveils."

However, Nick Watson, founder of Ruby Datum, said on LinkedIn:



"I'm all for this. It's time for firms to streamline their roll-out strategies and stop strangling themselves in red tape. I get the importance and realise it has to be done, but the glacial speed this happens is as much of a problem for security/adoption as it is a solution."



“Most software is moving to SaaS/cloud now anyway and by 2025 this will almost certainly be the norm, even in law.”

He has a point, but as law firms increasingly put all their eggs in the Microsoft basket, this latest move - bearing in mind Windows 11 had been denounced on Microsoft Answers support threads as 'an internet myth' - will no doubt be a blow to their trust.

# iManage adopts Azure as global cloud platform and attains Microsoft co-sell partner status

In a move that demonstrates that iManage is now not only a key customer but also a significant partner of Microsoft, the Chicago-headquartered company announced in June the adoption of Microsoft Azure as the global platform for the iManage Cloud and attained 'co-sell ready' status in the Microsoft Partner Program. iManage says it will deepen and extend its integration with Microsoft 365, and it now has an app for Teams that will enable iManage users to search for documents from within Teams.

iManage has spent the last two years redesigning its cloud product to become a true multitenant cloud offering. Initially it offered a private hosted solution that meant much of iManage's revenue has gone towards developing and maintaining its own infrastructure. Aside from the multiple advantages of offering a 'true cloud' product, the fact that iManage has now standardised on Azure going forward will mean it can spend more of its R&D on product development, which is a win for customers. It will also give iManage scalability to meet the incoming demands of its sales pipeline, with a number of large law firms lined up for migration over the next two years.

Being part of the partner program will enable Microsoft and iManage client teams to work more closely to deliver more integrated solutions. Given the fact that the vast majority of legal organisations use Microsoft this is highly significant. Access to Microsoft's global network of data centers will enable organizations using iManage Cloud to better address evolving data sovereignty concerns and privacy requirements, such as Brexit and GDPR. Customers will also benefit from enhanced iManage integration with services such as Azure Key services and Microsoft Information Protection (MIP). iManage itself was shown by the recent CLOC 2021 State of the Industry Report to be the most used technology behind DocuSign, Legal Tracker and Apttus/Ironclad.





"Deeper integration of iManage Cloud with Microsoft Azure and Microsoft 365 arms customers with greater flexibility and control over how their information is managed, used, and shared across the enterprise – ultimately driving greater impact of that knowledge to their businesses,"

said Dan Carmel, chief product officer, iManage.



"Together, we help our mutual customers achieve more. We're empowering knowledge workers in legal, financial and other regulated environments with high-impact solutions that free them to focus on high-value client work and make informed business decisions."

He added:



"Best-of-breed iManage capabilities, including advanced search, AI-based data extraction, and matter workspaces that are tightly integrated with Microsoft 365 and Microsoft Teams, extend the value of Microsoft environments for our clients. Customers not only benefit from greater agility and simpler cloud adoption, but this close alignment opens new opportunities for customers and partners to build 'Better Together' solutions. These solutions give knowledge workers the ability to work intuitively in a unified environment, with streamlined collaboration, fewer clicks, and added information protection – reducing enterprise risk while maximizing user productivity and truly making knowledge work."

Office 365 has been one of Microsoft's fastest growing products, with adoption led in particular by corporate legal operations teams. During the 2020 pandemic, adoption skyrocketed: there were 44m users active by March 2020,

and 75m by April. In October 2020, Microsoft announced that Teams had 115m daily active users.

The iManage app for Teams will enable iManage search from inside Teams, content from iManage to be included in Teams communications, and Teams conversations and content to be filed in iManage workspaces, just as Outlook emails are today. This maintains a single source of truth for all content and communications specific to a given matter, project, or client. Unified search across all content speeds time to value while need-to-know security and policy-based governance ensures that Teams content is governed in accordance with internal, client, or project requirements.

“We are pleased to be working with iManage and to tap into their expertise gained over more than two decades of delivering work productivity solutions in highly regulated industries,” said Tyler Bryson, corporate vice president, US one commercial partner, Microsoft. “Working together helps us deliver on new opportunities that benefit from the full value of Microsoft Azure and Microsoft solutions with the strength and utility of iManage to help customers work better in the cloud.”

iManage solutions will be available via the Microsoft App store.

## PracticeEvolve announces ‘Pathway to the Cloud’

And continuing the cloud theme, PracticeEvolve Group incorporating SOS and Linetime, has announced a ‘Pathway to the Cloud’ strategy available to all law firms globally, ultimately leading to a fully browser-based cloud solution called EvolveCloud.

The approach will see PracticeEvolve initially offer cloud hosting options for their existing SOS, Linetime and PracticeEvolve desktop applications, as a stepping stone to a fully native, browser-based, Cloud solution.

Since the pandemic there has been a dramatic increase in the number of law firms seriously looking at putting their core financial information in the cloud.

David Boland, Global CEO of PracticeEvolve Group, says uncompromising native Cloud software is fast becoming a realistic option for firms,



"Our firms have become increasingly savvy in terms of technology, and that has accelerated during Covid. They are looking at the future and are now seeing how Cloud can empower them to adapt to evolving opportunities and work practices. Firms have recognised buying into a provider for the future is imperative to level up their own businesses and their expectation, now, is for native fully Cloud-based software."



"Over the last three years, we have been optimising our existing technology for Cloud, while at the same time developing a completely new native Cloud solution that will shape how law firms think when selecting software for the future, this is what we call pathway to the Cloud"

He adds:



"Suggesting the events of the last year have led to heightened demand is somewhat disingenuous to firms, in my opinion. Firms were already considering how the world was changing before 2020. They have already identified how they need to be better connected with clients, with their staff and with software."

However, survey data conducted by this publication before the pandemic suggested that the number of law firms planning to move to a cloud-based practice management system was negligible.

# Intapp files for long-anticipated IPO

June is the month that saw Intapp publicly file for its long-anticipated initial public offering. The Palo Alto-headquartered company on 4 June filed a registration statement on Form S-1 with the U.S. Securities and Exchange Commission (the "SEC") relating to the proposed IPO of its common stock. The number of shares to be offered and the price range for the offering have not yet been determined. Intapp intends to list its common stock on the Nasdaq Global Market under the ticker symbol "INTA."

Intapp in the S-1 describes itself as a leading industry cloud for professional and financial services. Within the 'Intapp at a glance' section for potential investors, it says it works with 96 of the top 100 Am Law law firms, seven of the top eight accounting firms, and 900 private capital and investment banking firms.

Of course, Intapp is still in an official quiet period, but we will get you more on the IPO shortly.

# Factor vies to take on routine portion of transactions with new law firm service

Axiom spin-off Factor in June launched a Legal Transaction Optimization service for law firms, providing a tech-enabled transaction management, due diligence, and documentation support to deal teams. Factor says that the new offering is intended to help law firms respond to cost pressures and win more work, empowering them to focus on higher value aspects of each transaction. Law firm reaction has so far been positive, according to Ed Sohn, SVP, head of product & solutions at Factor, although the proof will be in the delivery.

The new service includes:

- Transaction management, including checklist maintenance, signatures, centralized coordination, document routing, and closing set assembly;
- Due diligence, including maintaining the due diligence questionnaire and the review of underlying documents; and
- Documentation, including ancillary agreements, templated contracts (e.g., under a fund umbrella developed by the law firm), side documents, consents, assignments, novations, and others.

Speaking to Legal IT Insider, Sohn said:



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“We’ve always worked together with law firms and collaborated with them and this is the next evolution of that: us coming together and law firms putting us into their deal team.”



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“There is work that frequently goes to junior associates and the clients put costs restrictions on – firms even get low realization – we will take that over.”

Other legal suppliers already undertaking this kind of work and role include law company Elevate, which works with firms including Hogan Lovells on document review.

In terms of document drafting Sohn said:



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“This is the kind of stuff we do anyway but it’s now a capability that law firms can have as part of their deal team. We can do it at a saving of around 50-70% on those activities and if you’re looking at a total deal, that figure is 30-50%.”

He adds:



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“Law firms are under pressure from clients to cut fees and now they can do that without cutting their rates, which is a bad idea because it puts them on the back foot. Now there is another lever they can pull.”

Factor, which rebranded from Axiom Managed Solutions in January 2020, will be recruiting in order to scale. However, Sohn adds:





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“We may only have been ‘Factor’ for a year and a half but we have been doing this a decade and already have lots of people with many years’ experience. They can easily take those capabilities and walk into a law firm deal.”

While technology adoption has accelerated during the pandemic adoption is often still low, Sohn says that Factor is better placed to leverage technology such as Kira Systems, which it is known to work with on due diligence.



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“Not only do we have better adoption, we don’t have a way of doing something that we have been doing for 30 years,”

he said.

A close-up photograph of a person's face, with only their eyes and forehead visible, peering over a fan of US dollar bills. The bills, including \$20 and \$100 denominations, are held by two hands with metallic, shimmering nail polish. A ring is visible on the ring finger of the right hand. The word "INVESTMENT" is overlaid in white capital letters on a semi-transparent dark grey rectangular background across the center of the image.

# INVESTMENT

# Lexion raises \$11m Series A

Contract management system Lexion has raised \$11m Series A led by Khosla Ventures, with participation from existing investors Madrona Venture Group and Am Law 100 law firm Wilson Sonsini.

The latest funding round brings the total invested to \$15.2m. Kanu Gulati from Khosla Ventures will join Lexion's board. The Seattle based company says it plans to use these funds to scale go-to-market functions, drive further product innovation, and grow the team, with a mission to offer a simple contract lifecycle management system (CLMs) that 'just works.'

Speaking to Legal IT Insider, Lexion co-founder Gaurav Oberoi said: "We're going to use the money for more sales and marketing and product expansion. One is investing in our outreach, and the other in expanding our product to add end-to-end workflow."

Oberoi and the founding team are technologists who met at the Allen Institute for Artificial Intelligence (AI2) and who settled on improving contract management for in-house legal teams in typically mid-sized corporates.

Oberoi said: "The problem that Lexion solves is that when we talk to counsel about how they are managing their contracts, we hear they do the most mundane of things: they look at all the documents signed and download them and put them in the right folder. How many times do they get an email saying, 'do we have an NDA with Amazon?' or, 'Is this the right one, help!' Legal becomes the gopher looking up mundane things, not to mention finance saying, 'We are going to raise our costs by 7% but I'm sure we had a contract saying we wouldn't raise it by more than 3%, can you find it?'" And this is just the tip of the iceberg.

Lexion ingests a corporates legacy contracts and directly integrates into the likes of Slack and Salesforce. It replaces what is typically a mishmash of file folders and excel spreadsheets.

The ambition with the new funding is to build out the product to substitute the numerous email chains requesting information with an automated triage system. The idea is that rather than requiring a huge expensive data exercise in order to get started, Lexion can immediately be used on an ad hoc basis. Oberoi says: "Sales will email legal and will get a form to fill that says, 'You're done, here is a link if you want to track the matter'. Legal gets a link saying they have a new task – and they can see all of their tasks and drafts. They download in their favourite editor and say, 'Here is the redline'. Then legal has all of the latest drafts in one place, ready for signature with DocuSign."

Lexion has a Microsoft Teams integration and is in the MS App Store.

In the last six months, Lexion has seen rapid growth, increasing revenues 400% and bringing on major brands like OfferUp, Blue Nile, and Outreach.



# Contract Mill closes €1m funding round co-led by HighQ co-founder

Finnish startup Contract Mill has announced the closure of a funding round of over €1M. The round was co-led by Swiss investment company Actium AG and Veenay Shah, co-founder of HighQ, together with multiple international investors from the UK and Sweden. We're told that the funding will be used to further expand Contract Mill's operations in the UK and Europe.

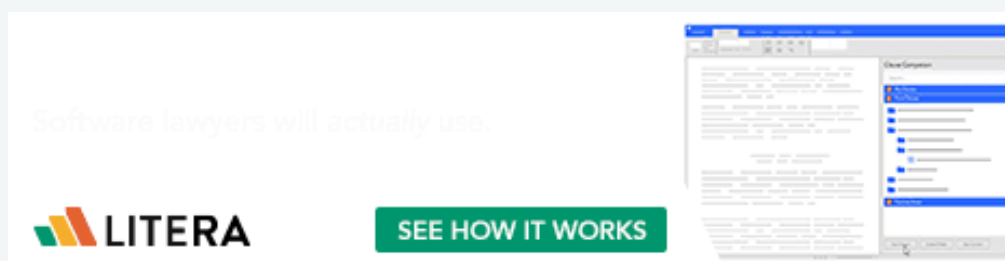
Contract Mill is a no-code document automation SaaS platform that makes the automation of complex documents easier than traditional software that requires significant IT resources, time, and money to deploy.

"As lawyers, we saw a huge underserved market – law firms and companies who needed document automation but who are not capable or willing anymore to take on the total cost of automation that is inherent in the complex incumbent systems," says Kaisa Kromhof, founder and CEO of Contract Mill.

Once a document template has been automated, users can generate new custom documents in minutes by answering a dynamic list of questions. Generated documents can be made in one or more languages, and they can form a total suite of many documents that are generated in one go instead of an inefficient and error-prone manual process.

"As corporate and transaction lawyers, we experience the increasing need to streamline the legal documentation processes on a daily basis. We are convinced that legal tech will eventually transform the legal industry, even though it has traditionally been slow to change. To achieve such a big transformation, a product must be not only technologically advanced but also easy and intuitive to use. We believe Contract Mill checks both those boxes," says Till Spillmann, partner and chairman of Actium AG.

Established in 2016, Contract Mill has offices in Helsinki and London. Its customers include a growing number of large international companies such as Bird & Bird, Solita, and TietoEvy, and a variety of businesses around the world like AdvisMe, Ijos Rechtsanwälte, and MK Law. Contract Mill has also been recently chosen by the leading Bay Area tech law firm Wilson Sonsini to be the partner for their Build-A-Bot summer program.



# ContractZen completes €1m financing

And Contract Mill wasn't the only Finnish legaltech company to raise in June: ContractZen completed a €1 million financing round led by Danish private equity firm Nordic Eye Venture Capital. The funds will be used to accelerate growth and international marketing efforts in the selected target markets.

ContractZen's SaaS service brings together contract management, meeting management, virtual data rooms (VDR) and electronic signatures. Current users of ContractZen include JCDecaux, Total and Volocopter. In addition, PwC Finland resells the solution to its customers. ContractZen is used by close to 400 organizations in more than 30 countries.

"Our mission is to help organizations of all sizes to manage their contracts, board meetings and so-called GRC documents (governance, risk and compliance) easier than ever before. We are pioneering a new category of SaaS which focuses on helping organizations to be due diligence ready every day, enabling them to be more agile, more scalable, and ultimately more valuable," says Markus Mikola, CEO of ContractZen. "The Nordic Eye partnership and the funds will boost our global marketing efforts and allow us to grow our team and develop our service further."



A person's hand is shown in the foreground, gesturing while speaking. In the background, a wooden desk holds a laptop, a notebook, and a smartphone. The scene is set in a professional meeting environment.

# PRODUCT LAUNCHES

# Prosperoware unveils enhanced content synchronisation for Teams

Prosperoware on 21 June announced enhanced content synchronization features between Microsoft Teams, SharePoint Online, and either iManage Work or NetDocuments.

The new capability comes within Prosperoware's SaaS platform CAM, which enables organisations to provision data in order to ensure compliance with information governance, compliance and security regulations and obligations.

Prosperoware says it has worked with leading firms to develop support for three common scenarios in how users of Document Management Systems (DMS) want to collaborate with documents in the Microsoft Teams Files tab and SharePoint Online. These scenarios are:

- **Publish** – users work in the DMS and folders is synchronized one-way so that external users (clients, vendors, and co-counsel) can consume completed documents. An example is publishing bundles, pleadings, and executed agreements.
- **Work in any repository** – for organizations who want users to work anywhere they please if the repository is appropriately managed and secured. There are two options: (1) two-way synchronization of content, or (2) copying content at matter/project end or on a defined interval.
- **DMS as a Factory Floor** – when a set of DMS users prefer to do their core drafting in the DMS and then check-out the document to Teams or SharePoint Online to either: (1) collaborate with only Teams users – such as legal departments with external parties (clients or professional service firms) using Teams as an extranet, or (2) use the real-time collaboration features of M365. Once collaboration is completed, the documents can be checked back in to the DMS.

The CAM Content Mover feature set has now been enhanced to support all these scenarios.

CAM's ability to provision Teams, SharePoint Online, Planner, OneNote, and Lists has also been enhanced in response to customer requirements.

"Many firms are looking at Teams & Channels in MS Teams as critical technology to power their digital transformation around hybrid work and outsourced service delivery." says Keith Lipman, Prosperoware CEO & Co-founder. "Firms want to empower users to work in any way they want to and collaborate internally & externally, while maintaining governance and reducing risks of damaging hacks."

The news follows the announcement, also in June, that Prosperoware has developed its first import/export solution based on the iManage Universal API, which facilitates data movement and reorganization needs within and across collaboration systems.

PowerDesktop, which is compatible with SaaS provisioning platform Prosperoware CAM, is available in five modules, three of which will be available between July and the Fall this year.

"We're very excited to introduce the first import and export solution based on the iManage Universal API," says Lipman. "As a solution designed for power users, PowerDesktop is tailored to meet the needs of the modern cloud organization, and we look forward to offering it for other collaboration systems in the future."

# Thomson Reuters Launches HighQ Contract Analysis

Thomson Reuters at the very beginning of June launched HighQ Contract Analysis, a contract review and analysis tool in HighQ that uses machine learning to help legal professionals to extract key data and begin to triage contracts based on their risk profile. It also pulls in data from Practical Law Company that enables lawyers to quickly work out how the contract they are looking at deviates from the norm.

Contract Analysis was already in development before the acquisition of HighQ but now lives in and leverages iSheets.

Speaking to Legal IT Insider, Rawia Ashraf, vice president of Legal Practice and Productivity at Thomson Reuters said: "We did a POC in 2019 and once we had validated that we have a novel approach we started building in late 2019 and we have co-designed it with law firms in the UK and US. Some are doing data testing, some are in pilot and some are experimenting with the tool."

Users can upload their contracts and in iSheets easily pull out key data such commencement data via a drop down menu on the left of the page.

Much of what you see is the result of work by the PLC team, and Ashraf said: "Practical Law sat down at the beginning of the process and worked out what, for example, you would be thinking about when reviewing a lease agreement."

The model has been trained by subject matter experts working with its innovation team Thomson Reuters Labs and its data science team, which have been annotating contracts.

Within the key facts and drop down menu on the left you can find out 'who is the landlord' or 'what is the rental amount'.

Ashraf says: "I can give it a risk rating and immediately share high risk documents with comments."

A semantic search for repair and maintenance details will return all related clauses whether those words are mentioned or not. The system is inevitably still not perfect and Ashraf demonstrates that where it misses something, it can be easily highlighted and added to the pool of answers.

The idea is that Contract Analysis gets contracts ready for human review in the due diligence process, which Ashraf and the team, in the many interviews they have conducted, have been told is like 'mining for gold.'

There is huge potential to build entire workflows around the contract review process, leveraging Contract Express to automate responses – and this contract lifecycle management capability was the vision TR had when it acquired HighQ.

"AI-powered applications require three key ingredients – data, subject matter expertise and technology – and HighQ Contract Analysis builds upon Thomson Reuters decades-long leadership in AI-driven products for legal professionals," Andy Martens, head of Research Products at Thomson Reuters said in a statement. "HighQ Contract Analysis begins with the deep knowledge of Practical Law editors who use their expertise to develop proprietary contract review templates specific to legal domains, and then leverages the work of AI experts at Thomson Reuters Labs to train and validate its machine-learning models. The result is a highly tailored, guided review that saves our customers' time and costs, and improves the accuracy and insights of the contract review process."

HighQ Contract Analysis is built around legal domains, beginning with real estate leases and sales and services agreements and soon extending to other areas, including intellectual property agreements and employment agreements.

# Momentum: Aderant to launch law firm benchmarking

Aderant's Virtual Momentum 2021 conference's key announcements included the imminent launch of a data intelligence offering that will enable law firm clients to benchmark their performance against one another.

The entirely online conference is said to have set an attendance record at 1300 attendees and 60+ sessions over three days, although clients will in many cases be relieved to hear that next year the conference will be held in-person in Austin, Texas at the Hilton Austin on May 16-19.

Notable themes included the cloud (Aderant's pipeline has seen a radical shift to its AWS hosted offering Sierra), infrastructure and application security, outside counsel guidelines (OCG) compliance, and data intelligence.

In the latter camp, Aderant ran a session to informally unveil its new offering, which we're told will bring greater performance measurement and benchmarking to the law firm billing process.

While there are benchmarking products on the market to help outside counsel select their law firms, Aderant plans to leverage the data within Expert to create law firm intelligence with regard to how they compare against their peers, including how their rates compare.

Writing ahead of the conference Trey Ruello, director of data services at Aderant said: "Corporate clients often curate detailed insights from data they regularly collect about their outside counsel firms. Aderant's concept of "data intelligence" revolves around providing law firms better visibility into similar metrics to even out this information asymmetry. Helping law firms leverage the power of data for their own benefit provides them with a strategic edge. It also enables informed, data-driven dialogues and negotiations with their clients, where now both sides leverage data to drive discussions." We'll get you more on that shortly.

Otherwise much of the conference was dominated by the topic of the cloud, and speaking to Legal IT Insider, executive vice president Chris Cartrett said: "Before the pandemic set in, we had started offering Expert in the cloud, which is called Sierra. At that time 10-15% of our pipeline was cloud but now it's 50/50, and that is a seismic

shift.”

While Sierra is not a ‘true cloud’ offering, it enables law firms, who still struggle enormously with moving their core systems to the cloud, to ‘lift and shift’ Aderant into a private instance of AWS. The environment is hosted and managed by Aderant, which for many large law firms right now means they get the benefit and security of cloud hosting, without the multiple nightmares of moving their central nervous system to a public cloud.

Cartrett said: “Firms know they have the most secure set up and us being able to manage it for them is huge.”

When it comes to outside counsel guidelines, it is interesting to note that Aderant, which acquired Bellefield Systems in 2019 for its iTimekeep and OCG Live applications, is working on embedding the OCG guidelines through the billing workflow. Cartrett said that while OCG Live has been available within the Aderant ecosystem, “the new thing we’re working on is the next level of OCG – more automation in managing those guidelines throughout the process and through ebilling, so it educates the application.” In a final shout out, Davis, Graham & Stubbs received the 2021 Innovator of the Year award as the first firm to go live on Aderant Expert in a fully remote environment in March 2020, just two weeks after locking down for the pandemic.

# Novum Learning launches career accelerator with the story of triSearch CEO Taylah Allen

Professional learning hub Novum Learning has launched a career accelerator that expands its remit from critical business skills training to broader career development. The accelerator will provide content including life success stories, kicked off by the CEO of triSearch, Taylah Allen, who was previously a chef.

Novum Learning is part of recruitment business Novum Global. In an interview with Novum Global’s CEO David Woolstencroft, Allen reflects on her journey rising to the C-suite from behind the grill. The interview covers questions such as her personal ‘why’ and how Taylah navigated her career, including how she dealt with obstacles along the way.

“Navigating the world of career choices and making these work is complex. Learning from others, examples of the choices they made and how they navigated obstacles for a clear path to the outcome that they wanted, provides professionals with fantastic insights on how to achieve their career goals in an accelerated time. Technical skills, qualifications and experience are no longer enough for professionals to achieve the career goals that they desire. Career knowledge and how that practically applies is a superpower. Taylah’s story is an amazing story of career choices, overcoming obstacles and practical tips – we are truly excited to share this!” commented David Woolstencroft.

Future stories in the Novum Learning career accelerator will contribute to not only prepare professionals with tangible skills for their next role but also expand their perspectives on alternative career options or potential

pathways to reach their desired career goals.

Allen added "The team at Novum are doing a fantastic job at educating the industry on how to move forward in their careers. I hope my story and message of hard work above all else can inspire people to take the next step in their own career. I am excited to see the Career Accelerator take off and hear about other successful journeys, motivations and tips for success."

Speaking to Legal IT Insider, which is supporting Novum Learning in its quest, Woolstencroft said: "We want to tell real stories about inspiring people. Let's talk about what they do and how they got there. Let's talk to the C-Suite and not talk about company productivity but what you did to get there and what are the secrets."

<https://www.novumlearning.com/courses/chef-to-ceo-behind-the-success-of-taylah-allen>

# Casepoint upgrades CaseAssist

Casepoint says it has significantly upgraded its analytics capability including providing users of CaseAssist with enhanced visualization capabilities and configuration templates.

The eDiscovery company claims that the predictions generated by Casepoint's CaseAssist technology in eDiscovery, investigations, and other document-intensive review projects eliminate the need for users to review documents that are nearly certain to be non-relevant, saving thousands of dollars in review time.

Through CaseAssist Active Learning (CAL), users can choose to train a single or multiple models with no sample set requirement and CaseAssist will ensure relevant documents are prioritized for review.

Vishal Rajpara, co-founder and chief technology officer at Casepoint said: "Increasingly, both law firms and legal departments recognize that using analytics can increase competitiveness, efficiency, and knowledge across a broad range of activities, including case strategy, early case assessment, litigate-or-settle decisions, and much more. We take a human-centered design approach in development with the intention of making advanced eDiscovery solutions accessible to users of all technological abilities."

# VirtualSignature launches iManage integration

Cloud-based digital onboarding platform VirtualSignature has announced an integration with iManage following the development of an API integration by Tiger Eye.

Designed to make online experiences frictionless, VirtualSignature enables compliance led businesses, including law firms, accountants, estate agents, training companies and recruiters to onboard new clients quickly and securely.

It includes anti-spoofing, bio-metric facial recognition and geo-location technology. This extra layer of security to document exchange, through reliably identifying the individual behind the signature.

Announcing the iManage integration, David Kern, CEO of VirtualSignature said, "Embedding the VirtualSignature solution into the workflow of businesses, to provide an automated service to our customers and an easy-to-use experience for their customers, has been our primary focus. To achieve this with an industry leading solution like iManage is likely to be very well received and we expect demand to be extremely strong.

The VirtualSignature suite includes: SmartSign for electronic signatures, SmartCheck for client identity verification, SmartForms for dynamic online forms and SmartLink for client pre-qualification and authentication.

In addition to these, the VirtualSignature platform has recently been upgraded to include Virtual Witnessing, which delivers digital deed signing and embedded e-signature blocks for a seamless web journey. SmartCheck ID will also benefit from automated "Know Your Customer/Anti Money Laundering" database checks and verifies the signature contained within the chip of a Government issued identity document. This game-changing technology complies with HMLR Guidance and reduces risk for any professional organisation.

Commenting on the partnership, David Kern, CEO of VirtualSignature, said, "We are thrilled to partner with Tiger Eye, a trusted provider of high-quality technical solutions and integrations. We look forward to our smart applications driving improved efficiency for organisations using iManage and to further enable the automation of the onboarding process."

Dave Wilson, Managing Director of Tiger Eye, added: Through this integration, iManage users will be now able to access VirtualSignature directly from iManage, with the automation providing an efficient, seamless process that sends documents to be digitally signed and automatically files them back into iManage, once completed."



A close-up photograph of a person's hand holding a dark pen with gold-colored accents, signing a white document. The background is blurred, showing another person's hand and a patterned shirt. A semi-transparent dark grey rectangular box is overlaid in the center of the image, containing the text 'WINS AND DEALS' in white, serif, all-caps font.

# WINS AND DEALS

# UK AND EMEA

**Access Legal** announced in June that it has acquired integrated cloud IT services provider, **Oosha**.

The acquisition will enable Access Legal, part of The Access Group, to accelerate its journey to bring together its legal software on a 'single sign-on' platform.

Called Access Workspace for Legal, this platform will feature a suite of solutions for practice and case management, finance, HR and legal-specific compliance and training.

Commenting on the acquisition, Doug Sawers, managing director at Access Legal, said: "Since officially launching in April, Access Legal has gone from strength-to-strength and the addition of Oosha is a natural and exciting progression for us. Technology has never been more important for law firms, who want to deliver modern, flexible and seamless experiences to both clients and employees.

"As the appetite for full or partially cloud-based systems has been rapidly increasing within law firms, our acquisition of Oosha means we can go even further for our customers, delivering the cutting-edge software and cloud service they need to grow."

Founded a decade ago, Wolverhampton-based Oosha has around 120 customers. Its 70 employees will join The Access Group.



**Equivo**, which is the newly-launched recoveries business of UK law firm **Shoosmiths** and national collections and enforcement business Chartsbridge, has invested in legal workflow and case management solution, **LexisVisualfiles**.

The plan is that when fully deployed, the Visualfiles platform will streamline processes end-to-end across the firm's three service areas – debt collections, recoveries and enforcement.

Equivo's customers include varied types of organisations – from tier one banks and financial institutions, car leasing companies, commercial property owners and private clients through to other blue-chip organisations.

180 users are live on Visualfiles in Equivo's litigation department and are said to already be benefitting from productivity gains as a result of the advanced process automation delivered by the solution. Many of the repetitive and administrative tasks have been automated and are completed by Virtual Legal Assistants alongside the VisualRobot™, freeing up time to enable personnel to focus on speedy resolution and the provision of a higher level of service for customers and clients.

"Debt recovery is a mature sector but, in most firms, it has typically been at the back of the queue for technology investments," Saranjit Soor, CTO at Equivo, says. "Following on from the pandemic, today more than ever before, there is a need to provide a responsible service to deliver better quality outcomes and overall service experience to customers and clients. Often, people get into financial difficulties due to circumstances that are beyond their control and so, they mustn't be penalised unfairly. Visualfiles is empowering Equivo to align service delivery with the firm's core values, most important of which is to treat people compassionately."



**Osprey** clients can now access **InfoTrack's** digital conveyancing platform via their case management system. Connected via a two-way integration, solicitors can optimise their conveyancing workflow end-to-end to digitise internal processes.

Creating a centralised solution for information, firms can manage a matter from initial enquiry to case completion through one system using InfoTrack and Osprey, including access to electronic client onboarding (eCOS), conveyancing searches, AML, indemnities, Property Report, and post-completion solutions.

Jamie Connolly, director at **Thomas Flavell & Sons Solicitors** says, "We have recently undertaken integration with Osprey and InfoTrack and the whole process was very quick and easy to implement. Since doing so the time savings on our firm are unreal. No more keying in duplicate information which is eliminating errors."



**Legatics**, the legal transaction management platform, in June announced the results of a two-year initiative with **Innovate UK**.

Legatics was awarded funding from Innovate UK, the UK's innovation agency, to collaborate with law firms, as well as academics in the fields of machine learning and behavioural science, for a two-year project. Leading international law firms Herbert Smith Freehills and DLA Piper were the original law firm partners for the project.

Innovate UK recognised that, despite high expectations of technology increasing productivity in the legal sector, this had been limited. Legatics' project focused on solving this problem by adopting a 'microservices' based approach to AI technology implementation combined with addressing the behaviour challenges associated with technology adoption.

You can access the company's behaviour change research and white paper here:

<https://events.legatics.com/barriers-to-legal-tech-adoption-lp>

Anthony Seale, CEO of Legatics commented "There has been a big gap between the legal industry's expectations that legal technology will completely transform the delivery of legal services and what we have seen in practice. We wanted to diagnose the underlying reasons behind this gap and unlock the potential of AI technology in particular by re-imagining from the ground up how these technologies are built, deployed and adopted within law firms."



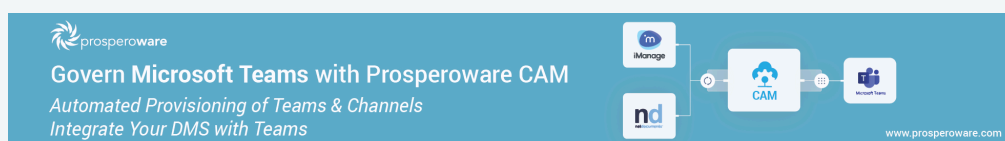
**Latimer Hinks** have announced the selection of **Linetime** to continue improving efficiencies across the firm, citing how the legal business management software was highly recommended throughout the selection process.

Based in Darlington, but operating predominantly in the North East of England and North Yorkshire, Latimer Hinks 40 strong team have been providing specialist and bespoke services in private client, commercial and residential property and agricultural law for more than 125 years.

Elizabeth Armstrong, Solicitor and Managing Director at Latimer Hinks, comments on the need to obtain recommendations from the market, "Selecting software that enables us to manage and grow the business is a minefield. With the market changing rapidly, software suppliers need to demonstrate flexibility and adaptability and, importantly, have an ability to prove it. Only that way can we be sure the software matches our needs now and for the future. Linetime came highly recommended by others and we were not disappointed throughout the process."

**Tughans** (Belfast) purchased **cleanDocs** from **DocsCorp** to ensure attachments are cleaned of metadata and emails sent to the correct recipient.

**Carson McDowell LLP** (Belfast) has selected **DocsCorp contentCrawler** to automatically convert all image-based documents in its **Linetime Liberate** document management system to fully searchable and retrievable PDF documents.



## NORTH AMERICA

Am Law 200 **Stoel Rives** is looking to expand on its engagement with **BigHand** with the rollout of BigHand Pricing and Profitability (previously known as Evaluate).

The Oregon-headquartered firm has for the past three years used BigHand Business Intelligence (previously known as Quantum), which it says in a case study released on 8 June stood the firm in good stead when the pandemic hit.

BigHand BI provides real time visibility of a firm's financial data – with dashboards tailored for lawyers, finance and management teams.

Cecy Graf, chief financial officer at Stoel Rives, said: "Providing client value is the external driver we are always striving towards, but without the internal KPIs to measure ourselves and ensure that we're making the most effective use of our time and resources, it's very difficult to quantify success – and hence a challenge to relay that to our clients."



Top 25 Canadian firm **McInnes Cooper** has upgraded its existing **BigHand** Voice licenses to the full advanced workflow management solution as part of a larger project to optimize processes and drive efficiency gains in its support services.

Process Improvement Specialist, Amy Alderman said: "Tasks were previously delegated via email or phone call, which often led to incomplete instructions and a lack of visibility over task progress and staff capacity. We knew there was an opportunity to increase efficiencies in this area, and after seeing BigHand's legal-specific workflow solution, we knew it was exactly what we needed. Plus, some of our staff were already used to BigHand's dictation technology which helped with training requirements."

With BigHand Workflow Management, tasks are delegated by completing a form that captures all relevant information upfront, and are automatically routed to the right resource and monitored throughout the process. Output reports can be used by management for visibility of key metrics like work type, volume, capacity and utilization to allow firms to make data-driven decisions around staffing, training and performance.

Marybeth Gromack, Human Resources and Administration Manager at McInnes Cooper said: "So far we have rolled out the technology to our support operations teams including our Document Centre, Word Processing Team and Office Support Assistants and have seen impressive efficiency gains. With the workflow technology in place, we can distribute work evenly to optimize turnaround times and utilize the reports to ensure we are making informed decisions."



**Relativity** has acquired **Text IQ**, a Top 100 AI company applying artificial intelligence (AI) to identify sensitive data.

Text IQ leverages the latest in unsupervised machine learning (ML), graphical modelling, social network analysis (SNA), natural language processing (NLP) and deep learning. It helps to lower the cost and risk of legal privilege review, speed up and increase the accuracy of data breach response workflows, and identify and manage personally identifiable information (PII) which are often associated with Global Data Protection Regulation (GDPR) and Data Subject Access Requests.

"We're merely scratching the surface of what the application of AI to our industry can mean. Our customers recognize that while AI offers immense possibility, it must be thoughtfully designed and applied to address use cases that yield specific business outcomes," said Mike Gamson, chief executive officer at Relativity. "We know that Text IQ's proven technology, coupled with its incredible team of talented professionals, will be a wonderful addition to Relativity and help us deliver even more value to our customers."



**Atkinson Andelson Loya Ruud & Romo (CA)** has selected **pdfDocs** from **DocsCorp** to manage and edit their PDF content. The firm also chose **compareDocs** as its document comparison solution.

**Adams Stirling PLC (CA)** purchased **styleDocs** from **DocsCorp** to enable its staff to apply house style and formatting to documents quickly.



A low-angle, upward-looking photograph of several modern skyscrapers against a pale, overcast sky. The buildings are constructed with dark, grid-like facades, likely glass and steel. Some windows are illuminated from within, creating a pattern of small, warm lights. In the foreground, a dark, geometric structure with a grid of square openings is visible, possibly a walkway or a part of a building's exterior. The overall mood is architectural and urban.

# MOVERS AND SHAKERS



# UK and EMEA

'App store for legal', **Reynen Court**, has hired **Sam Moore** as its legal technology ecosystem strategist.

Moore joins Reynen Court from **Burness Paull**, one of the largest law firms in Scotland, where he led the innovation function for nearly five years after having practised as a solicitor. He also sits on the Advisory Board of Lawscot Tech (the Law Society of Scotland's innovation and legal technology campaign) and is a senior tutor at Glasgow University School of Law, where he teaches the legal innovation & technology module of the Diploma in Scots Law that he co-created.

"Sam is a rare breed," said **Christian Lang**, chief strategy officer at Reynen Court. "Not only is he a passionate legal innovator with a significant track record of thought leadership and hands-on experience implementing some of the best tech in the market, but he can draw on a wealth of diverse experience (a computer-science background, biglaw legal practice, service as a front-line legal technologist, and--finally--responsibility for managing a law firm innovation function) to serve our platform users and technology vendors. It's a perfect combination of skills and experience to add to our team as we work to deeply understanding the unmet technology needs of firms and in-house departments and then source, shepherd, and champion the technologies that can help them drive meaningful change. We're very excited to welcome Sam to the Reynen Court family."

Moore said: "I have gone through the pain of sourcing new technologies for firms, testing their security, reviewing compliancy, negotiating with tech vendors, deploying applications and then finding out after nine months that we picked the wrong one so we could start all over again," says Samuel Moore. "Reynen Court is striving to become the new normal in legal technology, offering vendors a standardized deployment pathway, which makes it a fast, easy and frictionless experience for firms and legal departments to try and buy the technology they need, at the moment of need. I am super excited to be part of a company that has the potential to truly transform the legal industry for the

**Russell Enright** has joined **Legl** as chief revenue officer. Legl was founded by CEO Julia Salasky, who is also founder of A2J platform CrowdJustice.

Commenting on LinkedIn, Salasky said: "Thrilled to welcome Russell Enright to Legl. On the that two legal tech companies file for IPO, we're excited to be in this place, at this time, with this team, and with a relentless focus on driving better experiences for law firms and their clients."



**Veenay Shah**, co-founder of **HighQ**, has invested in Finnish startup **Contract Mill**, which in June announced the closure of a funding round of over €1M. The round was co-led by Swiss investment company **Actium AG**, together with multiple international investors from the UK and Sweden. We're told that the funding will be used to further expand Contract Mill's operations in the UK and Europe.

Contract Mill is a no-code document automation SaaS platform that makes the automation of complex documents easier than traditional software that requires significant IT resources, time, and money to deploy.



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benefit of firms, their clients, the vendor community and society. With the unique support of twenty leading global firms, I'm confident the Reynen Court team is on the path to creating an extraordinary company."

# North America



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Former Axiom vice president and legal tech veteran **Chris Iconos** has joined legal spend management vendor **Quovant** as chief revenue officer, we can reveal. Iconos, who leaves Axiom after seven and a half years, joins the Nashville-headquartered company after what we're told was an extensive, competitive executive search.

Corporate legal departments are increasingly turning to data and analytics to make business decisions and achieve greater visibility of their outside counsel spend. Quovant provides a tech-plus-services offering to enable corporate legal teams to measure law firm compliance and provides benchmarking data – including enabling in-house teams to compare law firm performance.

Quovant, which was previously called LegalBill, is entering a new chapter in its growth, according to Iconos, who has been brought in to help drive its sales and marketing efforts. Speaking to Legal IT Insider Iconos said: "Customers love what Quovant is able to deliver, and I will be trying to accelerate our growth and accelerate the expansion of the business." Quovant currently has around 100 members of staff. Iconos in 2018 took over as VP and general manager for the Southwest region at Axiom, growing it by a multiple of 10x.

A close-up photograph of a person's hands writing on a white sheet of paper. The person is holding a black pen with gold-colored accents. The background is blurred, showing what appears to be a person in a blue shirt. A semi-transparent dark grey rectangular box is overlaid on the image, containing the text "REPORTS AND SURVEYS" in white, serif, all-caps font.

# REPORTS AND SURVEYS

# New report Identifies top digital transformation priorities among post COVID-19

NetMotion in June unveiled a new report identifying the top digital transformation challenges, opportunities and priorities among global law firms post COVID-19. In total, legal sector technology professionals overwhelmingly ranked improving the end user experience, accelerating cloud migration, and adopting zero trust security tools and architecture, such as software defined perimeters (SDP) and the secure access service edge (SASE) methodology, as the most urgent technological advancements needed to support a post COVID-19 hybrid workforce. Additional priorities for 2021 include upgrading remote connectivity and refreshing the device estate.

To generate its report, NetMotion hosted over 50 virtual focus groups with legal sector CIOs and IT leaders from around the world.

Additionally, NetMotion commissioned a third-party survey of an additional 150 tech leaders from law firms in Australia, the United Kingdom, and the United States in April 2021: subsequently aggregating the results from the focus groups and the survey into its exclusive finding.

Additional findings include:

- Unreliable network connectivity and/or speed and poor application performance are unequivocally the biggest barriers to maximizing the end user experience for a permanently hybrid workforce. Some of the most reported issues to IT over the past year include Zoom/Microsoft Teams audio and video problems; consistent MFA reauthentication, application crashes and failure to access cloud resources, among other frustrations.
- To improve the user experience, CIOs and IT leaders require greater real-time data and insights into devices, networks, and applications; more visibility into remote-work specific security threats and enhanced diagnostics on issues encountered by remote workers.
- To better support the firm, CIOs and IT leaders also report needing greater insights into remote work specific threats, diagnostic issues reported by remote workers and data on usage intensity of websites and apps.
- Specifically, to better support remote work, CIOs and IT leaders report wanting more real-time data on connectivity issues, details on network traffic split out of the VPN tunnel, app usage stats and specifics on where network traffic is going.
- Physical locations will be the main place of work for less than 35% of law firms post pandemic, with nearly 50% remaining permanently hybrid.
- Only 12% of law firms still have more than three-quarters of core applications hosted on-premises, although less than half (44%) have managed to migrate the majority of their resources to the cloud.

The report also reveals that around 14% of law firms have implemented SASE already – almost twice as likely as those in other sectors. SASE adoption is also more likely to be driven by IT teams than in other industries, with 66% of SASE strategies at law firms being led by IT, compared with a global average of just 53%. Further, fewer than 1 in 5 law firms have made no plans to adopt SASE at all (19%), much lower than the global average of 29%.

“The onset of 2020 saw ten years of digital transformation among law firms in just ten months, as priorities were accelerated, abandoned and adjusted both temporarily and for the long haul,” said Matt Brown, head of

NetMotion's Legal Services in North America. "Our report reveals not just the pain points and pressures specific to the legal sector, but also provides actionable tips and resources to help accelerate the technology adoption that is most critical to the future of hybrid work."



# #TALKINGTECH WEBINARS

# The ContractPodAi Cloud


In absence of your ability to attend demos at conferences, our webinar series has developed a strong product focus, enabling end users to learn about new tech - and the ContractPodAi Cloud webinar was no different.

ContractPodAi's general counsel and chief evangelist Jerry Levine took us through the latest platform together with director of solutions engineering, Tara Bennett.

Their demo was broken into three parts:


- Simplifying and streamlining legal requests with a self-service contract authoring desk for users across the business
- Creating increased structure and visibility for contracts with a single central repository and related search and reporting
- Reducing the company's overall risk profile through a Contract Risk and Compliance tool

You can watch it by clicking on the play button below.




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Firms have transitioned well to working from home, but what are the tools that are needed now as firms navigate a far more fluid future?

We will look at the steps that firms are taking to expand their digital toolkit, as well as how they are driving adoption.

And we'll be conducting a few polls so we can see



Caroline Hill

Editor-in-Chief  
Legal IT Insider



Bill Bice

CEO  
nQ Zebra Works



Rick Hellers

Co-Founder  
nQ Zebra Works

whether the experiences of our guests accords with  
those of you listening in.

Taking Place Tuesday 13th July 2021  
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A professional recording studio setup. In the foreground, a black condenser microphone is mounted on a boom arm. Two pairs of black headphones are resting on a wooden desk. In the background, there are two computer monitors on a desk, with a large window showing a brick wall outside.

# THE INSIDER WITH CAROLINE HILL

# The story behind Baker McKenzie's new 11-strong data science team

In October 2020, Baker McKenzie started a pilot with SparkBeyond's advanced analytics technology. That pilot hit all of its KPIs and has moved into stage two, which is where Bakers' management recently agreed to invest in building a dedicated 11-strong data science team, led by partner and global head of R&D, Ben Allgrove.


Significantly, Allgrove is looking for two co-founders to invest in and help lead the new team.


Here, editor Caroline Hill talks to Allgrove about the SparkBeyond project, plus the development of the brand new team and how it will be working to solve client problems.


**PREDICTING THE FUTURE WITH AI TECHNOLOGY**

The Insider with Caroline Hill

Guest: Ben Allgrove, Partner and Global Head of R&D at Baker McKenzie

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# DocsCorp's integration into Litera: We speak to Dean Sappey and Jody Cosgrove



Litera recently acquired DocsCorp, so what is the plan for integration? How will Litera manage the acquisition from a logistical point of view? How much overlap is there with products? Is the plan to maintain all products? What is the roadmap?



## LITERA'S ACQUISITION OF DOCS CORP: THE ROADMAP

The Insider with Caroline Hill

Guests: Dean Sappey, CEO and Co-Founder of DocsCorp and Jody Cosgrove, CCO and Managing Director of Drafting at Litera

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# RECRUITMENT



# View from the Legal IT recruitment market

*By Justin Edwards, founder and director of ITS Recruitment*

The job market in legal tech has for obvious reasons been almost flat since April 2020. I'm sure you're all very sad to hear of the plight of us recruiters!

Whilst we were recruiting somewhat during lockdown, mostly for more senior roles, we did not see much activity until November last year.

As firms began to hire again most were sourcing people directly whilst volumes were still low, but we noted a sudden surge in new roles on our books in March as volumes began to overtake our clients' internal capacity to manage them. The trend has continued and this month we have 300% more vacancies on than we did in the same month in 2019.

The reasons for all these new hires are varied, but a significant proportion are in support, management, digital, business analysis and project management. Projects which had been on hold are all live again, which include the usual desktop refresh and core apps upgrades as well as others related to business process re-orgs. Newer specialisms such as EUC, unified comms, enterprise mobility and law tech / digital for in-house client product development account for a number of roles, though the flurry of 'law tech' hiring activity we saw in Feb/March seems to have faded.

Other reasons for hiring are backfilling of promoted staff with more junior level replacements to allow for growth and talent retention. Hiring of junior level staff had dropped off in the few years pre-Covid and perhaps the goodwill felt by users towards their IT staff following their heroic performances during lockdown has empowered IT Managers to do this.

Mid-level Service Desk staff are also being hired by many of our clients, an area thin on the ground at the moment due to the lack of the aforementioned junior hires over the last few years. Some IT functions have re-structured which has led to a change in skillsets being sought in support, particularly first and second line, and the new roles here are tending to be junior level service desk or higher level applications support.

What may be surprising given the increased security risks of work from home is the lack of increase in new hires in this area of expertise. We are at pre-Covid levels for such roles.

An incredibly encouraging development is the emerging trend of firms interviewing candidates and, upon realising their broad suitability for the firm but not necessarily for the role at hand, creating new or bringing forward pipeline roles just so they can bring into the business. We've not seen this approach, of identifying good people and bringing them in anyway, since 2007.

In terms of candidates job hunting, we do not feel all the candidates are back yet. Full confidence has not yet returned so competition for people is high and many candidates are getting 2-4 job offers. Our clients are also reporting an unusually high percentage of offers being turned down due to counter-offers from existing employers. (This is another reason why some firms are recruiting at more junior levels rather than replacing like-for-like). As a result, some candidates are receiving offers higher than they were expecting and hiring firms are finding it frustrating to miss out in these circumstances.

To combat this, clients of ours are beginning to look for other options. If you can get out of this arms race for legal tech people and go for more junior staff or people from outside the legal sector, it can tackle the issue. This also



gives you a larger pond to fish in. And those firms with up-to-date, plentiful and easily searchable knowledge bases of known fixes and processes are onboarding such people quickly and effectively.

As I mentioned above, senior roles were filled here and there during lockdown and we have a good number on at this level at the moment. Applications for them are in their 100s, and in one case 1000s. But these applications are coming from all sectors. For this reason, it is proving more efficient to source candidates through our networks and only advertise some of them. Many of these vacancies are due to firms hiring their first IT Director or creating new leadership roles in newly defined or previously less important functions.

Hiring of contractors ceased too until March/April this year but since May, there has been a steady increase in the need to resource for projects and to bolster first and second line teams to ease the expected demand from users coming back to the office.

Most firms were expecting to view all contract roles as inside the new IR35 legislation to avoid risk of non-compliance and there was a fear that contract rates would increase to compensate loss of earning to contractors. More firms are now taking a view on this and considering determining some roles where appropriate as outside the legislation. We have not seen an increase in rates from those determined to be inside as, while this may change, for now most contractors are just happy to be in work given the market is still nowhere near what it was.

Another contributing factor to this reduced contractor market is that some firms are resourcing via vendors, rather than recruiters, to avoid IR35 risk. This is expensive though and we have increased our focus on promoting the partnerships with have with small businesses who operate in the 3E and workflow developments spaces to offer our clients alternatives to paying high vendor consultancy rates whilst still outsourcing the work. This may well be the future on the contract market.

Lastly, and encouraging to see, of the new vacancies we are taking on, no more than usual are due to leavers. The "Great Resignation" that was being predicted by some print news media due to disaffected staff feeling put upon during lockdown or people re-evaluating their lives and changing career has not materialised thus far. Although IT Support staff in legal worked harder than ever before during lockdown, feedback on our Legal Tech Service Delivery Forum from all the law firms who attend suggests most felt valued and appreciated by the business for what they achieved. And with so many new projects in flight, it looks to me like there's never been a better time to be in Legal Tech.

***To be our next 'view from the market' recruiter contact [caroline.hill@legalitlexicon.com](mailto:caroline.hill@legalitlexicon.com)***



# COMMENTS

# If You Think the Shift to Remote Work Was Difficult, You Ain't Seen Nothing Yet

*By Bill Bice, CEO of nQ Zebraworks*

The pandemic put legal IT in the spotlight. Suddenly, every firm had to switch to remote work, all at once, overnight. I was impressed by the speed and efficiency with which legal IT professionals at so many firms were able to pull this off.

And it wasn't just me: there has been a lot of appreciation for firms' IT from attorneys and firm management – it's one of the silver linings of the pandemic.

But now there is a new challenge. During the pandemic, at least we knew where our attorneys and staff were: all working at home. Coming back to the office – accounting for the increased flexibility that many firms are employing – is a bigger challenge. The attorney and staff expectations of the technology at their disposal will return to what they've long been accustomed to, except now they have to be able to use those tools seamlessly as we Work From Anywhere.

What we need is more than just Work From Home or even Work From Anywhere. What we need is to be able to Work THE SAME From Anywhere. It doesn't matter whether you're in the office, at home, or in a client's office: the firm's infrastructure needs to extend wherever our attorneys and staff are at.

In the emergency nature of the pandemic, issues that would never have been left unaddressed got a bit of a free pass. Attorneys are using desktop scanners (connected to local hard drives) from their home office and random scanning apps on their smartphones, neither of which typically fit within firms' security standards. It would be the rare attorney that remembers to go back and delete all the documents left behind on these devices all over the place.

Then, those documents are almost always manually moved around via email. Only with extra effort do they ever make it the firm's normal workflows.

The solution is to extend the firm's infrastructure so that it supports these devices. Edicts that you simply can't use are difficult or impossible to enforce. It's far better to incorporate desktop scanners and mobile devices into your infrastructure, where the firm's security protocols and automated workflows still apply.

Another great example of needing to Work The Same From Anywhere is physical mail delivery. Attorneys are accustomed to getting their mail handed to them on time, and a lot of workarounds were implemented during the pandemic. The most common is to scan to email, leveraging tools already at the firm's disposal. But email as a delivery mechanism has some serious shortcomings: it further clogs up the email server without providing any follow-up or accountability. It's too easy for the mail to just get lost in the regular flood of emails.

A digital mailroom solves this problem by providing tracking and audit trails, while also automating processes like profiling in the document management system or tying to the accounting system or expense management, and

providing delegate access to make it easier to manage the whole process.

A digital mailroom is a classic example of “Why haven’t we always done it this way?” It’s a much better solution than pushing the cart down the hallway and has the advantage of working equally as well no matter where your recipients are at on a given day. Going digital opens up whole new ways of working. For example, physical mail can now be shared with workgroups like docketing, A/P, A/R, and large cases with many professionals working on it.

What I love about implementing a digital mailroom is that it makes the process paperless – it’s a great way to accelerate your firm’s digital transformation.

As we emerge from the pandemic, now is the time to take advantage of the shift in perspective in legal IT. Professionals that previously saw IT as just a cost of doing business now see it as a strategic investment and the key to enabling their workflows and a function that is critical to supporting the new challenges of Work From Anywhere.

***Bill Bice is the CEO at nQ Zebraworks, which is tackling the challenges created by Work From Anywhere. nQzw Queues is the workflow engine that powers more than 35% of the largest 250 law firms in the United States and 5 of the top 10 firms globally. Bill has a long history in legal technology, founding ProLaw Software at age 18, then becoming part of Thomson Reuters, where he founded the West km division.***

## BigLaw: Does prestige equal quality? Does it have to?

***By Nathan Cemenska, director of legal operations and industry insights at Wolters Kluwer’s ELM Solutions***

A recent analysis out of Wolters Kluwer’s LegalVIEW legal performance data indicated that Am Law 50 firms tended to gain market share from 2019 to 2020, whereas unranked firms lost it (see below chart). This shift reinforces earlier observations about a “flight to quality” in the legal profession, where clients do more and more business with the largest, most prestigious firms and less business elsewhere. And early reports on 2020 firm performance agree, indicating the top 50 firms grew revenue by 7.1 percent, while the Am Law 50-100 experienced only 2 percent growth.

However, the phrase “move to quality” is somewhat misleading because the legal industry has never defined quality, let alone measured it. Therefore, any assertion that legal work is “flying to quality” cannot be evidence-based. The change is better characterized as a “flight to prestige,” and this points to an embedded industry assumption that prestige = quality. Unable to verify whether the services they are paying millions to meet the value expected, CLDs do what leading management theorist Clay Christensen claimed purchasers of consulting services do: They buy based not on quality, but proxies for quality, including “educational pedigrees, eloquence, and demeanour.”

I’m not saying the “flight to prestige” is bad for quality since there is scant evidence either way. And regardless of quality, there are other reasons to move work to larger firms. For instance, the ongoing trend of converging more and more work into fewer and fewer suppliers necessitates the use of larger firms with greater ability to scale in terms of both geography and practice area. Continuing law firm mergers also drive the “flight to prestige,” as

lesser-known firms get acquired and become part of larger, more prestigious entities. And more and more law departments are prohibited by internal information security requirements from dealing with smaller firms that cannot or will not lay out the money to comply.

Despite these reasons to use more prominent law firms, there are equally good reasons to think the “flight to prestige” is unnecessary, even counterproductive. Many of the leading thinkers in the legal profession – including Bill Henderson, Mark Cohen, Jens Nasstrom, Evan Parker, Marjorie Shultz and Sheldon Zedeck – question whether there is as much of a relationship between prestige and quality as law firms would have their clients believe.

Parker, in particular, has spent much of his career using statistics to predict whether – after leaving the bubble of academia – a young lawyer will be successful in practice. His work is so provocative that it got the attention of Malcolm Gladwell, who interviewed him. In the interview, Parker said, “It really does not matter at all” where you went to law school. On the other hand, having served in the military, worked a blue-collar job, or played varsity sports were all indicators that a particular candidate was more likely to thrive as a practicing attorney, all else equal. So why the continued pedestalization of law review membership and grades? Parker believes it is because the legal profession is not the meritocracy it claims to be but a “mirror-tocracy.” He told Gladwell, “You end up selecting people who are like you, not people who are like the successful attorneys at your firm.”

Parker’s research is about law firms hiring new associates, not about CLDs hiring law firms. Still, the insight carries over: Law firms pedestalize prestige in hiring associates, and purchasers of legal services pedestalize prestige in hiring law firms. Meanwhile, the fact that quality isn’t measured or managed allows sourcing decisions to come down to squishy factors that probably shouldn’t matter.

What would CLD buying behavior look like in a world that emphasized results, not prestige? Well, it might look something like the insurance claims market. Claims departments pay for results, not prestige, and are a decade or two ahead of corporate law departments in making their sourcing genuinely evidence-based. They meticulously collect data on case length, attorneys fees and settlement amounts and hire based on those factors. Furthermore, the last few years have seen more and more of them using artificial intelligence like Wolters Kluwer’s Predictive Insights to to further optimize their firm selection. One of the factors AI doesn’t care about: prestige.[SDK1] [CN2]

But claims departments go even further, eschewing large, expensive firms with high overhead in favor of a vast, geographically distributed network of small firms and even solo practitioners who—despite having little or no prestige—continue to hit the performance targets their clients expect. The reasons for this distributed model are somewhat incidental and beyond the scope of this article, but in a post-pandemic world, it makes more sense than ever now that we realize physical offices and geographic location aren’t necessarily relevant.

Big Law leaders will claim that while small firms can handle average, regional claims litigation, they do not have the required resources to handle more complex work. Smaller firms, they claim, do not have the IT people and infrastructure, the eDiscovery and document review teams, and the scores of memo-writing junior associates necessary to avoid being overwhelmed. It’s a fair point, but the people making it look for problems while the creative claims people are looking for solutions.

For instance, an industry-leading insurer with which my company works recently purchased hundreds of licenses for a cutting-edge AI-assisted litigation brief-writing product and gave its entire network of defense lawyers access. Those attorneys now have an unfair advantage that most of their competition—the largest firms included—would envy. Likewise, insourced or ALSP e-discovery teams can be put at the disposal of a distributed network, giving smaller firms the ability to punch well above their weight.

Will the above model become so powerful that it makes BigLaw obsolete? Not any time soon. The industry is going in the opposite direction – perhaps due to lack of perception or perhaps due to inertia. But in the meantime, supporters of evidence-based legal practice are quietly building a case that may very well end up shattering the “mirror-tocracy.”

[SDK1]Overall, what information do we have that backs up these statements/position on insurance company's?

[CN2]These best practices have been in place at insurance companies for years. Legal costs and settlement amounts are reported explicitly in their internal financial statements, unlike in corporate where that information is buried in larger costs buckets and are therefore poorly understood by anyone except the people in the actual legal department. I've spoken with Dan Winkler and John Henry, a guy who used to own a TPA, in depth about this issue

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