



# Legal IT Insider

*aka*

*'The Orange Rag'*

*Issue 345, September 2021*

# Editors Note

Hi and welcome to the September Orange Rag, where we catch up on all of the legaltech news, acquisitions, and people moves of the past month. We kick off with a reminder that while we were all on holiday over the summer (yeah, right) we launched our brand-new US top 200 chart, which is part of our new subscriptions business. You can download the chart and analysis for document management, practice management, client relationship management, or all three, with the cost reflective of that. Please let us have your feedback, we are continuing to grow and perfect our data, so if you have something to say please call us.

The past month has seen some interesting law firm activity, with Baker McKenzie unveiling its data science team 'cofounders' (progress or déjà Vue?) And in the UK, Mishcon and Taylor Vinters coupling up Gwyneth Paltrow and Chris Martin style.

Please make sure you fill in our 'Back to work (or not) survey', and sign up for some great webinars that are happening imminently, looking at better leveraging Microsoft teams. Of course, keep an eye daily on [legaltechnology.com](http://legaltechnology.com) for all the latest breaking news as it happens.



*Caroline Hill, Editor-in-Chief*





TOP STORIES

# Brand New: US Top 200!

Since the last Orange Rag came out in July/August, Legal IT Insider has officially released our brand-new US Top 200, which you are now able to pay for through the normal website.

The chart is part of our new subscriptions business, which allows us to put more resource into making sure that the data you read is completely up to date and that we can keep adding to the huge bank of information that people rely on us for. Editorial content on the website will continue to be free.

The chart shows which system is currently live at each firm across practice management, document management, and customer relationship management. You also get a full analysis of the US legal market, and the report includes editorial, commentary, analysis and supporting raw data on which of the US Top firms are using those systems listed above.

The report also offers a visual representation of which software companies are succeeding and at which firms.

When it comes to practice management, aside from the odd smattering of other systems, the Top 200 is largely a two-horse race between Thomson Reuters Elite and Aderant and we track the progress of each.

Progress in shifting off sunsetted PMS Enterprise is slow, and the report says:

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Given that it was announced some years ago that Enterprise is not being developed, and that support for it will cease on 31st December 2022 (except for migration) and that it can take a year to decide on any replacement system, and up to 18 months to implement it, this demonstrates a phenomenal degree of lethargy in adherence to an obsolescent system.”

[TO RECIEVE THE REPORT, CLICK HERE](#)



# Other Top Stories

# Future of BCLP's tech arm BCLP Cubed uncertain amid 'review'



The future of BCLP's volume legal delivery and legal operations arm appears uncertain after the firm announced internally and to clients that it is conducting a review of the stand-alone unit, Legal IT Insider first revealed on 22 September.

Led by CEO Neville Eisenberg, BCLP launched Cubed in September 2019 as a new transatlantic service for high volume business-as-usual legal work from the firm, with dedicated teams working in the Manchester and St Louis offices. CTO Jody Jansen joined from UK top 50 law firm Gowling WLG in October 2019 at the launch, and the focus has been on giving clients a one-stop-shop for high volume work but in an integrated and tech-led way, working on the likes of real estate asset management; delivering commercial contract services; streamlining the generation and management of loan agreements; and responding to European data access requests.

However, the firm is reviewing the future of Cubed following a year-long, firmwide strategic review that led to the official launch of its new growth program 'Project Advance' in October 2020.

Project Advance saw BCLP establish a transformation office, with corporate partner Sean Odendahl becoming the firm's first-ever chief transformation officer to lead 'reorganisation and growth efforts.' That reorganisation has included combining the corporate and finance practice and appointing new leaders for BCLP's now three primary businesses: corporate and finance transactions; real estate; and litigation and investigations.

Perhaps most significantly, BCLP in March this year brought in Jason Marty as chief operating officer. Marty joined from Baker McKenzie, where he was the global director of operations and led the development of Baker's Belfast service centre and alternative legal services platform.

Asked whether BCLP Cubed is to be shut down, a spokesperson for the firm said: "Innovation is part of the DNA at BCLP, where we are increasing our investments in innovation for our growth engines and major clients. As part of this, we are reviewing the direction of Cubed, BCLP's volume legal services and legal operations support group launched as a stand-alone unit in 2019. We'll be continuing to support our great Cubed clients and products during this review.



“We’ve had many successes with Cubed that will help us continue to lead the industry in this space. Revisiting priorities in this area is important to both our clients and our Advance strategy, and exciting opportunities exist for us to collaborate and grow together.”

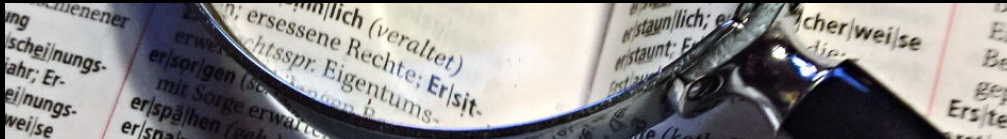
Cubed was highly commended in the FT’s 2020 Innovative Lawyers: Europe report, which stated that the tech arm had generated over \$1m in revenue since 2019.

Other firms that have recently made changes to their external tech-led captives include Clifford Chance, which recently brought the R&D side of Applied Solutions back within the body of the firm.

You can read our analysis of the launch of BCLP Cubed and the growth of the law firm ALSP market here:

[Bryan Cave Leighton Paisner announces BCLP Cubed, but it’s not an ALSP – Legal IT Insider](#)

# Addleshaw Goddard boosts consulting arm with ex-Big Four hire



Addleshaw Goddard has appointed former PWC and DWF digital transformation specialist Jason Macarthur as head of legal operations in AG Consulting.

Macarthur joins AG as part of its drive to significantly upscale its legal operations consulting services at a time when GCs are facing increasing complexity and ongoing cost pressure.

His role will see him support GCs and business leaders in their legal department strategy, performance and digital transformation, with a focus on improving efficiencies, cost and value, and transforming customer experience and legal risk management.

Dr Greg Bott, head of AG Consulting said:



"This is more than a strategic hire for us, this is a real game changer. Jason brings a unique customer lens and multi-disciplinary approach to legal service delivery, with a deep understanding of legal people, process and risk. As a function, legal operations is very broad but relatively immature. There are very few advisors like Jason with deep advisory and operational experience, inside and outside law, who have led major change. By combining our specialist people and operations capabilities, AG Consulting will help GCs simplify and accelerate performance improvement and change."

Prior to his role at PwC, Jason was commercial director at DWF, and led the firm's go-to-market approach for its managed services division, including the successful bid for BT's outsourcing contract in 2019.



# iManage end of life DeskSite, FileSite and Work Indexer (powered by IDOL)



iManage is to end of life DeskSite, FileSite and Work Indexer (powered by IDOL) in a move that will see those core legacy products no longer supported after December 2023.

iManage says that its desktop applications are being retired following the introduction and successful adoption of iManage Work 10. It is retiring all 9.x versions of the iManage classic clients and add-ons, including:

- iManage DeskSite
- iManage FileSite
- iManage OffSite
- Email management for Outlook and the Outlook Module
- iManage Express Search
- iManage Miner
- iManage DealBinder Add-On
- These applications, add-ons and modules are now in maintenance mode, meaning there will be no new enhancements – albeit in reality there haven't been any enhancements for some time. Support comes to an end on 30 June, and their end of life is December 29 2023. Customers using 9.x versions of those applications are being advised that they now need to start planning a transition to iManage Work 10.

iManage says that the decision was driven by the fact that the majority of iManage customers have upgraded to Work 10, and that all iManage technology partners have updated their integrations to support the Work 10 interface with the Universal API.

Meanwhile the IDOL Indexer is also in maintenance mode. Support will be provided until 30 June 2023 and its end of life date is December 29 2023. Customers are being advised to plan their upgrade to the RAVN Indexer now.

You can read that story in full here:

[iManage announces end of life for DeskSite, Filesite and IDOL Indexer – Legal IT Insider](#)

# Mishcon and Taylor Vinters to combine (not merge)



Mishcon de Reya LLP and Taylor Vinters LLP announced in September that they

have entered into a 'strategic combination agreement' - when the news first broke this month, some of the wittier among you commented on social media that this sounds like the sort of arrangement that Gwyneth Paltrow and Chris Martin might come to.

While reported by some publications as a merger, strictly speaking the two firms will continue as separate entities, albeit their intention is to operate within the same group structure when Mishcon lists on the London Stock Exchange.

The pair plan at the outset to launch MDR Taylor Vinters, a new business that will offer legal and consultancy services to innovators and entrepreneurs and the organisations and ecosystem that support them. MDR Taylor Vinters will be led by the Taylor Vinters Management Team.

Over the past five years Mishcon has launched MDR LAB and invested in a number of legaltech start ups, created the M:Tech programme for early-stage tech companies, launched the Innovation department, launched legal technology consultancy MDRxTech and invested heavily in a data science capability that is being applied throughout the business especially in dispute resolution, client management and pricing.

Taylor Vinters, meanwhile, operates in the key UK innovation hubs of Oxford, Cambridge and London and represents both national and international clients. The business has been on a fast growth trajectory: in the past three years its revenue has grown by over 40%. In 2020 it completed more than 160 venture funding rounds and supported around 25% of seed stage equity funding in the UK.

The long term vision of the Mishcon de Reya and Taylor Vinters teams is to establish the MDR Innovation Hub which will bring together MDR Taylor Vinters, MDR LAB, MDRxTECH and utilise the data science expertise Mishcon has built into a centre of excellence for the innovation economy. The MDR Innovation Hub will be led by a combined Taylor Vinters and Mishcon management team.

Kevin Gold, executive chairperson of Mishcon de Reya said:

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“This strategic combination is the culmination of years of thinking about how best to develop our business in the innovation space. In our many conversations with Taylor Vinters this year, particularly with the management team led by Ed Turner and Matt Meyer and with its Partners, it was obvious that we share the same values as well as strategic business vision. They are focused, purpose driven and have been very successful in growing their business and brand in the innovation space.”

# Baker McKenzie appoints duo ‘co- founders’ to head new data science team



Baker McKenzie has appointed Elevate’s vice president Brian Kuhn and senior Baker McKenzie attorney Danielle Benecke as co-founders of its newly created 11-strong data science team. The pair, who will have ‘skin in the game’ and have some personal responsibility for the success of the team, will be charged with combining the firm’s legal expertise with data science and machine learning.

Under the leadership of chief innovation officer, Ben Allgrove, Kuhn and Benecke will work closely with AI-powered research company, SparkBeyond on a series of projects, exploring new ways to apply machine learning to ‘transform the legal industry’ and ‘address key societal problems’ according to a news release out today (27 September). The collaboration falls within Baker’s wider innovation program, called Reinvent.

Ben Allgrove said of the new hires:



"We received over 750 applications for the co-founder roles, validating our belief that we were offering something different here in setting up this new team. We were truly impressed with the caliber of lawyers, technologists and others who applied. I could not have asked for a better response. In Brian and Danielle we have found two outstanding co-founders with a strong track record of successfully leading teams, collaborating across multiple jurisdictions and driving legal innovation within the organizations in which they have worked, including our own firm. The experience they will bring, from both inside and outside our firm, will help us to continue to explore what the future of the law - and in particular machine learning enabled judgement - will look like."

The move had a number of our readers and associates calling 'deja vu' on Twitter, although Alex G Smith from iManage said: "Data science is hard, data is hard, so it will be great to see what comes out of these teams." Less convinced was general counsel and legal innovation professor Mitch Kowalski, who said: "Let's see how long they last."

Benecke is a US and global IP and technology lawyer in Baker McKenzie's IP and Technology team. Admitted in California and Australia, she has been recognized by Fortune 500 clients in Lawyers Weekly's 30 Under 30 as "nothing short of spectacular" and Australasian Lawyer's 50 Rising Stars as "having a level of sophistication beyond her years."

Kuhn was previously vice president of digital strategy and solutions and having co-founded and run the IBM Watson Legal consultancy for IBM, one of the first efforts to apply a platform strategy and rapid customization to the design of AI-based product and consulting offerings for the legal industry. He was responsible for envisioning, launching, and directing all aspects of Watson Legal and its offerings, serving law departments within Fortune 500 and Global 500 companies.

The co-founders will have a dedicated team of data scientists, data architects, data analysts and project managers along with a three-year runway to deliver a series of projects for clients, internally and which will have social impact.

One of the first projects that Brian and Danielle will work on will be to oversee the launch of "Project Liberty," an AI-driven study on the unintended negative consequences of child detention that was generated by SparkBeyond's AI engine. In its research for Project Liberty, Baker McKenzie leveraged SparkBeyond to mine the entirety of Web data about global child detention. The AI platform revealed a troubling view of cause and consequence. The Firm plans to presents its findings at the World Congress on Justice with Children, taking place virtually in November, alongside SparkBeyond and pro bono partner Terre des Hommes. An interactive tool will be made available to all participants, allowing them to interact with Baker McKenzie's data, and empowering them with a more accurate understanding of cause and consequence to inform policy, public opinion, and advocacy on behalf of these children.



"Danielle and Brian are expertly positioned to drive our specialist, multi-disciplinary new team, helping us to accelerate growth in our Reinvent strategy, whilst also embarking on the next stage of our partnership with SparkBeyond," said Milton Cheng, Global Chair of Baker McKenzie. "I look forward to seeing them take the next step in embedding machine learning in our business to create new value for our clients and our communities."

Baker McKenzie is recruiting for four new roles within this new team, who will work with Kuhn, Benecke and Allgrove.

- [Enterprise Data Architect](#)
- [Enterprise Data Quality Architect](#)
- [Site Reliability Engineer](#)
- [Data Engineer](#)



# Video: The story behind Baker McKenzie's new II-strong data science team

## 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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# Gartner Identifies the three types of tech most ripe for adoption



As legal and compliance teams have faced acute pressures since the global pandemic and are struggling to manage their workload, legal leaders should focus their technology efforts in three areas to derive the maximum benefit, according to Gartner, Inc.

“Technology adoption for the average legal and compliance team lags many other corporate functions, therefore legal must not try to run before it can walk,” said Zack Hutto, director, advisory in the Gartner Legal & Compliance practice. “Teams should first establish foundational systems of record and then invest in solutions to facilitate key workflows before exploring more sophisticated opportunities like digitally-enabled risk management.”

The Gartner Hype Cycle for Legal and Compliance Technologies, 2021, covers a wide variety of innovations, including applications, platforms, concepts, methods and disciplines that will influence the roles and priorities of corporate legal and compliance leaders over the next decade. These innovations can potentially impact a number of different stakeholders. To understand how to interpret the Gartner Hype Cycle, visit [here](#).

“As a result of acute workload pressures through the pandemic, technology solutions appear more attractive than ever for over-burdened legal and



compliance teams,” said Hutto. “Compounding this, the market has seen on-going consolidation even as new entrants continue to arise. Significant hype tends to follow more sophisticated technology innovation – like AI – as well. As a result, many legal leaders get overwhelmed by technology opportunities. Legal and compliance teams don’t always know what they want (or what they could pursue), but they know they need technology.”

For most legal departments the level of digital maturity remains low. Gartner research identifies three critical opportunities for legal leaders looking to pursue technology: 1) establishing (or strengthening) foundational systems of record; 2) enabling core workflows with digital investments (beyond sending emails or excel spreadsheets); and 3) transitioning largely analog risk management methodologies into the digital realm. A range of mature technologies are available in the market to facilitate these areas (see Figure 1).

Figure 1. Hype Cycle for Legal and Compliance Technologies, 2021



Source: Gartner (September 2021)

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“While the right technology for a given team depends on their underlying priorities, their digital progress to-date, and their own risk posture, legal leaders must also monitor advancements in innovation to guide where they focus their technology investment,” said Hutto. “Focused investment in these areas can unlock the kind of transformational efficiency gains in legal and compliance like we have witnessed in other business functions, such as finance or HR.”

## Foundational Systems of Record

The pandemic has driven a proliferation of legal and compliance work even as teams face disruption to their working environments. At the same time, the organizations they support face heightened demands for corporate accountability and transparency. All the while, sophisticated innovations like analytics and AI promise to fundamentally change the practice and business of law, despite perennially remaining 5-10 years away.

Investments in foundational system(s) of record for legal and compliance promise to address all three trends, enabling better capture and reuse of work product, reducing the otherwise ad hoc data capture required for ESG reporting, and building datasets that could unlock the potential of analytics and AI. On the hype cycle for legal and compliance technologies there are several related technologies on or near the plateau that can help create such a

system of record of that will benefit directly from one.

"Enterprise legal management (ELM) systems continue to advance and provide a compelling option for pulling basic information out of poor-fit channels like email, personal devices or shared drives," said Hutto. "Even more important than putting them in place is keeping a team on the same page for how the solution should be used. Only then can they enable more effective information sharing for the post-pandemic era of hybrid work, improve accountability and transparency in the legal organization, and enable predictive analytics capabilities."

## Digitally Enabled Workflows

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"Legal and compliance teams face more work to manage than ever before, and the traditional overhead costs are enormous," said Hutto. "Digitizing the highest volume workflows is both feasible, with mature technologies to do so, and has been shown to have profound results in terms of legal productivity for early adopters – if well managed"

Legal leaders should identify the workloads that are sapping the most time in their departments and target those as a priority. For example, in many organizations, the processes of contract lifecycle management (CLM) are both time consuming and ready for digitization with mature technology to do so. Subject rights requests are another area that can be transformed with technology adoption and currently drain a lot of resources from many legal organizations.

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"Leaders should carefully consider where and how to invest in a given workflow – for instance, a CLM solution with a basic intake method and user-driven workflow routing often delivers greater, more consistent value than an overly complex configuration with poor-fit automations that fails to get off the ground," said Hutto, adding, "Don't waste the precious time of your team – on top of the cap-ex on a tech solution – trying tackle the wrong opportunities."



# Digital Management of Risk

Regulatory volatility, digital business transformation, increasing cyber risks, and the magnitude of information derived from monitored risk and security activities are straining the ability of organizations to manage risk effectively through traditional 'analog' means, and the pandemic has only exacerbated this stress.

“Trying to manage the organization’s risk profile without digital investments is not only needlessly time-consuming, but also inadequate,” said Hutto. “Digital management of risk can help connect disparate processes or stakeholders, deliver unprecedented insight, and will underpin dynamic risk governance – a transformational shift for how organizations should approach risk governance.”

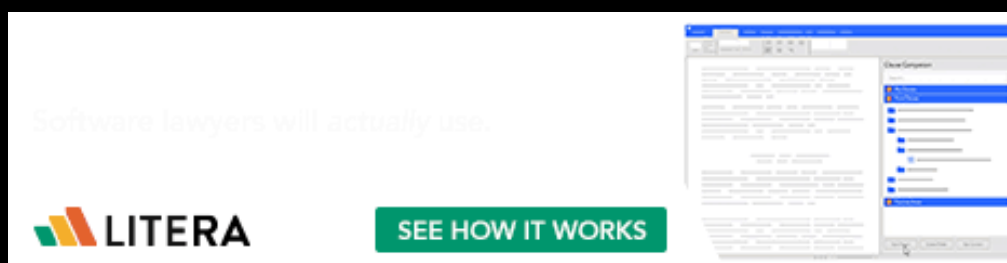
Legal and compliance leaders should look for opportunities to streamline and simplify their risk management and compliance-related activities and improve their understanding of risks through system integration with operational-level data sources, supported by risk program maturity assessment and consulting engagements, as well as augmentation of risk expertise and content through managed services. But companies should approach the replacement of multiple risk management solutions with a single, integrated risk management solution carefully. While such a strategy should reduce overall spending and improve risk mitigation in theory, organizations face immense complexity harmonizing disparate systems and processes and typically must sacrifice some 'best-fit' tooling or workflows enjoyed by individual stakeholder groups.

Gartner clients can read more in:

["Hype Cycle for Legal and Compliance Technologies, 2021"](#)

Clients and the general public can also register for the complimentary webinar:

["Plan Your 2022 Investments with Gartner's Hype Cycle for Corporate Legal Tech"](#)



The background of the slide is an abstract pattern of numerous vertical lines in various shades of blue and white. The lines vary in thickness and are slightly blurred, creating a sense of depth and movement. A semi-transparent dark blue horizontal band is positioned across the middle of the slide, serving as a backdrop for the title text.

# Talk: What's Hot – And Not – In 2021



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Editor Caroline Hill recently gave a talk to a group of UK IT directors about 'what's hot – and not – in 2021.' Here is that talk and the slides. As always there are a number of other things I could have included, and I'd be interested to use this as a discussion starter – what would you include?

"After the weirdest year ever in 2020 I think most of us looked forward to some normality in 2021 but it didn't take long for us to realise that we were all deluded.

People are still talking about how incredible the transition was from being almost entirely office based and in many cases, paper based to virtual working. But we're entering a new chapter where the pressure is on to not only to work from home but to be able to work from anywhere and not just to make do but to make working practices as efficient as possible. I'll come on to talk a bit more about that in a little while.

Before I get into the weeds of this talk I wanted to make an observation, which is that the emphasis on technology now is all pervasive, and that brings opportunities and challenges.

In a Wolters Kluwer Future Ready Lawyer Survey Report for 2021, which I like because it polls over 700 legal professionals across the US and Europe, the two top trends cited as having the biggest impact on organizations over the next three years are: Increasing Importance of Legal Technology (77%); and Coping with Increased Volume and Complexity of Information (77%). 63% of law firms said they will increase their technology investment, up from 60% in 2020.

Just as a slightly funny and quite telling aside from that survey, 69% of law firms said they expect Big Data and Predictive Analytics to have an impact on their organizations over the next three years. But just 22% say they understood what big data and predictive analytics really are, so make of that what you will.

In that same survey the importance that clients placed on law firms' use of technology also surged. 82% of corporate legal departments say it's important the law firms they work with fully leverage technology, although again I query what that really means.

One thing that we can definitely say is that the pandemic has further elevated the status of technology beyond law firm techies wildest dreams, but firms continue to have many challenges around the delivery of that and lawyers remain in many cases averse to working in new ways, despite all the rhetoric. Now really is the time to encourage legal professionals to be competent in tech not just in talking about it.

## WHAT'S HOT?

In terms of what is hot in 2021, the very first thing that comes to my mind is Microsoft and at the end of my session I'd love to come back to this topic that I'm going to spend quite a bit of time talking about.

Law firms have over the past year doubled down on their investment in Microsoft. Obviously law firms have always been heavily Microsoft based but we've seen more firms moving to Microsoft 365 and Exchange Online. Conversations about the cloud are very different now, although I think we're at risk of making out that the move to the cloud is far simpler than it really is for many firms. Speaking to some CIOs, they are nervous about adopting cloud systems in terms of how they will interact and impact the spaghetti junction of other systems.

It does seem largely as though the question for most firms is no longer if they will utilize Microsoft 365, but how much of it will they utilize? I spoke with Matt Peers, who is COO of Linklaters the other week and he said that the firm is likely to end up with everything in Microsoft 365 within a little while, which is a change for Linklaters, but interestingly from an email standpoint the firm simply doesn't have capacity at the moment, and capacity does seem to be an issue for many of you.

The legal sector is very much back in Microsoft's sights again and this year they launched Microsoft 365 Solution for Legal, which is designed to help firms protect client matter data and address their concerns over blind

subpoenas, which was one of the barriers for Linklaters.

Microsoft this year unveiled a four-step programme to rolling out Teams and leveraging 365 security and compliance tools and I can send anyone who is interested links to that. Microsoft is also working with document management vendors to create better integrations and acknowledges that a lot of people don't currently want to use SharePoint.

Corporates have been quick to adopt 365 and law firms need to have a coherent 365 strategy including an awareness of its in built data analytics capability.

## TEAMS – INTERNAL COLLABORATION

Teams has been one of the hottest bits of tech this year. As you know, it is designed to be the place where people live, where content can be delivered, and that you can access regardless of what device you are using. It also answers the question that legal organisations have been asking for years – what comes after email, particularly for internal communication.

Most law firms I've spoken to deployed Teams to a certain extent as the pandemic hit. They included Allen & Overy; Fieldfisher; Cripps Pemberton Greenish; and Browne Jacobson, where Abbie Ewen began transitioning away from Skype at the end of 2020 in favour of Teams.

Interestingly at Browne Jacobson, which at the beginning of lockdown finished a Windows 10 and Office 365 rollout, including bringing Exchange online, they immediately introduced a strict process for approving Teams. But at most firms it is still only being used for a fraction of its full functionality – often for telephony and chat – and IT teams are nervous about Teams turning into the Wild West with data all over the place.

We did a great webinar with Prosperoware looking at how to set Teams up and I can send you a link if you're interested. Repstor and Epona are also doing some very cool things around provisioning and as you know Repstor is now part of Intapp as of this year.

## TEAMS – EXTERNAL COLLABORATION

In terms of external collaboration, there is client pressure for more firms to start using it and widespread agreement that it makes sense to use the same system as your client.

There are obvious concerns around information governance but there are solutions and lots of guidance out there.

## TEAMS – PROJECT MANAGEMENT – OSBORNE CLARKE

You can use Teams as a project management tool and before I move off the Microsoft topic – and I swear I'm not on commission – I just wanted to share with you or at least remind you of some of the cool stuff that firms like Osborne Clarke is doing with Teams because they are one of the firms really leading the way.

OC has built its collaboration platform 1.0 around HighQ but it has been running a proof of concept using Teams as the basis for Collaboration 2.0. I think IT director Nathan Hayes summed up a lot of people's current thought process when he told me: "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 rolling out Microsoft 365 and has formed a multi-disciplinary consulting group of lawyers, trainers and techies to help professionals develop matter plans using teams.



One of the partners has codified an entire matter in Teams Planner and what's interesting is that partners are aware of Teams because Microsoft is doing a great job of promoting it, which in many ways makes your life a lot easier.

It will be interesting to see what this means long term for HighQ. I'm also wondering what is happening with Lupl and need to catch up with them – after a big bang entry and a \$14m funding round in January I do wonder how Lupl will compete with Teams.

## MICROSOFT – ALL YOUR EGGS IN ONE BASKET?

The one thing that people are thinking about is the risk profile from having all your eggs in one Microsoft basket, and that came to roost recently when Microsoft bumped up their prices by 20%, which is huge. I'd be interested to hear your take on that at the end.

## PLATFORMISATION AND THE RISE OF THE MARKETPLACE

My other observations as to the top trends over the past year don't necessarily come in any particular order, but I want to talk about platformisation next, and the drive among vendors and consultants to provide everything you need under one roof.

### PLATFORMISATION

Some of the biggest complaints I heard when I first entered the legal tech industry were around the sheer number of vendors and point solutions in the legal sector and what a nightmare that creates, and so consolidation is in many ways a really good thing, even though it's got to the stage where when Litera calls me I'm wondering which one of our advertisers they have nobbled up now.

Litera is leading the platformisation charge and over the past year it has acquired 12 companies including DocsCorp and Kira Systems. With DocsCorp I nearly fell off my chair.

Litera started out wanting to own the document drafting space but their ambition has moved out from the practice of law to the business of law and they are promising to do the hard work of integrating all these different systems for you.

Venture capital group Hg is very much behind much of this consolidation drive. Hg also part owns the Access Group, which in July last year acquired DPS Software and before that Eclipse, and I'm going to come on to talk about private equity in a second. The Access Workspace is bringing together all its products and services horizontally. It has 100 different software products and aims to allow law firms to eventually manage every aspect of their operations through the workspace without having to worry about integration. It is also focussing on running analytics across the entire platform, with all the huge amounts of data it has. This year Access launched a dedicated legal tech arm.

Another company quietly growing is one-stop-shop practice management provider PracticeEvolve, which has acquired both Linetime and more recently, in December last year, Solicitors Own Software. It started out life as Documatics in Ireland but after a merger with Australian company ClickOne has been trading as PracticeEvolve in Australia for eight and it is making a big play for the UK market.

And then there is case management provider Advanced Legal, which last year acquired Tikit from BT in a rather bizarre sale where Tikit appeared to not know that it was being acquired. Advanced has been slightly quiet since acquiring Tikit but before that it acquired Oyez Professional Services. It is the third largest British software and services vendors, with £254m annual turnover, so it will be interesting to see what comes out of Advanced Legal

next.

## THE RISE OF THE MARKETPLACE

One of the really interesting very recent trends I've been following is the rise of the legal marketplace, which aim to simplify the procurement and in some cases implementation of technology.

First up I want to flag the recent progress made by Reynen Court, and you'll be aware that Reynen Court vets vendors and in some cases enables law firms to download their software straight from the site in the way you can from an app store.

Lots of people have questions around Reynen Court and do think they are lacking in public customer success stories, but what they are trying to do is to take away from you the pain of having to vet and test a ton of different companies and I'd be interested to come back and see if any of you have experience of using the platform.

Reynen Court this August created a new consortium of 20 corporates including Morgan Stanley, Cisco and Intel. Their backing is huge and according to Morgan Stanley's managing director and global head of technology, Max Iori, they are driven by the opportunity to reduce the time and cost it takes legal teams to source and deploy new cloud-based solutions. Bringing the client into the dialogue is very powerful and I'm excited to see where this goes.

Reynen Court have got the most developed platform but lots of other vendors and consultants are now launching marketplaces – and they do differ from the partner programmes that have long been run by the likes of iManage because they go as far as recommending a particular technology and incorporating an RFP process into their own marketplace.

I don't want to spend too long on this and can provide you with more details after if you're interested but the marketplace I wanted to flag is a US entity called LexFusion that launched this year. It's aiming the change the way that law firms and in-house legal teams purchase technology. It vets and selects best of breed technology across all relevant categories and in effect says that is the tech you should be using. It is creating a kind of network or collective between those vendors to encourage discussions around what clients need including integration. It's early days but it will definitely be interesting to see how they get on and it's interesting that we don't yet have a similar organisation in the UK.

## BUY OR BUILD?

The consolidation or platformisation in the industry comes from a place of wanting everything taken care of for you under one roof by someone else but there are some really interesting shifts around the approach to 'buy or build' right now.

One school of thought is that law firms are not software houses and shouldn't be focusing at all on technology – it should be there and easy to use, with single sign on and none of the all too familiar challenges around integration.

In May this year I wrote an article about Access Group after speaking to CEO Doug Sawers, who is very much of the opinion that the legal sector is behind the curve in hiring tech developers. Doug's background is in HR, where it was quite common for businesses to have lots of different HR systems and it was someone's job to bring them together but that's no longer the case.

Doug told me: "It takes me back 20 years. Legal practices that are having to be specialist in IT, why would they be leading edge? Why should lawyers have to invest so much in the future of technology?"

However, there is an opposing train of thought.

Going again back to Osborne Clarke and my conversation with Nathan, OC is entering what it calls a new chapter for technology by building 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 software engineering and Anthony is tasked with building a team of five to six people in year one, with the intention to build the team further. The roles will include full stack developers and UX designers and Nathan told me: "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."

The thought is that if you are leveraging your own technology, you can deliver real competitive advantage and I would be fascinated to come back to you on that at the end to see which side of the fence you sit on.

## TECH CAPTIVES

Law firms are in many cases finding that tech-led services and products are more easily delivered from within a separate entity or captive where, being frank, it is protected from partners and the billable hour.

There is a strong shift towards productization where firms such as Allen & Overy has long led the way and done so from its tech arm aosphere but many firms are increasingly seeing commercial and repeatable opportunities.

For me an outright leader is Reed Smith's subsidiary Gravity Stack, which in 2020 launched a natural language processing-based contract review solution and a very cool Relativity Translator app.

But firms are still trying to find the right balance to make sure that the tech arm benefits from all the expertise you have. Clifford Chance this year backtracked slightly on the plans for its tech arm Applied Solutions, which was set up as its R&D and sales arm. What they did this year was brought R&D back into the firm within a centralised hub run by April Brousseau.

Applied Solutions will remain as its sales arm. It sounds on the face of like not much of a change but what Clifford Chance found is that R&D can't be isolated, it has to be part of the lifeblood of the firms and the lawyers have to invest in it.

## FUNDING AND INVESTMENT IN LEGAL TECH

I said I'd talk a bit about private equity funding and it's something that we have been tracking quite closely. We get exclusive data from a company called legalcomplex.com and the last lot of data showed that legal and tax technology companies have so far this year raised almost as much capital on the private equity markets as they did in the previous two years combined.

As of August 11 2021, \$4.16bn was raised across 178 deals, compared with a total of \$4.29bn raised in 2019 and 2020.

Hg are a driving force and as I mentioned before are behind the massive spate of acquisitions at Litera and also Access Group.

I've already talked about Hg but what you may not know is that Hg also recently invested \$1bn in Insight Software, which is a leader in tax software.

In the last few months we have seen some huge legal tech funding rounds including Clio's \$250m Series D, and RocketLawyer's \$223m Series E.

And I'd like to flag as we here that several legal technology companies including Intapp, Disco and LegalZoom have floated over the past year, which shows a new stage of growth for legal tech companies.

What's not hot is Nuix' float in Australia, which has been a disaster. In the Australian Financial Review called it Australia's most disastrous ever float after serious issues with its accounts emerged and I can send you more on that if you're interested.

## WHAT ELSE IS HOT?

### DOCUMENT MANAGEMENT – THE MAGIC CIRCLE CHOOSES IMANAGE

iManage now has all of the Magic Circle firms after Clifford Chance and Linklaters both selected iManage.

Linklaters at one point looked as though it would select NetDocuments, because it was very clear that the system it would choose next would be cloud-based. However, it's a testament to the investment that iManage has made that Linklaters was impressed by the iManage Cloud and also the search and analytics capability offered by RAVN.

### THE TRANSITION BACK TO WORK – DIGITISATION NOT STICKING PLASTERS

There is no doubt now in any of our minds that the future of work is hybrid and humpty dumpty is never going to be put back together in the same way, which isn't a bad thing because Humpty was really out of shape.

But what does that really mean? It means that we need to focus on the areas where we have made do or slightly fudged solutions, and that means not relying on sending an awful lot of stuff to legal professionals by courier in absence of a truly digitised solution.

I was quite surprised when I chaired a webinar with nQ Zebraworks during the summer and we did a poll of the people attending to find out how they handle physical post and many of them courier it out to people's homes or scan and email, meaning it can get buried in the inbox. A lot of firms still get attorneys to pick their mail up. In the short term firms are going to need to look to a fully digitised workflow.

The other things that people are doing is working out how to handle hybrid in the office.

Speaking to Matt at Linklaters the other day, they are hiring an AV team to help with the transition to hybrid in person/virtual meetings. There are so many ramifications of people being left out if they are at home, including the impact on training and development.

### CAPACITY MANAGEMENT

Another thing I've seen quite an uptick in is a focus on capacity management. BigHand did a survey on task allocation and capacity management and it's a huge priority. They acquired resource management experts Mason & Cook in November last year, which are one of the few vendors who can cater for it.

However, there is a new kid on the block and I like the founder a lot. I'd encourage you to take a look at Capacity Work Allocation Tool, which was launched in November last year by Dentons associate William Dougherty. What's interesting is that not only does it help manage workloads remotely but it can help remove unconscious bias.

## TRANSACTION MANAGEMENT

People are working out quite late in the day that transaction management is best done in an automated platform rather than with spreadsheets everywhere.

Last year iManage acquired transaction management platform Closing Folders, NetDocuments has Closing Rooms, while Litera acquired both Transact and Doxly, and there have been many developments in the space since. ALSP Factor in June this year launched a transaction management platform.

Legatics, which is another leading transaction management platform secured £3m of investment in June this year. They also recently won firms such as Hogan Lovells and Bowmans in South Africa as clients and they are doing well.

## DOCUMENT AUTOMATION AND CONTRACT MANAGEMENT

There have been a couple of notable projects that have recently gone live in the automation space that I think are really interesting and show progress in the space.

The Loan Market Association this summer launched LMA.Automate in partnership with Avvoka and Allen & Overy. It helps LMA member to generate documents through the platform.

And Linklaters' tech group Nakhoda this year launched a contract automation platform, CreateiQ, which allows data to be extracted at the point of creation. It is proprietary tech, developed by the Nakhoda team.

Working with ISDA they have launched ISDA Create, which enables ISDA members to draft and execute contracts through the platform. It can be used to complete really complex agreements like the ISDA master agreement.

We're told that nearly 30 companies in the Fortune 500 and 8/10 of the world's largest banks now use the platform. It represents a lot of work between the team and lawyers to categorise and tag content and break it down.

Another company that has been killing it over the past year is no code workflow automation company BRYTER, which in April raised \$66m in funding. In May they signed an enterprise agreement with Reed Smith. They were working with a client that wanted to automate its process for dealing with a new supplier from a GDPR perspective, to avoid using the legal team where possible.

### Reed Smith formally announces partnership with BRYTER

For in-house teams there's been a huge focus on contract lifecycle management and what's interesting from your perspective is that providers such as ContractPodAi are offering law firms the opportunity to become resellers. Pinsent Masons are doing it in the UK as are Rajah and Tann in Singapore. To me initially it seemed slightly uncomfortable but if you are happy that the tech is the best for your clients it is a growing way to generate new income.



## KNOWLEDGE MANAGEMENT AND LEGAL RESEARCH

KM has become the cool kid on the block and there is an opportunity to redefine what the role of KM is within the firm. It's at the heart of delivering digital transformation and providing information where the fee-earner is working.

iManage, NetDocuments and newer companies like Intellex have been working with firms to create a layer of analytics into how the knowledge management system is being used, and in enterprise search the emphasis is on using knowledge graphs to provide curated search not just federated search – much like Google it doesn't just chuck everything ever written at you but drives more intelligent search results.

And companies like LexSoft have been working with firms behind the scene on tagging their content in order to make it more easily discoverable by the likes of RAVN's search engine.

Leading Swiss law firm Walder Wyss has rolled out iManage Knowledge Unlocked, meaning it now has a better understanding of how members of the firm are using its knowledge management system, what searches they are carrying out, and where the gaps are in their library.

Speaking to Legal IT Insider, legal engineer and head of KM Urs Bracher said: "What's new to us is the analytics module and we can see how the user numbers are; who are the most active users; what content is looked for most often; and even what content is missing, where searches do not lead to results."

## WHAT'S NOT HOT?

### A MILLION DIFFERENT POINT SOLUTIONS.

Blockchain, which has reached the trough of disillusion in Gartner's latest hype cycle.

The speed of migration off sunsetted practice management systems is also 'not hot', with many firms still on Thomson Reuters Elite Envision or Enterprise. [Check out our new US top 200 for more.](#)

Please email me your 'what's hot' and let's start a discussion. One thing I haven't included is the hugely interesting work being done in the research space, which is a topic in itself and one I may come back to."

A close-up, shallow depth-of-field photograph of a person's hand gesturing while speaking. The hand is in the foreground, with fingers slightly curled. In the background, a wooden desk holds a laptop, a notebook, and a smartphone. The scene is dimly lit, suggesting an indoor office or meeting environment.

# Movers & Shakers

# UK AND EMEA

Former **Tikit** heads **Simon Hill** and **Mark Garnish** have launched a new software development business aimed at providing organisations with project managed developers, involved in anything from ad hoc projects to full time development work.

Garnish and Hill last week formally launched **Xperate** following a period of gardening leave, after Advanced acquired Tikit in March 2020. Hill reprises the role of CEO and Garnish COO.

Speaking to Legal IT Insider about the new business, Garnish said: "No-one at the moment can get developers but we have opened an office in India and we will have UK project managers. If you need a developer for a project we can do it, or they can be kept on retainer for projects plural."

He adds: "What makes us different is the UK project managers, which will act as an interface between the offshore and onshore teams."

Pricing for developers is currently extremely high and Garnish maintains that Xperate will be competitive on price. He said: "If you are a 200 or 300 staff company the chances of you having your own developers is small and often the people you use let you down, but we have a bucket load of experience working in India and can overcome those pitfalls."

And he adds: "Every CIO I've spoken to has said they are not delivering projects because they don't have the resources."



Law technology specialist **Access Legal** has hired a new head of customer success. **Bishu Solomon Girma** most recently spent three years as vice president of client services and forensics for the European division of legal solutions provider Epiq. She began her career in law practice articling at Blake, Cassels & Graydon LLP in Toronto, and has also served as in-house counsel at a North American auto manufacturer where she focused on corporate commercial law.

In her new role at Access, Girma will manage a portfolio of over 3,500 legal customers and take direct responsibility for the management of the professional services, support and customer service teams.

Commenting on the appointment, Doug Sawers, managing director of Access Legal, said: "Our investment in Bishu is an investment in our customers and we're thrilled to welcome someone of her calibre. Working alongside the team, Bishu will help accelerate our growth and enhance the quality of our service delivery. The legal industry has been in a period of transformation for years and historically has taken longer to adopt new technologies and a customer centric focus, relative to other sectors. Part of our ambition is to change that view and the arrival of Bishu is furthering our focus on customer success."

Organisations already using Access Legal software solutions include Eversheds, Minster Law, Winn Solicitors, Wolferstans, Neves Solicitors LLP and The MAPD Group.



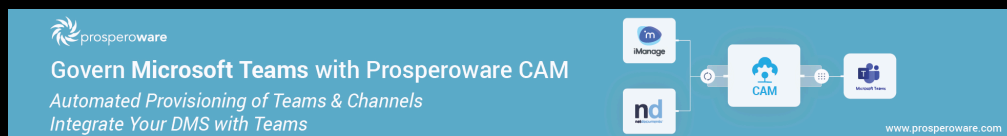
**Aderant Handshake's** account executive for Europe, **Richard Hill**, has joined **Advanced Legal** in the newly-created role of partnerships & alliances manager for legal, we can reveal.

Hill's remit is to manage the existing partnerships and alliances but to also to review and expand the ecosystem internationally.

Advanced is one of the companies leading the platformisation charge in the legal tech sector. In 2020 it acquired Tikit, which was its fifth acquisition in 12 months. The acquisition was intended to help it broaden the market opportunity for Advanced Solutions to include the UK top 100 to 200 law firms – a step up from Advanced existing presence within small to medium sized firms.

The acquisition of Tikit brought practice management system P4W within the Advanced Legal stable.

Hill said: "I'm very excited to be joining Advanced Legal Division during a period of significant growth in the legal software division, and in a newly created role. I will be responsible for looking after both their existing global alliances and partnerships which include those inherited from the Tikit acquisition last year such as NetDocuments, as well as those connected with P4W, ALB, Carpe Diem and MLC.



## NORTH AMERICA

**Wilson Allen** has hired **James Baldassarra** as director of data science. In his new role at the company, Baldassarra will be responsible for rolling out Wilson's Managed Analytics Services, as well as accelerating the development and scale of the services offerings resulting from the company's innovation efforts, including concepts coming out of the Wilson Think Tank and its work as a Microsoft AI Inner Circle Partner.

Baldassarra joins Wilson Allen from **BigHand** where he led the business intelligence consultancy and was responsible for a global team delivering best of breed solutions to law firms in the UK, North America, and APAC. His responsibilities included shaping the company's business intelligence product, working with senior client stakeholders to define requirements, and managing service delivery to ensure that solutions addressed clients' strategic objectives. These efforts ensured that the company met the needs of both clients and the market at large.

"Our data and analytics product and services portfolio has grown rapidly and we want to establish visionary leadership to accelerate our innovation efforts, including our vendor-as client analytics work, client engagement Think Tank, and various cognitive services and machine learning applications," says Norm Mullock, vice president of strategy for Wilson Allen. "James is joining our team to help us connect even more effectively with the

professional services firms we serve. He offers an understanding of what clients need as well as a unique knowledge of data and analytics that make him the ideal person for this role.”



**Aderant** has announced the promotion of **Raphael (Rafi) Shure** to executive vice president and chief operating officer (COO), with Shure making a further two senior promotions internally. Those promotions see Matt Graywood take over as vice president of global professional services and Samantha Rouse as vice president of global customer support.

And as we revealed at the beginning of September, Aderant has hired Sage’s vice president of sales for North America to lead its global sales teams as chief revenue officer (CRO). George Seymour steps into the CRO role vacated by Chris Cartrett, Aderant’s new president who will become CEO in January 2022. Based out of Aderant’s Atlanta headquarters and reporting to Cartrett, we’re told that Seymour will help to deliver aggressive growth objectives for the company.

In his role as CRO, Seymour will draw upon his experience at Sage – a widely-known cloud-based enterprise resource planning (ERP) and accounting software provider – where Seymour expanded the company’s human capital management (HCM) sector. Prior to his tenure at Sage, Seymour held several other sales leadership positions, most notably as VP of sales for the Americas at Nuance, where he was responsible for achieving substantial growth and directed an overhaul of the organization’s go-to-market strategies.

His arrival comes as Aderant focuses on meeting the market demand for more cloud-based software-as-a-service solutions as well as continuing to evolve its on-premise product line.

Seymour said: “The opportunity at Aderant is extraordinary, and I am looking forward to working with Chris and his team to encourage the company’s upward trajectory,” remarked Seymour. “The CRO role allows me to leverage my unique mixture of legal industry experience and ERP/HCM knowledge to bring fresh perspectives and new ideas that will both invigorate sales and support its growth.”



Elsewhere, **Litera** has hired **Ashley Miller** into the position of vice president sales for North America. Before joining Litera, Ashley was a senior manager, legal function consulting for EY; and before that a director in legal managed services at Thomson Reuters. She has also worked at Kraft Kennedy and LexisNexis. Miller will be part of the sales and marketing team at Litera.

You can read more on that here: [Big hires and promotions at Litera and Aderant – Legal IT Insider](#)



No-code contract lifecycle management provider **Agiloft** has expanded its leadership team by three, amid, we're told, a 100% increase in customer bookings and more than 50% growth in annual recurring revenue (ARR).

The three new roles fall within three primary areas of the company including business, product, and sales:

**Business:** Angel Lange, VP of Finance. Financial professional Angel Lange has over twenty years of experience in accounting, management, and financial planning and analysis, with twelve in the software industry. Most recently, Lange was Executive VP of Finance at Protegrity USA.

**Product:** Anne McNulty, Senior Director of AI Success. With her decade-long experience in the legal industry, Anne McNulty is responsible for maximizing customers' return on investment through adopting Agiloft AI. Originally a corporate lawyer, McNulty most recently spent five years at Kira Systems where she built and led the team that trained AI to analyze contracts.

**Sales:** Dan Mosera, Senior Vice President, Strategic Accounts. A top performer in large, complex enterprise sales, Dan Mosera has a reputation for building strong executive relationships from the top down. Mosera most recently managed the top 20 strategic accounts for TIBCO Software with revenue in excess of \$40M.

You can read that story in full here: [Agiloft expands leadership team by three – Legal IT Insider](#)

**Kira Systems'** first non-founder executive, **Steve Obenski**, is leaving the company, which was acquired in August by **Litera**. Obenski is Kira's chief strategy officer and has been at the heart of its rapid growth.

In an email message called 'Moving on' sent on 1 September to Legal IT Insider among others, Obenski said:


"Today was my last day at Kira Systems.

The company has been acquired by Litera in a transaction backed by Hg Capital. In addition, an independent spinout, Zuva, will commercialize the company's AI technology in new products for the corporate market.

I am taking this opportunity to depart and I will take a bit of a break before embarking something new.

It has been an enormous pleasure working with all of you: the phenomenal team at Kira/Zuva, our key customers and partners, and innumerable friends. Thank you for being a part of this journey."

While Kira founder Noah Waisberg is continuing as adviser to Kira, the majority of his time will be spent as CEO of Zuva. Kira's co-founder and CTO Dr Alexander Hudek is a strategic advisor and board director to Zuva.

The background of the slide is an abstract pattern of numerous vertical lines in various shades of blue and white. The lines vary in thickness and are slightly blurred, creating a sense of depth and movement. A semi-transparent dark blue horizontal band is positioned across the middle of the slide, serving as a backdrop for the title text.

# Legal IT Insider ‘Back To Work’ (Or Not) Survey



So, we all know that the future of back to work is hybrid, right? Easy-peasy. Well, we'd like to hear from you what arrangements are actually in place; what hybrid means from a tech perspective; and how the market is overcoming the (in reality) significant challenges of hybrid working, if that is what we're doing.

Please answer this short survey and we will give you anonymised feedback on your peers and the wider market response shortly.

[COMPLETE THE SURVEY HERE](#)

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A close-up photograph of a person's hands signing a document. The person is holding a black and gold pen, and their signature is visible on the paper. The background is blurred, showing the person's face and upper body. A semi-transparent dark rectangle is overlaid on the image, containing the text "Wins & Deals" in white serif font.

# Wins & Deals

# UK and EMEA

**Clifford Chance** has selected Austin-headquartered records management provider **FileTrail GPS** (Governance Policy Suite) to replace and upgrade its incumbent OpenText LegalKEY system.

"The last 18 months have transformed the way we work, challenging how we've traditionally stored, moved and consumed information," says John Hayward, office services manager, Clifford Chance, which has over 3,500 fee earners across five continents. Hayward added: "Our business services team has made significant changes to how we support our lawyers, regardless of where they are working. At the same time, we're keenly aware of the need to adhere to information governance policies, particularly around data protection and retention. Technology that enables us to make records more accessible to our lawyers and staff, while allowing our facilities and IT teams to maintain tight control over who is allowed to view them, enhances our ability to deliver high-quality services to our clients."

Clifford Chance is initially deploying FileTrail GPS in London and the United States to approximately 1,400 users.

You can read that story in full here: [Records management: Clifford Chance swaps out LegalKEY for FileTrail](#)

**ThoughtRiver** and **World Commerce & Contracting** have announced a partnership which when launched, will allow any user of the ThoughtRiver contract acceleration platform to instantly review a third-party NDA against the WorldCC contracting principles.

This partnership between WorldCC and ThoughtRiver has involved the ThoughtRiver team ingesting the WorldCC contracting principles into its AI tool and effectively treating the principles as a risk policy for the AI to review against. ThoughtRiver has also used WorldCC's own standard NDA as the template agreement for any clause suggestions that the tool offers back to users during the review.

Paula Doyle, chief legal innovation officer for WorldCC said, "WorldCC is delighted to work with ThoughtRiver on this pilot which effectively productises our contracting principles and brings them to life. Since inception, the principles have been a regular go to for many of our members focused on a more balanced starting point for negotiations. ThoughtRiver's tool takes this several steps forward and allows its customers to automatically leverage the principles in drafted form. We are very excited about this new partnership and look forward to embedding our principles deeper into the ThoughtRiver tool for the review of multiple contract forms."

The next phase of the partnership is to expand the use cases beyond NDAs into broader commercial agreements with work on services agreements and 'as a service' agreements already started by the legal content team at ThoughtRiver to align to the WorldCC principles.



Bournemouth-based, full service commercial law firm, **Steele Raymond**, has selected [Ascertus Limited](#) to help the firm adopt best practice document and email management, with the implementation and support of [iManage Work](#) in the cloud.

This implementation is said to be core to Steele Raymond's IT strategy as the firm looks to future-proof its infrastructure and deliver the best possible legal service to achieve its ambitious business growth goals. Once deployed, iManage Work will be the central hub and "go to" application for all client matters as well as internal firm-related information, facilitating a paper-light, digital and hybrid working environment.

Lee Taylor, business development director at Steele Raymond, said: "We work with some highly recognised brands in business and typically compete and pitch for work against other significant regional and national firms. So, to maintain our competitiveness, we want to provide a work environment that attracts the best talent, and is conducive to high quality service delivery. The right technology infrastructure is core to this, with best practice information management in the cloud being among the most important capabilities. It will support hybrid working, and facilitate a digital and paper light environment, transforming our way of working."



CTS has been selected by family law firm, Woolley & Co, to provide a hybrid cloud platform.

Woolley & Co, Solicitors operates from 23 locations around the country providing specialist legal advice on divorce, separation, and family law. As well as dealing with divorce and family law cases in the UK, their lawyers handle divorce for British expats living around the world.

When the firm went to market, they were looking for a dedicated partner whose solutions and service delivery was specifically shaped for law.

Michelle Webley, Woolley & Co's managing director, said: "As the contract with our previous managed service provider neared its end, we recognised the importance of building a partnership with a legal sector specialist. CTS' 14 years of experience working with law firms, their comprehensive understanding of our chosen applications, and close relationships with leading legal technology providers, were all very appealing qualities to us during the selection process".



In its fourth acquisition in less than 12 months, Onit has extended its reach into Europe with the acquisition of Frankfurt-based corporate legal spend and matter management provider BusyLamp.

Onit, which is based in Houston, said that the deal means it is now one of the largest global enterprise legal management conglomerates, with more than 600 implementations completed worldwide by Onit and its subsidiaries SimpleLegal and now BusyLamp. Onit announced its acquisition of legal spend analytics, benchmarking and market intelligence company Bodhala on September 1. In late 2020 it acquired 'AI as a service' startup McCarthyFinch and then document automation provider AXDRAFT 30 days later. Onit also acquired SimpleLegal, a modern legal operations software provider, in May 2019.

"The acquisition of BusyLamp fulfills several strategic priorities for Onit. First, it will be a valuable contributor to our continued rapid growth. Second, it embeds Onit and its solutions even more deeply into Europe. With the BusyLamp team, we have some of the brightest minds in legal operations and technology on the ground in Germany, the UK and throughout the continent – experts who understand European customers' unique needs. We're now one of the largest ELM software providers in the world, with software that fits any corporate legal department's requirements regardless of size or location," said Eric M. Elfman, CEO and co-founder of Onit.



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# North and South America

Am Law 200-ranked law firm **Ice Miller** has successfully implemented the **NetDocuments** native cloud platform, replacing its existing, aging, client-server system. According to our [US Top 200](#), Ice Miller was an OpenText customer.

Ice Miller, which began its search for a new document and email management technology several months prior to the pandemic, was already set on a cloud system. "As a firm, we embraced the idea of moving to the cloud. We know that the cloud is more secure, not less secure, than what we can deliver internally, and that a mission critical system like document management belongs in the cloud," stated Steve Johnson, Ice Miller's director of IT applications.

The firm's document management system (DMS) review and selection process were extensive and included more than 65 people within the firm, ranging from attorneys to support staff and partners. Johnson added: "Document management was truly the software that required more feedback and buy-in from the firm than anything else we were going to do. We understood how vital user buy-in, and technology adoption are, especially with a new DMS."

Ice Miller worked with **Kraft Kennedy** on the roll out. You can read the release in full here: <https://www.netdocuments.com/press-releases/ice-miller-increases-productivity-and-efficiency-with-netdocuments> ...

And **Cariola Díez Pérez-Cotapos**, one of Chile's leading full-service law firms, has also selected [NetDocuments](#).

"At Cariola Díez Pérez-Cotapos we focus on constantly innovating and that is why we are so thrilled to announce that we have successfully completed our migration to NetDocuments," said partner Juan Pablo Matus. "This transformation takes us to another level, beyond our expectations, and will fully prepare us to lead future challenges."

The firm will also partner with Alfredo Reátegui and Lima-based Pronet S.A.C. to help implement NetDocuments across the firm.



A professional broadcast microphone, likely a Shure SM7B, is mounted on a boom arm and suspended in a shock mount. The microphone is black with a silver grille and a black foam windscreen. It is positioned in front of a blurred background that appears to be a studio or office environment. The text "Law Firm News" is overlaid on the microphone in a white serif font.

# Law Firm News



# HSF launches Neota-based legal privilege app

**Herbert Smith Freehills** has developed a new web-based app to help in-house counsel quickly navigate the complexities in determining which documents are likely to be privileged, or not.

The 'English Law Legal Privilege' web app, which has been designed and built entirely in-house using Neota Logic's platform, allows clients to quickly access the information they need both on their mobile phones and via their desktops.

The tool guides users through a short series of questions and then uses the answers to analyse whether a document is likely to be covered by legal advice privilege and/or litigation privilege under English law.

Notes providing guidance and interpretation of relevant case law are accessible directly from the question screens. Once all the necessary questions have been answered, an on-screen report provides a summary of the answers given and the likely privilege status of the document.

The app was developed by Herbert Smith Freehills partner Alexander Oddy; professional support lawyer Maura McIntosh; senior legal automation specialist Bilal Syed; and senior associate Andrew Wells, with support from the firm's legal operations and innovation teams.

Oddy said: "This is an exciting example of digital transformation of our business in practice. We've built this app entirely in house on a no-code platform in a matter of weeks through Practice Group, Innovation and Legal Ops collaboration. I think it will be a real help for busy in house lawyers."

To find out more, [click here](#).

# Wedlake Bell goes with BigHand Document Creation

**Wedlake Bell** has published a case study with **BigHand** detailing the templating automation work they have done with BigHand Document Creation.

David Hymers, head of IT, Wedlake Bell, said: "We were previously using another system for managing our templates. They were automated to a fashion, but there were issues around the automation, plus the speed and ease of use, particularly with regard to the creation of engagement letters."

Sandra Pawley, IT Business Engagement Specialist at Wedlake Bell took the lead on the implementation, working with the firm's users and BigHand consultants to understand existing processes and how these could be improved and automated with the new Document Creation platform. She said: "We identified that our users had to go to multiple different places – for example a page on the company intranet where everyone's charge rate was listed - to manually create the engagement letter. We had the idea of building that into the automation, which BigHand was easily customisable to do, so now you can type a fee earner's name into the template and it will automatically

pull in their rate from our practice management system. We also enhanced individual and specific ways of working, such as how footers might be populated. BigHand was extremely responsive and easy to work with on all aspects of the implementation."

You can read that case study in full here: <https://www.bighand.com/en-gb/resources/case-studies/wedlake-bell-adds-automation-and-sophistication-with-bighand-document-creation/>

## Ashurst unveils 'newlaw' career path

And global law firm **Ashurst** has announced the launch of a new career development framework specific to its 'new law division' Ashurst Advance to help the next generation of legal professionals develop their careers.

The framework sets out clearly the core skills, knowledge and behaviours required for the full range of Ashurst Advance roles.

Mike Polson, head of Ashurst Advance Delivery, commented: "At Ashurst, we believe one of the key drivers of our success is our people. We are committed to investing in their personal growth and supporting each other to be at our best. The aim of this new careers framework is to provide a better-defined pathway built around clear role expectations and the stages within a long term career in NewLaw. It will remain fluid and we can adapt it as new roles inevitably emerge within Ashurst Advance, but we wanted to ensure that everyone at Ashurst has the opportunity to explore and clarify development areas that support people to hone their craft, increase their impact, and develop their career."



# #TalkingTech Webinars

# Join Us For The Next TalkingTech Webinar with



## DMS For Teams

In this live and interactive webinar, we will be speaking with senior Epona consultant Keith Valley and product manager of DMSforLegal, Marcel Lang, about how you can live entirely in Microsoft Teams using Epona's newly-launched solution, DMSforTeams.

We will be discussing:

- The shift among law firms to Microsoft 365 and the cloud;
- Is SharePoint really up to the task as a biglaw DMS?;
- The money conversation – what is it that iManage and NetDocuments give you over and above SharePoint and what do those extras in effect cost?
- TeamsforDMS – a big focus of our conversation will be Teams and Epona's brand new product, DMSforTeams. You can't live in Teams and search for emails, but you can in TeamsForDMS. Marcel will give us a demo of TeamsForDMS and is happy to answer all your questions live;
- How Microsoft is working with Epona and the MS integrations.

We can't wait to see you there!



**Marcel Lang**  
President @ Epona



**Keith Valley**  
Vice President Senior Consultant @  
Epona

**Taking Place Thursday 30th September 2021**  
**11:30 EST/ 16:30 BST**

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FREE PLACE NOW**

# Join Us For The Next TalkingTech Webinar with

## ClearPeople

## Leveraging Microsoft 365 and Teams as an end-to-end collaboration platform

In this live webinar we will be speaking with ClearPeople co-founder and director Gabriel Karawani; Gowling WLG's IT director Shane Scott; and Nick Hedderman, the director of Microsoft's modern work and security business group, which advises on a portfolio of products including Microsoft Office 365 and Teams. ClearPeople help their customers with external collaboration and the creation of client workspaces, leveraging Microsoft technologies they already have in place.

Our discussion will be guided in large part by you and we hope that you will come armed with plenty of questions, but topics will include:

- Developing a successful hybrid work strategy, including leveraging Microsoft Teams as a platform for hybrid work. You can watch Nick's interview ahead of the webinar here: [Developing a successful hybrid work strategy with Nick Hedderman of Microsoft – YouTube](#);
- Managing the sprawl of data and Teams sites;



**Gabriel Karawani**  
Co-founder @ ClearPeople



**Shane Scott**  
IT Director @ Gowlings



- How ClearPeople's digital workspace Atlas helps you to overcome the gaps when it comes to external collaboration and document sharing;
- Is end-to-end collaboration possible using Microsoft 365 and Teams?;
- Is the legal sector getting the best out of its Microsoft investment?

Gowling WLG is up and running on Atlas, and Shane will be discussing and taking questions on his experiences to date.

This webinar will be informal and give you plenty of opportunity to interact with Nick, Shane, and the ClearPeople team.

**Nick Hedderman**  
**Director, Modern Work & Security**  
**Business Group**  
**@ Microsoft**

**Taking Place Thursday 7th October 2021**  
**11:30 EST/ 16:30 BST**

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A close-up photograph of a person's face, with only their eyes and forehead visible, looking directly at the camera. In the foreground, a fan of US dollar bills is held by two hands with metallic, shimmering nail polish. The bills are fanned out, showing various denominations including \$20 and \$100. The text "Acquisitions And Investment" is overlaid in a white serif font on a semi-transparent dark rectangular background in the center of the image.

# Acquisitions And Investment

# North America

**Onit** has acquired New York-headquartered data analytics and legal spend management company **Bodhala**.

Bodhala applies machine learning and AI to help companies source outside counsel at competitive and market-driven rates.

"A decade ago, Onit reinvented enterprise legal management by showing how workflow and process automation could drive useful and easily adopted best practices. Today, we occupy the forefront of business process automation, AI and legal business intelligence. Our vision for the next wave of business transformation has legal departments running their operations based on actionable data," said Eric M. Elfman, CEO and co-founder of Onit. "The acquisition of Bodhala, combined with our enterprise legal management and AI-enabled technology platforms, gives our customers the power to exponentially multiply the savings and value associated with their legal spend."

Bodhala will operate as an independent subsidiary of Onit. The company represents the third acquisition for Onit in less than a year. In November 2020, Onit acquired legal AI innovator McCarthyFinch and then document automation leader AXDRAFT 30 days later. Onit also acquired SimpleLegal, a modern legal operations software provider, in May 2019.

Lawyaw focuses on digitizing entire workflows from information gathering to document assembly, e-signatures, and more in an easy-to-use, cloud-based interface that simplifies document generation for law firms whether they're in-office or remote.

This announcement comes weeks after Clio's announcement and acquisition of CalendarRules, which helps law firms manage their court deadlines specific to jurisdictions in all 50 states.



**Veritext acquires Reportex.** Deposition and litigation support provider [Veritext Legal Solutions](#) has acquired **Reportex** and its family of brands in British Columbia, Canada. With this latest acquisition, Veritext says it will offer innovative and advanced litigation solutions across North America.

As part of the acquisition of Reportex in Vancouver, Veritext also acquired United Reporting in Vancouver and Kamloops Reporting Services in Kamloops. Both companies, along with All-Star in New Westminster and Island Reporting in Victoria (which were recently acquired by Reportex), will be integrated into the Veritext family as part of Reportex, making up the British Columbia arm of Veritext.

"By partnering with Reportex we are able to offer unparalleled legal solutions across Canada," states Nancy Josephs, CEO of Veritext. "Because of this acquisition, our clients will have access to the industry's most cutting-edge legal services, including a supportive and integrated network of court reporting professionals and legal technology solutions across North America. We look forward to what the future will bring."

For more information on Veritext go to [www.veritext.com](http://www.veritext.com).



**Frontline Managed Services** has acquired Nashville-headquartered legal IT consultants **Logicforce**, bringing the organization to more than 750 employees.

Logicforce CEO Gulam Zade and CFO & COO Bret Babcock will join the Frontline management team. The acquisition also brings Logicforce's proprietary Synthesis E-IT Secure (SEITS) service – an assessment of law firm technology and business goals that results in an actionable blueprint for increased profitability – to the Frontline platform.

"As we continue to deliver on our promise to stay out in front for our 800 plus clients in the legal market, we are excited to once again expand our presence with the integration of another forward-looking leader in legal tech as Logicforce," said Seelin Naidoo, CEO of Frontline. "We remain committed to our strategic growth plan to always add scale and innovation for our clients, and the team of experts and services we are welcoming from Logicforce will provide a tremendous value-add for the law firm teams we serve."



**Clio** has acquired **Lawyaw**, a San Francisco-based company developing innovative digital workflows for legal documents. As part of the acquisition, Lawyaw's team, along with Tucker Cottingham, CEO and co-founder of Lawyaw, will join Clio to continue their work connecting and streamlining information gathering, automated document generation, and e-signatures for legal professionals.

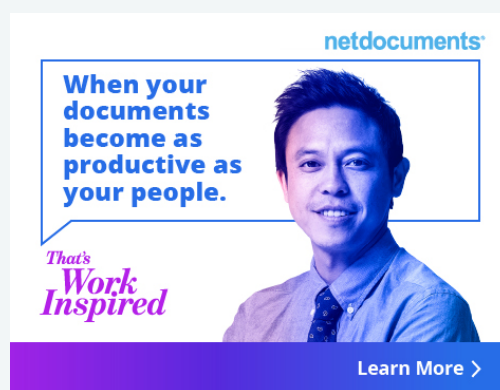
"We have been so impressed with the Lawyaw team and their dedication and innovation to streamlining the creation of important court forms and legal documents," said Jack Newton, CEO and founder of Clio. "Acquiring their business and bringing their team in-house better enables us to support further



**Hanzo raises \$10.5m.** eDiscovery and compliance provider **Hanzo** last week announced a substantial debt financing facility from **Recurring Capital Partners** totalling \$10.5 million. eDiscovery and compliance provider Hanzo last week announced a substantial investment from Recurring Capital Partners totalling \$10.5 million.

"Remote working and enterprise collaboration applications that power many of the increasingly digital-first workplaces of today, have fundamentally changed the way we create, transmit, retain, and interact with information," said Hanzo's CEO, Julien Masanès. "Legal, compliance, HR, and security teams face significant challenges searching, analyzing, and identifying the vast volumes of information within these complex data sources, leading to enterprises collectively spending hundreds of millions managing discovery and compliance processes. Hanzo's mission is to simplify the complexity of managing this data so that companies can manage their risk affordably."

You can read that story here: [ICYMI: Hanzo raises \\$10.5m– Legal IT Insider](#)



development against the critical work they are doing for the industry."

Founded in 2016 by Tucker

Cottingham, Lawyaw and Clio have had a productive working relationship for several years, including a long-standing data integration. Lawyaw was also the first document automation company to offer an app inside of Clio's app store.

## UK and EMEA

**Definely raises \$2.2m seed funding.** Contract drafting and review startup **Definely** in September announced a £2.2m Seed+ funding, co-led by **Microsoft's** venture fund, M12, and CRE Venture Capital. The latest funding follows a Seed round raised in September 2020, bringing Definely's total investment to date to £3.4m. Definely was previously just called 'Define' and it came to our attention partly through being selected by Allen & Overy for its startup incubator Fuse. Its customers now include some of the world's largest law firms, financial institutions and multinational corporations including Deloitte, Allen & Overy and Dentons. Ben Brooks, an associate at Allen & Overy said: "Before Definely I would have to have multiple copies of the same contract open on my screens or a printed copy in front of me. Definely allows you to work logically through the contract whilst viewing and editing other areas, never having to navigate away from the provision you are considering. I would not want to draft a contract without using Definely."

You can read that story in full here:

[Microsoft's M12 leads £2.2m Seed+ investment in legal tech startup Definely – Legal IT Insider](#)



# Comments



# Looking Back at My Time as a GC — How I Learned to Stop Worrying and Love Legal Disruption

By Jerry Levine, Chief Evangelist and General Counsel at ContractPodAi

“Plan for what is difficult while it is easy, do what is great while it is small.” Writer, strategist, and philosopher Sun Tzu certainly got human nature right in his ancient Chinese treatise, *Art of War*.

When I was a *bengoshi no tamago* (that’s Japanese for “lawyer egg” — and just a cute way to say “law student”), I took the opportunity to evaluate my life, discover leadership, and chart a new course for myself. Truth be told, like many law students, I wasn’t sure why I went to law school at first — other than it seemed to be a good choice for a kid from New Jersey. One of the more interesting areas I studied, though, was the history of Asian legal systems. I absorbed Confucian concepts and even learned how Sun Tzu’s *Art of War* inspired modern military and civilian law, not to mention day-to-day boardroom antics. Actually, I still go back and read *The Art of War* to this day (Perhaps not cover to cover!). It simply answers questions that can be applied to just about any business scenario: How do you come up with solutions to issues exactly? How do you make ‘a plan of attack’ to achieve true success? When you endeavor to accomplish anything, how do you build a sturdy team before fully executing?

I’ve learned a thing or two during my time as a general counsel (GC) and technologist, too. I’ve learned how to make sound strategic decisions, identifying counterparties’ needs and weaknesses so that I can adapt accordingly. That’s because as a good legal leader, I’ve had to remain bold, wily — and, yes, even ‘artful’ — in my ways and dealings. At the same time, I’ve had to remain sincere and humane, setting the workplace tone, pace, and expectations with some modicum of balance.

Here are a few other things I’ve learned throughout my career and professional interactions.

## The Practice of ‘Awesome Law’

I’ve had quite an interesting career path, to say the least — and especially compared to other GCs. But I started out in a very traditional way like most other legal professionals.

With my eyes set on becoming a litigator, I first joined a medium-sized firm with lots of high-profile clients in the pharmaceutical, energy, and media industries. I wasn’t happy, though. I strongly preferred working on technology projects at the firm over going to court, and always tried to pick up corporate law assignments instead of engaging in motion practice. As a result, I very aggressively multi-tasked, starting my own law firm focused on technology start-ups, advising sports teams on privacy law, dealing with eDiscovery and computer forensics — and, basically, working all of the time. Later, I was hired as a GC and corporate secretary by a technology company — its very first. The organization wanted someone who not only understood the law, but also emerging technology. In January 2021, I then joined ContractPodAi as general counsel and chief (technology) evangelist. I now advise customers, helping them transition toward having more digitally driven legal operations.

Let’s face it, as legal executives, we need to spend less time in an endless sea of administrative tasks. We need to become what I like to call “awesome lawyers” — attorneys who serve as strategic leads and transformative figures within organizations. In fact, I’ve always referred to my own practice as “awesome law,” in the truest sense of the term. I have focused my energy on deploying strategic solutions and bringing the latest technology into legal departments and companies.

## Disruption Pays Dividends

In the various roles mentioned above, I have seen firsthand how disruption benefits corporate legal departments — how using artificial intelligence-based systems help legal departments work more efficiently and effectively. But although other industries have modernized through AI and automation, the legal industry has been stuck on the wrong side of the proverbial technology gap.

It’s time for legal’s approach to technology to become disrupted — that its digital evolution was sped up. Legal teams, for starters, need AI to simplify and streamline their most standard, ho-hum, and repeatable tasks.

The good news is the majority of lawyers are now ready for automation, many surveys have suggested. Here’s the rub, however: corporate legal teams just aren’t set up for success at the moment. Even though in-house attorneys know the value of having the time to tackle higher-level, strategic work, they receive little support in the form of legal tech investment. Nevertheless, with in-house legal budgets increasing and expectations of legal teams growing, there’s a significant opportunity for companies to invest in something like AI moving forward. This will facilitate legal digital transformations, which will have outsized, strategic value.

## Fine Line Between Positive and Negative Disruption

Without question, though, disrupting the legal industry can be equally positive and, let’s just say, not so positive.

Naturally, positive disruption makes legal professionals’ lives easier. It vastly improves the way in which they operate — and helps them find brand-new ways of working. It helps them to achieve far better results in a much shorter timeframe. Disruptive technology, more specifically, is about supporting people and functions, not hurting them.

Now, here’s the caveat: something like AI is incredibly disruptive, but it can be a source of negative disruption when implemented without concern for the people using the technology (or humanity, itself!) That means disruption for the sake of being disruptive. Alternatively, lawyers would do well to ask if they’re truly trying to improve people’s lives and, if they are, whether or not their technology is positively impacting the people using it. Basically, they must think deeply about the human aspects of the legal work they’re doing, not just legal tech exclusively.



## Three Pieces of Legal Advice

For in-house attorneys, I have three pieces of parting advice. Firstly, keep in mind that lawyers program relationships. It's their role to shape the relationship between parties. Contracts and other legal documents make for really good legal code, fortunately enough. With agreements, for instance, lawyers can define rules and setting guidelines, and build a system for how parties will work together. In other words, they write code for the many ways in which humans interact with one another (This is a concept for technology developers to keep in mind, too!).

Secondly, putting in tremendous effort in legal departments is obviously important. However, attorneys need to get results from that maximum effort. If they continue doing the same thing with no result, is that not the very definition of insanity? Ask instead what result needs to be achieved and what efforts are needed to get them.

Lastly, but not least importantly, it's crucial to realize that there are no "problems" per se. There are only "issues." My mother would share this old adage when I was younger, and to this day, I hardly ever use the word, "problem." It only makes a given challenge appear all the more unsolvable. When framed precisely the right way, then, just about any obstacle will have one clear solution or another.

Ultimately, we lawyers are operating in a drastically different world today. In fact, we're in the middle of a period that is more difficult than ever anticipated. We need to ask ourselves tough questions like how do we adopt the legal tech that is available currently, and use it in a way that not only benefits legal teams and companies, but also humanity. Also, how do we go about freeing ourselves up — to do what we do best as legal practitioners?

At the end of the day, we need to create a more positive future for our profession. We need to determine the best path possible — for the most people imaginable — using advanced legal technology and prioritizing positive disruption.

But remember, too, what Sun Tzu also wrote in *The Art of War*: "Never venture, never win."

*Jerry Levine is the Chief Evangelist and General Counsel at ContractPodAi. He uses his experience to support ContractPodAi's continued product and delivery innovation in legal technology and digital transformation.*



## The Benefits of Knowledge Management for Legal IT Leaders

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

How can knowledge management benefit Legal IT leaders? And how could a mutual KM/IT partnership support IT leadership with their work? In this article, Dave Wilson, founder and managing director of Tiger Eye, explores the core benefits of knowledge sharing, curation and centralization for today's IT leaders.

For effective knowledge capture and management, knowledge leaders need IT buy-in, technical assistance – and often IT resources. To connect end users with the content they need when they need it, Knowledge Teams need IT support as well as IT tools to make these connections happen at the right time, with secure processes and solutions.

But how can knowledge management benefit legal IT leaders? And how could a mutual KM/IT partnership support IT leadership with their work? In this article, we explore the core benefits of knowledge sharing, curation and centralization for today's IT leaders.

## Centralization

In the world of hybrid working, many legal IT leaders have focused their efforts on providing reliable, secure access to systems and networks for all staff, wherever they may be working. Throughout the pandemic, legal IT leaders have worked tirelessly to connect staff with access to matter information, and secure methods of collaboration. Whether focusing on shared drives, Cloud DMS or intranets, effective access is critical to the everyday successes of fee-earners and support staff, with search access issues often leading to delays with the discovery of information, experts – and knowledge. Ensuring that key documentation is available and accessible is a poignant example of the meeting of minds between KM and IT, with KM leaders also focused on improving efficiency and reducing risk through interconnectivity. Yet, this shared emphasis on smooth business operations is just one example of the united practice – and vision – of these two critical business services departments.

However, perhaps unlike some legal IT leaders, KM teams have long been focused on centralization. Moving beyond accessibility alone, this practice aims to not just connect staff with resources but bring content together, minimising the number of clicks needed to access resources – and radically reducing the number of siloes available for knowledge to become trapped within. In many ways, knowledge leaders are working to simplify what has become a complex network of information and collaborative systems. For this reason, many legal knowledge leaders have invested in – or are looking to adopt – knowledge management systems (KMS), designed to bring together the firm's critical know-how resources, making it easy for fee-earners, PSLs and all staff to find and reuse expertise across the business. An effective KM system will not only act as a store, but also drive efficient knowledge workflows, steering the process for knowledge capture, curation, and management. This stops fee-earners wasting their valuable time 'reinventing the wheel' and stops knowledge staff focusing on low-value tasks such as chasing knowledge contributors for metadata, comments and drafting notes. But, more than this, the centralization work of the Knowledge Team can also reduce pressure on internal IT, for example by negating the need to answer repetitive queries related to search, document access, and 'who do I talk to about this' questions. Where firms have adopted consolidated, trusted KM systems, Knowledge Leaders can also support IT by providing concentrated, effective training for fee-earners for one trusted go-to system, avoiding issues of misuse and human error that commonly arise where multiple systems are in place. In essence, knowledge management's focus on centralisation attempts to alleviate issues of control, communication, access and ultimately, confusion.

## Compliance

As the network swells and points of entry increase, we also have an increased risk of outside threats attacking valuable data and potentially exposing the business. In the hybrid working environment, knowledge sharing is no longer office bound, and it can easily slip its way onto our personal devices. This is an issue for legal IT in terms of compliance, with audit trails often difficult to track in a complex, highly varied network of channels and devices. With fee-earners potentially bringing content into the firm's domain through personal email accounts and downloads from personal devices, the ever-expanding workplace poses a risk to legal IT leaders. Therefore, the work of Knowledge Leaders to adopt secure, reliable knowledge sharing solutions can often reduce compliance risks from an IT perspective simply by reducing the number of knowledge sharing solutions in use.

Similarly, knowledge leaders' focus on documentation can also benefit legal IT teams from a compliance perspective. The creation and collation of precedents, templates, forms, best practice and more into a single trusted source of truth ensures consistency, efficiency, standardised approaches to work – and reduces risk. Knowledge teams review documentation not only for regularity and usability, but also for security purposes, ensuring all client confidential data is removed. Furthermore, without precedent collections, firms could risk fee-earners simply copying, editing and reusing existing documents for other cases, with metadata, client names, contact information and key data also copied – and sent to the wrong client. With integrated KM solutions, both IT and knowledge leaders alike can build on the security of existing systems such as the DMS to support firmwide security and accountability with best-of-breed protection, minimising the risk of threat by ensuring all data is systematised, trackable, auditable and secured.

## Innovation

KM is dedicated to enabling end users to focus on higher level knowledge work rather than low level administrative tasks. So, it is no wonder that in larger firms, KM and Innovation are so closely related that KM leaders adopt a dual role, incorporating innovation into their practice. Focused on improved problem solving, better and faster decision making, KM is a natural fit for supporting IT's innovative projects.

In many ways, KM leaders market innovation to the firm – increasing awareness, providing communications and working towards increased engagement with innovative processes, technologies and thinking. KM encourages reflective thought and innovative mindsets. Almost every firm will find that some of its staff – whether fee-earning or administrative – are already using some of their time to focus on improving efficiency and 'working smarter', however it is common for this to be done in isolation, with staff focusing on improving their own workflows rather than supporting team productivity. Knowledge sharing cultures can support these problem-solvers by giving them the confidence to share their ideas and innovations with the wider firm, supporting organisational learning rather than siloed productivity gains. Encouraging staff to take ownership of their own workflow improvements can also be of real benefit to legal IT leaders who can work in partnership with end users to find – and invest in – appropriate solutions for specific business needs. Such problem-solving individuals can then become ambassadors for new adaptations and even adoptions acting as trusted internal promoters for new launches.

Knowledge sharing cultures drive resourceful collaboration, uniting unique views, diverse opinions and varied experiences. However, more than just encouraging collaborative perspectives, KM's work towards centralisation arms staff with a unified store of critical knowledge which can be used as a snapshot of the firm's history, processes and ideas, grounding innovative thinking in the firm's collective experience. With the firm as a whole armed with this valuable resource collection, teams can be easily brought together for effective process review, workflow analysis and problem-solving, successfully making decisions based on collective knowledge and expertise – supported by KM's 'bigger picture' mindset.

## Conclusion

In summary, an effective relationship between legal IT and KM leaders can have a range of benefits for both parties – and the firm as a whole. With a united focus on efficiency and productivity, it is no surprise that the valued work of KM teams can support legal IT leaders to ensure processes and workflows are not only streamlined but optimised.

Yet, more than this, knowledge management is built on the principle that as organisations, teams and individuals, we are on a continuous journey of learning. Connecting knowledge, encouraging communications and building knowledge sharing cultures, knowledge leaders work to ensure that the firm has a competitive edge which is both sustainable and agile for years to come.

***About the Author: Dave Wilson has many years of experience within the legal technology industry, spending most of his career focusing on work product management. In 2005, Dave worked to forge partnerships with***

*key industry players (including iManage, Litera, DocsCorp and more) to build Tiger Eye – an organisation dedicated to helping professional services organisations to enhance the way they work with their documents, emails and knowledge.*

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

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