

legal insider

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▶ Bird & Bird to roll out Salesforce-based CRM

Bird & Bird is moving its client relationship management system into the cloud with OnePlace, a client intelligence solution based on the Salesforce platform, as it also takes steps to become more agile, including making a final decision on whether to roll out Surface Pros to fee-earners.

The top 20 law firm, led by IT director Karen Jacks, selected OnePlace after an extensive pitch process and the firm is just beginning to migrate across to the new platform.

OnePlace, which has offices in Sydney and Los Angeles, integrates with firms' internal systems including exchange, time and billing, event management tools, human resources systems and fee-earners own calendars.

It gives users a centralised view of clients and contacts, including forthcoming events, meetings, publications, matters and tenders.

OnePlace uses a series of native apps for IOS, Android, BlackBerry or Windows and users can look up contact details and make notes on their phone or tablet. OnePlace Proposal Builder enables them to build and export team profiles with information populated from the time and billing system, as well as draft and track tenders.

However, the big selling point for Bird & Bird was that OnePlace customers have access to the Salesforce community and AppExchange, where they can select add-on apps. Integrations include Intapp TimeBuilder, NetDocuments and email marketing tools Concep and MailChimp.

Jacks said: "We did a proof of concept in our Brussels office last year and really liked the product. It's the community and AppExchange we like."

The firm, which has entirely integrated technology throughout its 28 offices across Europe, Asia and the Middle East, is staggering the transfer of its data to the new solution, starting with mailing lists and events. "Right now it's about getting onto the platform and getting the data cleaned up and embedded. It will be a long programme," said Jacks.

The move comes as Jacks and her team help pave the way for Bird & Bird's move to new, more agile UK premises at 12-14 Fetter Lane later this year, including installing Cisco Jabber, which allows fee-earners to access presence, instant messaging, video, voice messaging, desktop sharing and conferencing from anywhere.

It is currently being rolled out in the UK with a view to rolling it out across Asia Pacific and the rest of Europe after that. The 1032-lawyer firm recently introduced a new policy to encourage staff – male or female – to work more flexibly.

Jacks said: "You leave the office but you don't leave the job – you just flex your job around what needs to be done."

Bird & Bird's new premises will see the firm ditch the two-person office in favour of a more accessible two-person pod. This has necessitated more mobility in telephony and more break out rooms.

BIRD & BIRD CONTINUES ON P.3

▶ Taylor Wessing to move data into Azure

Taylor Wessing has made the decision to move 80-90% of its data into the cloud with Microsoft Azure over the next two years as the top 20 UK firm, led by chief information officer Kevin Harris, also prepares to automate all of its legal precedents with ContractExpress.

The firm began discussing its data centre options at board level last October, prompted by an ageing secondary data centre.

The three key considerations focussed on by the firm, which also set up a project board to help lead the decision making process, were security; the ability to guarantee where the data is held; and client perception and buy-in.

TAYLOR WESSING TO MOVE DATA CONTINUES ON P.4



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► Cuatrecasas brings in R&D budget and eyes startup market

Cuatrecasas, Gonçalves Pereira has approved an ongoing research and development budget to explore new and innovative technology as the Iberian giant also analyses the legal technology startup ecosystem with a view to deciding on whether to begin investing in startups.

The R&D budget – on which the firm specifically does not expect to see a return – will be used to experiment with new technology such as artificial intelligence solutions, natural language processing and semantic technology. The firm, led by chief information officer Francesc Muñoz, will look at technology that has no proof of concept within the legal sector.

Cuatrecasas has hired one new full-time employee to work as part of a team within the IT department that will monitor and test new technology without needing to get sign off on each occasion.

Muñoz said: “There is such a high momentum in the legal sector and the amount of legal tech is growing so fast that to monitor it is challenging. The new guys are coming in with very nice, clever solutions to help business become faster and cheaper so a team is going to monitor and be able to test in a short period of time new things, without having to go through back office. We need to be agile.”

Muñoz has also been monitoring the legal technology startup market, including in Silicon Valley and he told Legal IT Insider: “Until now our business has not been to invest but in the future it may be interesting for us to invest in startups – right now we don’t know.”

The move comes as the circa 950-lawyer firm rolls out NetDocuments as part of its ‘cloud first’ strategy, that has seen it move its development and test platform onto Microsoft Azure. The firm, which was one of the first to roll out Rekoop’s cloud-based time recording software and uses Thomson Reuters Elite’s Salesforce-based CRM system ContactNet, has yet to move its email system into the cloud as it is waiting for an additional layer of security that Microsoft has said it will deliver in the short term.

Muñoz said: “Law firms are not about upgrading systems. If we rely on an agile solution, we can concentrate on things like helping lawyers to manage new systems properly and understanding how they work so we can provide tools like AI. We are working on having a much deeper intimacy with our lawyers.”

► Bird & Bird to roll out Salesforce-based CRM

CONTINUED FROM FRONT COVER

Jacks said: “We’re getting people to move around and make it easier for people to work together – it’s a better use of floor space.

“We’re not going completely agile – staff will still have a ‘home desk.’ But it will be easier to get up and sit down somewhere else.”

She adds: “The thing we have had to overcome is that spending time on a speakerphone won’t work in shared space. I can’t have whole floor disturbed and listening in but then I can’t tell the client I need to ring off to go to a breakout room. So we’re choosing WiFi and headsets cleverly so you can move while on the phone and patch people in.”

This drive towards agility means that Bird & Bird is also currently deciding on whether to roll out Surface Pros to its fee-earners, where it is in the final stages of making a decision.

“Our 11th floor will be entirely social space – there’s a café, huddle booth seating, and there’s been a big investment in how it will look – making it a nice space to socialise in and eat in or have a coffee chat. If we want people to embrace it need to give them the technology to do that,” Jacks said.

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► DWF swaps out TRE 3E modules

DWF is swapping out Thomson Reuters Elite's financial reporting and time capture solutions with QlikView and Intapp Time respectively, as the firm moves to limit the amount of direct interaction partners have with TRE's practice management system 3E.

The top 25 UK law firm, which was one of TRE's first 3E clients and uses an old version of the system, needed a reporting tool that augments many data sources and is easy to use. While many newer clients of 3E use Elite Workspace, which was launched in 2014, that integration platform is not compatible with the old version of 3E.

QlikView is a business intelligence platform that provides insight and analytics from across all parts of the business, which are delivered as accessible dashboards.

For time capture, DWF wanted a system that is capable of active, passive and mobile time recording, which it couldn't achieve without a major upgrade to 3E, and is midway through rolling out Intapp Time. Intapp Time was chosen by a small pilot group of interested lawyers. The very close runner up was Rekoop, which was acquired by Intapp in January 2016.

Elsewhere, DWF is working with TRE on invoice management and billing but is driving towards email approval for invoices for some types of work.

DWF's chief technology officer Richard Hodgkinson said: "3E will be the technical, accounting tool but partners will have no direct interface with it anymore.

"We continue to strive to a balanced portfolio of products that are convenient for IT but effective for the fee earners. Doing some of the above allows the firm to keep some options open as our particular island story is evolving quickly so we may need to change quickly what we do and how we do it."

TRE said: "We are proud to count DWF as one of our very first 3E clients in the world. Most of our more recent 3E clients are choosing to implement Elite Workspace, which wasn't available at the time DWF implemented 3E and is not compatible with the version that they currently use. Workspace – which is included with 3E at no extra charge – represents the most modern, intuitive, fully mobile and open architecture interface for fee earners, including Time Capture, Timers, Proforma edit and approval, Information Management and cross-product workflow.

"We continue to support DWF as they actively explore broadening their use of 3E with additional product modules and new Elite products."

► Quote/Unquote

"We are trying to get law firms to see that you can't divorce risk and opportunity. When we talk about managing risk we don't want you to be put off using technology. Lawyers tend to be risk averse. We're trying to say use innovation to deliver better services."

...Crispin Passmore, SRA executive director for policy

► 15 years ago today...

Following a hearing at Blackfriars Crown Court on 2nd April 2001, Judge Brian Pryor QC placed a stay on proceedings to prosecute Kenneth Bagnall QC on 14 counts of theft relating to the disappearance of £560,000 from his former business New Law Publishing. The alleged thefts took place over the period 1997 to 1998, during and in the immediate aftermath of New Law's acquisition by Croner Publications. Bagnall, who founded New Law, admitted taking the money but denied dishonesty, arguing it was the repayment of capital he had put into the company and salary arrears. The proceedings also heard allegations that Bagnall, himself an ex-judge and, by the time of the court appearance, in his 70s, had spent nearly half the money on gifts for a woman "half his age, in the hope of starting a relationship with her."

The advertisement features the Phoenix logo and MatterView logo at the top. The main headline is "Empower iManage" with the iManage logo below it. A central graphic shows a hand interacting with a globe, surrounded by seven circular icons representing different iManage modules: 360° Matter Views, Integrated Financials, Matter Tasks and Deadlines, iManage Matter Documents, Integrated Matter Contact Management, Business Intelligence, and a calculator icon. The website address www.phoenixbs.com is at the bottom right.

► Taylor Wessing to move data into Azure

CONTINUED FROM FRONT COVER

Harris, who joined Taylor Wessing from KPMG in January 2015, said: "The security is better than we can provide. There is no financial investment we can make that will match Microsoft."

With regard to location, he added: "Amazon or Microsoft are used to dealing with big banks and you can now choose which data centre your data resides in. There is an element of trust but they have so much invested in this they couldn't afford a breach of trust."

Feedback from clients has been positive and so the firm now plans to put its disaster recovery back up servers into Azure in the next 18 months and transition from there.

"There will always be bits of software on site and if a client demands that their data is held on site we will have that capability," Harris says. "We will keep up to 20% of server capacity in our current data centre but expect that 80-90% will be in Azure in the next two years."

Taylor Wessing in Germany, which has notoriously strict data protection law, will remain on premises, although notably Microsoft announced last autumn that it plans to build a set of data centres in Germany to circumnavigate US surveillance.

Harris and his team, meanwhile, are talking to iManage – which in 2015 announced that it will offer a hosted document management system in Azure – about moving onto the cloud platform.

The move comes as Taylor Wessing also engages in a significant project to automate its precedents using Business Integrity's ContractExpress solution. Business Integrity was acquired by Thomson Reuters in 2015.

Until now, Taylor Wessing has used HotDocs in the finance department and Evident Legal Service Platform for self-service document creation on its website but ContractExpress will now be used universally.

The firm, which is hiring in a team of between three and five people of mixed legal and technical skill, is starting by automating the precedents of the finance and real estate teams, which it envisages will be complete by Christmas.

The longer term goal is to automate between 500-600 precedents in two-to-three years.

Over the past two years, Taylor Wessing has been working on improving its precedents, and has set up a central repository called Uno, which launched in mid-2015.

Harris said: "In the last two years we've done a lot of work to get our precedents sorted out so we have a good starting point."

All precedents, automated or not, will now be accessed through Uno to acclimatise fee-

earners and encourage a change of habits. But ultimately, Harris, who was formerly digital strategy lead at KPMG, responsible for the formation of its digital strategy, and before that COO and CIO of Deloitte Technologies, says, "the way to get everyone to use it is to switch off the other stuff."

► 2016 eDiscovery guide out now

The Allvision – Insider Guide to UK eDisclosure is now available as a FREE download

The definitive Guide to UK eDisclosure systems is now available, as Allvision and Legal IT Insider publish the 2016 edition of what has become the industry bible to the UK eDiscovery industry. The Guide remains stable at around 100 suppliers and 70 products but these figures include 13 new suppliers, balanced out by 11 who have left/been acquired, as well as two name changes. The 14MB, 440 page PDF can be downloaded FREE of charge from the Legal IT Insider via a Dropbox link [HERE](#)

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► “You know the client” – SRA’s policy head on innovation and cloud

It’s quite unfashionable to like the regulator, but there’s something about the Solicitors Regulation Authority’s plain speaking executive director for policy that makes everything seem unfashionably straight forward.

Crispin Passmore and I meet with no specific agenda but our meeting coincides with the release of the SRA’s short IT and Innovation report.

For my part, I want to hear more from Passmore about the SRA’s changing attitude to innovation but also to discuss the lack of concrete guidance available to law firms when it comes to executing their cloud strategy.

Passmore is known to be both outspoken and quotable. In a speech before he joined the SRA in October 2013, while he was strategy director for the Legal Services Board, he said: “As Blockbuster, Jessops and HMV all discovered, you can argue your business is different because you offer expertise and personal service, but no part of this market is immune to change.”

We meet at the SRA’s somewhat unofficial looking shared premises near London Bridge. It’s a modern kind of meeting and we look (fairly briefly) at the IT and Innovation Report on my iPhone 5 - Passmore because he’s gone paperless, and I because I couldn’t get my printer to work before leaving the office.

I find the report slightly challenging, and not just because it’s in miniature. It’s a mixed bag of advice that suggests firms should turn to virtual assistants and artificial intelligence within due diligence and for data mining in litigation. Equally, it advises law firms to keep their passwords secure and keep security software updated. Speaking to all needs and budgets is a perennial challenge faced by the legal regulatory and representative bodies, but I want to know, who is the report targeted at?

“Everybody,” Passmore says. “Big law firms are more likely to have an IT department and the capital to invest but innovation doesn’t have to be large scale and take lots of money or change the world. It’s about doing things differently and about the attitude behind it. Perhaps the biggest challenge in a changing world is to focus on client, client, client.”

The report is the latest effort by the SRA, led by CEO Paul Philip, to engage on innovation and the report is easier to make sense of if you think of it as part of a tasting menu than the whole meal.

In October last year, the SRA launched its SRA Innovate offering (to be formally launched at a conference on 22 March) and an extensive report on innovation and growth. Short ‘thought leadership’

reports are going to become more the norm.

“We are trying to get law firms to see that you can’t divorce risk and opportunity. When we talk about managing risk we don’t want you to put off using technology.

“Lawyers tend to be risk averse. We’re trying to say ‘use innovation to deliver better services,’” Passmore says.

In this vein, the SRA is considering creating an ‘innovation space’ where firms and individuals can bring all their new business ideas and the SRA will find a way to regulate them, in a sort of delicious, if a little crunchy melting pot of technology and regulation.

Without wishing to stereotype mainstream law firms or dismiss their (often lack of) ideas about innovation, this seems to me more likely to appeal to new market entrants.

“Lots of firms are thinking about it,” says Passmore. “Lots are investing, big and small. Sometimes the way firms are set up can be a disadvantage. They are set up to do things in a certain way whereas if you’re starting from scratch you can offer an entirely different solution.”

The innovation space coincides with the SRA this summer opening a consultation on the amendment of its highly prescriptive handbook, with the aim of cutting it to 50 pages and seeing it become more outcome focussed.

Passmore, who joined the SRA in 2013 from the Legal Services Board, where he was strategy director, said: “We will write the rules around what you need to achieve rather than the steps you need to take to achieve it. It will be more flexible so that when firms do something different they shouldn’t have to come and ask permission.”

I’m not convinced being less prescriptive will necessarily mean more helpful. One of the issues for firms in executing their various cloud strategies is that they feel the SRA is not prescriptive enough. It’s Silver Linings cloud paper is now three years’ old and gives little guidance on key, thorny issues such as the degree of client consent that should be sought.

Passmore reminds me that lawyers must also turn to guidance from the Information Commissioner, responsible for data protection enforcement. He adds: “Law firms have an obligation of confidentiality and to always act in the best interest of the client, that’s very clear. Let’s not over complicate things. If a firm decides to outsource their data, do they need consent from the client, probably not. But you know the client, you know what they want and you know what your relationship with them is. You end up with bad regulation if it’s made on one case. If the client wouldn’t want their data in the cloud, don’t do it, you mustn’t expose clients to a risk they wouldn’t want to take. But if the client doesn’t like it, they can go somewhere else. That’s how competition works.”



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► “More competitive than anyone else” – Mishcon Discover

Having begun building its own eDiscovery consultancy over the past two years led by eDisclosure manager Richard Legge, Mishcon de Reya is emulating the US market and leading the UK market by signing a three-year fixed price deal with eDiscovery provider Unified and Relativity developer kCura.

Working under the new brand Mishcon Discover, Legge together with disputes managing associate Edward Carder will be offering clients a complete package of eDiscovery services including analytics such as predictive coding, which for large cases could result in reductions of anywhere between 10% and 30% under the new arrangement.

This is a model that has been embraced in the US by firms such as Reed Smith, with its Records & E-Discovery team, and by Morgan Lewis & Bockius with eData, which also licenses Relativity. However, Mishcon is understood to be the first UK firm to enter into this kind of partnership.

The arrangement begs a number of questions, not least what happens if a client wishes to use another technology. Carder said: “In the same way as the client would receive a number of quotes, they will see the Mishcon Discover offering. We’re not making it compulsory but we are hoping that it’s an attractive proposition because our lawyers will be more used to using our version of Relativity.”

In terms of why Mishcon would commit to one provider, Carder said: “Because of our arrangement with kCura we can offer analytics at a more competitive price than anyone else in the market.”

But while passing on cost savings on analytics is a key feature of the new arrangement, Legge and Carder emphasise that they have wider, longer term ambitions.

Legge said: “There is opportunity to deploy the best in class technology and analytics without a big cost and to push disclosure to the next step. We think there will be whole bunch of emergent technology. So we should be able to offer a more intelligent discovery offering to help with early case assessment – it’s about offering a better and more tech-savvy service.

“This is something that will come to the UK and we want to embrace it. We’re now at the stage where you can really leverage the technology to get the best result for your client.”

The development follows the arrival in 2016 of chief strategy officer Nick West, who is working on a number of new initiatives.

► An interview with... Ascential’s group legal director Nilema Bhakta-Jones

One of a growing number of general counsel with a passion for innovation and an advocate for change, Nilema Bhakta-Jones is group legal director at Ascential Group, a business-to-business media company that publishes titles such as Retail Week and Health Service Journal and in February floated on the London Stock Exchange at a value of £800m.

Please describe your role at Ascential in a nutshell.

I’m group legal director. I work as a strategic business partner. I am committed to sustaining the right environment for our business to succeed and grow. I lead a multi-talented legal team and support them in their own leadership journeys.

NILEMA BHAKTA-JONES INTERVIEW CONTINUES ON P.8

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NILEMA BHAKTA-JONES INTERVIEW CONTINUED FROM P.7

What are the main challenges you face in delivering legal services to the business?

We operate at pace, and have recently completed an IPO, so creating time for 'blue sky thinking' / 'horizon scanning' can be hard. Although challenging, it is important that I keep track of evolving geopolitical and economic factors and increasing regulation in every region we operate in.

What are your key strategic priorities and goals?

My priority in the next three months is to help our business to acclimatise to the PLC world again. I am focussing on enhancing some key protocols and 'stress testing' them. A constant, overarching priority is to create a stimulating, learning and fun environment for my team.

How does technology help you in achieving these?

For my first priority, we have begun rolling out training and will roll out webinars and bespoke online learning modules to reach all employees globally shortly.

Only last year we were tested on our emergency procedures when one of our subsidiary businesses was evacuated in a matter of minutes when the Holborn fire struck in April. The fire posed a risk to adjacent properties and our Business Continuity Plan came into play immediately with limited business interruption. There was real insight gained from this emergency and we decided to replicate the lessons in other office locations to ensure we are suitably prepared.

Please give an example from your sector where technology is changing the way your brands operate.

Technology is enabling our customers to enjoy the content rich environment we create wherever and whenever they want. Our fashion trend forecasting business is curating content from around the world every day, regularly loading up terrabytes of data to its platform. By using its own patented image tagging technology it can bring catwalk photos to its customers in record time. This business predicted the advent of wearable tech.

Money 2020 is a Fintech event that is 'the' place to discover the next payment solutions. The speed of innovation in this area is breathtaking!

Elsewhere we are seeing increasing use of beacon technology, AI and predictive analytics supported by bot technology. With so much content out there, it is no longer enough to simply grant access to 'big data' we need to provide expert interpretation and predictions to allow our business customers to make smarter, better informed decisions and in turn grow their businesses.

There are exciting developments in mobile experiential technology, developments in cognitive science to improve sensory enjoyment/learning which we will see in the entertainment and education sectors (check out BETT - <http://www.bettshow.com/>).

How do law firms compare in their delivery of legal services?

A couple of years ago I was pretty gloomy about the external legal landscape but no longer! Some firms are genuinely investing and starting to 'think'

differently about the way they deliver their services and interact with their clients. Some are just 'kicking the tyres' with their pre-existing tech and data. I am encouraging every partner I meet to go to the Cannes Lions International Festival of Creativity (<https://www.canneslions.com/>). It's truly inspirational!

Is there sufficient innovation within the legal sector?

No. Admittedly I would like to see a revolution, where lawyers are setting the pace and are at the vanguard. The Magic Circle firms and Big Four Accountants are investing and deploying products with IBM Watson. Although the investment in technology is not quite matched by what we are seeing in the fintech, health (biotech) or automotive sectors - it is encouraging that the legal juggernaut is starting to move in the right direction. Innovation is a core business pillar at Ascential and working in such an environment keeps our eyes open to what can be achieved.

What should law firms be doing?

I have a long list, perhaps hire real innovative/creative thinkers and entrepreneurs (from outside the law). Look around you, there are many places firms can borrow and mimic.

Create one team that incubates and launches new ideas and co-creates with clients.

Think big, bold and radical! Where is the legal equivalent of Apple, Google or Amazon?



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► Gleneagles – thanks for all the snow

The overriding theme of Legal Leaders IT Forum in Gleneagles at the end of February was innovation and change, drawing together legal leaders and visionaries to discuss how they are delivering legal services better.

In the first session of the day BT Legal's UK commercial general counsel Chris Fowler gave an inside view of the radical changes that have transformed the telecoms industry, forcing companies to cut costs and move into adjacent markets as new, asset light, nimble competitors entered the arena. There are clear parallels with the legal industry and Fowler said: "Some of the alternative legal service providers are providing services which are IT enabled. It's sticky and they don't depend on one conversation or one relationship going wrong – those services, when they're in, effectively they create an operational dependency which needs to be managed."

He added: "I would love to see more of the people who are in this room on pitches that law firms give BT. At our last monthly management meeting among the BT legal leadership team we probably spent more time talking about technology and the challenges we are having implementing it, than any other topic. There's huge value that external firms can provide in really bringing to life practically the way in which they're using technology and then externalising that. Ultimately, it leads to more sticky propositions for law firms."

Speaking about how to drive through change, particularly technological change, Ashurst's Glasgow managing partner Mike Polson, who has overseen much of the recent innovation at the firm including a deal to automate its precedents using ContractExpress, said: "This is a great invite from Chris – if you, as an IT Director, help your firm win a bit of work, a major bit of work from one of your priority clients, just think: how does that change your relationship in the organisation? You're suddenly no longer back-of-house support, you're actually engaged in the front line, helping to bring new solutions to clients and helping to win work." The other speakers, Matthew Whalley, director of legal risk at EY, formerly at Berwin Leighton Paisner (BLP) and Claire Debney, former GC for group legal affairs and compliance at RB, both discussed the high profile transformation programmes that they have led.

Herbert Smith Freehills Belfast head Lisa McLaughlin and UK head of legal project management (LPM) Cathy Mattis spoke about the top 10 UK firm's global alternative services model and sector-leading LPM capability. Mattis, who is one of the best-known figures in the growing LPM market and joined HSF from BLP in 2015, said: "We look at process, we look at project management, we look at data analysis, and technology is the other part of what we do and I am heading up that technology piece."

Mattis was followed by the inimitable Professor Burkhard Schafer, lecturer in computational legal theory at University of Edinburgh, who defied illness to give an impressive speech in which he warned against returning to the hype surrounding AI in the

80s – referred to by Professor Schafer, accompanied by a photo of snow, as "the long, dark winter of AI."

Having experienced a 20-year period with no interest in AI from legal practitioners, Professor Schafer said there has recently been a "remarkable change."

"I organised a workshop at Jurix in December in Braga about intellectual property law and artificial intelligence – half of the speakers came from practice, and they had developed their own 'AI systems', mini AI systems, in their own working environment, but fully aware of the academic discussion. That sort of interest and activity has simply not happened before," Professor Schafer said.

The roundtable sessions saw discussions on cybersecurity, transgenerational diversity, privacy and law firm investment in technology. Speaking on the latter topic and echoing Fowler, HSBC's head of professional services, corporate banking UK, Simon Adcock said: "I would like to see more IT directors. When a firm asks for a loan, there is often not enough clarity as to what the IT strategy is and how that matches up with where the firm wants to be in the next five years."

The discussions continued into the night, where the weather gods were good enough to provide real snow, luckily enough lasting for a day, not 20 years.

The key themes and highlights of LLIT 2016, including the roundtables, will be explored in more detail in a series of blogs over the coming weeks.



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► What's hot & what's not: wins & deals

UK WINS Busy end-of-financial-year at **Bighand** with upgrade and add-on deals announced at **Anthony Gold Solicitors**, **Cripps**, and **Wright Hassall** with the task delegation tool BigHand Now and SmartNote proving popular. In addition **Bentleys Stokes & Lowless** is implementing BigHand Scrub to protect against metadata risk, **Pepperells** in Hull has rolled out speech recognition, and **Layzells Solicitors** has switched from a stand-alone digital dictation system to BigHand's SaaS cloud-based solution.

Kain Knight, the UK's largest firm of costs lawyers, is implementing ready-to-go Proclaim case management from **Eclipse Legal Systems**.

Bristol based **Foot Anstey LLP** has rolled out **DocsCorp** cleanDocs firmwide and **TLT LLP** deployed pdfDocs across the UK.

Having previously relied on paper files and consumer-grade file sharing, **BPP University Law School** has deployed SaaS collaboration solution **Intralinks VIA** to support its students working pro bono in legal advice clinics, giving them the freedom to host and share sensitive legal information without exposing BPP to any compliance risk or data loss. BPP runs several clinics as part of legal charity **LawWorks** network of more than 200 free legal advice clinics.

International law firm **CMS** has selected **Qlik** via BI specialist **Informance**, as the business intelligence solution for all of its UK operations and some of its European offices.

British cloud and network provider **Exponential-e** has partnered with **Phoenix Business Solutions**. One of Exponential-e's first legal customers is **Nabarro LLP**.

Pure Legal and **Pure Claims**, both part of the fast growing Pure Group ABS set up by Phil Hodgkinson last year, have selected **Converge Technology Specialists** to provide a fully managed hosted (cloud) desktop service. The Converge TS solution includes managed support, security, system backups and a comprehensive business continuity and disaster recovery service.

300-staff law firm **Geldards** has implemented the **Kutana Kappris** print solution to manage printing within Microsoft Office and integrate with the firm's iManage DMS.

Top 100 London law firm **Russell-Cooke** has chosen to implement **iManage Work** as its preferred document and email management solution. And **Tikit** has secured a deal with Fieldfisher to deliver the iManage Work product management suite, which will also be supported by Tikit.

RPC has chosen **Nikec Binder** to help improve its business efficiency and further its less paper environment. One of the ways RPC has utilised Binder is in the auditing process by creating Binders from within OpenText DMS, with only the relevant data exposed to the auditors.

The **Hull City Council Coroner's Office**, which investigates deaths reported within Hull and East Yorkshire, is replacing its legacy IT system with the **Civica Coroner's** solution.

Manchester businessman **Martyn Maund**, who has launched two ABSs in three years – **Acorn Law Northwest Solicitors Limited** and **Elizabeth Hassall Family Law Limited** – says he partly attributes his success to cloud software and outsourced legal cashiering support from **Quill Pinpoint**.

EMEA & APAC The Dutch firm **Boekel NV** is now live on **Aderant Expert** as its practice management system. Boekel began using **SAP** in 2006 but last October decided to switch to Aderant because it required a system with a more user-friendly interface and additional flexibility for the user. After a smooth, four-month implementation, the firm went live on Expert in early February.

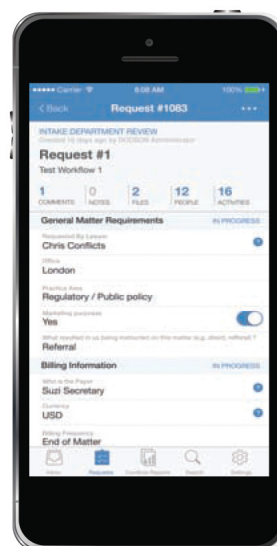
French law firm **Bredin Prat** has switched out its historic DMS to **iManage Work**, while **Nicolau Panou Anthony Tsalkis** in Greece will be using iManage across the firm to manage sensitive documents and emails. The **Emirates Group** in Dubai is to deploy iManage Work within its inhouse legal department, while the inhouse legal team at **Waypoint Leasing** has opted to go with iManage Cloud.

Bar & Karrer has selected **Tikit eMarketing** to manage its digital marketing and comms. And, **Marks & Clerk** has employed Tikit to implement **iManage Work** products and services.

French advisory and litigation firm **Hoche Société D'Avocats** is now using **DocsCorp** pdfDocs.

WINS & DEALS CONTINUES ON P.11

Business Intake



intapp
Software for a Changing Legal Market

WINS & DEALS CONTINUED FROM P.10

Norwegian commercial law specialist **Fulford & Pettersen** has purchased both pdfDocs and compareDocs, whilst Dutch **Boels Zanders Advocaten** is now using compareDocs. Meanwhile in Australia, Sydney based **Antunes Lawyers** is using pdfDocs and **Maurice Blackburn** have purchased additional pdfDocs.

UNITED STATES East Coast law firm **Spilman Thomas & Battle** is to replace Elite Enterprise with TRE's 3E practice management system. In February **Thomson Reuters Elite** announced it was to sunset Enterprise over the next seven years, given the platform is over 25-years old and TRE can no longer maintain compatibility with newer Microsoft technology.

Handshake Software has won deals for Microsoft SharePoint-based intranets and enterprise search applications from **Baker Donelson, BuckleySandler, Honigman Miller Schwartz & Cohn, Loeb & Loeb, Nossaman, and Wiley Rein**.

Capensys has announced an increase in the number of law firms who wish to improve user productivity with the Learning in Action (LiA) tool as a non-intrusive way to evaluate technology skills and/or provide LTC4 certification. The firms include **Butler Snow, Cole Schotz, Downs Rachlin, Epstein Becker & Green, Fladgate Gordon & Rees, Greenberg Traurig, Jeffer Mangels Butler & Mitchell, McGuireWoods, McKenzie Lake, Robinson Bradshaw & Hinson, Sutherland Asbill & Brennan, and White & Case**.

The latest US wins for **DocsCorp** include **Friedman Springwater**, which is now using compareDocs and cleanDocs. **Stroock & Stroock & Lavan LLP** has taken up with compareDocs. **Armbrust & Brown LLP**, and **Kerr Russell & Weber PLC** are ensuring metadata security with cleanDocs. And **Liever Hyman & Potter** is now using pdfDocs.

LawBase announced the company's case and matter management software has been implemented by **C2C Innovative Solutions**, a long-time contractor for the **Medicare** program.

The global biopharmaceutical company **PTC Therapeutics** has selected the **Lecorpio** intellectual property management system to maximize the efficiency of its inhouse IP processes so all activities, including patent prosecution and annuity payments can be managed from a single, secure online environment.

► Legal IT director priorities

Kevin Harris, chief information officer, Taylor Wessing

1. One of my key priorities for the next three years is finding technology that will grow or at least maintain margin. Law firms are not going to be in a position to be competitive unless we apply better technology. This includes document automation and artificial intelligence for doing market research. Not just market research but using analytics and data to look at court cases and case

history to give predictive analysis. On the litigation side, it's much harder to automate so we are looking at large data sets to help predict the outcome of court cases.

2. Our second priority is all around collaboration and working together to break down practice silos. Being multi-practice, we are looking at ways to cross-sell and make sure people can work on matters from across a broader background. That means unified communication and agile working – really getting people out of their offices and breaking down boundaries so they work together and share client information.

3. My bread and butter is the back-end infrastructure and how we go about growing our IT capability without growing headcount, which leads us to the cloud. We have demand not to increase headcount but much greater demands from clients and threats from cyber security. The challenge is how we bring that together and one way is to rely on the cloud more, so we get a certain level of security without having to spend more. The infrastructure in our team then changes from guys with screwdrivers to guys that make strategic decisions.

Nathan Hayes, IT director, Osborne Clarke

1. **Innovation.** Over the past few years we have seen a paradigm shift and both law firms and lawyers are not

LEGAL IT DIRECTOR PRIORITIES CONTINUES ON P.12

Leadership

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- 4 of 5 Magic Circle Firms
- 92% of the AmLaw 100
- 185,000+ lawyers
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LEGAL IT DIRECTOR PRIORITIES CONTINUED FROM P.11

only much more open to changes to their working practices, but are now actively driving those changes and looking to technology to help achieve that. My first strategic priority is not only to deliver technologies that enables those changes, but also technologies that have the potential to redefine the way in which we deliver our legal services. That will no doubt range from the introduction of more Legal Project Management capabilities through to more business process and document automation to the introduction of AI-based technologies.

2. Agile Working. OC has been a proponent of agile working for many years, however with the increasingly intense competition to attract and retain the very best people, it is becoming an even more important tenet of our IT strategy. While continuing to provide the best technology in this area is important, be that hardware such as high-end smartphones or services such as Skype for Business, the real focus of this second strategic theme is on collaborating with our lawyers to develop new agile working practices, incorporating that thinking into our new working spaces (such as our office in Reading) and providing our people with the training and coaching to enable them to get the most of the technology available to them.

3. Information Security. Keeping our and our client's data secure is paramount for law firms yet our ability to achieve that is coming under increasing pressure. The increase in complexity of our IT systems for numerous reasons including a higher utilisation of cloud based services, combined with the increased information security threats that are being signposted even in mainstream media, are a few of the main drivers behind that. At the same time we are seeing an increase in the reputational impact of information security breaches, as both governmental and regulatory penalties for such breaches are being increased significantly. It is for these reasons that Information Security is my third strategic priority.

Steve Sumner, director of IT, Taylor Vinters

1. Security, Security and Security are the three priorities for us, or rather the first priority is security in bold three times over. If you had asked me 12 months ago what my priorities were, security would not have been number one, however in 2016 it is clear that the risk to the firm of losing its data either by it being encrypted or removed without permission is ever increasing and ever more likely, imagine a world with no documents and email, not a nice thought.

As a mid-market firm without the resource to operate a security team to focus on that risk we seek to use technology and service providers to predict, prevent and remedy this risk to our business, so 2016 will see a significant increase in our spend on security.

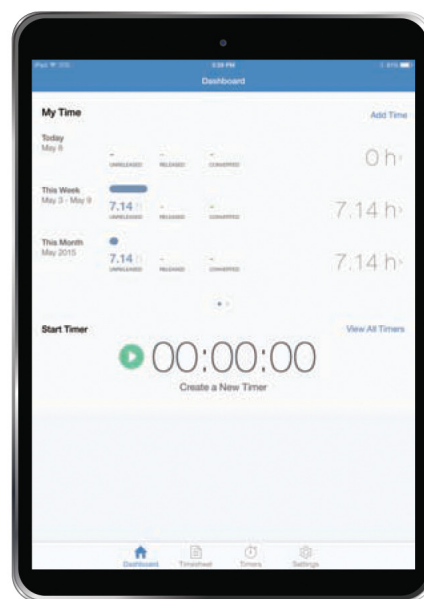
It is now a cost of doing business and I would not be surprised to see it reaching 10% of budget this year.

2. Priority two is two things together, infrastructure and cloud. We have had our production infrastructure running very successfully under managed service for five years now, full service disaster recovery and business continuity have been delivered. That is private cloud but the public cloud market is maturing now and questions are being asked about the use of public cloud, what will we do, never forgetting the requirements of our regulatory authority, more of the same or something radical? We have to decide.

3. Priority three is mobility, or what I would call "universal delivery", laptops, tablets and smartphones working in the way that a desktop environment does, providing document management, integrated telephony, email, video conferencing, time recording and knowledge.

We have been working with the electronic master file for several years now so it is a logical extension to capture and deliver data to those files from out-of-office devices. It has to be secure, easy to use and enticing to get the best benefits to our staff so we are working with suppliers to get to that ideal world.

Time Entry



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Software for a Changing Legal Market

► Deloitte – storm in an (automated) teacup?

With its forecasts of a 2020 'tipping point' and around 39% of legal sector jobs lost to automation in 20 years, Deloitte's recent Insight report certainly did a good job of getting itself noticed.

Behind the scenes, there was some confusion over where the substantive evidence is, not helped by the fact that the only reference to the 39% figure was in a diagram on page four, which was unclear even to many with a McKinseyish love of graphs.

'Developing legal talent: Stepping into the future law firm' predicts that automation, changing client demands and the rise of millennials in the workplace will significantly alter the nature of talent required by law firms in the future. A combination of retiring partners and a shortage of skilled workers, as well as alternative career paths within alternative business structures, means law firms could find the profession flips into an employee-led market.

Spurred on by the quickening pace of technology, shifts in workforce demographics and the need to offer clients more value for money, this transformation will mean that by 2020, law firms will face a 'tipping point' and the need for a new talent strategy, with the report finding that "businesses must prepare effectively now so they are not left behind by the end of the decade."

Peter Saunders, lead partner for professional practices at Deloitte, said: "Our report shows that firms have already identified a mismatch between the skills that are being developed through education and those currently required in the workplace. Employers will need to look for lawyers who are not just technically competent, but who have a broader skill set."

Responding to the report in his Lawyer Watch blog, director of the Centre for Ethics and Law and professor of law and professional ethics at the Faculty of Laws, University College London, Richard Moorhead said: "In truth, as interesting as the report is, it has not produced new evidence to support the claim that '[legal services businesses]' will need access to lawyers who have a broader skill set and are not just technically competent lawyers."

Deloitte further suggests that 'non-traditional' employees such as project management and data and technology experts may be "transient" and accessed via contractor or partnership models, which firms are less likely to invest in. But Fireman & Company consultant and market commentator Ron Friedmann said: "Just as firms may need to flex the number of lawyers up and down, so too may they need to flex other professionals. I do not see the logic in treating lawyers as "permanent" and other professionals as "transient". In fact, a strong case exists for reversing that mindset."

► Movers & Shakers

GLOBAL Tikit has appointed **Ryan Steadman** as director of business development – Eastern region. With over 15 years' experience servicing the legal sector, Ryan joins from Tikit London to help increase visibility of the company's 'Next Generation' technologies and spearhead the introduction to North America of key partners whose products already benefit their European clients. Prior to Tikit, Ryan spent time with Thomson Reuters Elite and Tata Consulting Services. As part of its continued expansion in the EMEA region, Tikit has also hired **Colin McArdle** as an account director. McArdle spent almost nine years at LexisNexis, the latter part in their Enterprise Solutions division. He then moved on to Kindelworth where he worked as a technology consultant and, more recently, with Williams Lea as a client services director.

Intapp has made two senior appointments including bringing in **Steve Robertson** (not the guy from kCura) formerly chief financial officer at Axiom, as its new CFO and **Tariq Choudry**, formerly at E2open, as senior VP of professional services and support.

MOVERS & SHAKERS CONTINUES ON P.14



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MOVERS & SHAKERS CONTINUED FROM P.13

UK & EMEA **Wilson Legal Solutions** has appointed **Jonathan Blair** and **Madjid Mouhous** to the company's EMEA consulting services team based in London. Blair joins as an application consultant with more than 13 years of experience in finance and billing within the legal and large enterprise sector, most recently as finance manager for Knoll International and prior to that Cadwalader Wickersham & Taft. Madjid Mouhous joins as a senior technical consultant with more than 10 years' experience in legal technology, most recently with the law firm Ashurst London.

To support its growth strategy, **Encompass Corporation** has appointed **Chris Bull** as an industry advisor. Bull's executive career includes COO Europe & Americas at professional services outsourcing firm Integreon and executive and board member roles at law firm Osborne Clarke.

Ryan Prins is now heading up the SpeechLive product programme in the UK for **Speech Processing Solutions**, the business still better known as **Philips** digital dictation and speech recognition.

NORTH AMERICA **nQueue** has hired **Danielle Page** as business development manager. Page is resident in San Diego and will focus on cost recovery, scanning and routing efficiency through the use of nQueue products. Page joins nQueue from Xerox company MRC Smart Technology Solutions.

Veteran US **LegalTech New York** show event head honcho **Henry Dicker** has left ALM to join Newport Beach-based ediscovery vendor **Franklin Data** as the company's first chief revenue officer.

Prosperoware has hired former Litera director **Rich Powers** as sales manager (Americas, information governance). Powers will helm sales of the Prosperoware Milan family of products.

HotDocs has appointed former Axios Systems chief technology officer and vice president of support services **Scott Leckie** as its first-ever CTO, as it expands its senior leadership team and approaches the 100-staff milestone. Leckie will take on global responsibility for the HotDocs development teams, providing technical direction for the company and shaping the next generation of HotDocs products.

DW Reporting has hired **Rob Stote** as its North American director. Stote joins DW after over 15 years with Whitehill Technologies and Thomson Reuters Elite in a number of senior product and sales management roles.

Morae Legal has hired 10 senior legal and consulting executives, as it moves into new state-of-the-art premises in Houston and Chicago. The company has also announced the launch of its information and discovery management service, which will be led by one of the new executives, **Jeff Seymour**. Former general counsel **Roland Castaneda** and **Rick Wittenbraker** join the company as executive counsel. **Kevin Blodgett**, **Danish Butt** and **Carolyn Southerland** join as managing directors, and **Teju Deshpande**, **Malini Ireland**, **Bill Young** and **Mark Woolfolk** join as senior directors.



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► Freshfields wins 24-hour charity hackathon

Freshfields Bruckhaus Deringer has been announced as the winner of a 24-hour hackathon that saw 150+ coders work through the night on Friday, 18 March to build solutions for Hackney Community Law Centre.

Organised by Legal Geek, which, led by founder Jimmy Vestbirk, is building a 'disruptor' LawTech community through a series of events, the LawTech Hackathon saw teams battle it out to conceive, build and pitch technical solutions for current issues that affect the delivery and access to legal services in the London borough and beyond.

With entries from firms and organisations including Mishcon de Reya, Neota Logic and Softtools, the winner was Milos Kresojevic, enterprise architect at Freshfields, with a tool that quickly identifies legal need and enables users to access advice and open a case on line. Runners up included an AI automated SMS virtual receptionist and an SMS alert system.

Solutions were judged by a five-strong panel that included Matthew Ryder QC from Matrix Chambers, who was lead counsel on a number of Edward Snowden hearings.

Hackney Community Law Centre will now test the products, which may be used as a pilot by other law centres in the UK.

Vestbirk said: "There is a huge community of startups, coders and designers in Hackney, however there are also many issues delivering and accessing legal services in the Borough. The LawTech community is seeking to help the most vulnerable people in the community by solving these issues with technology."

► Quote/Unquote

"Our biggest concern is making sure people utilise the tech we've already invested in. We bought the Ferrari but is anyone going to get it out of first gear? Just look at the paint work and alloy wheels! But have you passed your driving test and does anyone know how to use the brakes? Lawyers are too busy to take a driving test." ... ***A top 100 IT director laments most lawyers' lack of real engagement in the firms' IT systems.***

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The next Insider newsletter will be published on **Wednesday 27 April**.

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