

legal insider

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▶ Brexit – the legal sector says ‘remain’ in Europe

Just under 80% of people working in the legal sector would vote to remain in the European Union in the forthcoming referendum in June, according to a recent survey conducted by Legal IT Insider.

The flash poll, conducted over seven days from 18 April to 25 April, garnered responses from over 300 law firm partners, general counsel, IT directors, legal IT suppliers and other senior personnel working in and around the legal and legal technology sector.

At the time of going to press, the ‘remain’ vote sat at 78%, with many respondents citing potential damage to the economy as their reason for not wanting Britain to leave the EU.

Speaking to Legal IT Insider, Chris Hale, senior partner at UK top 40 law firm Travers Smith said: “I have barely met anyone within the financial services sector who is in favour of Brexit. Almost all the private equity executives, investment bankers and lawyers I meet are in favour of remaining in the EU.

“We have been doing some thinking about the effects of Brexit on our own business. Given transactions are an important part of what we do, the short term impact would probably be adverse since the uncertainty flowing from a Brexit will make pricing deals difficult and reduce volumes, possibly very considerably. In the medium term, the impact might be neutral; transactions may well still be subdued but our advisory businesses would be in demand. In the longer term, leaving the EU is likely to be bad for our business, not least because we are very London-centric. Leaving the EU would most probably diminish London’s attractiveness as a financial centre and those who do business here, including some of our clients, might move some or all of their operations to other parts of the EU.”

Many people working in the legal sector are in favour of the freedom of movement of goods and services brought about by the European Single Market. The argument by pro-Brexit politicians such as UKIP leader Nigel Farage and Cabinet minister Chris Grayling that Britain would sign new trade agreements in its own right has failed to convince - not helped by President Barack Obama’s statement on 24 April that it could take a decade for the UK to reach a trade agreement with the United States, if it leaves the EU.

BREXIT CONTINUES ON P.2

▶ Legal Leaders IT: Innovation, evolution, change

In this edition of Legal IT Insider, we have drawn together some of the best content from TavistockMedia’s Legal Leaders IT Forum in Gleneagles last month in one, go-to issue.

The focus of the conference was innovation and evolution, with some of the brightest in-house and private practice lawyers reflecting on what that means within the context of their respective organisations; how they have driven change through; and how IT is helping them. From the world of academia, Professor Burkhard Schafer, professor of computational legal theory at Edinburgh University, warned against repeating history and setting up artificial intelligence to fail, while giving a glimpse of the exciting AI developments taking place outside of the legal sector.

‘Innovation’ is a term so overused within the legal sector that it can be almost meaningless. But it is worth paying attention to those who are ahead of their game.



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► Brexit – the legal sector says 'remain' in Europe

CONTINUED FROM FRONT COVER

Andrew Dey, independent legal technology adviser and former director for business and change management at Barclays Legal, said: "The leave camp is saying that if we exit the EU we will just sign new agreements but how long will that take? Just this weekend President Obama made it very clear that we would be at the back of a trade deal with the US. There is far too much uncertainty and it will be bad news for the economy."

Dey echoes many in the legal sector, who feel that pro-Brexit politicians have not gone far enough in demonstrating in practical terms how Britain would extricate itself from the EU. Hale said: "I haven't heard anyone articulate clearly what a post-Brexit landscape will look like. How exactly will this country's relationship with the EU be structured if we leave?"

The deputy general counsel of one of the world's largest banks said: "The difficulties of extracting ourselves from the EU are far too complex and the uncertainty would be way too damaging to UK plc."

In the leave camp there are some who believe the UK deserves more credit than that. Steve Sumner, director of IT at technology, investment and private client law firm Taylor Vinters said: "Behind the politicians are a lot of very professional and clever people in the civil service and I'm sure they already have a contingency plan in place or are working out how we would deal with an exit."

Sumner's personal reason for wanting to leave the EU is one of sovereignty, and he told Legal IT Insider: "In the 1970s I don't think most people signed up expecting to see our sovereign rights eroded and upwards of half of our laws come from the EU. Our policies may not be perfect but they should be made by our politicians with an insight into the country itself. Economic alignment is fine, political and legal interference is not."

Obama's earlier intervention is certainly regarded from within the leave camp as unjustified political interference and John Dobson, chief executive of online anti-money laundering platform SmartSearch said: "There has been misrepresentation about all sorts of things by the remain camp and it was a master stroke bringing in President Obama but my reaction is that he ought to mind his own business."

Dobson is one of many in the leave camp who fear that the EU will continue to gain power, until Britain becomes little more than a federal state.

Dobson said: "Cameron and his supporters are voting for their own demise. In 10-15 years the EU will be even more powerful and the UK Parliament will be redundant. It's like turkeys voting for Christmas."

However, the flip side of that coin is that fear over the EU's future stability is pushing some who might vote remain towards a preferred exit. The finance director (FD) of one UK top 40 law firm, said: "Personally I think the EU is in

permanent decline and if we stay we will carry on as we are, declining. Longer term the EU and UK would be better together, but the EU has to reform."

The FD joins Dobson – and many within both the leave and remain camps – in feeling that politicians have been less than honest with the public. He said: "A year ago I was firmly in the 'stay' camp but the arguments on both sides have been disingenuous. Neither side has been entirely honest about the issues, which is a disappointment."

This is a divisive debate which, while having huge potential repercussions for legal business, is at the same time intensely emotive and personal. Alper Riza QC, a barrister at Goldsmith Chambers, said: "Nationalism nearly destroyed Europe twice last century. The EU is inherently anti-nationalist. It is anti-war, pro-human rights, pro-social provision. I love European music and literature and philosophy and economics. The EU has had a civilising effect on all European people."

Legal IT consultant Graham van Terheyden, formerly IT director at Addleshaw Goddard, added: "For me, the overwhelming reason for staying inside the EU is the prevention of another World War, which was the reason for setting up the EU and it has been successful at that."

"For the legal sector it could make sense to exit the EU in the sense that advising on recasting the law and dealing with new situations would present substantial opportunities. But it would be fairly small minded to want to exit on that basis."



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► Civica acquires Norwel to boost public and private sector

Civica has extended its reach within the legal market with the acquisition of Norwel Computer Services, one of the oldest names in the sector.

Norwel, which counts Trowers & Hamlins as its largest site, specialises in legal practice and case management systems, including cloud-based solutions, and is particularly strong within the local authority market. Last year its new business wins included Cumbria County Council, while its system implementations also included Parisi Tax LLP and United Utilities.

Civica, meanwhile, which employs over 2,800 people supporting 4,000 customers in 10 countries, is also now best known in the local authority legal sector, although for many years its Galaxy software was a serious contender in the law firms market.

Its legal sector clients include Francis Wilks & Jones, Gadsby Wicks and Memery Crystal, and in the public sector Cheshire West & Chester, Rochdale and Wigan county councils.

Speaking to Legal IT Insider, Civica's marketing director Tim Magness said that the strategy behind the Norwel acquisition is to target both the local authority and private sector market, while expanding in size and scale. "Civica is already involved in the legal sector with both public and private customers so we are building on that. Both Norwel and Civica have a strong software heritage in legal and we will be combining that capability and looking at other compatible services," Magness said.

► Vital statistics: six Nelson's columns

David Jackson, the managing director of Netmaster Solutions, calculates that the new Crown Court Digital Case System is expected to save over 300 million sheets of paper – or 700,000 evidence bundles – every year. With over 25,000 evidence bundles in place, the paper mountain saved is already the equivalent of six Nelson's Columns in height.

► Still running DOS after all these years

Graham Irwin, of Irwin Associates, has been in touch to say his company's Virgo Accounts (previously Kestrel Accounts) ultra low-cost, single user accounts system for law firms (he now has users in Hong Kong and the Sudan, as well as the UK) is now available on GitHub as an open source project for anyone wanting to develop the system for Microsoft Windows. Irwin is still selling and supporting the software in its original DOS format. Yes, DOS – Virgo is a character-based system that operates natively under DOS and most 16 and 32-bit versions of Windows. It will run on 64-bit editions of Windows, as well as Linux and OSX, using DOSBox or a similar DOS emulator. The software can also be installed on a bootable DOS USB drive. Irwin Associates is now based in Umbria, Italy. www.virgoaccounts.co.uk

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Legal Leaders IT Forum

► Change management: leading by example

How do you help to affect systemic, transformational change within your organisation?

This was a question posed at Legal Leaders IT Forum (LLIT) in Gleneagles, to a panel of four recognised legal innovators from both the corporate counsel and private practice sector, who have turned to IT and process improvement to overcome some of the familiar challenges facing other organisations.

When BT undertook a process excellence project in 2010 with the aim of improving efficiency and bringing down costs within legal, it turned to BT Legal's general counsel for UK commercial legal services, Chris Fowler, to lead the project.

Fowler told LLIT: "In my view, there are a number of parallels right now, between where telecoms was and comparable issues that are being faced by the legal industry.

"If you look at the revenue that BT used to earn, approximately 85% of it was from a variable charge. The longer you used it, the more you paid. I'm sure many of you remember when a bill would arrive through the post and it might have been very thick and sound like an encyclopaedia as it hit the floor. That doesn't happen now, because in reality the majority of the business that was derived through variable charging, has disappeared and been replaced with a fixed charging model."

Technology has changed the services that BT provides in a way that would have previously been unrecognisable. Fowler said: "There's a huge opportunity for legal service providers to use technology to move into adjacent markets. 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."

Since 2009, BT's top line revenue has dropped but its profits have increased and that is largely thanks to better systems and processes. As part of its process excellence project, BT worked out which staff do what and why. It uses a triage or 'front door policy' (now provided by Axiom but the inaugural arrangement was with UnitedLex) to decide where work is directed – to alternative providers, to the internal team or to external lawyers. This has not only enabled BT to be consistent in its approach to instructions but to understand, analyse and manage the peaks and troughs in its workload.

BT's legal leadership team now spends more time talking about technology and the challenges in implementing it than almost any other topic.

Fowler told the IT directors present at LLIT: "I would love to see more of the people who are in this room on pitches that law firms give BT.

"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."

Technology is something that Claire Debney, former vice president and general counsel, group legal affairs and compliance at Reckitt Benckiser is no stranger to, having spearheaded a complete overhaul of the way the FTSE 100 company's legal team interacts with the business by enabling the business to generate its own contracts. Debney set up i-Legal and i-Contract – a ContractExpress backed global contract management system and repository, which have given the business the freedom to instantly turn around contracts ranging from non-disclosure agreements to slightly more complex contracts.

CHANGE MANAGEMENT CONTINUES ON P.5

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 holding a globe, surrounded by seven circular icons representing different iManage features: 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.

Legal Leaders IT Forum

CHANGE MANAGEMENT CONTINUED FROM P.4

She said: "You're never going to take everyone along on the journey, but I think people get there eventually."

"The one thing I learnt from starting the i-Legal project was, I needed to talk the language of my business and I needed a grass roots up uptake of the technology and the solutions. And what we did – our front door was, give the power to the business and make their own decisions."

BT and RB undoubtedly have one of the most advanced legal teams in the industry and not every in-house legal team is at the same developmental stage, rightly pointed out Mike Polson, managing partner of Ashurst's Glasgow office, which is being used as a centre for innovation at the UK top 15 firm.

However, understanding the client is key to helping to drive change and Polson, who spearheaded Ashurst's recent deal to automate all its precedents globally, said: "If you understand what the client pressures are and the client challenges, you can start to think about that in the context of how you provide your help, your support, your solutions."

He added: "If you can find an anchor into a client, a client opportunity, a client challenge, and you can help fix that, and you can help win work – that is transformational in terms of the role you will play within the firm, how you are perceived within the firm."

Building bridges internally is equally as important, starting with identifying the best relationship builders within IT. "It will also help you in your firms if you can find some respected evangelists. There are some people who are very, very effective lawyers, have huge trust/confidence internally, huge kudos, and get the whole 'the world is changing' and the tech role," Polson said.

At Ashurst, Polson is working closely with Tae Royle, a former corporate associate who leads the automation process. The Glasgow office has also recruited legal technologists who have a law degree and understanding of automation, cloud computing and big data. Polson told LLIT: "IT are often driving on an operational business as usual basis, the lawyers the same. What we need to find are resources who have a role, a proper role, that sits right in the connection between IT and the lawyers with an understanding of both sides."

While a few law firms have an R&D budget they are in the minority and Polson said: "Law firms are generally not good at R&D, they don't really do it in a way that their clients do. Imagine BT not having an R&D focus or RB not thinking about their next product – it's just R&D doesn't exist as a theme, as a function, as an investment in a law firm in that sort of way. And I think that has to change."

EY legal risk director Matthew Whalley, who was previously head of legal risk at Berwin Leighton Paisner and who spearheaded its 'artificial intelligence' deal with RAVN Systems acknowledged the challenges surrounding delivering real transformation. But he said: "For the next ten years, technology-enabled transformation is going to be the key to competitive advantage and sustainable business models in the legal sector."

Big data and artificial intelligence are complex to capitalise on but Whalley said: "There's a huge amount of insight that law firms can give to their clients that you can give if you can get to grips with how to extract and analyse data from your core product, which is legal work. It's an incredibly difficult issue to deal with, whether it's IBM Watson or RAVN or one of the other AI providers. You need to let them loose on a huge amount of information that you don't really want to let them loose on, extract data points and start to try and make patterns out of that. But it brings huge benefits in terms of bringing your business from purely transactional legal work to strategic advisory insights."

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Legal Leaders IT Forum

► AI: Don't believe the hype

A leading professor of computational legal theory at University of Edinburgh has warned both lawyers and technologists against repeating the mistakes of history and setting up artificial intelligence (AI) to fail, as happened 20 years ago, when AI fell into 'a long winter of discontent' because it couldn't measure up to the hype.

In a wide-ranging talk in which he concluded by flagging up a number of potentially transformative current AI developments, Professor Burkhard Schafer took the Legal Leaders IT Forum (LLIT) in Gleneagles back to the 1980s, when AI was the 'new big thing.' "Suddenly, computers were good at playing chess. And, as you all know, playing chess is the ultimate pinnacle of human intelligence," he said wryly. "So, because a computer can play chess, inevitably that meant that within two or three years' time, they would replace humans in all other activities as well. Already then, people started to write about the end of the legal profession, or at least its transformation beyond recognition. It hasn't happened yet, and that is partly a fault of our communities, both legal and technology, because what we were aiming for at the time was something like a robo-judge."

During the ensuing winter of AI even the name AI fell out of favour. Professor Schafer said: "We quietly more or less dropped that word, because it was tainted goods. Research continued, but they didn't call it AI any longer, instead focusing on the specific activity studies – machine learning, information retrieval, decision advice systems – simply because the over-hype of the technology and the disappointment that that had created, made it problematic to enthuse people."

During that period there was little-to-no engagement from legal professionals, but a notable turning point came at a workshop hosted by legal knowledge based systems forum Jurix in December, where half of the speakers came from legal practice and had developed their own mini AI systems. Professor Schafer said: "That sort of interest and activity has simply not happened before."

"So suddenly there is a really remarkable change which I'm very excited about, but also slightly wary about because, again, we should be learning from history."

So what were the technical shortcomings of AI the first time round? One was the knowledge acquisition bottleneck. "Because we tried to model explicitly quite a lot about legal reasoning in its context, it took a very, very long time to get the knowledge out of the employees into the machine," said Professor Schafer, adding, "By the time that was completed, technology had moved on, or you had moved on, or the business environment had moved on."

Early systems were very inflexible and lacking robustness – they had little ability to deal with unforeseen

situations or transfer their knowledge from one field to another – which is still an issue today. "Deep Blue plays chess, but only chess. A Google car drives, but only drives. Here is a danger in our attitudes and perceptions. We learn that humans who are good at chess often are also good at strategic thinking elsewhere, and good at driving means having hand-eye coordination and special reasoning that also helps with football. But we cannot make the same inferences with intelligent machines."

Another problem was consistency maintenance. "We built these huge legal expert systems that modelled lots and lots of legal rules and then Parliament was so inconsiderate to enact a new rule, and then what do you do? By that time, we, the academics, had moved on, people in the organisation very often didn't have the skill, even, to operate this technology because it was written in a language only researchers could comfortably write in."

Further issues were that early systems lacked any sort of creativity. "You don't want to be too creative with the law or your clients' futures," said Professor Schafer. "You don't want to go to them and say, 'Look, yes, you have a really, really difficult case, but I – and only I – found that one interpretation of the law that no one has ever seen of that specific provision. Go ahead! Risk it. I am 100% behind you, these High Court judges, what do they know!' But a little bit of creativity is needed if you are looking for that competitive edge."

One of the real game changers for AI this time round has been the development of machine learning. With reference to issues such as consistency maintenance, Professor Schafer said: "We are not any longer dependent on the static snapshot pictures of the legal system – they upgrade themselves through machine learning and through the flexibility that that brings."

"Once you added this, then it really became data science – and that, for me, is one of these big game changers because it dealt with the problem of flexibility, it dealt with the knowledge acquisition problem, that we suddenly could say we don't need to specify everything in advance – these machines, these algorithms, these AIs, can learn by themselves, update themselves, are just more agile to whatever is coming."

Examples of interesting AI projects include a Legal Knowledge Interchange Framework-based Eurobonds transaction framework. This was created by Professor Schafer's Masters student Orlando Conetta, before he was hired by Pinsent Masons, where he is now head of research and development. Professor Schafer said: "I had high hopes for Orlando. I was hoping he was going to write my articles for the next three years and pay us, in addition, PhD student fees – and then Pinsent Masons gave him, amazingly enough, a proper job to develop this idea further."

DON'T BELIEVE THE HYPE CONTINUES ON P.8

Legal Leaders IT Forum

DON'T BELIEVE THE HYPE CONTINUED FROM P.7

Another well-known example is Lex Machina, which uses machine learning to analyse docket submissions, court decisions and other materials in the field of patent law in order to predict outcomes. "Here we have a new type of company," Professor Schafer said. "They are not a traditional software company. They are not a traditional law firm. It is a really genuine interdisciplinary company where you have both legal expertise and computing expertise to develop a service in a form did not exist before. And that is, I think, slightly more exciting, a really new field, a new chance for cross-overs between the legal industry and the software industry. And you really need to get both. You can't do what they are doing without also having legal expertise. And you can't do what they are doing without having computer science expertise."

Other examples of legal and computer science crossovers include TrademarkNow, which uses machine learning tools to data-mine trademark text. And while automated cars don't often come up in the context of legal AI, they are an example of how law and technology will intersect going forward. Professor Schafer said: "If it's going to work, then it needs to have not just a driver, but in the back a data protection lawyer who tells the car what sort of information it can disclose about itself to other cars. And it also needs a contract lawyer – because the car will automatically pay things like the congestion charge. Obviously it needs also a lawyer who knows about road traffic law a lot. So, in order for that machine to work appropriately, it needs to have a basic ability for legal reasoning."

Looking at the much bigger picture, the final piece of the puzzle for AI is creativity, empathy and legal reasoning – the ability to explain why the computer has taken a course of action.

Outside of law, in the world of art, Simon Colton's project The Painting Fool is showing us the possibilities. "It's a painting project, a programme, and one of the things it gets increasingly good at is emotional recognition," said Professor Burkhard. "So it realised that the person it was doing a portrait of was angry, unhappy, probably depressed, simply from the facial expression. There wasn't a rule, a pre-fixed rule in the system that told it that, it had simply learned from lots and lots of images that this is not a happy bunny. And it had also learned that if people are not happy, paintings in bright colours and with a big smile is not the appropriate response. And it came up with an image in dark colours, muted colours, a sort of cry of agony, to express that sort of feeling."

Emotional recognition is one of the big research fields in AI, including in data mining and predictive coding. "Give me all the documents where someone is really, really angry. If you want to show that there is a hostile environment towards women in a big company, that is more important than looking for specific key words. You want emotion, the

raw emotion expressed," said Professor Schafer.

Having read the Guardian at a time when there was lots of bad news, The Painting Fool not only painted a sad picture but explained how it reached those choices. Professor Schafer said: "One of the things we noticed that old AI was bad at, but which is essential to legal expertise, is giving reasons explaining why it did what it did, rather than just doing the right thing. That is what I think sets law apart from many other disciplines. Doing the right thing is not enough. We need to be able to explain why we did the right thing; that the reasons were the right reasons.

"And that is the third pillar of what I see as the big developments. Emotion and emotional recognition, individual styles, individualised AIs that respond to their external input forming a sort of identity, but also explanation-centric computing, being then able to say why they did what they did."

"This is coming here from the art world, a brilliant vision of the future, a really transformative future in the field of AI, being able to deal with human emotions, being able to deal with explanations, with reasons, and being able to individualise what you are doing, rather than following a boilerplate. I think this might also matter for law, rather than just art."

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Legal Leaders IT Forum

► LPM and alternative legal services, HSF-style

Legal project management (LPM) is still regarded with something resembling suspicion in many legal circles, so when Herbert Smith Freehills (HSF) hired Berwin Leighton Paisner's head of process improvement Cathy Mattis and a team of three last year, the market sat up.

At Legal Leaders IT Forum in Gleneagles, Mattis shared her experiences of delivering LPM and driving change, speaking alongside Lisa McLaughlin, director of HSF's Belfast office.

McLaughlin helped to launch the game changing near-shore legal support office in 2011, which initially catered for document review in litigation but was swiftly extended to cover real estate support and has become a full service global offering driven from Belfast, London and Australia, headed by Libby Jackson. Incidentally, Belfast was using predictive coding in partnership with Recomind as long ago as 2012 and worked on the first UK Commercial Court matter to use the emerging technology.

Mattis works hand-in-hand with the global alternative legal services team, alongside HSF's Australia and Asia LPM head Libby Jarvis. While no-one is suggesting that leading a LPM team for Europe, the Middle East and US is easy, some of the hard work in breaking down the circa 2,300-lawyer firm's processes has already been done.

For some LPM providers it is a struggle to get to the table but HSF has notably put LPM and alternative legal services at the heart of its strategy and Mattis and her team are constantly brought into conversations among lawyers and clients. "It is a case of 'come and join this meeting, because we want to see what ideas we can have together,'" she said.

"It is key that people feel that they are on a journey and that is an exciting journey and that we are there to help and support them and not threaten them and not say, 'Oh gosh, well if you are improving something, that must have meant you were terrible in the past.' We support conversations with lawyers around imagining a different future, so it is about not saying 'What you do is a process', but encouraging them to see that there are patterns in the way that they have been delivering something and actually, maybe, we could introduce new patterns and learn from other teams throughout the business who are doing similar things and possibly not in the same way."

The fact that the LPM is so client focussed means they often get invited to pitches. Mattis said: "The current team are lawyers and so we are able to have those conversations without having to translate what it is that the GC may be saying. We can describe how we monitor, how would we report, how could we

tailor our reporting to suit the client's internal needs."

The LPM team is often involved at the very early stages in answering RFPs. "The questions are becoming much more precise and those conversations are becoming trickier and that is why we get into the pitch presentation because the partner says, 'Cathy, over to you for that one,'" Mattis says.

Technology inevitably plays a big part and Mattis, who heads up technology within the LPM function, works closely with HSF's chief information officer Haig Tyler. She said: "For me this is a new challenge and I am very much working with Haig. He is always open to joint meetings to thrash out solutions with the legal team so that what we are producing really supports the way that they are working and the ideas they have to work differently.

"I am very much 'let's roll our sleeves up and have a go at technology' but always with a lot of guidance from friends in IT and particularly Haig and his team."

Mattis' arrival shortly followed the globalisation of HSF's alternative services offering, which only took place in June 2015. McLaughlin said: "Today, we effectively provide a full service offering in support of our offices across the global network. To date, the offering has been concentrated in Belfast but we are entering an ambitious new phase which will see us relaunch as part of a global entity, bringing together teams in Australia, London and Belfast.

The team uses Trello for project management and has increasingly turned to HighQ for collaboration across the global team. It has also recently used HighQ to monitor media reports on behalf of a client and 'red flag, amber flag and green flag' the commentary.

"One of the key ways in which we use technology is through predictive coding or technology-assisted review. In this age of big data, where again we tend as a firm to act on the biggest disputes, the data is only increasing. Clients are often surprised when they see the cost of hosting, processing and then reviewing data, when they do find themselves in a very large dispute. In a recent matter for a large international arbitration based in the Middle East, we used a global team to complete the project and if we hadn't used predictive coding technology to reduce the number of documents for review, we would have been looking at a data set of 4.5 million documents. In the end we used the technology to bring it down to half a million.

"As we move forward, we will be investigating and piloting new technology both in terms of the way we do our legal work but also in other areas."

But she adds: "I recently stayed in a hotel which shall be nameless in London's new tech city and it was really technology for technology's sake; technology everywhere, iPads everywhere but you couldn't switch on and off a light. It was an inhibitor and as we move forward, I am keen that we don't make that mistake and adopt the right technology solutions for our business."

Legal Leaders IT Forum

► HSBC's head of professional services: "I would like to see more IT directors"

HSBC's head of professional services, Simon Adcock, has said that he would welcome more involvement from IT directors in law firm loan requests for transformative projects.

"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," said Adcock, speaking at Legal Leaders IT Forum (LLIT) in Gleneagles.

While HSBC has seen a trend towards law firms seeking seven figure sums to invest in technology and process improvement, Adcock, who took over the newly-created professional services head role in June 2015, told LLIT: "There is still a big reluctance across traditional law firms to make bold investment decisions. Given client

demands and competitive pressures from alternative providers, firms have a five-year window to close the gap and invest in their delivery and service propositions.

"Given the return on investment a firm could generate from a transformative project, it is surprising we aren't seeing much greater levels of financing requests."

HSBC, which created industry sector heads for the first time last year, is speaking to a number of law firms about \$10-100m projects, where law firms are seeking investment for areas such as new global billing or client relationship management systems, often combined with nearshoring ventures or the establishment of legal services centres.

HSBC has recently been working on structuring lending so that in the case of Swiss vereins, lending can be spread pro rata across the member firms so each are paying a fair sum – overcoming a familiar obstacle of identifying where the cost should lie.

Speaking last year to Legal IT Insider, Adcock said: "Law firms can cut costs and make gains only up to a point – technology has a massive part to play going forward in creating efficiencies and driving profitability."



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

UK WINS The international privacy and data protection team at **Bird & Bird** is to use **Nymity Attestor**, one of Nymity's privacy management solutions, to assist clients with privacy and compliance projects.

The UK's largest provider of mover conveyancing services **My Home Move** is to deploy **LexisOne** from LexisNexis in its finance department. My Home Move is already a user of LexisVisualities case management software.

Battens Solicitors has chosen electronic document bundling software from **Zylpha** to prepare, paginate and distribute court bundles and other legal documents. It will also use the software to organise documents for commercial and residential property sales and auctions, which are published online.

Kennedys is the latest law firm to use ultra high-definition 4K video as part of its recruitment strategy. The production was handled by legal sector online marketing specialist **mmadigital**, which has also recently produced videos for **VWV** and **Knights Solicitors**.

Penningtons Manches has upgraded its **BigHand** technology to BigHand 5 and will also be introducing the BigHand SmartNote, Now, and Capacity Manager applications to help manage secretarial and document production activities more effectively. And **McMillan Williams**, which has 21 offices around the London and South of England, has switched from its incumbent digital dictation supplier and has rolled out BigHand Speech Recognition and the BigHand Go application.

Startup law firm **Hall Brown** has selected **Converge Technology Specialists** to deliver a fully managed hosted (cloud) desktop service. The firm was launched by former JMW Solicitors partners Sam Hall and James Brown to provide a full range of family law services and already has a number of high-profile clients including former Liverpool FC manager Brendan Rodgers, Premier League footballers, entrepreneurs and celebrities.

Osborne Clarke has engaged IT service provider **Plan-Net** to provide its 1350 staff, including over 700 lawyers, with full out of hours IT support coverage in a three-year managed service contract. The service will operate week nights, weekends and bank holidays and will be delivered via a 24/7 shared service.

Four months after investing in legal tech startup **Pekama**, **Taylor Vinters** has announced a strategic partnership with contract intelligence startup **ThoughtRiver** and will this week begin beta testing its platform across the law firm's international client base. ThoughtRiver's contract intelligence software applies a contract risk evaluation tool that scans and interprets information from written contracts used in commercial risk assessments and produces visualisations of the potential risks and other issues.

Clyde & Co has taken steps to enhance its key client account management and bolster business development by selecting **HighQ Publisher**, which helps firms produce tailored and personalised content solutions. The firm's CTO **Nigel Lang** said "Firms are looking to stand out

from the crowd to maintain existing clients and win new business. Publisher will enable us to build innovative client experiences for our existing client programmes and deliver outstanding services to help win new clients."

Glovers Solicitors LLP in London has purchased **iManage Work** as its new DMS, while over on the corporate legal side new wins include **Carillion Plc** and the German-based engineering group **Linde**.

The London office of **Joseph Hage Arronson** has bought Tikit Exporter as well as add-on licences for its iManage DMS platform. **Tikit** has also won a large iManage v9.3 upgrade and professional services deal from **Hugh James**. Finally, Tikit is working with **Brodie's** to convert their existing iManage BlackBerry licences into an all-device licence to enable them to access iManage documents across multiple devices.

In what may be the first of many ventures **Taylor Wessing** has collaborated with **Neota Logic** to produce a new app to guide clients through the People with Significant Control Rules (PSC) which came into force on 6 April. The venture, led by Saleh Abukmeil, product manager for Taylor Wessing, sees Taylor Wessing clients offered an app, accessible from any device, to help decide if they are affected by the new rules and need advice. The PSC requires UK companies and LLPs to keep a statutory register showing who the ultimate beneficial owners and controllers are and the details of their holdings.

WINS & DEALS CONTINUES ON P.12

Workflow



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Software for a Changing Legal Market

WINS & DEALS CONTINUED FROM P.11

The **Netmaster Solutions CaseLines** cloud-based secure, bundle management and courtroom presentation system has been adapted for the **Ministry of Justice** to help digitise the criminal justice system in England and Wales. Building on Netmaster's track record of delivering CaseLines for the UK Supreme Court, for civil trials in the High Court and for use in the Family Courts and Employment Tribunals, the new Crown Court Digital Case System has been rolled out to all Crown Courts (save four – listed buildings where it is difficult to install wifi) with an expected traffic of 700,000 evidence bundles per year.

Lincolnshire-based residential conveyancing specialists **Fletcher Longstaff** swapped out its incumbent conveyancing case management system (according to Insider #285 this was Hoowla) because of Outlook and Word integration issues and switched to **Redbrick Solutions**. Redbrick also integrates with the firm's Quill Pinpoint accounts.

In what is described as a "six figure deal" North of England law firm **Walker Foster Solicitors** has implemented Proclaim case and practice management software from **Eclipse Legal Systems** across the firm's conveyancing and probate departments. The Proclaim credit control module will also provide the firm with a central dashboard display of key financial and payment information. In other Eclipse deals: Greater Manchester startup **Morton Young Solicitors** is implementing a full PMS and personal injury case management system, and **Quality Solicitors Copley Clark** will be rolling out Proclaim case management across a number of departments. The project includes the Eclipse TouchPoint self-service portal to provide a device-independent and interactive experience for clients.

Essex solicitors **Fisher Jones Greenwood** is introducing **Skype for Business** alongside its other client communication options.

As part of a technology refresh Scottish commercial lawyers **MacRoberts LLP** has chosen **Gridstore** Hyper-Converged Infrastructure (HCI) to manage over 40 million documents across the firm's three sites. The firm's infrastructure architect **Robert Crichton** commented "We had 40 different servers, with different VMs and in some cases, limited virtualisation, with direct attached storage. It was a business risk and what we really needed was to consolidate and reduce the complexity and gain capacity." Before going with Gridstore, the firm evaluated solutions from Hewlett Packard Enterprise, Cisco, EMC, Nimble Storage and Nutanix, but none met its need for performance, simplicity, or integration with Microsoft.

EMEA & APAC Dutch law firm **Loyens & Loeff** has selected the Microsoft SharePoint-based document management product Contentworker from **Formpipe Intelligo AB** as its new DMS platform. offering a matter centric document management solution based on SharePoint. "We had been looking to replace our current DMS with a SharePoint DMS for a couple of years. Neither SharePoint itself nor any applications for SharePoint we investigated prior to Formpipe Contentworker by Formpipe

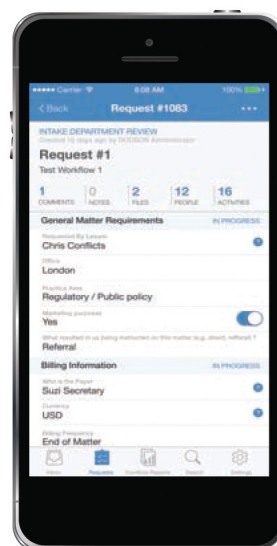
were an option for a firm our size," said **Ron Blijleven**, Manager Application Services at Loyens & Loeff. In another Formpipe win, Rotterdam-based law firm **Kneppelhout & Korthals** has also selected Contentworker by Formpipe as its new DMS. "In Contentworker we finally found a Sharepoint DMS and partner that fits both our needs as well as our vision on how the future of the legal profession will look like", said the firm's managing partner **Olaf van Haperen**.

Maastricht-based **Transform Data International** just announced that its Custodian For Legal & Professional Services product has been selected by the legal department of **ForFarmers** as its new document, email and legal project management system. ForFarmers legal counsel **Ilse Niehof** said "We evaluated the custodian solution from TDI, which clearly fits in our technical legal strategy and, from a business perspective, it is definitely the most appropriate for our needs."

Since opening its Frankfurt office in January, **Phoenix Business Solutions** has scored a number of wins including **Linde Group Legal Department**, as well as law firms **Beiten Burkhardt** and **Oppenländer**. Elsewhere in EMEA, the largest Belgium law firm **Eubelius** has deployed Phoenix Workspace Control, Importer, Exporter, Soft Delete and Office Template Management solutions to further support their DMS environment.

WINS & DEALS CONTINUES ON P.13

Business Intake



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WINS & DEALS CONTINUED FROM P.12

Leading Danish law firm **LETT** is to rollout **DocsCorp pdfDocs** as its PDF creation and **editing** solution practice-wide in a move that will replace Adobe Acrobat.

Brisbane law firm **McCullough Robertson** has transitioned from its incumbent DMS provider over to **Phoenix Business Solutions** and **iManage**. The firm has also installed **K2**, K2 Connect for iManage and iManage support.

UNITED STATES Digital transaction management provider **ThinkSmart** has implemented its Transaction Automation Platform at **CLOC, the Corporate Legal Operations Consortium**. CLOC will be using TAM to manage the corporate contract sponsorships and invoices for its Annual Corporate Legal Operations Institute conference in San Francisco.

Brown Rudnick is replacing its inhouse template document production solution with **BigHand Create** to streamline the process across all global offices. As part of a larger technology upgrade initiative the firm rolled out BigHand across its US offices and, more recently, in London.

Chicago-based IP law firm **Marshall Gerstein & Borun** has selected **Nikec Binder** to enhance efficiency as part of its electronic information governance initiatives, including using Binder to create litigation binders for use in depositions and trials.

The **LawBase** case and matter management solution has been implemented by **Nashville Metro, Everett WA, Municipal Court**, and the **Las Vegas Valley Water District**.

Lecorpio, which supplies intellectual property management and analytics software solutions, has been selected by high-speed transportation innovator **Hyperloop Technologies** to help organize its patent-related data.

The **Tikit Group** continues to have success with its Carpe Diem time recording products with **FTI Consulting** signing up for 4200 users and **Paul Hastings** going for 1100 Carpe Diem Mobile licences. In addition, Chilean-based **Carey CL** has signed up with Tikit to help spread the Carpe Diem product into the LatAm market.

In a major win for **Aderant**, top 30 global firm **Davis Polk & Wardwell** has selected Aderant Expert as its new practice management system. The firm will also be implementing Aderant's newly-released Spotlight Analytics business intelligence solution and MatterWorks. According to Legal IT Insider data, Davis Polk previously used a bespoke practice management system. **Quintairos Prieto Wood & Boyer (QPWB)** has also selected Aderant Expert as its new practice management software, along with Expert On the Go Time, Paperless Billing, Expert Image and BI. QPWB has a network of 19 offices across the United States and US territories.

LA-based **Public Counsel**, the largest pro bono law firm in the US, has implemented **Helm360 Terminus Pro**, integrated with ProLaw, to help to improve productivity. The firm's IT director **Scot Moore** commented "As a non-profit firm, we track and report on thousands of volunteers and the hours they've donated. Previously, this was a very lengthy process requiring hours of precious time. Since implementing Terminus Pro, we can have this information to the right people in seconds, and it

relieves our staff to do other things to fulfill our mission."

The **Pegasystems Inc Pega 7** platform has been selected by the **New Jersey Courts** to help the State to efficiently identify, release, and track low-risk defendants before their trial dates, as part of an initiative to create a fairer criminal justice process for its citizens while reducing jail populations and associated taxpayer costs. According to the Center for Court Innovation, an estimated half million people are detained every day across the United States because of an inability to post bail. As a result, jail populations rise and state spending increases, which ultimately impacts taxpayers. This often takes a personal toll on low-risk defendants who cannot post bail and are unable to report to work, leading to possible job loss and further financial disadvantage. New Jersey voters chose an alternative path by passing a constitutional amendment on bail reform that will go into effect in January 2017. The State turned to Pegasystems to help operationalise these changes and the software will enable the New Jersey Courts to quickly conduct intelligent risk assessments of each defendant using pre-determined rules and criteria to assist in a judge's determination of pre-trial release eligibility.

HotDocs Market announced that the **State Bar of Wisconsin** now offers WisDocs Estate Planning automated legal content via HotDocs platform. The State Bar is initially launching a series of wills, revocable trusts, marital property agreements, durable powers of attorney and advance care planning templates.

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► Legal IT director priorities for 2016/17

Andrew Brammer, IT and shared services director, Allen & Overy

- 1. New solutions, designed for clients** – the right blend of technology, expertise and resourcing to solve our clients' challenges. With respect to technology, we are exploiting workflow, collaboration, automation and analytics tools to provide 'end-to-end' services to our clients.
- 2. Information security and risk management** – our areas of focus include moving towards the emerging SOC2+ standard, forthcoming GDPR legislation and the constant improvement and tuning of our cyber monitoring capability as threats change.
- 3. Improved mobility and collaboration technologies** – meeting increasing demands today whilst recognising 'total' mobility will be a pre-requisite for new hires in future years. Increasingly our people are working outside the office. We are developing ways of securely providing the technology services to the user rather than an office desk. This will provide application and data 'at the edge', reducing the dependence on a high quality, highly availability network.

David Aird, IT director, DAC Beachcroft

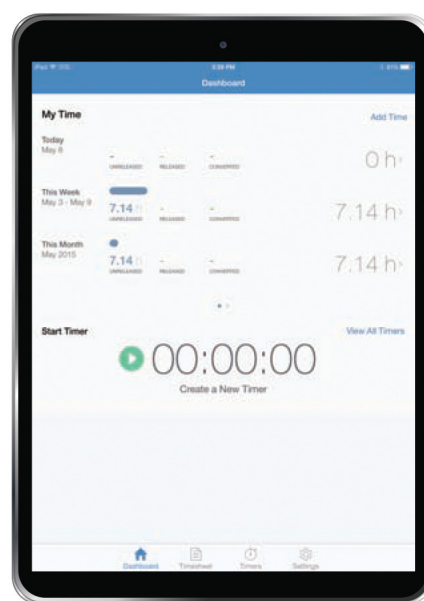
- 1. Security** - beginning to sound like a broken record here, as most Legal CIOs are on this one, but security whilst always important has shot up the agenda in the last few years but was often something you read that happens to other people. These days, it's probably something that happened to you last month or if you are lucky last year. Everyone has their own war story or near miss. We are investing quite heavily in this area, new systems, experienced partners running security related services for us and also, most importantly, on awareness and the people factor.
- 2. Digital** - this is something again that more people are beginning to get and take more of an interest in. While we are interested in the pure digital experience for clients, we do realise that we are a law firm and for now, that probably means we are not going to be Uber. So for us, digital at the moment is more about looking at how we do business / the processes (particularly back office); how we can digitalise to improve margin and work smarter. We're doing this in a number of places from real estate to clinical risk. We are also interested as part of our digital agenda on artificial intelligence; while it's beginning to look a little over-hyped, we think this could be a very useful weapon in the armoury.
- 3. Change in law firms** - having been in the sector for two and a half years, it's struck me that change full stop in law firms is quite difficult. Even when you deliver something quite compelling you will still get consternation about it (much more than other sectors I believe). So as we do our new stuff, projects/

change/transformation/upgrades, call it what you will, we are trying to think of better ways to manage the change, be that comms/training etc. Otherwise, it just becomes "stuff that the IT department has thrown out there" and that people don't engage with.

Maurice Tunney, Keystone Law

- 1. Innovate** - although our key systems are function rich, easy to use and get excellent feedback from our users - there is always room for improvement. Our innovation team are always on the lookout for new and exciting technology that we can harness to enable us to provide a more effective service to our clients and we have several of these projects underway.
- 2. Automate** - our model places more emphasis on IT self-reliance, therefore our systems need to be as simple and intuitive as possible. The more tasks that we can automate the better. This focus on automation applies to the daily life of a lawyer as well as the back-office support functions.
- 3. Collaborate** - over the last few years we have grown by 35% year-on-year and continue to grow rapidly. Therefore, we are not only ensuring that our core systems and processes are as scalable and resilient as possible, we are also working with our lawyers to ensure they can collaborate effectively with each other and most importantly with our clients.

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► Movers & Shakers

UK **Mark Craddock**, one of the legal IT market's leading sales management evangelists, has joined **Prosperoware** as sales manager for EMEA. Craddock, who will be based in London, is the third major industry hire for Prosperoware in the past 12 months, after **Ben Weinberger** joined as vice president of solutions from Phoenix Business Solutions at the end of 2015 and former Withers project manager **John Jones** joined as director of consulting for the EMEA region in February 2016.

NetDocuments has announced the hire of former Thomson Reuters Elite client account executive **Daniel Ibrahim** and former Eclipse Legal Systems sales manager **Steve Latter** to boost its EMEA capability. Ibrahim joined in March as director of strategic accounts EMEA, while Latter in February began the role of senior accounts executive EMEA.

The **Dentons** innovation and technology investment arm **NextLaw Labs** has bolstered its advisory board with two inhouse appointments: **Keith Austin**, senior vice president and UK/EMEA head of legal at Deutsche Post DHL; and **Gastón Bilder**, senior legal counsel at Total. NextLaw Labs said the appointments will help bring greater international perspective and a more comprehensive understanding of the legal landscape to NextLaw Labs. The pair join Casey Flaherty, former inhouse lawyer and founder of legal technology consultancy Procertas and creator of the Legal Technology Assessment, who joined NextLaw Labs advisory board in October 2015.

New managed legal services, technology and advisory firm **Ethien** has hired Osborne Clarke consultant and former Freshfields Bruckhaus Deringer partner **Paul Taylor** as its head of business solutions.

Taylor, who joined OC as a partner in its digital business team in 2007, will work with Ethien's law firm and inhouse legal clients to develop solutions that help improve quality and efficiency and reduce risk within legal services delivery. He will also act as Ethien's general counsel.

Intapp has hired its first inhouse recruiter in the UK, as **Nigel Lawrence** joins the California-headquartered time recording company from Cogence Search. The hire, which follows Intapp's acquisition of Manchester-based time recording supplier Rekoop in January, is seen as justified by how quickly the company has already grown in the UK and its future growth plans.

Solicitors Own Software (SOS) has appointed **Graham Colbourne** as its new managing director, taking over from industry veteran **David McNamara**, who is stepping down to retire after 23 years with the

company. Colbourne, who joined SOS in 1995, has been the company's technical director for the past ten years. McNamara has worked at SOS since 1993 and was promoted from sales and marketing director to managing director in 2008, when SOS's executive team undertook its MBO after the retirement of founder Michael Platt.

The managing director of **Quill Pinpoint**, **Julian Bryan**, has pledged to extend the membership of the **Legal Software Suppliers Association (LSSA)** to a wider spectrum of members following his appointment as chair of the UK industry body for legal systems developers and vendors. Bryan, who takes over from **Matt Lancaster**, said: "With technology touching every aspect of our business and personal lives, it is time for the LSSA to extend its membership offering to a far wider spectrum of software suppliers to the legal sector. I see this as a key component of the LSSA's strategy for the forthcoming year." **Dominic Cullis** of **Easy Convey** continues in the role as vice chair and **Phil Snee** of **Linetime** continues as treasurer.

MOVERS & SHAKERS CONTINUES ON P.16



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MOVERS & SHAKERS CONTINUED FROM P.15

mmadigital, the online marketing agency for the UK legal sector, has added three lead generation specialists to their expanding team. **George Boden**, **Ian DeCordova** and **Matthew Gibson** will join the Cheshire-based outfit which already works with a third of the UK's top 200 law firms on lead generation, including PPC, SEO, CRO and Paid Social.

NORTH AMERICA Having made its first US hire in August 2015, when **Andrew Baker** joined from SeyfarthLean, legal industry management consultancy **Janders Dean** has brought on board its second permanent US member of staff **Karl Haraldsson**, also formerly at SeyfarthLean. Haraldsson was until March 2016 an associate data solutions architect specialising in legal analytics.

Ediscovery vendor **Venio Systems** has promoted **Babs Deacon** to VP of training and education and chief marketing officer. Deacon commented "Marketing in ediscovery has always been about educating."

Wilson Legal Solutions continues its expansion with four new senior hires. They are **Monica Browning** and **Greg Giblin** as marketing manager and account executive respectively. Previously, Browning worked as Aderant's corporate events manager, where she oversaw everything from choosing the venue and coordinating logistics to planning and executing the event theme. Giblin was employed by Thomson Reuters Elite as a sales executive, responsible for selling 3E. Also joining are **Greg Boyd** and **Jeff Shaw** who will be based out of Wilson's new office in New Brunswick, Canada. Boyd and Shaw will be senior consultants and have track records that include Whitehill Technologies, Skywire Software, and Thomson Reuters Elite.

Legal outsourcing provider **QuisLex** has hired **Steven Rudnick** as a director in legal spend management. Rudnick was previously operations manager, legal invoice review at Zurich Financial Services, where he advanced the use of analytics in billing review and compliance for a \$600M+ per annum legal spend.

kCura has appointed **Jason Ream** as chief financial officer (cfo), where he will oversee core internal operations and financial strategies, and report to kCura's founder and CEO, **Andrew Sieja**. Ream has 20 years experience in software and investment. During his time at SolarWinds, where he was CFO, he helped guide the company through a successful IPO and then took the company private again in a \$4.5 billion sale. kCura's **Keith Lieberman** will transition from CFO to chief accounting officer,

working closely with Jason on internal operations.

Helm360 has appointed **Bim Dave** as Executive VP Products and Services. Bim will lead Helm 360's product and development teams, as well as continue to expand the company's global services team. Bim was recently director of global technology services responsible for building the Thomson Reuters Elite team delivering Elite 3E and Enterprise implementation services.

Houston-headquartered legal consulting and solutions startup **Morae Legal** has now hired former Huron Consulting Group (HCG) managing director **Robert Haskin** as its MD and **Mori Kabiri** from Kiersted Systems as senior director. Haskin has spent the last 14 years helping corporate legal and IT departments improve their discovery management functions by designing and implementing innovative solutions, including advanced data analytics. In May 2002 he joined HCG, working within Huron Legal, which was acquired by Consilio in January this year. Before Kiersted, Kabiri was as a senior project manager for 20th Century Fox. These two latest hires follow the announcement in March that Morae Legal, which is led by president **Shahzad Bashir**, himself ex-executive vice president of HCG, had hired ten senior legal and consulting executives.

► 10 years ago today...

April 2006 saw the surprising news that UK-based maritime and insurance law specialist Holman Fenwick Willan had opted to swapout its legacy practice management software, including Axxia, and go with an SAP solution supplied by reseller Intalec and based on the SAP All-in-One platform. The announcement caused a huge buzz in the market as this would have been SAP's second win in UK legal (the first was with Linklaters) and HFW were considerably smaller than Linklaters. Sadly the project ended in tears with the SAP implementation being canned and Holman Fenwick subsequently going with Thomson Reuters Elite 3E.

By coincidence, it was also in April 2006 that Elite went public and released full details of 3E as its "next generation financial and practice management system." Given the recent controversy surrounding the end-of-life announcements for Elite Enterprise, it's interesting to note that in 2006 Elite stated that 3E was "not a replacement for Enterprise" which would continue to be supported "for at least the next 10 years".



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► Radiant Law: “We change systems at a rate that would make CIOs hair go white”

Market commentators can be guilty of talking about alternative legal service providers collectively as if they have a slightly mythical quality about them and a little bit of pixie dust on tap.

At technology and outsourcing boutique Radiant Law, which operates on an entirely fixed fee basis, there is no pixie dust but the firm epitomises that agility you associate with a new breed of legal adviser.

The now 35-staff firm, which counts Deutsche Bank and UBS among its clients and last year unveiled revenues of £3m for 2013/14, has just put in cloud-based project management system Wrike in place of Trello. It has also recently pulled out OnePageCRM and put in Salesforce.

Co-founder and CEO Alex Hamilton, formerly co-chair of Latham & Watkins' global technology transactions group, told Legal IT Insider: “We change systems at a rate that would make CIOs hair go white.”

Wrike is compatible with Radiant's Box document management system and its MediaWiki, which includes a semantic wiki.

The boutique hasn't used email internally for a while; it rolled out Slack in Q4 of 2014.

And with clients constantly moaning to Legal IT Insider about old fashioned firms that still use billable hours, we're amused to hear that Radiant from time to time has to bow out of RFP processes where the client insists on Radiant providing hourly rates.

► Quote/Unquote

*“To get off the Brussels gravy train.” **One IT director at a top 100 law firm expresses his private views as to why we should leave the EU. Unless, of course, he's referring to the Eurostar.***

legal*i* insider

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Editor-in-Chief:

Caroline Hill

t: +44(0)1825 713409

m: +44(0)7786 245612

e: caroline.hill@tavistockmedia.com

🐦 [@chillmedia](#)

Editor-at-Large:

Charles Christian

t: +44(0)1986 788666

m: +44(0)7786 738172

e: charles@legaltechnology.com

🐦 [@ChristianUncut](#)

Advertising Sales:

Jeremy Hill

t: +44 (0) 203 7622295

m: +44(0)7973 483131

e: jeremy.hill@tavistockmedia.com

🐦 [@tavistockmedia](#)