

legal insider

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▶ Dentons trials NetDocuments & pessimistic security model

Dentons is set to launch a proof of concept of NetDocuments' cloud-based document management system, as the 7,300-lawyer firm also moves closer to locking down its files to all but those immediately involved in its matters.

Dentons is a long term iManage client but, as part of a five-year plan put in place by global chief information officer Marcel Henri in, will review its DMS and knowledge management arrangements in two years' time.

Henri told Legal IT Insider: "We have been in discussions with NetDocuments for some time and are planning to launch a proof of concept before the end of this year within a reasonably self-contained area in Asia.

"We have agreed with iManage to do a similar proof of concept with the latest iManage. Both will be run in greenfield sites so we are comparing like for like."

Henri added: "We will be reviewing our document management system and knowledge management tools in a couple of years' time, so we won't be making any big decisions immediately but I have to do my research at a good time."

The trial comes as Dentons also moves closer to a pessimistic security model, under which documents are only accessible by staff who are granted access by the firm.

Fears over security, particularly sophisticated phishing attacks, where a hacker tricks staff into handing over confidential login details and assumes their privileges, have led a number of firms to discuss increasing their internal security measures.

However, for reasons of convenience, cost, and resources, the vast majority of law firms still operate an optimistic security model, whereby documents are often restricted but the default position is that they are accessible across the firm.

Henri told Legal IT Insider: "There is a push within the firm for a completely pessimistic security model; it's what clients expect. The business gets it but of course some parts of the business are resisting it because it limits your ability to share knowledge and content. Firms have invested heavily in search but what is a search if everything is locked down?"

Dentons is currently trialling a pessimistic security model in Germany and Henri added: "Whatever solution we go with, whether it be iManage or NetDocuments, it will most likely be under a pessimistic security model.

"One scenario we have discussed is to draw a line in the sand and say that, from a given date, we will apply a pessimistic security model and lock things down. In order to be able to share best practice and model documents, you are going to have to put more effort in the qualification of those documents and you are going to have to clean them and profile them, which is an extra workload."

The decision follows recent high profile security breaches and leaks such as the Panama Papers. Henri said: "In light of the many recent security breaches that have made the headlines, I simply don't think firms will have a choice."

▶ DAC Beachcroft selects OnePlace

DAC Beachcroft will in November roll out Salesforce-based client relationship management system OnePlace to 200 users as part of a pilot that looks likely to be implemented across the 2,200-staff firm next year.

DAC BEACHCROFT CONTINUES ON P.2



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► DAC Beachcroft selects OnePlace

DAC BEACHCROFT CONTINUED FROM FRONT COVER

OnePlace, which in June hired former LexisNexis Enterprise Solutions international sales director Guy Phillips and formally opened its first London office, was selected ahead of competitive CRM products following a pitch largely because it is a software-as-a-service solution and can be scaled up easily.

Speaking to Legal IT Insider, IT director David Aird said: "Because of its particular functionality, the barrier to entry is removed and it doesn't seem quite such an unwieldy, large project. If we need to add 50 users, we can simply add them."

The project is being led from within the business by the firm's clients & markets team headed by partner and director Nathan Butcher.

Butcher added: "The ongoing implementation of the OnePlace pilot forms an important part of our overall Client Engagement Programme and further underlines our commitment to putting clients at the very heart of our business."

DAC Beachcroft will become the largest law firm to roll out OnePlace, after Legal IT Insider revealed in March 2016 that circa 1,800-staff international law firm Bird & Bird has signed up with the cloud CRM provider.

OnePlace 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.

One big selling point is 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.

► Quote/Unquote

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▶ Travers signs up with CheckRecipient

Travers Smith has become one of the early law firm adopters of CheckRecipient, a tool that automatically predicts and prevents misaddressed emails from being accidentally sent to the wrong recipient.

The machine learning-based software company was established around three and a half years ago and formally launched 18 months ago, with a number of major international law firms known to be at different stages of engagement with the young company. Penningtons Manches went live with CheckRecipient in May 2016.

CheckRecipient first started working with Travers in May 2015 and the UK top 50 law firm's feedback was built into a final product launched in February 2016. Travers rolled out CheckRecipient across the firm at the start of September.

Aside from the fact that CheckRecipient at the end of the pilot presented Travers with a list of emails that it had prevented from going astray, the firm liked the admin-free nature of the product and the minimal disruption that it causes.

CheckRecipient, which uses a blend of data science and machine learning algorithms to automatically spot mistakes based on historical email sending patterns, has received significant investment, including from BigHand founder Stephen Thompson, who has spent time working with the company, helping it go to market and grow.

Other investors include QXL founder Tim Jackson, the venture capital arm of investment manager Winton, ex-Clifford Chance partner Keith Hyman, and former head of investment banking EMEA at Nomura, Christian Thun-Hohenstein. CheckRecipient has also received a six figure government grant from Innovate UK.

CheckRecipient was founded by three former junior investment bankers who have engineering and mathematics backgrounds.

Speaking to Legal IT Insider, co-founder and CEO Tim Sadler said: "We saw lots of data lost through emails sent to the wrong person."

Sadler was a young analyst at HSBC, while co-founder Tom Adams worked in a corporate advisory M&A team at Santander. The third co-founder and CTO, Ed Bishop was an analyst at RBS. All three studied mechanical engineering at Imperial College London from 2007.

Sadler said: "The Information Commissioner's Office reports its findings every quarter and misdirected emails are one of the top data security incidents. In accordance with the SRA handbook, client-attorney privilege is one of the cornerstones and lawyers communicate everything over email, so it's a recipe for disaster."

Ann Cant, IT director at Travers Smith, added: "CheckRecipient's ability to prevent misaddressed emails using artificial intelligence is unrivalled in the market and it is now something we consider a crucial part of our firm's cyber security strategy."

▶ Barclays launches performance survey tool

Barclays will in October launch an internal survey tool to assess its external lawyers' performance.

The survey will be completed by in-house counsel at the bank and will contribute towards a visual value chart used by Barclays as the basis of regular reviews with external counsel and in the bank's decision on which law firms to instruct.

The value chart shows in the clearest relief where a law firm sits in comparison to its peers. The chart is shown to law firms (with the other firms anonymised) and it forms the basis of a discussion with the bank over what areas firms need to improve to raise their overall performance.

The chart will be factored in by Barclays' in-house lawyers in their decision on who to instruct on any given matter.

Speaking to Legal IT Insider (see the full interview on page 13), Stéphanie Hamon, managing director of Barclays newly-created commercial management team, which was set up to review and run the panel, said: "Firms can move up and down the value chart and we will be tracking and monitoring where our work is sent. It's in their interest to be an 'a' or 'b' rated firm rather than 'c' or 'd' – we wouldn't expect to give the bulk of our work to a 'd'-rated firm."

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► Legal IT Insider increases influence among ILTA firms

Legal IT Insider has increased its influence among ILTA member law firms, with 19% saying that we are among their favourite publications – the highest of any UK publication by a country mile.

The 19% figure, taken from InsideLegal and ILTA's influential Technology Purchasing Survey 2016 - is up from 18% in 2015 and 17% in 2014.

Rank	2016	Blogs/Online Communities/Sites	2015	2014
1	67%	ILTA Connected Community	59%	59%
2	52%	ILTA Blogs	52%	53%
3=	23%	Above the Law	22%	26%
3=	23%	Google News	20%	23%
3=	23%	PinHawk Law Technology Daily Digest	31%	25%
6	22%	Engadget	20%	24%
7	19%	3 Geeks and a Law Blog	17%	22%
8	17%	Wired	18%	20%
9	14%	Gizmodo	16%	20%
10=	13%	Ars Technica	18%	0%
10=	13%	Law.com	13%	23%
10=	13%	Legal IT Insider www.legaltechnology.com	17%	7%
10=	13%	Lifehacker	17%	15%
14=	11%	Legal IT Professionals	12%	19%
14=	11%	TechCrunch	15%	15%
16	10%	Law Technology Today (ABA LTRC blog)	17%	14%
17=	8%	InsideLegal.com	9%	8%
17=	8%	Slashdot	10%	9%
19	7%	None	9%	7%
20=	5%	AdamSmithEsq.com	0%	0%
20=	5%	Lawyerist	4%	0%
20=	5%	Legal Support Network	5%	4%
23	3%	DennisKennedy.com	4%	6%
24	2%	Slaw	2%	3%
25	0.23	Reddit	0.19%	0%

Rank	2016	Publications Legal/Legal Technology	2015	2014
1	86%	Peer to Peer (ILTA)	83%	80%
2	83%	ILTA White Papers	86%	86%
3	51%	Legaltech News (ALM, formerly LTN)	50%	57%
4	31%	ABA Journal	19%	26%
5=	20%	Legal Management (ALA)	18%	24%
5=	20%	TechnoLawyer	18%	18%
7	19%	Legal IT Insider (The Orange Rag)	18%	17%
8	16%	The American Lawyer (ALM)	16%	17%
9	15%	Cybersecurity Law & Strategy (ALM LJN)	17%	19%
10	11%	Legal IT Today (Legal IT Professionals)	21%	13%
11	8%	Corporate Counsel (ALM)	5%	7%
12=	4%	Law Practice Today (ABA LP/LTRC)	6%	0%
12=	4%	Legal Week (ALM)	0%	0%
14=	3%	Briefing (Legal Support Network)	0%	0%
14=	3%	Law Practice (ABA LP)	6%	10%
16	2%	LPM (Legal Support Network)	0%	0%
17=	1%	Legal Business (Legalease)	0%	0%
17=	1%	Managing Partner (Wilmington)	3%	3%
17=	1%	The Lawyer (Centaur Media)	0%	0%

► Freshfields announces Kira tie-up

Freshfields Bruckhaus Deringer has become the latest law firm to sign up with Kira Systems to implement a global artificial intelligence tool for document review in the M&A due diligence process. Kira's portfolio of clients now includes DLA Piper, which in June announced that it had entered into a partnership with Kira, and Clifford Chance, which made a similar announcement in July. However, the largest deployment of Kira to date is with Deloitte, which signed up with Kira in March through its US business.

Freshfields' director of legal services innovation, Isabel Parker said: "Kira can be configured around our own custom provisions, using our knowledge base, ensuring that it is perfectly tailored to clients' needs. It complements our own legal expertise, and will further enhance the quality of work delivered to clients, while helping to free up the Legal Services Centre team to focus on more complex areas of work."

► Thomson Reuters Legal to hot desk in new Canary Wharf office

Thomson Reuters' London legal team is set to move to entirely agile new premises in Canary Wharf by the end of 2016.

Previously the Bank of America building, Thomson Reuters will take up the first seven floors of the building in 5 Canada Square, with the circa 150-strong legal team the first to relocate.

Desks will not be allocated to any particular individual but will be allocated through a desk booking system and staff will have lockers to keep their work possessions in.

Thomson Reuters has been planning the move since the start of 2016 and, after consultation with other organisations that have already become entirely agile, has decided to introduce 'neighbourhoods' to its new office space. Staff will be directed by the booking system to their neighbourhood of choice.

Jim Leason, VP and head of Thomson Reuters court management business in UK and Ireland, who has led the project for the legal team, said: "The guidance seems to be that having complete flexibility is not the best route so we have chosen to have neighbourhoods so you can be directed to the functional group you are working in. If the neighbourhood is booked up, the booking systems opens up other desks."

Thomson Reuters has focussed on providing collaborative working spaces and furniture and Leason says: "There are areas where teams can gather round a white board or screen and a lot of walls will be writable."

The neighbourhoods that require peace or, on the contrary, tend to be noisier, have also been separated.

The booking system is flexible meaning if you want to assemble a team for a project, that team can be located in one area of the office – a move towards agile working that many law firms still just dream of.

In terms of the other technology installed, all staff will have the same desktop experience and will be using softphones to make and receive calls on their laptop via VoIP. Leason says: "Softphones enable you to move from the office to home while your PC still remains your communication hub. When people phone the Thomson Reuters network, it routes the call to your laptop."

While there will be desktop phones to start with, and certain teams may need to continue to use them, the long term strategy is that all communication will go through the laptop.

Given that there will be significantly fewer desks than staff, everything will hang on the efficacy of the

booking system and Thomson Reuters' calculations, after weeks of painstaking floor walking.

Leason says: "We've done a lot of analysis of how the business works. All staff have flexibility and when we looked at the occupancy of the building, it was no more than 50% of desks occupied 100% of the time. Yes, we've taken desks away but if we carry on working the way we have done, during peak periods we should be able to accommodate everyone on one day."

He adds: "We're about to kick off another exercise of floor walking to measure occupancy – you've got to make sure you're comfortable with it."

While hot desking or 'hoteling' has been embraced by the likes of Deloitte and Citigroup and can cut costs by up to 30%, it can inevitably be unpopular with staff, particularly to start with. Thomson Reuters has long been open plan, so culturally the shift will not be as great as were it moving from an entirely cellular model. It has also long had a clean desk policy and in its new building has tried to exactly replicate the desktop experience. Beyond that, staff will have to get comfortable with not having their own bit of real estate complete with pot plant and family photo. Thank goodness for Smartphone photo frames.



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► Norton Rose Fulbright: SAP – bold or bat crazy? Discuss.

Norton Rose Fulbright has become the fourth international law firm to sign up with SAP and the first to adopt a single, unified global practice management system at a base overall project cost to the firm of an eye watering £75m.

The 3,800-lawyer firm has, like Baker & McKenzie and most recently K&L Gates, engaged Fulcrum Global Technologies as the system integrator, advising on the design, build and implementation of SAP S/4HANA Digital Core. Accenture has been advising NRF on the project, which in SAP terms has completed its Blueprint and is now in Realisation, using the full suite of Fulcrum products.

Fulcrum was the saviour of Baker's SAP implementation, which after an expensive aborted first attempt to install the enterprise resource planning system, went live in December 2014, using Fulcrum's Pro Billing for Legal, which is configured for the legal industry and provides flexible billing options.

Nonetheless, the decision by NRF to proceed with SAP is mind blowing, in terms of the costs out the door; the amount of work and global buy-in needed for a successful conversion; and the potential risks involved, not least for the individuals who spearhead the project.

Linklaters was the first international law firm to implement SAP in 2003 in a project reported to cost north of £30m and which saw the firm unable to bill its clients for a period of time thanks to serious teething problems.

Incidentally, the Magic Circle giant doesn't use SAP for workforce scheduling, timesheets or CRM, where it is a LexisNexis client, but other than that its solution covers all practice management and is consistent globally.

Baker, even after its successful conversion to SAP, saw a drop in revenue and profits, which it attributed in large part to the new system.

While there is undoubtedly growing support for the argument that major league global law firms have outgrown the capabilities of traditional legal software suppliers, the trend towards investing in technology that directly benefits the client makes it harder to justify spending over a quarter of your profit on background plumbing.

As one IT director of a major international law firm delicately puts it: "That's a fuck load of money and a ridiculous amount in today's world. The problem they are trying to solve is worth about £30m in terms of how much I would have spent.

"The people who spend their money on providing new and clever ways to serve the clients will be the real winners. This will be a noose around Norton Rose Fulbright's neck."

The consultant adds: "Firms like Herbert Smith Freehills are spending a tenth of that and spending the rest on data analytics, legal project management, data scientists and technology that focusses on the client, not on getting money out of them."

However, Fulcrum continues its focus on helping clients to assimilate artificial intelligence into their legal processes and striking a more optimistic note, one global CIO says: "It could make a lot of sense, not least in terms of integration with end-clients. I'm very keen to see how this bold initiative plays out."

NRF, which as a Swiss Verein transformed from a top-ten-wannabe (it was in the top 20) to a global giant through a series of mergers between 2010 and 2013, is comprised of five profit centres or subsidiaries across the UK, US, Australia, Canada and South Africa, none of which talk properly to each other on a systemic level.

Global CEO Peter Martyr and the team that successfully led the move to become one of the largest firms in the world had always intended to build a global platform first and then rationalise it. At is stands, NRF is unable to pass on to its clients the benefits of its global network and lacks the agility to deal with the complex fee arrangements now expected by clients.

Fulcrum's Chicago managing director and founding member Ahmed Shaaban told Legal IT Insider: "Clients are quite innovative in the fee arrangements they request and the law firm's system has to be able to handle them. At many firms, including Baker, clients are also demanding transparency of certain types of interim data such as WIP, without waiting weeks for the information to be formalized in an invoice. Now that information can be readily available in one place."

NRF first started to flirt with the idea of SAP in 2014, after Mark Whitley joined from BT Operate to initiate change and the firm launched Project 2020.

The 60+ office firm was in something between a rock and a hard place in terms of how to rise to the challenge of addressing the inefficiencies and lack of cohesion - there is no question that bespoke legal ERP systems start to struggle with the global tax arrangements of firms of NRF's size.

NORTON ROSE FULBRIGHT CONTINUES ON P.9

The new benchmark for Legal DMS

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NORTON ROSE FULBRIGHT CONTINUED FROM P.7

SAP + Fulcrum gives firms one version of the truth and in turn that benefits clients that want real-time billing information and fee arrangements.

Shaaban says: "Say I'm a partner in the US and you're in the UK, and we both perform work for the same client on the same matter. How much can we use automation to support the billing and management of that matter so the client can be served promptly with information and billing that is flexible and accommodating to the various fee arrangements they demand, taking into account global considerations like multiple currencies, taxes, languages, statutory reporting and e-billing formats? Fulcrum has built a solution on the world's largest business software platform, SAP HANA, because that platform is state of the art, handles these types of challenges with ease and is used by banks, governments, and Fortune 1000 companies that require scale and performance."

There is no question that the solution, when it is in and up and running, works. Baker's COO Craig Courter, speaking to Legal IT Insider about SAP earlier in the year said: "It is running well and gives us an amazing advantage with its rock solid performance."

In August, Baker announced a rise in global revenues of 8% in constant currency to \$2.62bn. Net profit grew by 14%.

However, Baker's key lesson in SAP Mark II, aside from the fact that it needed Fulcrum's legal understanding and wrapper, was that you can't make SAP fit the firm, you need to make the firm fit SAP.

NRF's U.S. firm is extremely independent and the challenge ahead in persuading them and the global network to comply is immense. South Africa, which is set up as a company, is understood to be sticking with Aderant Expert.

Shaaban is confident. He says: "Half the challenge for a law firm is to understand what is involved in these types of projects – so much so that if they aren't ready, or prepared, to manage the significant internal changes to handle the breadth of the project, we prefer not to engage and indeed we've declined to move ahead in the past."

Only when – if - NRF pulls off its switch to SAP will it silence the doubters, with the roll out planned for Q4 of 2017.

Until then, NRF has just given every IT director in the country carte blanche to go cap in hand to their management and ask for a significant uplift to their IT investment.

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► Movers & Shakers

UK & INTERNATIONAL **Fulcrum Global Technologies** announced that **Martin Telfer** is joining the Fulcrum GT team to lead the EMEA region as the senior vice president of business development & delivery (international/EMEA). Telfer, whose experience spans over 30 years, is a highly seasoned technology and business executive, having served as CIO for a number of major law firms in Europe, Asia Pacific, and the US, including Baker & McKenzie, where he most recently led the firm's transformation to SAP enterprise solutions. Fulcrum GT say Telfer's business knowledge and software development experience will be harnessed by the company as it continues its focus on helping clients assimilate Artificial Intelligence (AI) into their legal processes, including intake, billing, and reporting.

Wilson Legal Solutions has expanded its London team with the hire of former Intapp solutions engineer **Daryl Quadros**, former Aderant project manager **Paul Steeples**, and former DNE Resources director of sales **Victoria Laliberte**.

Consultancy and training specialists **Jaeva Management** has recruited **Viona Retkowska**, previously with DWF and Cobbetts, and **Alison Brown** as legal practice management software trainer and business support administrator respectively.

Paul Pastura is relocating from Sydney in a new role as EMEA & APAC director of professional services at **Intapp**.

NORTH AMERICA **Neota Logic** has hired **Ryan McClead** as vice president of client engagement & strategy. McClead, who will be based in New York, was most recently business transformation architect at HighQ and, prior to that, legal tech innovation architect at Norton Rose Fulbright.

Fresh from winning ILTA's Innovative Solution Provider of the Year, **ThreadKM** announced that **Damon Goduto** has joined the collaboration platform as an investor and vice president of sales & marketing. Goduto, who has worked in the legal tech sector for over 20 years, co-founded Iris Data Services in 2007. Iris was acquired by Epiq Systems in 2015 for \$134m, when Goduto took on a consulting role.

An internal management restructure at **RBRO Solutions** sees co-chief executive officers **John Russell** and **Howard Russell** take on different roles, with John becoming chairman and Howard taking on the role of sole CEO. RBRO has also created the role of chief operating officer (COO) and hired **Dennis Croft** to the senior executive team. Croft was most recently the president and CEO of the Spark Regional Innovation Centre.

UnitedLex has appointed **Katherine Kawamoto** as vice president. A former VP of the International Association for Contract and Commercial Management (IACCM), Kawamoto will work to support and expand UnitedLex's growing legal business solutions and digital contracting solutions groups.

EDISCOVERY He's written the book, he has the ediscovery t-shirt, and, after nearly 20 years of consultancy at Allvision Computing, **Andrew Haslam** has now moved into a permanent in-house role as the UK eDisclosure project manager at **Squire Patton Boggs**. Haslam, who enters the global law firm in a fee-earning capacity, will become the first London member of a now eight-strong international eDisclosure litigation support team. Whereas in the United States dedicated inhouse eDiscovery support is an established concept, in the UK it is still in its relative infancy. Haslam, who for much of his consultancy time worked part-time at Hogan Lovells, running an IT litigation support group, told Legal IT Insider: "In the US there are around 2000 in-house litigation support functions whereas in the UK there are 20."

Jonathan Sachs, a lawyer and former executive with Kroll Ontrack, has joined **Catalyst Repository Systems** as managing director for the East Coast, where he will lead regional sales and business development strategies and initiatives.

Litigation support specialist **CDI** reports that **Paul Gettmann** has joined the company as vice president for product strategy. Most recently he served as director of product management at ZyLAB and, prior to that, worked for Content Analyst and LexisNexis.

UK litigation support sector veteran **Jack Bond** has joined **Legastat**, one of the UK's only independent litigation and ediscovery services providers, as an eDisclosure consultant.



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Financial institutions in focus

► Lloyds Banking Group's group GC Kate Cheetham talks tech

Kate Cheetham, group general counsel at Lloyds Banking Group gives Legal IT Insider an inside view of how technology is helping her team to deliver its key strategic priorities and goals; in what way law firms are impressing her and her team; and how they could do better.

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

Working in-house for a major financial services company clearly has its challenges. There's been a huge amount of legal and regulatory change over the last few years, and that looks set to continue as we move towards the EU exit. But this is also a great opportunity for the legal team to work with the business and deliver for the Group.

We recently launched our vision for "Brilliant Business Partnering" to make sure we are working on those priorities that our businesses consider most important and to deliver in the best way possible. We continue to improve how the legal function performs internally; internal feedback is very good but we still have scope to improve further and the use of technology will assist in driving improvements and better collaboration.

As a legal team, what are your key strategic priorities and goals?

The Group's Legal team provides solutions, risk management and legal and market insight to all divisions within the Group. It is instrumental in the effective implementation of the Group's strategy to become the best bank for customers and shareholders and in our aim to help the UK economy to prosper.

Are there examples of where technology is helping you to deliver those goals?

We recently introduced our new matter management system [Visualfiles], giving us better centralised storage of our matters and better management information on all our matters. Our in-house legal team is of a substantial size and we are spread across different business divisions across the UK and internationally. We therefore needed an improved central database of our legal matters which avoids duplication and makes data easy to share and locate as well as providing better insight and reporting on the work that we do.

We have also started to use an internal colleague communicator tool called "Hive." We are setting up a

private legal colleague forum in which we can discuss and share ideas and information in a quick, discussive manner and then share this with the wider businesses that we serve without the need to use emails or sending large files online. Again this has driven efficiencies in the business and is a far more collaborative and open way of working.

Technology tools are also very important in managing litigation efficiently and effectively – particularly e-disclosure tools, including predictive coding.

More generally, we also hold a regular legal technology forum for our legal colleagues to discuss and assess latest innovations that are being introduced to the market. This is a helpful way to not only knowledge share but also discuss market updates.

We continue to explore future options to increase the use of technology. We plan to implement a complete e-billing solution next year, which again will give us significantly more management information and improve transparency and efficiency.

Do law firms currently offer sufficient support to enable you to collaborate with them?

We are seeing more investment from firms to collaborate in a more efficient manner including using portals and extranet sites but there is still quite a way to go to use technology fully and create a more efficient, dynamic working environment between law firms, other third party specialist providers and in house legal teams.

What examples of innovation or initiatives from law firms have really impressed you?

The key advances to date have been in relation to e-discovery (including predictive coding), automation of certain types of documentation and developing artificial intelligence for tasks such as discovery, document review and due diligence. However, technological innovation has by no means been embraced by all firms. I would say that the sector as a whole is on a technological transformation journey but it is still very early days. Certainly more firms need to make these investments and actively plan to deliver legal services in a different way in the future.

Do you reward, encourage and measure law firm innovation?

Yes. Use of innovation is a key factor when we decide which law firms will be 'core firms'; i.e. our strategic partners and it is also something we assess and measure on an ongoing basis with our panel of law firms. It is an important part of the culture as well as a commercial imperative for the legal team and the Group – and therefore for our law firms too.

Financial institutions in focus

► Barclays on innovation, collaboration, and plain old conversation

When Barclays announced its new panel arrangements in June one thing that leaped out was how little hung on a law firm's ability to give excellent legal advice.

Quite the opposite of it not being important, legal excellence is treated by the multinational financial institution as a given. Lawyers no longer get a sticky star for knowing the law, sorry.

Instead, as part of the panel negotiations, Barclays sat down with tendering firms and gave them an opportunity to articulate their version of collaboration and innovation.

Stéphanie Hamon, managing director of Barclays newly-created commercial management team, which was set up to review and run the panel, ran the process alongside Chris Grant, a director and head of law firm management at Barclays.

Speaking to Legal IT Insider about how law firms' efforts to innovate and collaborate measure up, Hamon says: "The thing that impressed us was the law firms that came to us with ideas to improve their productivity rather than waiting for us to go to them.

"One firm was really resistant to fixed fees in the litigation work they do for us. They came to us with a fixed fee proposal for their entire investigation work. We are willing to engage on both sides knowing that there will be some trial and error. The fact is that they were approaching it knowing we wouldn't get it right first time."

A further panel firm has moved completely away from hourly rates and is using its own profitability tool. Hamon said: "On paper it looks amazing. We are waiting to see what it's like in practice."

Other examples of innovation that impressed the Barclays team include law firms that are making strides in legal project management. Hamon said: "We've seen how firms around LPM are ahead of the curve and looking at unbundling and eDiscovery. They said that they will never do eDiscovery as effectively as an external provider but will offer a package: what we want is the collaboration between us and the law firm."

The new panel specifically requires law firms to innovate in the way they provide their legal services. Albeit that firms are often still uncomfortable discussing innovation and that the panel is only two months old, they have been stepping up to the plate.

Many of the best ideas are not technical; when Barclays required a secondment in a niche area and

the two law firm specialists it approached were unable to help, the firms got together to co-ordinate between themselves a secondment share.

While undoubtedly proactive, these ideas are not entirely spontaneous – Barclays has put in place a number of metrics to measure and in effect reward law firm productivity and innovation. It has created a value chart that shows in the clearest, visual relief where a law firm sits on the chart in comparison to its peers. The chart will be shown to law firms (with the other firms anonymised) and it will form the basis of a discussion with the bank over their performance.

The tool is being shared among Barclays' in-house lawyers, who will factor it in to their decisions over who to instruct on a given matter.

Barclays will in October launch an internal survey tool, which measures law firms against a list of expectations and award them scores that will filter in to their value chart. Hamon said: "Firms can move up and down the value chart and we will be tracking and monitoring where our work is sent. It's in their interest to be an 'a' or 'b' rated firm rather than 'c' or 'd' – we wouldn't expect to give the bulk of our work to a 'd'-rated firm."

Barclays also maintains a ring fenced relationship account that keeps track of all the value-add services that law firms must provide over the year, such as secondments. These services are compulsory - if the law firm doesn't provide the earmarked service, it must repay the bank the monetary equivalent owed.

It is from this account that Barclays will 'pay' firms to develop solutions that will benefit the bank. While this could be a piece of software Hamon says: "It's much more of a two-way conversation and it won't be limited to software development.

Grant add: "It would be good if law firms were to be more open to sharing the technology they have since, as an in-house function, we don't have the same kind of funding as the law firms.

"We want to change firms' mindsets when it comes to relationship management so they act less like lawyers and think about what they can bring to the table that benefits us as a bank."

When it comes to the crunch, Hamon says that firms could have all the technology in the world but what they often lack is the ability to have a proper dialogue with the Barclays team. "Some firms have been hitting their heads against a brick wall and we could have helped them," says Hamon. "Some have great expertise or tools we didn't know about and haven't brought to the table. How do we know if you don't talk to us? Firms are letting themselves down by not engaging properly with us. Maybe they are thinking about the next deal when they should be thinking more holistically."

Among the noise of technological innovation, it's important to tick off the basics.

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

UK & EMEA **Freshfields Bruckhaus Deringer** has become the latest law firm to sign up with **Kira Systems** to implement a global artificial intelligence tool for document review in the M&A due diligence process. The deal follows a year-long trial from its Manchester legal services centre. The Insider Top 200 Chart now includes an AI column – currently Kira and **RAVN** are level pegging with three sites each.

Thomson Reuters Elite is expanding its Irish customer base as Dublin-based law firm **LK Shields** swaps out its long term legacy Axxia Arista practice management system (PMS) for **Elite 3E**. The firm will be utilising TRE's Express Services Package, which enables rapid deployment in nine to 12 months with a standardised 3E configuration. ESP proved a key factor in the firm's selection of 3E. The decision to partner with Elite was taken after a thorough market review to find the best replacement for Axxia, which it selected in around 1997, long before LexisNexis acquired Axxia in 2008. In the UK, **Stewarts Law** has completed the migration to Elite 3E from the now legacy Elite Envision platform. Elite has now concluded five go-lives by UK firms in the past four months.

City firm **Macfarlanes** has selected the **Prosperoware Milan** InfoGov comprehensive confidentiality management platform, to replace its legacy Intapp/Frayman ethical wall solution. **Andrew Powell**, Head of IT at Macfarlanes, said "Today's security challenges for law firms are well-known, and Milan InfoGov puts our firm on the leading edge of satisfying our clients' needs for confidentiality while providing for the proper workflow to allow our professionals to do their jobs."

Shepherd and Wedderburn has deployed the latest version of **iManage Work** document management system to over 500 users across its offices in Edinburgh, Glasgow, London and Aberdeen. The solution has been implemented by **Ascortus Limited**. The UK-based maritime litigation firm **Winter Scott LLP** has also successfully deployed iManage Work via Ascortus.

Pinsent Masons is the latest firm to sign up to the **Plan-Net** 24/7 shared service IT desk. The service operates week nights, weekends and Bank holidays.

Cordery, a compliance advisory and solutions business launched by LexisNexis in 2014, is deploying CRM/customer relationship management solution **Lexis Nexis InterAction**.

UK top 200 firm **Pitmans** has rolled out the **NetDocuments** document and email management platform across its four offices spanning London, Reading and Southampton. **Joanne Evans**, IT manager at Pitmans, said: "We completed a thorough review of DMS options available in the market and NetDocuments emerged as the platform and innovation partner that will take our

firm into the future and build on our Cloud-First strategy." The implementation was handled by NetDocuments and channel partner **Peregrine Cloud**.

West Yorkshire firm **Chadwick Lawrence** chose IT services company TSG to protect and support its IT environment with SystemCare, which monitor the firm's 16 servers, 24/7.

Another good month for **Eclipse Legal Systems** with wins for its **Proclaim** software at **Total Legal Solutions**, a Sheffield-based firm providing clients with cost services from bill drafting and negotiations to points of dispute and advocacy for a range of sectors including personal injury, litigation, property and negligence. Total went with a ready-to-go Proclaim Costs Drafting Case Management solution. The newly-formed inhouse legal team at **Network Homes**, one of the country's leading housing association developers which now manages over 20,500 homes throughout London and the Home Counties, is to use Proclaim case management to streamline processes and help to reduce spend on external solicitor fees. And, Eclipse is also implementing its case management software solution at **UCL Consultants**, a wholly-owned subsidiary of **University College London** and one of the UK's leading providers of academic consultancy services.

WINS & DEALS CONTINUES ON P.15

A large white speech bubble icon is centered at the top of the advertisement. Below it, the text "Collaborate, engage, optimise" is written in a white, sans-serif font. Underneath this, a smaller line of text reads: "Increase transactional efficiency, optimise legal processes and provide an outstanding client experience." At the bottom of the ad, the text "Collaborate 4" is displayed in a large, white, sans-serif font, followed by "Coming soon." in a smaller font. The HighQ logo, consisting of the word "High" in white and a blue speech bubble icon, is positioned in the bottom right corner. The background of the entire advertisement is a dark, starry night sky with a silhouette of a mountain range at the bottom.

Collaborate, engage, optimise

Increase transactional efficiency, optimise legal processes and provide an outstanding client experience.

Collaborate 4
Coming soon.

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Legal software for the new era

Find out more at www.soslegal.co.uk/demo



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WINS & DEALS CONTINUED FROM P.14

Attwaters Jameson Hill has deployed **VIA Voice**, a unified communications (UC) solution that completely replaces the need to operate a traditional telephone network. The firm wanted to replace its outdated Lync-based platform from another supplier with VIA Voice, a more feature-rich solution that incorporates Lync's successor Skype for Business.

Following the recent launch of the **Databarracks Cyber-DRaaS**, law firm **Magrath LLP** has taken up the solution to best protect the business and its customers against ransomware attacks.

Bournemouth-based **Lester Aldridge** has selected the email print management tool ThreadPrint via **Nikec Solutions**.

Newly merged **Royds Withy King** is reporting significant efficiency gains through the use of the **Zylpha MOJ** (Ministry of Justice) portal integration software, with submission processing times reduced by over 80% when compared to previous paper based systems. In addition, Zylpha has launched a "Bundling Robot" to provide high-speed background bundling automation within LexisNexis Visualfiles case management system, so users can still work on other matters simultaneously. The first customer is the Legal Services team at the **London Borough of Lambeth**.

Manchester-based property and housing management specialist **Croftons Solicitors LLP** has chosen a fully managed hosted desktop solution from **Converge TS**.

Morecrofts Solicitors, one of Liverpool's oldest family law solicitors, has selected BigHand's task delegation tool, **BigHand Now**, to increase the visibility of administration tasks across teams in all five offices on Merseyside. And in the West Midlands, **Higgs & Sons Solicitors** reports a 50% reduction in transcription times in a pilot running BigHand Speech Recognition.

Estera has rolled out **DocsCorp pdfDocs** companywide for creating and managing PDF documents through EMEA partner **Phoenix Business Solutions**, while **Browne Jacobson LLP**, has swapped out Workshare for compareDocs as its preferred document comparison solution.

Offshore trust **Bedell Trust** has selected the **SeeUnity** solution to help maintain common content across its document management systems with **Phoenix Business Solutions** as its implementation partner. Bedell Trust uses Filesite from iManage to store and manage client related documents but has recently begun using Microsoft SharePoint to establish client portals and share content.

Managed IT services specialist **Quiss Technology** has been appointed to deliver external support for 60-user Portsmouth-based solicitors **Verisona Law**.

Pérez-Llorca, an independent law firm with offices in Madrid, Barcelona, London and New York have recently expanded their rollout of **Workshare** to an additional 75 staff due to positive feedback received from the firm's other staff.

Kemp Little has become one of the first UK firms to adopt **Intapp Time** as a cloud-based application for time recording. **Phil Wedgwood**, VP of Intapp's Time Practice said "With Intapp Time now available as a cloud-based application, firms have more flexibility in choosing the deployment model that fits their organization's needs."

APAC Intapp reports that specialist insurance law firm **Gilchrist Connell** has rolled out Intapp Time recording software across its five offices in Adelaide, Brisbane, Melbourne, Perth and Sydney.

NetDocuments announced continued rapid growth in Australia and across the Asia-Pacific region with leading firms **Mills Oakley** and **Minter Ellison SA/NT**, as well as boutique firms **Hive Legal** and **Polczynski Lawyers**, all selecting NetDocuments' cloud platform for document and email management.

Stiles Lawyers, **PL Berry & Associates**, and **Travis Partners** have all gone with **DocsCorp compareDocs** while **RGS Law** in Sydney have purchased pdfDocs and compareDocs.

NORTH AMERICA UnitedLex has been selected by **Verizon** to help conduct due diligence on the Yahoo! patent portfolio, as part of Verizon's acquisition of Yahoo! UnitedLex also reports that Atlanta-based **PulteGroup Inc**, one of America's largest homebuilding companies, has named UnitedLex as its preferred litigation services provider.

RAVN Systems announced that **Reed Smith** has successfully piloted RAVN's AI platform ACE (Applied Cognitive Engine). **Lucy Dillon**, Chief Knowledge Officer at Reed Smith commented "We are now looking to roll out the RAVN solution to live client matters within the firm".

Kegler Brown Hill + Ritter a regional, Ohio-based firm, has selected **Prosperware Milan** InfoGov confidentiality management and ethical wall platform to secure its **NetDocuments** environment.

The corporate legal sector was iManage's fastest growing customer segment in Q2, making up 35% of new wins. New in-house legal customers deploying **iManage Work** both in the cloud and on-premises include **Allina Health System**, **Energy Transfer**, **Optima**, **Platinum Equity**, **Renovate America**, **Sunroad**, **University of Pennsylvania**, and **Waypoint Leasing**.

WINS & DEALS CONTINUES ON P.16

WINS & DEALS CONTINUED FROM P.15

InOutsource and **FileTrail** announced that **Neal Gerber & Eisenberg LLP** will deploy FileTrail to manage its physical records as well as retention for both electronic and physical records. According to **Brian Creona**, application development manager for Neal Gerber & Eisenberg, "After evaluating both FileTrail and iManage, we decided that FileTrail would better support the firm's strategic goals in terms of business and technology infrastructure. We can deploy FileTrail either on-premise or in the cloud and its simple user interface makes it easy to navigate and train on. We like everything it offers."

Holland & Knight is live and fully operational on **Aderant Expert** after a short 13-month implementation. Holland & Knight is a global law firm with more than 1,200 lawyers and other professionals in 27 offices throughout the world.

Exterro announced that **Swift Transportation Company** has selected Exterro software solutions as a part of its Legal Department's initiative to streamline and automate their departmental processes. Swift is adopting Exterro solutions to help automate what is now a largely manual process of managing legal holds and employee movements.

John F. Kennedy University has selected TutorPro's student technology portal. The **TutorPro LTECH** portal is designed to support law students in the challenging task of getting workplace ready.

Canadian law firm **Taylor McCaffrey LLP** has selected **Formpipe Contentworker** as its document and email management solution. Built for law firms and corporate legal, Contentworker delivers a matter centric and fully integrated document and email management solution in SharePoint.

American LegalNet announced that **Blank Rome LLP** has purchased its eDockets court-rules-based calendaring and docketing systems software as well as Docket Direct local/federal court feeds and Smart Dockets court date calculator app. Blank Rome also bought the eDockets/iManage Document Management System integration and national court rules as part of their subscription. After acquiring Dickstein Shapiro in February 2016, Blank Rome had several different docketing and calendar applications including two versions of Aderant CompuLaw, MA 3000 and CourtAlert. Maintaining many different systems was not sustainable, and merging them together would have been complicated and expensive. Instead Blank Rome decided to buy American LegalNet's software.

Levit & James reports that Ohio law firm **Krugliak Wilkins Griffiths & Dougherty** has implemented L&J's Best Authority Table of Authorities (TOA) software.

The increasing popularity of the cloud-based **NetDocuments** DMS is also having spin-off benefits for **Traveling Coaches**, with firms signing up for its training and user adoption products and services. Recent wins include Dallas-based **Munsch Hardt Kopf & Harr PC**, Fort Worth-based **Shannon Gracey Ratliff & Miller**, New York-based **Kelley Drye & Warren**, and Memphis-based **Baker Donelson Bearman Caldwell & Berkowitz PC**, where the firm's CIO

John Green commented "This move to NetDocuments is one of the largest and most far-reaching projects we have undertaken in years."

Harris Beach PLLC is one of the latest US law firms to select the **Tikit Carpe Diem Next Generation** system as its new timekeeping solution.

McMillan senior project manager **James Walker** says the firm has selected **Wilson Legal Solutions** to migrate its conflict management processes from the Elite 3E platform to **Intapp Open**. The firm had already implemented Intapp Walls and Intapp Integrate and was using Intapp Open for new business intake. It wanted to upgrade to the latest version of Intapp Open and use it for both intake and conflicts as "By integrating conflicts with intake, we would establish an audit trail for every step of the approval process, complete with an attached conflict search report." Of the three providers shortlisted, the team Wilson Legal Solutions surpassed the rest. It earned the highest score in 10 areas of consideration, Walker adding "Our biggest reason for choosing Wilson was because of its knowledge and expertise on the 3E platform."

Bennett Bigelow Leedom and **Kay Casto & Chaney PLLC** have gone with **DocsCorp contentCrawler** to ensure all documents in their document management systems are fully searchable. **Lackey Hershman, Liner LLP** and **Timoney Knox** are using compareDocs Pro as their document comparison solution, while **Partridge Snow & Hahn** is now using cleanDocs Pro for metadata removal.

► Vantage: Elite unveils 3E 2.8 as Mason Hayes switches to 3E

Thomson Reuters Elite unveiled 3E 2.8 at its Vantage London user conference on 26 September, alongside the news that leading Irish law firm Mason, Hayes & Curran will be making the transition from its existing Enterprise practice management system to 3E.

As Elite prepares in 2017 to move full speed ahead into the cloud, 3E 2.8 brings with it standardised workflows that encourage configuration, not customisation. Launching in tandem with 3E 2.8, a new Monitoring & Diagnostics module will help firms track 3E usage and performance spikes, troubleshoot issues and proactively monitor their 3E system.

Rather than releasing 3E 2.8 and waiting for the first law firm to sign up, Elite conducted a pilot with Oklahoma-based law firm GableGotwals; Washington IP firm Sterne, Kessler, Goldstein & Fox; and litigation boutique Quinn Emanuel Urquhart & Sullivan. Both GableGotwals and Sterne, Kessler, Goldstein & Fox are live on the new version of 3E now, while Quinn Emanuel is moving into production with 2.8 as a result of its experience in the pilot program.



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► Talking Tech is back

Back by popular demand, Legal IT Insider is relaunching our successful Talking Tech series of webcast interviews with senior legal IT executives. We'll be filming on 12 October in the board room of a prestigious law firm office overlooking The Gherkin, with interviews led by editor in chief, Caroline Hill.

To find out more detail about the new format and book a place contact: jeremy.hill@liti.co.uk

► Quote/Unquote

"At ILTA I met a CeO who said they want their software to be like the Goldilocks story: not too hot, not too cold, but just right. Now I associate their software with porridge." ...*An IT director at a major international law firm is put off his breakfast by questionable marketing.*

► Microsoft's UK data centres are up and running

Microsoft announced this month that its first UK cloud computing data centres are up and running, with Azure and Office 365 now generally available from data centres in London, Durham and Cardiff. Dynamics CRM Online will join the line-up in the first half of 2017.

Amazon is set to open its own rival UK data centres soon.

With many UK law firms already flirting with a move to 365, having local data centres can be expected to accelerate that trend.

At Ward Hadaway, director of IT David Bullock said: "This finally opens us up to use Microsoft 365, which is certainly something we watch with interest. It's not something we are looking at this year, but it's on the roadmap."

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