

# legal insider

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## ▶ Watson Farley appoints inaugural IT director

David Wood has been appointed as global IT director at Watson Farley & Williams, in a new role that has been created as the firm for the first time appoints directors to run each of its core business functions.

Wood, who joins from Berwin Leighton Paisner, where he was head of business projects, started at Watson Farley in mid-November.

A former solicitor who has an MBA from Cass Business School, Wood told Legal IT Insider: "The first thing for our business is to make sure the base technology platform is reliable and robust. This is key in the short term. With this in place we can focus on delivering intelligent support to our partners and lawyers to meet their flexible working needs and also promote client service which is critical in our competitive legal market.

"The key thing is that we don't deliver tech for tech's sake. Technology in its widest sense underpins the business of law. The business administration piece complements my law and technology background and helps spot opportunities when it comes to the strategic use of technology. In turn this will help drive the firm forward."

The creation of the IT director role follows the UK top 40 firm's decision to appoint directors for core areas such as compliance, HR and IT, which previously all fell within the remit of COO, the position held by Dave Greening. In August, Greening was appointed as director of finance.

Global IT manager Sam Luxford-Watts will now report to Wood, who will be looking at how to best deploy the existing circa 35-strong IT team.

Speaking to Legal IT Insider about the new IT director role, Watson Farley's joint managing partner Chris Lowe said: "As the business has grown and the number of offices and

people has expanded, we need to have defined business services heads and we have been putting in place directors who run each of these services on a global basis."

*WATSON FARLEY CONTINUES ON P.2*

## ▶ BT: Automated triage and SharePoint document assembly

BT Legal is currently trialling a numerical decision framework to triage work coming into the department, as it separately begins rolling out an extensive Microsoft SharePoint-based document assembly tool to the business. The move comes as BT emerges as one of the early corporate adopters of RAVN Systems, in a move said to be saving the telecoms giant "tens of millions of pounds," (see story on page 2).

Currently BT Legal uses a Belfast-based employee from its legal process outsourcer Axiom to review around 50 requests a day for legal contracts, which come in to Axiom's proprietary end-to-end contract management platform IRIS. The employee diverts more complex work to BT Legal, while more routine and less complex work will be handled by the LPO. However, BT Legal is currently trialling an automated concierge, which, based on answers given by those requesting the contract to a series of drop down options, will grade contracts between 1-5 and divert them automatically.

Speaking to Legal IT Insider, BT general counsel TSO & UK commercial, Chris Fowler, said: "You might have a NDA on counterparty paper and score that as a one and the system will send the request to the appropriate place. But if it's very complex that would be a five and the system will send it automatically to BT Legal."

*BT CONTINUES ON P.7*



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## ► BT confirms RAVN relationship

BT has for the past year been working with RAVN Systems within its group revenue and margin assurance team, in an arrangement that it says is likely to save "tens of millions of pounds" in lost revenue.

The team, headed by Horia Selegian, reviews the commercial contracts that BT enters into in order to maintain BT's profitability by ensuring that contracts are accurate and that no unexpected changes have been made. It saves BT an estimated £100m a year.

Speaking at a RAVN AI and search conference on 28 November, Selegian said: "We've been testing the product for the last year. We needed a solution to get inside the data, find the latest contract, and compare it with the invoicing data, so whatever sold is what is invoiced."

RAVN's contract analysis software automates the review process and can quickly pick up any changes made to the contract by the contracting party. By engaging with RAVN, Selegian says the telecoms giant is moving "from reactive to proactive".

"We're making sure that we understand what we are selling in the early days," he said.

Additionally, BT is running analytics on the data and extracting information about suppliers and employment contracts to enable it to be more agile.

"We're rolling out contract risk analytics to prevent bad contracts plus to analyse, for example, employment contracts."

BT in August sealed its merger with EE and Selegian added: "With EE coming on the contractual position will be quite complex and we'll need to ensure that we have it all in hand."

## ► Watson Farley appoints inaugural IT director

WATSON FARLEY CONTINUED FROM FRONT COVER

"IT was probably the biggest piece of that puzzle to get right. Although we've moved forward with the right network infrastructure, technology and software, what we were lacking was joined up and functioning policies and procedures.

"David has to make sure everything works internally but more importantly, this is a big opportunity for us to use the knowledge we have and deliver innovation to our clients, particularly with regard to clever IT solutions for those in the transport and energy sectors."

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## ▶ Linklaters launches IT Shop in Silk Street

Linklaters has built an Apple-inspired IT shop in its Silk Street headquarters in a move that looks set to change the way tech training is delivered to lawyers and staff at the magic circle firm.

Ask IT is permanently manned and located next door to the staff restaurant, where footfall is highest in the London office. It has been set up so that visitors can try out different hardware on display, charge their phone over lunch, or seek advice.

Speaking to Legal IT Insider, director of information systems and strategy, Matt Peers said: "What we're trying to do is to put IT in full view, to make it accessible rather than hidden away."

He adds: "The reception within the firm of Ask IT as a concept has been really positive. If the people staffing the shop don't know the answer, they will find it out. Our service desk does that but this is the personal face of IT."

The store was set up over the summer and Peers and his team are pushing for more space to develop Ask IT further.

Fee-earners who need a new phone now collect it from the shop, which is integrated with Linklaters internal service desk software.

Peers now has plans to use Ask IT as a focal point for drop-in training, commenting: "People want to learn in a way that suits them. They don't want to be invited to a two-hour class but they are happy to do a 10-minute session. It's a shift in the way we are being encouraged to provide training and we are planning to hold drop-in training in the shop. You'll be able to get all kinds of hints and tips and best practice, in the same way as you can in an Apple shop."

Linklaters' support function heads from around the globe are now looking at how the model could be replicated in their own region.

## ▶ LexisNexis launches legal tech accelerator

LexisNexis has launched an accelerator in Silicon Valley designed to give startups a leg-up in the rapidly expanding legal tech industry.

The accelerator, which is being run out of Lex Machina's office in Menlo Park, will provide startups with access to LexisNexis data, tools and technologies, mentorship, education, connections and (for three people for three months), workspace.

The program will be run by Josh Becker, CEO of Lex Machina – which LexisNexis acquired in November 2015 – with support from LexisNexis chief technology officer Jeff Reihl; chief product officer Jamie Buckley; vice president of US product management Jeff Pfeifer; and Lex Machina chief evangelist Owen Byrd.

Becker said: "Lex Machina has deep roots in Silicon Valley. Being actively involved in Stanford University's CODEX program, and having begun as a Stanford project before

spinning off as a startup, we know first-hand the struggles that legal tech and other Silicon Valley startups go through. That's why we're proud to be spearheading this incredible opportunity and bringing this much-needed resource to the startup community."

## ▶ Fletchers partners with Liverpool Uni on AI

Medical negligence and serious injury law firm Fletchers Solicitors has partnered with the University of Liverpool and received £225,000 from Innovate UK as part of a landmark project to develop future tech innovations for the legal sector.

As part of the project, Fletchers is recruiting two PHD students to work alongside their in-house software programmers and the computer science department at the University of Liverpool to explore and develop artificial intelligence innovations.

The grant from Innovate UK, a government organisation that works with companies across the UK to drive forward technology and innovation, is part of a UK-wide 'Knowledge Transfer Partnerships' programme to help businesses improve their competitiveness and productivity. Riverview Law entered a similar KTP with the University of Liverpool in January 2015.



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## ► 2016: Legal tech grows up

2016 has been something of a coming of age story for legal technology. The slightly irritating teenager that hung around waiting for an invite to the party has got rid of their spots and is starting to feel pretty damn cool. And hey, guess what, not only are they being invited to parties, but they are having to turn some down.

The past year has been a great number of things – frothy, over-excited, and a period when everything, but everything was labelled AI – but beneath the hyperbole, leading law firms have been making meaningful and in some cases systemic changes that are here to stay.

Driven by a perfect storm of the consumerisation of technology that has seen previously tech-incapable lawyers now seemingly never without a screen; great leaps by clients into technologies that are disrupting their own businesses and the wider market; and a huge downward pressure on law firm fees, technology has begun to take centre stage.

Andrew Brammer, IT and shared services director at Allen & Overy, which in its last strategy review 18 months ago, decided to increase its investment in IT by 5% says: "In 2016, legal technology investment has pushed its way up the strategic agenda. That's happened because legal technology has developed so it's increasingly well adapted to suit the needs of the legal market. Our clients have woken to the potential changes in the way law firms are developing and can provide legal services to them.

He adds: "I was in our Frankfurt office recently and a partner spoke with me about how he sees technology enabling his practice. What we are seeing now is a pull from the business rather than a push."

This is a story replicated and retold with varying degrees of surprise and delight across every major legal IT department. Mike Nolan, IT director at Berwin Leighton Paisner says: "For the last few years we've been working with professionals across the firm and making sure technology is on their agenda; that they understand our role and what we can deliver. This year we have found there's a real appetite to talk to us and they really want to hear what we've got to say.

"We're not the most innovative of sectors so it's been interesting to see the amount of interest from our lawyers, clients and other firms – technology is now right at the top end of strategic consideration by many firms and it's good to see because it's driving the wider sector and there is a lot more coming into the market in terms of wider innovation."

For CIOs and their senior team, this has increasingly meant they have, in many cases for the first time, genuine buy-in from senior management.

Matt Peers, who in February 2015 joined Linklaters as director of information systems and strategy from Deloitte, says: "One of the key attractions for me of moving into law at the time I came into the industry was that we were entering a new era, when technology was taken more seriously in the legal world and we would have a bigger influence in the role it plays and the way it's delivered - so far that has completely lived up to my expectation."

While the legal sector undoubtedly does trail others, such as FinTech (EdTech, MedTech....) among CIOs and their teams, Peers has been impressed by the energy and job satisfaction within IT. He says: "People in the external market regard legal as being sleepy and behind the times but we just did a global engagement survey and 93% of the IT team said that the work they do is really challenging and interesting and that they are working with new technology that is advancing their career. I'm thrilled they feel that way.

While this sense of excitement and engagement among both the tech team and the wider partnership is infinitely preferable to banging a drum no-one wants to listen to, it is not without its challenges.

2016: LEGAL TECH GROWS UP CONTINUES ON P6





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2016: LEGAL TECH GROWS UP CONTINUED FROM P4

Where CIOs until only very recently tried to find innovative ways to slip legal tech into the agenda, they are now having to dampen unrealistic expectations as to what can be achieved in a legal context.

Furthermore, now that front end technologies are being adopted in a meaningful way, firms are having to give serious consideration to what that means for the traditional law firm model. Brammer says: "The challenge is how the legal industry responds to the pace of change. We all work in firms that are incredibly successful in certain ways and its now possible to work in different ways. What does that mean to the firm and how do we adapt? What does it mean in terms of how we train and develop our staff to maximise the opportunities of some of these technologies? This will be a bigger challenge for Allen & Overy and our entire industry for years to come and the firm that works out how to do it well will be successful and the firms that don't will be less successful."

These existential challenges come on top of one of the most turbulent political years in living memory, with Brexit and the U.S. presidential vote causing market turmoil.

Richard Hodgkinson, chief technology officer at DWF says: "It's been a tough year as we watched the before and after impact of Brexit. Some firms are likely to do well in the short term and others will trade precariously looking for some signs of certainty around the Brexit process. Who knows what will happen longer term. If you factor in a couple of notable cyber events in the public eye this year and it has made 2016 a bit of a challenge with disturbances guaranteed to have lasting effects. It's going to be an interesting platform to work from in the next few years."

In fact, Brexit could prove to be a further boost for legal tech, and Hodgkinson adds: "If firms weren't already looking at ways of preserving margin, Brexit is going to be the catalyst for new emerging technology to make a significant play in every firm looking to build a sustainable business."

Andrew McManus, IT director at Eversheds adds: "2016 has been full of uncertainty and across the legal sector this year's events have questioned many planned activities. However, that high level of uncertainty went from a considerable level in the summer to people realising that there continues to be a fantastic opportunity to develop new and exciting digital capabilities with our clients. Most people I speak to now think 2017 may still have uncertainty but more and more of our lawyers and clients are talking about technology and digital innovation and improvement which leaves open an exciting prospect for the year ahead."

Digital innovation agenda or no, one of the big challenges and realisations of 2016 and beyond is that exciting tech may be out there but it needs to fit the budget and strategy of the firm.

Nathan Hayes, IT director at Osborne Clarke says: "It's fascinating to realise there's a slew of tech you can take advantage of in a perfect world but it's not a perfect

world and you have to identify the technology that's right for your business."

The cyber events referred to by Hodgkinson mean that significant resource has been diverted by firms towards improving information security. At Ashurst, global IT director Bruna Pellicci says: "It's a fast moving and demanding market and cybercrime is becoming ever more prevalent. Tech is developing at a faster pace than ever and it's imperative to invest in the right technology at the right time to keep ahead of the game. Having the right people in place is fundamental to successful delivery."

However, 2017 looks likely to see the fruition of a number of more innovative projects that have been running behind the scenes, including in, yes, we said it, AI.

Brammer says: "AI means different things in different sectors but there is no doubt that machine-based learning and rules-based learning are being applied to extract information within the legal sector and that is only going to increase, which will create efficiencies."

In his write up of ILTA 2016 for Legal IT Insider, IT consultant Neil Cameron said: "AI appears to be very much like teenage sex at the moment – everybody is talking about it, but few people are doing it, and even fewer know where to start." If, as we suspect, the teenager really has come of age, 2017 could be the year all that changes.



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## ► BT: Automated triage and SharePoint document assembly

BT CONTINUED FROM FRONT COVER

The pilot comes as BT Legal on 1 November launched Document Wizard, its own SharePoint-based document assembly tool, which is currently being used by the procurement team with the feedback "overwhelmingly positive," according to Fowler.

Users generate multi-clause contracts by selecting different dropdown options, including the project name, document type, supplier and liability cap.

Each dropdown option provides guidance if required and each section of the contract has a red light until it has been addressed, when it changes to green. Once all provisions of the contract have been addressed, the contract is built and can be executed with DocuSign.

The system has generated around 120 contracts for 60 users since its launch. Fowler said: "We are giving the business training and the tools so they don't need to come to legal and can generate customized contracts themselves."

The plan is to roll out the new platform to the BT sales team next.

BT, a former OpenText customer, uses SharePoint for its intranet, document management system, workflow tools and purpose built apps. Fowler said: "When we spoke to our internal tech team they said 'if you spend the time we can help you build the system'. We fed our guy internally with all the legal information, involved trial users and worked with the technology team to get the configuration right. We thought it could be done in three months but in reality it has taken nine, it inevitably takes longer than you originally anticipate."

Speaking to Legal IT Insider, BT central operations head of suppliers & systems, Keith Thomson, who spearheaded the project from an IT perspective, said: "What we're not trying to do is have something complicated. The business wants something simple to build the contract into a nicely formatted document that contains all the approved text and that they can be comfortable is all up to date. We can build on its functionality in the future and plan to integrate it into our Salesforce CRM.

"Where SharePoint takes the functionality to a certain level, the legal team is still looking at other solutions to automate our very complex agreements over potentially multiple products. I'm not sure the solution exists yet, we're waiting for the market to become a bit more advanced."

## ► Legal know-how challenger FromCounsel launches

Heavyweight corporate legal know-how service FromCounsel formally launched in the UK in December, backed by 22 members of Erskine Chambers and 15 PSLs and already subscribed to by some of the biggest law firms in the industry.

FromCounsel provides commentary and analysis on English corporate law – both legislation and key updates – in an online Q&A format underpinned by an intelligent search function.

Users of the subscription-based legal knowledge challenger, which is chaired by former Orange general counsel Mark Paterson, can opt for three different levels of detail. The 'full fat' service provides practitioners with comprehensive and analytical coverage of a topic, while 'semi' gives broad coverage and a textbook level of detail and 'skimmed' a brief overview of the topic, ideal for reading up on an unfamiliar area.

Subscribing firms are said to include Bird & Bird, Clifford Chance, Cleary Gottlieb Steen & Hamilton, Davis Polk & Wardwell, Macfarlanes, Michelmores, Morrison & Foerster, Norton Rose Fulbright, Pinsent Masons, PwC LLP, Shearman & Sterling, Simmons & Simmons, Stevens & Bolton and Travers Smith.



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## ► Freshfields on Innovation

*Freshfields Bruckhaus Deringer's global innovation architect Milos Kresojevic talks to Legal IT Insider about what innovation meant in 2016 and the magic circle giant's own approach to new tech*

### **What did 'innovation' mean in 2016 in the legal sector?**

It was a year of machine learning for contract analysis – all Magic Circle firms acquired some kind of solution in the space. The really interesting thing is that “radical” (aka disruptive) innovation is driving incremental innovations in law firms – they have not adopted fully the use of cloud-based solutions but are already “jumping” on machine learning for due diligence purposes that in turn are cloud based.

The second phenomena of 2016 is clients' innovation – they are innovating and asking what law firms are doing in the space. They are asking about AI/machine learning, blockchain, and document automation. While AI/machine learning has become a reality for most law firms, there's a lot of talk about blockchain, although it is not obvious how much is actually happening in practice. It has a huge appeal because it is a big disruptor for financial clients and smart contracts might be a game changer on how contracts are created, negotiated, executed and analysed. But as I mentioned, disruptive innovation (AI) is driving incremental innovation in areas like information security, cloud adoption and generally allows law firms to use the latest technologies that are already used by clients.

### **Why are financial institutions so far ahead in tech innovation?**

The primary difference is that technology and more specifically information is a key differentiator in the financial services industry. Those that can get to better information more quickly and have the ability to execute on it quickly potentially have a competitive advantage: something Nobel Prize Winner Joseph Stiglitz calls “information asymmetry”. The second difference is that venture capital investment in fintech versus legaltech is on a different scale altogether. As Citi executives are saying, they “.. might become dumb pipes” and if they do not invest fintech start ups might eat their “lunch”. That is the reason why we are seeing staggering investments in the financial industry, eg JP Morgan only this year invested \$4bn just in new technology (according to the Wall Street Journal).

My personal view is that financial clients' innovation agenda will drive legal firms' innovation. If major clients in the financial sector are doing deals and the legal sector becomes the bottle neck in processing those deals, the legal sector will be forced to adopt new technology.

### **Why did you select Kira Systems?**

Our objective is to extend our legal expertise and knowledge with a system that no one can replicate. We are achieving that by teaching Kira ourselves and therefore maintaining IP rights and extending our in-house expertise to the system itself. So Kira is not only an efficiency play for us but a strategic play, where we can create additional value for our clients, partners, lawyers and the firm as a whole.

### **What attitude and approach is being taken to machine learning more generally in Freshfields?**

At FBD it is not about AI necessarily but how can AI create additional value for our clients, our partners, lawyers and the firm as a whole. We are serious about AI and embedding it into the core of how we operate and provide legal services. This is, again, not only about achieving efficiencies but looking at what kind of services and offerings we can provide with machine learning that previously we were not able to do (because it is humanly impossible). For example, with Kira we can now go much deeper into document analysis and provide insights that we were previously not able to, so it opens up a different set of opportunities.

### **What other technologies are you working with?**

We are looking at any technology that might significantly change how FBD operates or provides legal services to our clients. They include expert systems, blockchain, smart contracts, semantic web technologies, extra-smart document creation and all of them combined in a smart way to provide innovative ways of providing services end-to-end. We are even advising major financial clients on the legal aspects of using blockchain and smart contracts, in themselves disruptive for machine learning and AI.

### **What work are you doing with legal tech startups?**

We are actively participating in the start-up community; Freshfields participated, presented and sponsored Legal Geek's start-up conference earlier this year with the intention to be close to the start up community and potentially collaborate with them. For that purpose, we organised “Dragons-Den” type five minute pitches from individuals and start-ups to two of our top partners - Simeon Rudin and Richard Lister. A couple of interesting proposals came out of it that we are following up or trying to actively support. For us AI/machine learning introduces a change of ethos: it is not only about us as single firm but has wider implications for the legaltech community, socio-eco system and society at large. This is not limited to start-ups but also legal aid (we are working with Hackney Law Community Centre to develop innovative solutions that they might use).



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## ► 2016: Quotes from the market

*Leading IT directors share their highlights and challenges of 2016*

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

In 2016, legal technology investment has pushed its way up the strategic agenda. That's happened because legal technology has developed so it's increasingly well adapted to suit the needs of the legal market. Our clients have woken to the potential changes in the way law firms are developing and can provide legal services to them.

Clients are going to immense cost and in the case of our banking clients are under intense regulatory pressure to find smart ways to solve business problems. The MarginMatrix product developed by David Wakeling with Deloitte is an example of applying technology to deal with changes in regulation at a huge scale.

The challenge is how the legal industry responds to the pace of change. We all work in firms that are incredibly successful in certain ways and it's now possible to work in different ways. What does that mean to the firm and how do we adapt? What does it mean in terms of how we train and develop our staff to maximise the opportunities of some of these technologies? This will be a bigger challenge for Allen & Overy and our entire industry for years to come and the firms that work out how to do it well will be successful and the firms that don't will be less successful.

**Bruna Pellicci, global IT director, Ashurst**

This year we launched our new website, which is running in the Microsoft Azure Cloud as Platform as a Service (PaaS) as well as using the Sitecore content management system on PaaS. Ashurst is one of the first UK businesses to use Sitecore on PAAS. The site was designed, developed and launched in under a year and involved a great collaborative team effort across the firm. We have had really positive feedback on the new site, as well as increased engagement. We now have an enhanced digital platform from which we can further develop our client services.

AI has certainly come of age with a wide range of tool sets that can be applied to problem solving and automation in the legal industry. It's an exciting time!

It's a fast moving and demanding market and cybercrime is becoming ever more prevalent. Tech is developing at a faster pace than ever and it's imperative to invest in the right technology at the right time to keep ahead of the game. Having the right people in place is fundamental to successful delivery.

**Mike Nolan, IT director, Berwin Leighton Paisner**

One of my highlights of 2016 is how well the team has worked in terms of the differing focus of the new technology and foundation technology. Running those two side by side can be quite tricky and a big high has been how well the team has worked together to make progress.

We're not the most innovative of sectors so it's been interesting to see the amount of interest from our lawyers, clients and other firms – technology is now right at the top end of strategic consideration by many firms and it's good to see because it's driving the wider sector and there is a lot more coming into the market in terms of wider innovation.

The challenge is finding the right opportunities. Often the opportunities found by technical people don't necessarily stand the best chance of success. It's about going out and developing opportunity in the business and it takes a lot of footwork to develop opportunities from the lawyers themselves.

Technology is important but the face of technology will change as new things come along – using your investment well means building a good team that can work together and understand where we want to get to, build relationships and understand what our clients want.

**Chris White, global chief information officer, Clyde & Co**

We continue as a firm to focus on growth and expansion. We've opened a number of offices over the past year, which has kept us very busy. We've opened in Miami and Dusseldorf, and merged with Simpson & Marwick. Our expansion and supporting the growth of the firm has involved a lot of work for the IT team and that will continue over the next 12 months.

This year we've rolled out a number of new applications, which has been very intensive from a technology standpoint. We've rolled out Elite 3E, a new HR system, a new learning and development system and a new global communications platform, so there's a lot of work there.

The year has been about making better use of technology. I'm very reluctant to use the word 'AI' because it is overused, but there's been a huge emphasis on making better use of technology/automation. There's been a big play on rolling out MatterSphere, which is designed to automate a lot of processes and again make better use of tech. Aligned to that is data analytics and mining - making better use of the data we have. Our clients quite rightly expect us to provide better management information than in the past.

The legal market, in my personal view, is going through a fairly significant structural change and recognising that things can't carry on as they are – firms have to operate differently if they are going to be successful and that will include embracing technology.

2016: QUOTES FROM THE MARKET CONTINUES ON P11

2016: QUOTES FROM THE MARKET CONTINUED FROM P10

**Richard Hodgkinson, chief technology officer, DWF**

This last year has seen a coming together of a number of themes, which between them are the foundations of monumental disruption to the legal market over the next five-to-10 years. Blockchain, AI, the digital agenda, consumerisation/agile working are starting to change the traditional law firm business model forever.

A few big businesses have started to change their operating model by using other regional or offshore centres for types of work or back office services.

Next year more people will be adopting AI and both new legal entrants and legal tech are likely to start properly challenging the market as we know it, responding to client needs of making things simple, cheap and accessible. I don't think any traditionalist can sit on their hands anymore.

It's been a tough year as we watched the before and after impact of Brexit. Some firms are likely to do well in the short term and others will trade precariously looking for some signs of certainty around the Brexit process. Who knows what will happen longer term. If you factor in a couple of notable cyber events in the public eye this year and it has made 2016 a bit of a challenge with disturbances guaranteed to have lasting effects. It's going to be an interesting platform to work from in the next few years.

**Andrew McManus, IT director, Eversheds**

If I was to summarise 2016, we've completed a considerable infrastructure platform transformation to ensure our lawyers can work from anywhere and access their work from any location. Historically, lawyers would consider our offices as the main place to work, now their office can be anywhere and ideally putting them right in front of the client. We've also seen a large amount of attention on working jointly with our clients with a whole different range of capabilities using, amongst others, startups and innovators to develop new ideas not normally seen in the legal sector. This has told me that not only are our clients and lawyers really committed to using digital technologies to support a greater level of service but that they are willing to share ideas and co-create new and innovative solutions.

Much of this transformation has been in simply providing the right equipment such as new laptops and the growing crop of tablets and also completely refreshing our hardware estate. We have also completed a root and branch upgrade of our backend infrastructure so we can push new services out remotely and offer reliable performance anywhere. Importantly this now allows a shift of focus for my team from fixing day to day services to attending to providing far more digital solutions to support our clients.

Our strategy now allows us the time and investment to focus on what I call the Front Office meaning the day to day software products that make our lawyers far more effective and provide closer and more effective support for our clients. This will include document and matter management as well as growing our considerable use of new technologies and developing the considerable investment already made in our automation capability and client facing systems. Without the platform transformation, this wouldn't have been possible.

**Haig Tyler, chief information officer, Herbert Smith Freehills**

The tremendous thing about 2016 is that the major infrastructure projects such as moving the firm onto one global platform are all done. Having it all in and settled is wonderful; we can pitch up anywhere in the world with a laptop and we're up and running.

We've rolled out Skype for Business and BT Anyconnect from CISCO is now rolled out, and that makes remote mobile connection completely seamless. It's all done under the cover without the complexity of multiple sign ups all through your Surface Pro login.

We've now rolled out over 200 Surface Pros. We're really excited about that new technology. It's probably taken a little while longer to bed in than our users would like but we've had no comeback and the focus of 2017 will be rolling out more.

**Matt Peers, director of information systems and strategy, Linklaters**

It's been an unpredictable year given Brexit and the U.S. presidential election but we're enjoying the benefits of being a truly global firm. It's my first year in a law firm and a global law firm and seeing how you ride the peaks and troughs in one country with the peaks and troughs in another has been interesting to see.

One of the key attractions for me of moving into law at the time I came into the industry was that we were entering a new era, when technology was taken more seriously in the legal world and we would have a bigger influence in the role it plays and the way it's delivered - so far that has completely lived up to my expectation.

When I take a macro view of the market, so many law firms work so heavily with finance and the growth of FinTech has been a catalyst for change in the legal sector. But pressure comes from different places: people are out meeting clients who are doing all sorts of interesting stuff with their technology and who are asking 'what are you doing to evolve your own business model.'

**Nathan Hayes, IT director, Osborne Clarke**

The highlight of 2016 was the sheer volume of activity around legal technology. How much of that is actually going on and how much is just press releases I don't know, but there is enormous appetite for leveraging technology within law firms. We're seeing lawyers and partners really utilising technology to change the way they deliver their services. Certainly not across all firms but it's a marked change and that momentum is building."

It's fascinating to realise there's a slew of tech you can take advantage of in a perfect world but it's not a perfect world and you have to identify the technology that's right for your business.

The ambition of the business is to achieve significant global growth and supporting the business has been a challenge while also deepening our strength in terms of the technology that we provide to our people.



## ► Movers & shakers

**GLOBAL** **Josh Becker**, CEO of **Lex Machina** (which LexisNexis acquired in November 2015) is heading up the legal tech startup accelerator which **LexisNexis** launched in December in Menlo Park. Becker will be supported by LexisNexis CTO **Jeff Reihl**, chief product officer **Jamie Buckley**, VP of US product management **Jeff Pfeifer**, and Lex Machina chief evangelist **Owen Byrd**.

**UK & EMEA** **Tikit** has bolstered its EMEA sales team with the hire of **Emma Sarson**, who joins from legal eBilling startup Apperio and before was at Big-Hand, where she was global account director. Sarson's hire follows that of former Big-Hand employee **Sam Bentley**, who will join Tikit as business development manager with a primary focus on Partner for Windows (P4W).

**RAVN Systems** has entered into a partnership with legal IT consultant **Neil Cameron** to help law firms to identify AI. The move comes as CIOs report that senior partners in their firms are increasingly asking how they should be engaging with AI initiatives, often under pressure from clients.

**Olswang** global IT director **Stuart Walters** is leaving the firm to take on the newly-created role of CIO at accountancy and business advisory firm **BDO LLP**. The hire follows the announcement in October that Olswang will merge with CMS and Nabarro.

**Ashurst** has selected a new chief financial & operations officer, appointing UKTV's **Jan Gooze-Zijl** to the role. Gooze-Zijl, who has previously held roles at Virgin Media, Telefonica O2, Accenture and Telewest, will start in February. He replaces Brian Dunlop, who left Ashurst in August.

The **D2 Legal Technology** consultancy has appointed **Peter Newton** as COO. Newton joins D2LT from Sapient Global Markets.

UK provider of hybrid cloud services **Pulsant** has appointed **Nick Hayne** to the role of business development manager. Hayne, who joins from Quiss Technology, will focus on the legal sector, particularly Pulsant's partnership with **Peppermint Technology**.

**LEAP** opened its first office in Northern Ireland in Belfast and appointed **Keith Armstrong** as new business product manager for Northern Ireland.

After 11 years heading up business development and marketing for **Money Penny**, **Joanna Swash** has been appointed managing director. Swash joined in 2005 as sales manager before later becoming commercial director.

**APAC** **Neota Logic** has expanded its operations in the Asia Pacific region, appointing **Brad Rosairo** as the vice president of business development, Asia Pacific. Rosairo, who will be based in Melbourne Australia, joins Neota Logic from Sage Publishing.

**NORTH AMERICA** **TRU Staffing Partners** has added two new members to its operations team: **Kate Neal** and **Samantha Watts**, joined the company in Q3. Prior to joining TRU, Neal worked at a Richmond law firm, while Watts was with Edmentum Learning in Dallas, Texas

**Xact Data Discovery** has appointed **Carol Purcell** as its new regional VP of client engagements. Purcell has extensive legal industry experience, most recently as ediscovery manager at **Endo Pharmaceuticals**.

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

**UK & EMEA** The shakeout from the decision by **Thomson Reuters Elite** to end-of-life its Envision (previously Pilgrim LawSoft) product continues with **Edwin Coe** selecting **Aderant Expert** to replace its Envision practice management system, and **Pemberton Greenish** implementing **iManage Work** replace its Envision document and email functionality.

As part of its new knowledge management platform, **Withers** has deployed **RAVN Connect** to extend the capabilities of **Microsoft SharePoint 2013 Search** to its entire enterprise. Along with an improved user experience, the platform will allow 20 million **iManage Work** documents and other Withers global repositories to be discoverable through SharePoint Search.

North-West law firm **Stephensons** has chosen disaster recovery-as-a-service and managed support from **Converge Technology Specialists**. The new services from Converge include daily 24x7 technical support.

The **Tikit P4W** case and practice management system continues to be the software of choice for many mid-tier firms as **Sort Legal** is the latest to adopt the software.

England and Wales pro bono legal advice charity **LawWorks** has deployed Lexis **Visualfiles** matter management for free, as part of **LexisNexis Enterprise Solutions** own pro bono activity.

**Royds Withy King** has undergone a major IT infrastructure upgrade, orchestrated by **Commercial IT Services**, to facilitate post-merger growth. Data and email accounts for Royds staff were migrated to Withy King's remote data centre, creating an immediate need for increased digital capacity. Back end capacity was increased to 10Gb and core applications centralised at the data centre are underpinned by VMware. All Royds staff are now on Citrix virtual desktops.

**Katchr Business Intelligence** has secured two new deals: with property lawyers **Brady Solicitors**, who will be integrating the BI software with the Eclipse Proclaim system to provide graphical views of their data; and with **Brethertons** who are using it to create a firm-wide management information portal in conjunction with their **Peppermint** practice management system.

**Eclipse Legal Systems** has added mediation to its portfolio of case and matter management workflows, with the new system designed to simplify the complex rates and structures associated with mediation and cater for stages such as Mediation, Information & Assessment Meetings (MAIMs), and financial or childcare agreements. **Consilia Legal** is an early adopter of the new system.

Eclipse has also signed up two new law firm startups case management software: **Prism Family Law** in Newcastle-upon-Tyne, and **SNS Solicitors** in Cheshire, who focus on personal injury claims, from accidents at work and slips and trips, through to RTAs and holiday sickness.

WINS & DEALS CONTINUES ON P13



WINS & DEALS CONTINUED FROM P12

**Osborne Clarke** has begun to automate high-use legal documents for the first time using **Thomson Reuters ContractExpress**. The move follows a proof-of-concept and is the firm's first-ever use of external automation software, which will initially run within the UK corporate, banking and real estate teams.

**My Home Move**, the UK's largest provider of mover conveyancing services, is now live on **LexisOne**, the **Microsoft Dynamics AX**-based practice management system from **LexisNexis Enterprise Solutions**.

Berkshire litigation firm **McAllister Olivarius** has awarded the contract for the support and maintenance of its **iManage Work** email and document management to **Ascertus**, who will also upgrade the firm to the latest version of iManage.

Spanish law **SLJ Abogados** has agreed contracts with **NetDocuments** to implement its cloud based document management system. The firm has also engaged the services of **Hoffbrand Consulting** to implement the system. The firm will be among the first in Spain to go live with NetDocuments. SLJ Abogados partner **Daniel Jiménez García** said that having reviewed the marketplace extensively, the firm concluded that NetDocuments was the best-placed product to meet those needs. **Paul Hoffbrand** of Hoffbrand Consulting said he was "looking forward to working with a highly motivated and enthusiastic client."

Ireland's **Aramark Property** has chosen **Worldox** for its document and email management utilizing Worldox Ireland reseller **Legal IT**. The UK's **BlackRock PM** has chosen Worldox as its document and email management platform utilizing Worldox reseller **Copyrite**.

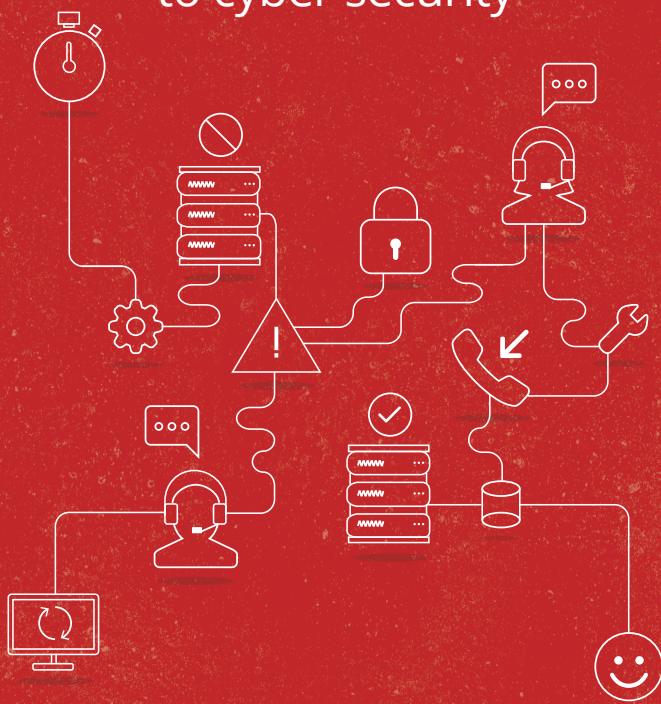
Swedish law firm **Torngren Magnell** have chosen **DocsCorp** for its document management needs. The Stockholm-based firm purchased cleanDocs, compareDocs, and pdfDocs to cover metadata management, document versions and document efficiency overall.

**Electrosonic** has provided audio-visual systems design and integration as part of an upgrade to the **Eversheds** auditorium and boardroom in London. Electrosonic was appointed by Eversheds to work alongside main contractor and interior designer **Action Workspace**, to complete the remodeling of the two areas. The new client boardroom, originally a large meeting room with modest AV tech, is now a state-of-the-art collaboration zone featuring a 98-inch touch-screen LCD equipped with whiteboard software.

The auditorium has seating for 124 people, with presentations possible either from a top table seated panel or from two lectern positions. To maximise the visual impact in the auditorium, a 3x3 videowall comprised of 47-inch LCDs was installed, providing a central backdrop for the space. For viewing detailed content, one 98-inch LCD was positioned either side of the videowall. At the back of the space is a separate breakout room containing a further three 65-inch LCDs.

WINS & DEALS CONTINUES ON P14

## A new approach to cyber security



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The ongoing prevalence of ransomware attacks means that organisations must introduce specific contingency plans with some urgency.

Outright prevention is practically impossible – attackers evolve too quickly, and software-based solutions are locked in an arms race to keep pace.

Databarracks' new Cyber DR service uses replication to bring a fresh, continuity-led approach to cyber security.

Here's the short pitch: the service identifies attacks early and enables users to roll back to the last clean replication point in Databarracks' secure DR environment. It's a simple and effective solution to a historically complex and costly problem.

[www.databarracks.com](http://www.databarracks.com)

## WINS & DEALS CONTINUED FROM P13

Faced with complex networking and ageing hardware/software, **Howell Jones** engaged **AspiraCloud** to implement a **Microsoft** cloud solution that includes Microsoft Azure, Office 365, OneDrive for Business and Power BI. Along with simplifying infrastructure, the new platform has delivered cost savings, improvements in productivity, and greater levels of control and data protection.

Licensed conveyancers **Donn & Co** has extended its use of the **Redbrick Practice Management** software to include probate and LPA modules as well as the out-of-the-box conveyancing system.

**APAC** Independent Australia law firm **Hall & Wilcox** is one of the first firms globally to benefit from the new integration between the **DocsCorp cleanDocs** metadata management software and the **HighQ** family of secure cloud collaboration and content management solutions. HighQ customers with the **iManage Work** connector will be the first to benefit from the integration. Documents uploaded to HighQ from iManage Work using the HighQ integration appliance will now be able to be cleaned of metadata as a seamless part of the upload process. **Peter Campbell**, client solutions director at Hall & Wilcox said "We are already enthusiastic users of both the cleanDocs product and HighQ and value them as part of our technology portfolio. The collaboration between HighQ and DocsCorp to link the two products, demonstrates a shared vision and technical capability that aligns with our own smarter law strategy to co-create solutions with clients and other providers."

Australian firm **Moray & Agnew** has become one of the early adopters of the new **Aderant Expert Case Management** solution, which was formally released in November. Moray & Agnew is already an Aderant Expert customer but having tried two other case management systems over the last few years, had suffered the perennial problems of replication of data between disparate systems, as well as reporting complications arising from using separate systems.

**NORTH AMERICA** **DLA Piper** just announced a collaboration with **Shoobx**, a workflow-based software tool, to customize, generate and execute early-stage companies' Delaware incorporation. "We're excited to forge this relationship with Shoobx," said **Jay Rains**, DLA Piper global co-CEO & US co-chairman. "This is yet another valuable tool available to our entrepreneur and startup clients, as well as our lawyers, in helping them continue to provide the best possible counsel to early-stage companies who are looking to attract investors." All workflows, information and documentation are permissioned and all documents are securely stored, organized, interconnected, and accessible.

"Our startup clients need to run fast – and they expect their lawyers to leverage the latest technologies to deliver top quality and efficient services," said **Randy Socol**, co-chair of DLA Piper's US Emerging Growth & Venture Capital practice. "By leveraging Shoobx and its offerings to provide early-stage and emerging growth companies with greater flexibility and autonomy, our team can continue to focus on providing strategic advice and assistance to drive value to clients' businesses."

**Bryan Cave** become the eighth and latest US law firm to sign up to IBM Watson-backed legal research tool **ROSS Intelligence**, as the Missouri-based firm also launches an internal 'tech forward' legal team called TechX to advance its use of and thought leadership around new technology. Bryan Cave had been piloting ROSS in its bankruptcy team since October.

AmLaw 200 firm **Quarles & Brady** has swapped out its legacy **Thomson Reuters Elite Enterprise** practice management system for **Aderant Expert**. The ten office, Wisconsin-based firm will begin implementation in January 2017.

**Milligan Lawless**, based in Phoenix, Arizona, has adopted **DocsCorp cleanDocs** desktop and mobile to ensure metadata is removed from all possible email exit points on any device.

**NetDocuments** has been selected by Canadian firm **McLennan Ross**, which has offices across Edmonton, Calgary, and Yellowknife in Alberta and Northwest territories. According to **Chuck Martel**, information systems manager at McLennan Ross, the decision to switch its DMS was driven in a large part by the NetDocuments innovation and security initiatives.

**Auto-Owners Insurance** recently implemented **Exterro** ediscovery software to support its legal departments efforts to make ediscovery processes more efficient. "When dealing with matters previously, our ediscovery process was highly manual, which made it tedious, time consuming, labor intensive, and expensive," said **Kathleen Lopilato**, Assistant VP, Legal Department with Auto-Owners Insurance



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## ► On the Sofa with Andrew Arruda, co-founder and CEO of ROSS

Andrew Arruda co-founded IBM Watson-backed legal research provider ROSS Intelligence in 2014 with fellow University of Toronto student Jimoh Ovbiagele, since when the company, which relocated to Palo Alto in 2015, has signed eight major US law firms, the most recent of which was Bryan Cave.

With 'real' AI still something of a rarity in the legal market, Legal IT Insider caught up with Arruda to find out how ROSS is developing and whether its use cases measure up to initial expectations.

**What practice areas is ROSS being used in now and how is that expected to develop over the next, say, year to 18 months?**

ROSS is live in US bankruptcy and intellectual property law. We are also exploring other legal AIs with our partners such as a ROSS KM AI. As for the next year to 18 months, we will be expanding ROSS's breadth and depth meaning additional AI capabilities in areas ROSS is already in and widening the scope of ROSS' capabilities into many more practice areas.

**When you first launched ROSS, what were your expectations as to how the software would be applied by law firms and has the reality mirrored that or not?**

We first saw ROSS as technology that would be quickly adopted by solo-practitioners and lawyers at small law firms as our AI has the power to level the playing field for those with less resources. While we certainly had Big Law and in-house teams in mind, we thought adoption would weigh heavily with solos and small law firms at the beginning.

In reality, ROSS was quickly adopted by large and medium sized law firms as well as in-house teams in addition to small firms and solos. We learned more about the extreme shift in the legal-market post-2008 and how the pressure from clients to be efficient is not something that is constrained to any one slice of the legal industry.

**What are the key challenges you have faced using ROSS in practice and how have you overcome them?**

Adoption of any technology within an organization can be a challenge as adopting new technology means breaking old established habits. This being said, one of the challenges we faced early was being the "new kid on the block" and having to establish ourselves in lawyer's workflows. As time went on and our profile continued to raise we began to see lawyers at firms we are working with jump at the opportunity to use ROSS, which has been great.

**Within the firms already using the technology, who is it that gets the most benefit from it and uses it most frequently?**

ROSS is a frontline tool for practitioners.

Associates do most of the legal research tasks so I'd say associates gain the most out of using ROSS and use it most frequently, not just in that it allows them to work more effectively, but it also allows them to reach their professional potential sooner. By enabling associates to focus their energy on high-value work, they are able to learn much more about the practice of law rather than spend their time searching for information. ROSS provides them with the answers they need, rather than search results.

The thing is though, ROSS has a few AIs which do different powerful things so while associates benefit the most from our core search AI capabilities, partners seem to benefit the most from ROSS' law monitor AI, which keeps them up to date on any changes to the law for all the cases they are working on.

ON THE SOFA CONTINUES ON P16

## Epoch™ Intelligent Time Entry

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ON THE SOFA CONTINUED FROM P15

**What do law firms struggle with most when it comes to using this kind of sophisticated AI tool?**

The beauty of AI is that, while in the background the technology is incredibly sophisticated, AI allows for extreme simplicity when it comes to the user experience. Since ROSS understands how humans communicate, filtering by date/jurisdiction etc. is done away with, as lawyers simply ask the question they are looking to answer in its entirety – the way they would ask a lawyer at their office with experience in the matter.

What this translates to is very sophisticated technology being tied behind a simple user experience that is extremely intuitive.

What firms do struggle with is wrapping their minds around what AI can do at present and where it is going. This is why, in addition to providing our AI software, ROSS Intelligence also works with law firm leadership to establish the firm's AI strategy and keep the firm leadership up to date with advances in AI as they occur, so they can always stay on the cutting-edge.

**Do lawyers feel threatened and does that inhibit the way they interact with the software?**

Lawyers only feel threatened before they use the technology as the idea of artificial intelligence sometimes strikes the imagination and ignites thoughts from sci-fi movies from the 1980's and 1990's.

Once lawyers use ROSS they end up seeing just how much more they can accomplish which for the team at ROSS Intelligence, there's nothing really better than that!

I always say there are three stages when it comes to introducing AI technology: 1) the fear stage, where folks make decisions based on very little data and past (usually fictitious) information, then 2) the information stage: this is where folks actually read up on what artificial intelligence is and what it can do today and where the technology is going tomorrow and lastly 3) full-adoption: this is when the organization is educated on AI, and makes the decision to bring AI into the organization.

Some people, firms and organizations go through these stages faster than others, and it's the early adopters who stand to gain the most as they can reap the benefits before the technology becomes status quo and everyone is using it.

**AI tools will almost certainly take out lower level legal work. What jobs do you envisage may be created that don't exist now as the adoption of AI technology becomes commonplace?**

I do not believe that AI tools will "almost certainly take out lower level legal work" because the legal market at present is not addressing everyone who needs a lawyer. Time and time again studies show that the majority of people who need a lawyer cannot afford one. This means there is a massive untapped market of folks who 1) have insufficient funds and 2) want a lawyer to help them.

I think that AI technology will allow for this untapped market to be addressed by savvy lawyers who use AI technology, in combination with non-AI technology, to create a practice which is efficient making serving this untapped market, what Richard Susskind has labelled the "latent legal market" possible.

**Do you envisage a time when ROSS is used by non-lawyers or will it always augment legal practice?**

We build all of our AIs with human lawyers at the center of them, and this is a conscious decision because the right legal training is essential to being able to navigate the law.

In my opinion, the issue at present isn't that we do not have enough lawyers, as we see report after report of the overabundance of lawyers in the market who cannot find work, who also happen to be in record numbers of debt, but that the tools lawyers have available to them essentially price them out of being able to address most of the people who need a lawyer.

**What does 2017 look like for you and what can we expect from ROSS?**

2017 looks like another record year at ROSS Intelligence.

We can expect to see ROSS supercharging lawyers' abilities at even more organizations, being used at more law schools and also driving access to justice through a variety of new programs we are launching which allow deserving organizations to have access to ROSS technology free of charge. 2017 here we go!





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## ► Legal Leaders IT Forum Gleneagles update

We already have over 50 delegates signed up for Legal Leaders IT Forum on 1-3 March in Gleneagles Hotel and our latest speaker is Chris Sykes, CEO of cognitive computing and AI leader Volume Global, who will be bringing his robot, Lusy. Other confirmed speakers so far include the former founder of Autonomy and now Invoke Capital, Mike Lynch; Stéphanie Hamon, head of commercial management, managing director at Barclays; Hans Albers, chief of staff and head of worldwide legal operations for multinational network solutions provider Juniper Networks; and our chair Mike Rebeiro, the highly-rated global head of technology and innovation at Norton Rose Fulbright. We will keep you updated as further speakers are confirmed: expect some exciting announcements in the New Year. For details on how to sponsor this invitation-only event, please contact [jeremy.hill@liti.co.uk](mailto:jeremy.hill@liti.co.uk).

## ► 2016 was the year when...

*Daniel Pollick, CIO DLA Piper:*

iManage regained their mojo and showed us what legal OneDrive might look like;

The future of the desktop suddenly became clearer: it's hybrid Windows 10 devices;

DLA Piper really really really couldn't remember life without Lync/Skype for Business;

Legal AI went from bleeding edge novelty to me-too mimicry, but without a clear direction;

It looked like SAP might finally be in the game;

People stopped saying 'is it ok to go to the cloud?'

# legal*i* insider

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