

legal insider

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▶ Tikit ends support for iManage: what next?

Tikit will by 1 November 2017 no longer support iManage after notifying clients at the tail end of 2016 that its support and maintenance for the leading document management solution will end and clients will need to find an alternative vendor as their contracts expire.

The move, which follows the announcement in June 2016 that Tikit, once iManage's largest partner, has entered into partnership with iManage rival NetDocuments, has caused a high degree of confusion among law firms and led to newer Tikit rivals such as Ascertus to begin scaling up their capability.

Going forward, Tikit will still look to win iManage sales and implementation work but then hand over to another vendor for support and maintenance. Vendors to have already won support contracts include Ascertus and Tiger Eye, which have each signed two new contracts, with more waiting in the wings. Ascertus in February bolstered its senior team with the hire of senior accounts manager Antony Wells, who was previously at DocsCorp and before that Phoenix Business Solutions, and is still hiring.

Speaking to Legal IT Insider, Tikit's CEO Katherine Ainley said: "We're working with each of our iManage clients to work out what the right thing is for each of them. We'll continue doing iManage sales and implementation as well as other services such as health checks, upgrades and training.

"We will still be providing support for other iManage related partners and other integrations with iManage."

She adds: "We are working closely with iManage and had a good 2016 with many new iManage clients. iManage Work 10 and the new iManage Cloud are very exciting and creating huge interest in the market. Tikit are following a different model. We would do the sales and implementation, ensure the client is live and happy, but not provide the ongoing support and maintenance."

Firms that have moved away from Tikit since November 2016 include DWF and Ashurst, which have moved to iManage direct for their support.

Amid the confusion, there is a clear perception among many in the DMS market that iManage's strategy is to swell its coffers by bringing former Tikit business in-house, with one top 50 CTO commenting: "When iManage first bought the business out from HP it was as clear as night follows day that where they are going to get value is a book of business of retained service contracts. Inevitably, they would take back annual maintenance contracts."

However, Geoff Hornsby, general manager EMEA at iManage told Legal IT Insider: "In the last 12 months, we have signed over 25 new partners. In EMEA, we have traditionally sold the vast majority of our software via our partners and they provide installation and first line support. That has been a very successful and we don't intend to change this model."


TIKIT ENDS SUPPORT FOR IMANAGE CONTINUES ON P.3

▶ Slaughter and May: 5% Stake in Luminance

Slaughter and May has a 5% equity stake in machine learning-backed due diligence tool Luminance, Legal IT Insider has learned, after an early stage collaboration that saw the magic circle firm invest its lawyers' time in helping to develop and shape the product.


The stake emerged after a rival vendor privately complained to Legal IT Insider that Luminance Technologies, which is backed by Mike Lynch's investment vehicle Invoke Capital, is not being sufficiently transparent about Slaughter and May's monetary interest. Luminance described Slaughter and May as simply a "client" in a recent press release announcing Norwegian firm BA-HR as a new client win, and in much of the recent publicity surrounding Luminance, Slaughter and May is most often described as having "adopted" or "worked with" the solution.

SLAUGHTER AND MAY CONTINUES ON P.5



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► Barclays rolls out TeamConnect and internal timesheets

Barclays this January rolled out Mitrtech's TeamConnect matter management and eBilling platform to its 140 panel law firms, as the banking giant moves towards better KPIs, having rolled out timesheets for its own in-house lawyers just over a year ago.

Barclays began rolling out TeamConnect in August last year across firms that conduct its litigation work and that was extended in January to all types of work across all panel firms, with some firms now losing work thanks to being slow to adjust to the new system.

Now each time a Barclays lawyer instructs a panel firm they raise a purchase order linked to a matter in TeamConnect. The law firm receives that reference and law firm invoices are processed automatically through Mitrtech's eBilling module Collaborati.

Barclays worked with Consilio as its implementation partner to include all of its terms and conditions within the automated billing rules, including hourly rates, disbursements and when firms should bill - increasing the off the shelf billing rules from six to 135. Stephanie Hamon, head of commercial management, managing director at Barclays, who has been charged with rationalising the bank's external legal spend, said: "The off the shelf product could only give me six rules including the name and address of the vendor, which wasn't enough. If we have an eBilling system, we want it to be fully automated system, we're not going to create a review team internally and we didn't accept market practice, we know what we want."

Unless all terms are complied with, law firm invoices won't be paid, with one invoice now having been rejected 47 times. However, Barclays, which traditionally may have taken weeks to pay advisers, has said that if the billing rules are complied with it will pay in seven days.

According to Hamon, Barclays went to great lengths to ensure last year that firms were aware of the changes, offering training and information. Hamon says: "We reminded firms that if they hadn't submitted their invoices by 15 December they wouldn't get paid. Some firms are still dragging their feet. There seems to be a big disconnect internally in the law firms and the right people are not always talking to each other. There's a disconnect between the billing team, the eBilling team and the relationship team. It's just about getting people in the law firms to speak to one another."

She adds: "Some of the firms forget who the client is and are not willing to engage to achieve a reasonable compromise. After a while, it becomes painful and some of our lawyers are going to firms of equal quality but not so much hassle when it comes to billing."

The matter management system is also being used to drive internal management information, after Barclays introduced time sheets for its lawyers in November 2015.

Lawyers are required to account for their time in half hour chunks in order to help the bank accurately allocate

cost. Hamon said: "The idea very much is to try and have the conversation with the business as to where and why we need the legal function and what the cost of that legal function is to you. Some lawyers work for more than one part of the business and we want to allocate the cost appropriately. If we want to manage our headcount and cost base, it helps to know exactly where people are based and what they are doing. Do we need a very senior person in London or three less senior people in Birmingham or Manchester? Or is there enough business to look at automation?"

"If there is enough repeat business, it's surely more cost effective not to send it out and better to have a conversation with the business and manage our legal risks. We need to know those are the costs and those are the levers that we can pull."

Unlike lawyers in private practice, internal lawyers do not have targets to reach.

Having focussed on encouraging the team to fill in their time sheets by explaining what the data is for and how it will be used, Barclays will now focus on using it for MI, with time linked and tagged in TeamConnect.

The changes come as Barclays looks to review its eDiscovery panel, which it has had for four years. In this its third review, it is expected that the emphasis for volume work will be on dedicated eDiscovery providers that can provide wider technology support as well as document review capability.

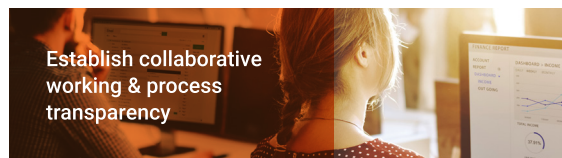


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► Tikit ends support for iManage: what next?

TIKIT ENDS SUPPORT FOR IMANAGE CONTINUED FROM FRONT COVER

A big question for Tikit going forward, is whether law firms really will go to one vendor for support and another for sales. Standing in its favour is reputation, bandwidth and existing relationships with clients, with many of its newer competitors only just making a name for themselves in the DMS market.

However, one top 50 CIO, who told Legal IT Insider they now perceive Tikit as a "NetDocuments house" said: "We wouldn't go to Tikit for sales now," adding: "Everyone is very unclear as to what is going on."

An IT head at a top 50 firm said: "For BigLaw particularly it is a strange one, Tikit are still presenting a 'we can help with iManage from a consultancy point of view.' But it has them in a predicament: for us they have gone from a key supplier to a fringe supplier. Why would we use them for iManage consultancy when they are no longer providing our support (they no longer know our environment, nor are they getting as much product experience)? We've had conversations with other key vendors now about why we should still go through Tikit and not direct to them."

With NetDocuments still yet to secure a DMS win in the

UK top 50 and the iManage 10 cloud architecture now online, many iManage clients inevitably question whether Tikit is backing the right horse.

However, the top 50 IT head adds: "For small/mid law I think Tikit are playing a canny game. [Development director] Mark Garnish has talked and published about how they see Microsoft Office 365 being key, I think they are positioning themselves as a cloud provider/consultant. Their products are integrating with Office 365, for example Tikit TMS, and the move to NetDocuments underlines this; it allows them to provide a full service or products to smaller firms. This then leverages their parent, BT, in the full service, for telephony, and networks, etc."

Certainly, diversification is a key part of Tikit's strategy and Ainley told Legal IT Insider: "We've invested a huge amount in our products and we're confident in those; we're looking at it in the round and from a portfolio perspective. The year looks good and I'm confident about all our plans looking forward. iManage is a key part but there are other parts to the portfolio."

Tikit has had a record year for its mid-market legal technology sales, with wins for practice management system P4W and time recording system Carpe Diem as well as Tikit eMarketing v6. (see page 15).

However, in the space of a year, it will have gone from earning a seven-figure sum in iManage support annuities, developed over 15 years, to zero. The real question is how long it will take to fill the gap.

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► Slaughter and May: 5% Stake in Luminance

SLAUGHTER AND MAY CONTINUED FROM FRONT COVER

Legal IT Insider has spoken to one CIO of a top 50 law firm that Luminance gave a demonstration to who said the investment was made clear. However, a partner we spoke to who was involved in a Luminance pitch at a firm that has since become a client, was unaware of Slaughter and May's stake in the business.

A spokesperson for Luminance said: "Luminance is very proud that Slaughter & May has a stake in the company, and has not hidden this fact from potential customers. This information is publicly available in Companies House."

A spokesperson for Slaughter and May, which is also often described in public material as having 'collaborated' with Luminance, said: "Slaughter and May has invested substantial amount of intellectual capital into Luminance and has played a major part in its creation and development. In return, the firm's partners have been given a small equity stake in Luminance Technologies Limited, the company which owns the Luminance software. We are always open about this, whether in reference calls with potential purchasers of Luminance or in more formal written documentation."

While Slaughter and May will use ad hoc technology as directed by clients, as a result of its investment in Luminance, it will not habitually use rival due diligence analysis software tools such as RAVN Systems or Kira Systems.

► Freshfields launches Global Associate Innovation Group

Freshfields Bruckhaus Deringer has created a 14-strong Global Associate Innovation Group (AIG) to help generate, champion and test new technology, working with the Legal Services Innovation team led by director Isabel Parker.

The cross practice, cross geography group was launched at the beginning of the year after gaining sponsorship from Freshfields' senior leadership team, including London managing partner Julian Long and a number of global partners.

AIG members will be seconded to the Legal Services Innovation team on a rolling basis. Currently two associates are seconded full-time and two for one day a week.

The AIG will help the magic circle firm to generate ideas in areas such as more innovative pricing, alternative delivery models or simple process improvement. Participating associates are expected to form a network and encourage engagement from their peers.

The idea is that rather than creating ideas that risk not being close enough to the business – a common issue for innovation teams – the AIG will help drive and champion change from within their various practice areas.

They will pitch their ideas at a senior level and any ideas that have legs will be given financial backing. Parker told Legal IT Insider: "The Global AIG has been established to help us innovate to serve our clients better. Successful innovative companies design products and services for (and with) their customers. One of the objectives of the group is to apply this methodology in a legal services context.

"I'm sure lots of ideas will surface in the next few weeks and not all ideas will come to fruition as we have a robust filtering process. But if an idea has legs we will invest in it. If the technology needs to be built, we will build a prototype and test it."

Freshfields is in the process of hiring developers for its Manchester legal services centre, which provides transactional support to the firm and forms a hub for much of its development and testing of new software.



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► Smiths Group: 'People then tech' transformation

FTSE 100 giant Smiths Group has appointed a first-time legal operations director in order to help deliver a wholesale restructure of the legal team, with innovation and digitisation at its core.

Jamie Fraser was appointed at the tail end of 2016 to the newly-created legal ops role. The former IBM lawyer, who trained at Freshfields Bruckhaus Deringer and before joining IBM in 2007 was an associate of almost seven years at Arnold & Porter, is being tasked with delivering Project 3.0 – a centralisation and digitisation of the legal team in line with the overall business.

Smiths Group, which employs over 23,000 people across 50 countries, is, under new chief executive Andrew Reynolds Smith, ushering a change of direction in which five very separate and autonomous businesses are introducing a degree of centralisation. Through its five divisions: John Crane, Smiths Medical, Smiths Detection, Smiths Interconnect, and Flex-Tek, Smiths Group covers the energy, medical devices, threat and contraband detection, communications and engineered components market worldwide. The key thrust now is to apply technology and big data analytics to drive efficiencies and innovation across all of its businesses.

The legal team, headed by group general counsel Michael Herlihy is mirroring this centralisation, moving from five federated units that each report to its president, to all reporting in a straight line to Herlihy.

Fraser says: "I have had the finger pointed at me to execute on the idea of an integrated legal function. It was the General Counsel's idea, so it's not like I have had to build a business case to convince anyone – this clearly has his full support."

Whereas pockets of the legal team have used different software, Fraser is now in discussions with companies including iManage and Riverview Law with a view to developing a more comprehensive approach. While bits of the business use automation and eSignatures, those are areas that will also be revisited on a more holistic scale. Fraser says: "The immediate temptation is to go out and buy lots of tech toys but I've realised it's not about that – the more important thing is getting the people part right. Having said that, the legal function in Smiths Group has done some really interesting things with technology over

the years, but these have generally been fairly isolated – we're now looking at pilots across the whole group and are in discussions with various suppliers. I can certainly see a future where machine learning or AI will play a part, although perhaps not immediately."

Getting the people part right includes working on a new model of resourcing work and Fraser said: "Our model is to break free from the old fashioned in-house/external model – we're looking at a third way." That third way is under wraps until it is finalised.

Meanwhile, Herlihy and his senior team are creating centres of excellence or virtual hubs in areas such as compliance and M&A. In line with Tim Harford's concept of Messy economics, whereby people work best when not confined to tidy boxes or tramlines, the legal team is being encouraged to undertake work outside of their natural practice areas.

The idea is to encourage the team to become entirely dynamic, working on cases that don't necessarily fall within their division or area of expertise.

Under Herlihy there is a layer of divisional GCs, associate GCs and junior lawyers and new recruits, the more senior of which will need to embrace this new, more challenging model in order for it to work well.

Herlihy said: "We think we have an unusual opportunity. We're not too small and not too big. If this was a 600-strong department we would have to have boxes and line. You need boxes in a department that size. But we're 60 people: we're big enough to have flexibility but small enough to be agile."

► New CEO for ILTA

After a six-month search, the International Legal Technology Association (ILTA) has found a replacement for executive director Randi Mayes, bringing in as CeO Daniel Liutikas, who most recently served as chief legal officer and corporate secretary of not for profit technology association CompTIA.

"Dan's deep background in technology and as a practicing lawyer with a law firm and in-house gives him insights from the perspective of our members, and his association leadership provides him experience guiding a group of diverse professionals," said Meredith Williams, ILTA's president.

See page.13 for further details.

► Howard Kennedy continues major new tech drive

As part of Howard Kennedy's roadmap to overhaul and improve its existing technology, the top 65 law firm is to roll out RAVN Connect Enterprise and Tikit Carpe Diem as it enters the last stages of a proof of concept with Salesforce-based CRM solution OnePlace and Introhive.

Howard Kennedy, which is also working on discrete projects with AI-backed contract review startup Purple Frog, has only just finalised its decision to roll out Carpe Diem in place of Elite WebView. Led by IT director Clive Knott and chief technology officer Jonathan Freedman, the firm also reviewed Intapp, which it found to be more expensive than Tikit's rival solution.

Howard Kennedy will shortly roll out RAVN Connect, having conducted a proof of concept over the enterprise search solution. Knott said: "We're aiming to combine our precedent library with online legal research services from PLC so fee-earners have a single point of search."

Howard Kennedy began talking to RAVN at the end of 2016 and has started rolling out RAVN Connect to the real estate team, with plans to shortly roll it out to the rest of the firm. Knott said: "We've seen a huge improvement in the way we can find precedents and search for documents."

However, the 169-lawyer firm has turned to Purple Frog for machine learning-based document review and analysis, having reviewed software from RAVN, Kira Systems and Neota Logic.

Purple Frog was founded in 2009 and last year launched SynAPPS DMS Cleanser Elite on top of existing search and data extraction and analysis software that was formally released in 2015 and 2016. Freedman said: "We're still in the very early stages but we're working with Purple Frog to automate the completion of lease templates, extracting that information from larger documents."

Knott added: "We were looking for a small supplier that we can develop a close partnership with. For us it was about finding a partner that gets our business and goes the extra mile."

The firm was also looking for an AI offering in order to drum up interest and engagement among its lawyers and clients.

Freedman said: "We were looking for the right small task to apply this technology to so we can demonstrate it to the business and that will spark more ideas and engage people."

Knott added: "It's important for IT to be seen as enabler. There are some very obvious things we can progress, starting small but aiming to move forward."

Howard Kennedy at the start of 2017 set up an AI working group consisting of representatives from across

the business. Freedman said: "People are really keen and there's been quite a lot of excitement around it."

"We'd like to get to the stage where we can begin testing with representatives from various departments. We've talked in the abstract about AI but what we're trying to do now is get concrete small examples that are working, that they can test and feed back to us how it works."

The pilots come as Howard Kennedy enters the final stages of a six-month proof of concept with CRM system OnePlace, which, subject to board approval, the firm plans to populate using relationship management intelligence software Introhive.

OnePlace, which has been in a POC among 20 Howard Kennedy staff, is being looked at in place of Thomson Reuters Elite's solution ContactNet, which failed to gain traction within the firm. Knott and Freedman conducted a full review of CRM systems, including LexisNexis Interaction.

A business development run project, the firm will make a final decision on OnePlace at the end of April.

Howard Kennedy set out its IT 2020 Vision a couple of years ago after Knott arrived in 2014. It upgraded to Elite Enterprise and last year rolled out Mattersphere, but will next year decide whether to select 3E or another practice management system as Enterprise was last year sunsetted by Elite.



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Gleneagles Legal Leaders Forum 2017 in Focus

► Gleneagles: The Client Point of View

With efficiency and innovation at the top of every client conversation, technology and process is becoming a major differentiator in terms of how much work a client is prepared to give a law firm.

However, speaking at Gleneagles Legal Leaders Forum 2017, leaders from Barclays and Juniper Networks made it clear that firms are often not getting their basic invoicing right, and that there is a critical disconnect between client relationship partners and those in the firm that can action meaningful change.

Stephanie Hamon, head of commercial management, managing director at Barclays

Stephanie Hamon's role was created in 2015 in order to help Barclays 800-strong legal team understand and rationalise its external spend. The legal function inevitably spends hundreds of millions of pounds a year but rather than the bank just looking to reducing headcount to cut costs, Hamon is tasked with making sure the right work is being sent to the right providers at the right price and looking at whether certain roles need to be consolidated or brought in-house.

At Gleneagles Legal Leaders Forum 2017, Hamon discussed Barclays' commercial optimisation programme in 2016, which has seen the bank invest in technology and rely more heavily on data analytics to assess the value it gets from its law firms.

Three quarters of Barclays legal spend is on external advice, of which around 70-75% is on 'traditional' law firm providers. But the bank also works with eDiscovery players, LPOs, contract lawyers and barristers and going forward can be expected to send more volume work in that direction.

Hamon said: "It is great to be able to say we're going to look at law firms differently but how do you measure it? How do you represent it? So, one of the big things we had to do last year is a lot of work around analytics and data. And in order to that we had to invest in technology."

Barclays, which cut its panel in June 2016 from 400 to 140, has created a Gartner-style value chart that shows by a series of different coloured dots where each law firm sits in comparison to its peers. The chart is used by Barclays lawyers to inform their decision on who they should – and shouldn't – give most work to. Factors include willingness to commit to fee arrangements with the bank (one firm point blank refused) and general service levels, including timely and accurate invoicing.

Barclays last year began rolling out Mitratch's TeamConnect matter management and eBilling platform and its internal lawyers are notably also now using timesheets to help accurately allocate its own lawyer costs (see page 2).

The bank has moved heavily into legal project management including creating standard templates for legal projects where the work is divided between providers and

Hamon says: "That's allowing us to say, 'You know what? In that project, not everything should go to a law firm, because there will be other providers that are better placed to do that piece of work because it's a volume play or because you can be quite location agnostic. So maybe you could use a different provider but also engage in service delivery efficiency with the law firm.'"

As referenced above, Hamon is reviewing the eDiscovery panel and volume work that has traditionally gone to law firms can increasingly be expected to move to dedicated eDiscovery providers.

Meanwhile, Barclays has ring fenced part of its relationship account to invest in innovative ideas put forward by law firms and worked on in partnership with the bank. Hamon said: "We said to all our law firms, if you have any ideas, if you want to pilot something, if you need a guinea pig, Barclays is happy to help. If you need funding to customise one of your tools, to actually test it with the client, we're happy to fund it from the relationship account. Come to us and then we'll work together to try and develop some of those tools."

While this represents an opportunity to develop closer ties with Barclays Hamon adds: "But here we are, giving firms an opportunity to test, real time, with the client, before putting too much investment into trying to get the perfect solution only to find it's not fit for purpose. And we've had only three suggestions of small stuff. They're all very good ideas. But I thought we'd be inundated."

Barclays has created a panel of firms that it will work together with on innovative projects and is increasingly looking to push the envelope. But with the bank's assessment of value now dependent on so much more than good legal advice, Hamon points out: "If you can't give me your bill on time, you are going to be far less credible talking about innovation because you can't get some of the basics right."

She concluded: "This is the direction of travel. This is coming. This is happening. This is what clients want, and the law firms or suppliers that get it are going to come out on top. Otherwise they're going to have big problems, and it's all around not looking at innovation or technology in isolation. It's really how you make this part of your bigger business model. Where do you want to be in five, ten years from now? What is your brand strategy? And getting to terms with the fact that, while I'd love to say that everything I do is amazing and valued, it's not. So just come to terms with that and come to the table and engage with the client."

Hans Albers, chief of staff, head of worldwide legal operations at Juniper Networks

Hans Albers has been an in-house lawyer for 25 years of which 17 have been in the IT industry. He's been chief of staff, head of worldwide legal operations at Juniper Networks for just over six months; a role that has been created to help drive efficiencies in the company's internal and external legal spend through better processes and technology.

GLENEAGLES CONTINUES ON P.10

Gleneagles Legal Leaders Forum 2017 in Focus

GLENEAGLES CONTINUED FROM P.9

A high-tech Silicon Valley company, Juniper Networks' \$5bn annual business is IP networking and it is the market disruptor, with Cisco the incumbent market leader. A global organisation, Juniper has offices in 46 countries and 10,000 people. Its legal team spans ten countries, the majority of which are in Silicon Valley and with a large group in Amsterdam, where Albers is based.

Albers told Gleneagles: "Managing this organisation is quite a task and we are a team that is committed to provide real competitive advantage to the business."

In a trend being replicated across many in-house teams, the legal operations role was created to cover strategic planning, strategic initiatives, IT tools and systems and how the legal department best services the business. Albers said: "Our general counsel came in about a year ago and said, 'you know we have a \$60/65m budget annually for legal and we need to manage that as a proper business.'"

Traditionally more work simply equalled hiring more lawyers, but Albers and his team, who have been given targets to reduce outside counsel spend, said: "It's becoming an untenable model to continue that way, so we're looking at how we can do it differently, using external resources as well, or automation and technology."

Juniper Networks, which uses Thomson Reuters Legal Tracker eBilling tool, is looking to hire a legal services company to review invoices and more strictly apply terms – if an invoice is more than 60 days late it will be rejected outright, with an anticipated saving of 8-10% as a result. Albers said: "We found law firms are very good at making deals around billing rates but to actually apply them in daily practice is another matter."

It has emerged that one partner is being paid £1,500 an hour and Albers said: "What we're trying to analyse leads to some interesting discussions in the department and when I shared with this all of our functional leaders they said, 'No this can't be right, I'm not paying that much.' Well, the data comes straight from the invoices. So, I didn't make it up."

Much like Barclays, internal lawyers are not immune from review and Juniper Networks is currently analysing the work its lawyers undertake in order to further automate or outsource mundane or repeat tasks, elevating lawyers up the food chain.

The company already automates 50% of its NDAs (it is targeting 70-80%) with ThinkSmart Automation Platform and now 65% of its commercial procurement agreements are signed electronically with DocuSign, dramatically reducing 'lost' documents that are sent to customers and not returned.

It has moved all of its real estate work off a billable hour and onto a fixed fee per transaction model, globally. Albers said: "That's going to be making a massive saving."

How is this relevant to CIOs? Albers said: "If I look at a law firm, I want to know how they run their business, how they apply technology. Because a law firm that doesn't apply technology in the right way is inherently inefficient and they will not be able to provide a cost-efficient service to us."

Juniper Networks aims to save about 5% next year by moving to lower cost firms including regional firms, enforcing its billing guidelines and analysing where greater efficiencies lie.

Albers adds: "The challenge to the law firm and specifically to the IT departments here, is to make sure you can run your firms as efficiently as possible. Because then you are able to offer more of these alternative models in a cost-effective way. I'm starting to now measure what we do against certain matrix. I think law firms need to the same, because you can't just continue. The world is going to get disrupted. If I talk to some of the other law departments out there, the world is definitely changing, and changing rapidly."

► Gleneagles: The Investor Point of View

Mike Lynch, founder of Autonomy and Invoke Capital

In a much-anticipated talk, Invoke Capital founder Mike Lynch set out at Legal Leaders IT Forum Gleneagles to dispel a few well-trodden myths around machine learning; describe its various current and potential applications in the legal sector, and discuss the significance of this latest wave of technology (spoiler alert: "this is genuinely a little bit different.")

Unlike the limited Boolean-based expert systems of the 70s and 80s (when AI first became the next big thing), the key differentiator for the new wave of machine learning systems is that they are self-taught. Lynch says: "They learn by experiencing the problem, no one explicitly tells them why you make a decision, they work that out for themselves in a probabilistic way. Just like a two-year-old growing up in Paris, what you'll get is a very robust practical implementation if it's done correctly because, for example, that two-year-old will learn Parisian slang in the way that you wouldn't if you were learning it from a text book."

Failures and limitations The failures of machine learning, Lynch said, stem from people not understanding the problem that the system sets out to solve, which are more difficult than appear at first sight, with the real recent breakthrough the combination of supervised and unsupervised learning. (Without going into too much detail, Lynch talked about distinguishing dogs, cows, horses and nostrils – clear? Good, keep up.)

The problem in the real world is "noise" or non-meaningful data that can throw a system off, leading people outside of the machine learning world to make the mistake of trying to achieve beautifully clean training data, where Lynch says: "You want exactly the opposite, the training data should be exactly like the problem with all of its warts because the machine has to learn how to understand what matters and what doesn't."

GLENEAGLES CONTINUES ON P.11

Gleneagles Legal Leaders Forum 2017 in Focus

GLENEAGLES CONTINUED FROM P.10

Other failures include giving the machine insufficient examples to define a problem. Lynch said: "If I'd shown this system lots of lizards, but I think I'm training it to recognise reptiles, it's going to get it wrong because sooner or later up comes a snake and a snake is not a lizard."

But the biggest challenge facing the machine learning community at the moment is inference, where Lynch says: "Getting a machine to classify or to spot something doesn't fit – to say 'I don't know what that it is but it's not right' – the systems do that very well. The big challenge that everyone is looking for is inference, being able to take multiple steps in this probabilistic way rather than in the old expert system way."

Slings and arrows While demonstrations of machine intelligence can be "jaw dropping" Lynch warned: "The question in all the machine applications is how does it handle the slings and arrows of outrageous fortune, the ups and downs of the real world – so the first rule on testing is always bring your own data to the test."

Look for generalisation rather than learned examples – the system needs to recognise the problem, not just the data – and don't necessarily look to replace 100% of a task. "Rather than asking the machine to do it all, ask the machine to do the 90% it's most confident about and your blended results of 10% human, 90% machine will often out-perform the human," Lynch said.

Legal application Key to the legal sector embracing machine learning mark II is an acceptance that perfection is a myth. Lynch said: "The question for these systems is, is the accuracy level more or less than the human or can it make the accuracy level of the human higher, but you have to accept that there's a myth of perfection at the moment."

Otherwise, in due diligence, machine learning has "pretty much arrived", while in early case assessment it is becoming a powerful tool, as it is in advanced eDiscovery.

With regard to cybersecurity, machine learning is helping law firms to identify threats in an era where obsessing about boundaries and firewalls is no longer enough. Lynch, who through Invoke Capital invests in cyber solution Darktrace, said: "You can now buy online in the dark web non-malware, non-signature attack vectors and those will do zero day attacks so they're zero day factories in effect."

With it being virtually impossible to keep serious attackers out, the emphasis and philosophy has changed to damage limitation. Lynch said: "The reality is you're probably going to catch a cold but how do you make sure you don't die of it?"

Machine learning-based cybersecurity systems watch traffic and start to build up a model of self "just like your immune system does" and then spot the anomalies.

Lynch said: "One of the things that surprises me is how much nation state stuff there is in the city of London law firms," adding: "Interestingly enough, what we've seen is law firms have been at the forefront of having to do some of the more advanced things in this sector, almost at the same level as some of the defence areas just because they've discovered the kind of attractiveness they have for some of these attackers."

Elsewhere, contract negotiation is likely to become a machine learning action, according to Lynch, who said: "For repetitive advice, a bit like you're seeing in financial services, you're going to see robo-advisors, for example around HR." He added: "A big market opportunity for the law firms is automated compliance, because the regulations are changing so quickly, companies and banks and people can't keep up with them but a law firm training up systems which then actually enforce that compliance could be a great market opportunity."

Flash in the pan? Are all of these developments just the next flash in the pan? Lynch doesn't think so. "People always tell you it's all big change, it's going to be different and it's wonderful and then there's a next wave and something will come along with a three-letter acronym that you're supposed to buy. This is, I think, genuinely a little bit different."

"If we think about the industrial revolution as being about the replacing of muscle and we think about the computing revolution that started at the end of the sixties as being about replacing very simple repetitive tasks like doing a payroll ledger or something like that. This is the next wave and it is about taking a whole level of much more cerebral tasks and automating them. That means it's going to change a lot of things. The National Academy of Sciences in the US, the US government and indeed our own government here have done analysis on this and the general feeling is over the next 10 years three out of 10 jobs are going to be affected by these machine intelligences."

While there is a high degree of pessimism in the US, Lynch said: "The argument over here is that three out of 10 jobs will go but there will be different jobs that we can't even conceive of now. What that does mean is that there's going to be a big shift in terms of skills that are required."

"One of the things that's been very surprising for me is after a long period of resisting change, I think the legal profession now is starting to embrace it and understand that it has to start thinking about some of these things."

There are a couple of things to watch out for, Lynch warns. Avoid the hype and consulting companies that offer machine learning as part of a big consulting project ("You should never be signing up to some sort of year consulting gig to implement something, that's not what this is really about.")

Make sure the training for these systems is something that any of your current partners or junior staff can do ("if it's anything more than drag and drop it's just the old stuff dressed up as the new.")

But Lynch concluded: "These systems are incredibly powerful, they are going to change what's possible, they are going to change business models because you can automate things that would have had a cost base before and I do think it is very, very exciting. So, one of the things to start doing is to start thinking about the opportunities that this can give your organisation as long as you approach it realising like all technologies, it has its limits as well as its promises."

We are grateful to all the remaining Gleneagles speakers, whose talks and observations will be serialised over the course of the next few weeks on the Legal IT Insider website.

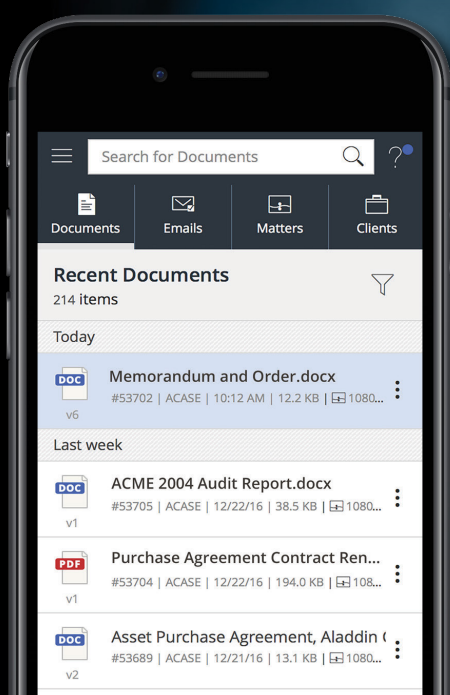
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► Movers & shakers

GLOBAL The **International Legal Technology Association** has appointed **Daniel Liutikas** as its CEO and will be taking over from serving executive director **Randi Mayes**, who announced her decision to step down in August 2016. Liutikas brings to ILTA extensive experience in association management. Most recently, he served as the chief legal officer & corporate secretary of CompTIA. During his tenure, CompTIA's legal department was recognized by Inside Counsel magazine as one of the most innovative adopters of technology for legal efficiency in the United States.

"The intersection of law and technology is an exciting and rapidly expanding area of intense interest for law firms, in-house legal departments, attorneys, IT and legal operations professionals," said Liutikas. "I am grateful to the current and past staff, volunteer leaders and members of ILTA who have, over the course of four decades, created a strong community that will serve as the foundation for future growth. Leveraging technology to enhance the practice of law and solve legal practice challenges has long been one of my passions, and I am excited and humbled by the opportunity to lead ILTA into the future."

UK & EMEA The senior team behind RPC's tech-led inhouse consultancy arm **RPC Perform** is to move lock stock and barrel to UK eDiscovery provider **Millnet** – now part of **Advanced Discovery** – led by **Julia Chain** as newly-appointed UK managing director. Chain, formerly a managing director of Huron Consulting and before that general counsel of T-Mobile, moves alongside **Varun Srikumar**, former Royal Bank of Scotland legal services group sourcing manager, and **Andrew Dey**, ex-head of legal operations at Barclays. Chain takes over from **James Moeskops** who is relocating to Australia as APAC managing director.

Prosperoware has appointed **Sharon Cannon** as Solutions Consultant EMEA. Sharon was most recently Global Project Management Officer (PMO) Manager for a global software and consultancy firm where she had project oversight internationally.

Former IT operations manager **Darren Broughton** has been promoted to head of IT at UK top 40 insurance firm **BLM**. Broughton, who reports to IT director **Abby Ewen**, was promoted on 1st February.

Ascertus has bolstered its management team with the appointment of **Antony Wells** as senior account manager. Wells was most recently with DocsCorp, which he joined in London in the summer of 2016 after relocating from Australia. He went to Australia in 2014

as commercial manager APAC for Phoenix Business Solutions.

Legal workflow software specialist **Ochresoft**, has announced the appointment of solicitor and property industry stalwart **Robert Sanderson** as Managing Director. Sanderson takes over from founder **Richard Bretherton**, who has transitioned to the role of Chairman. Prior to joining Ochresoft, Sanderson was the COO of Cordery, the LexisNexis ABS that specialises in helping GCs manage compliance. He has also held roles with LMS, LexisNexis, and Addleshaw Goddard.

Managed IT services provider **Quiss Technology** has strengthened its sales team with the appointment of **Gerald Martin** to the role of Professional Services Manager. In a sales career spanning more than 30 years, Martin has worked for some of the IT industry's biggest names including Wang, SunGard, and Hewlett-Packard. More recently he has specialised in selling hosted cloud solutions to law firms.

NORTH AMERICA Legal outsourcing services provider **Integreon** has appointed **Bob Rowe** as CEO. Rowe will also join the board of directors, while **Robert Gogel**, Integreon CEO since 2011, will become the non-Executive Chairman of the Board.

Foundation Software Group has added **Chris Vorderer** to its management team as Senior VP of Customer Success. Vorderer joins Foundation from Microsystems, where she was VP & Chief Customer Officer. Prior to Microsystems, Chris served as VP of Customer & Partner Services for LexisNexis InterAction. "Our most important priority is customer success," said **Nate Fineberg**, Foundation co-founder & president. "Chris brings a wealth of experience in legal enterprise software."

Angie Birdsell has joined **Financial Software Solutions**, a provider of web-based and mobile case management solutions for law firms and bankruptcy trustees, as business development manager.

EDISCOVERY After 20 years as CEO of **Evolve** and, since the 2015 acquisition, **Fronteo USA**, **Andy Jimenez** is stepping down from his roll as CEO. Industry veteran **Craig Carpenter** is to succeed Jimenez as CEO. Carpenter joins Fronteo having held senior positions at Kroll Ontrack, AccessData and Recomind in the areas of sales, operations, business development and marketing.

DiscoverReady has appointed **Laurey Harris** as VP Account Management. Prior to joining DiscoverReady, Harris was a Senior Director at Consilio. Prior to that, she was a corporate counsel at Lowe's Companies Inc in North Carolina.

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

GLOBAL Machine learning-backed due diligence tool **Luminance** has secured another continental European client, as leading Norwegian firm **BA-HR** deploys its software to speed up the corporate review process, including tagging clauses in Norwegian. Luminance (whose shareholders include Slaughter & May) uses anomaly detection to highlight differences between contracts so that M&A teams can prioritise their work, focusing on the most concerning or risky documents. Since November, BA-HR has used Luminance to analyse four live M&A data rooms containing thousands of documents in several languages.

UK insurance law firm **BLM** has awarded its **iManage** DMS support contract to **Tiger Eye Consulting** in place of Phoenix Business Solutions, in a significant win for the Norwich-based IT consultancy. The iManage software suite forms a key part of BLM's IT strategy and Tiger Eye are now working closely with the IT team at BLM, led by IT director **Abby Ewen**, to look at infrastructure, integrations, upgrade and mobility projects in 2017 to support staff with their key technology requirements.

Fast growing Leeds-based **BW Legal**, which has also opened a new firm in Glasgow, will be supporting operations with **Linetime Liberate** case management software running as a Microsoft Azure cloud based solution. Birkenhead law firm **RMNJ** is to implement Linetime Liberate legal software throughout the practice. And, top 200 law firm **Higgs & Sons** has selected Linetime Liberate as the case support platform for its Dispute Resolution team. The firm is also continuing to work with **Zylpha** electronic document bundling software and MoJ portal integrations, as well as Zylpha's Visualfiles support expertise.

Manchester start-up **Progressive Solicitors**, which specializes in personal injury work, is implementing Proclaim off-the-shelf case management software from **Eclipse Legal Systems**. Nearby in Stockport, **Higgins Miller Solicitors** specialises in divorce and family law work nationwide, is rolling out Proclaim practice management software to support its expansion plans. And, Sheffield-based **Total Legal Solutions**, which offers a nationwide costs and claims service for the insurance and legal sectors, is implementing Proclaim file transfer and case management in a move to streamline business processes and offer a paperless service.

Cornwall law firm **Nalders Solicitors** is looking to "revolutionise" its processes after signing up to integrated practice and case management with SOS Connect from **Solicitors Own Software**. A full service law firm with eight offices across the county, Nalders is also rolling out SOS's conveyancing module. **Gayle McDermott**, partner in charge of IT at the firm, says its incumbent case management system had been in place

for almost 20 years. "We adopted our existing system in 1998 so it was getting a little tired!" she said.

DWF will shortly roll out the **Canon** managed document service and inbound digital mailroom nationally after its acquisition of claims manager Triton out of administration in January.

Brabners has selected **Lexis InterAction** as its customer relationship management (CRM) solution. Over 340 fee earners and staff will have access to InterAction across the firm's three offices in Liverpool, Manchester and Preston. InterAction is being integrated with Brabners' Lexis Axxia financial system.

Startup Irish boutique law firm **Colleary & Co** has selected cloud-based **Clio** for its accounts and practice management system.

Bates Wells Braithwaite has engaged **Managed 24/7** in a five-year, £1.5m project to design and implement a full digital transformation of its IT infrastructure. Managed 24/7 is working with BWB to install an entirely new IT platform plus put in place long-term monitoring using predictive intelligence based software.

WINS & DEALS CONTINUES ON P.15



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WINS & DEALS CONTINUED FROM P.14

Austrian law firm **Graf & Pitkowicz**, with 80 staff offices in Vienna and Graz, has chosen I.R.I.S. to implement an **iManage Work** solution to manage documentation and emails across the firm. Partner **Nikolaus Pitkowicz** said "Structuring and managing digital data, comprising mostly of Microsoft Office documents and emails, has become more and more time consuming. The new iManage Work solution will handle our digital data, providing a consistent, centralized, comprehensive and reliable document management system covering all our unstructured content."

S&G Response, which operates in the motor industry, has moved from on-premise IT to a private cloud solution delivered and supported by **Converge TS**.

Tikit has had a record year for its mid-market legal technology sales with major new business wins from the **Wilkes Partnership**, **Blandy & Blandy LLP**, **Dawson Cornwell**, **HSR Law**, and **Fletcher Day**. These firms have all chosen P4W for practice and case management. Tikit's Carpe Diem has also seen success with **Travers Smith**, **MacFarlanes**, **Kilburn & Strode** and **Penningtons Manches** upgrading to the latest version as well as **Kammeradvokaten** taking on TimeFinder in order to increase billable time captured. Tikit eMarketing v6 which has just been released, is already seeing success with both **IK Investments** and **Pinsent Masons** upgrading to the latest and greatest version. Q4 also saw an increase in take up of iManage DMS services and licences through Tikit with firms such as **SMB**, **Kingston Smith**, **Maclay Murray and Spens**, **Addleshaw Goddard**, **Withers & Rodgers**, **Hassans** (Gibraltar), and **Browne Jacobson** jumping on board. In other Tikit news **Crawford Chartered Accountants**, **KWM/Goodwin Proctor**, **Thompsons**, **Thesis Asset Management** and **Pinsent Masons** have all invested in Mimecast for email security.


Flight compensation experts **Flightright** have selected **HotDocs** as the tool for improving the document production process within their content management system. Markus Michnik, Legal Tech Product Manager at Flightright's German HQ said "Prior to HotDocs, creating the templates to enable document generation was difficult. We have to produce a wide range of documents, from customer via airline to court correspondence and integrating HotDocs with our CMS will streamline the process, providing the necessary documents faster and more accurately."

The release of the new **iManage Work 10** is driving new client adoption in the EMEA Region. In recent months, 11 firms, including **Cakmak Avukatlik Buros** (Turkey), **Gatti Pavesi Bianchi** (Italy), **Hassans LLP** (Gibraltar), **Herzog Fox & Neeman** (Israel), **Levy Tadmore** (Israel), **Serra Lopes** (Portugal), **Vischer AG** (Switzerland) and **Wegnerpartner** (Germany) have selected iManage Work as their document and email management platform.

Leading Benelux law firm **Stibbe** has replaced its Workshare metadata cleaning and document comparison software with **DocsCorp** cleanDocs and compareDocs citing improved performance and ease of use. Stibbe also replaced Adobe Acrobat with DocsCorp pdfDocs for its PDF creation and editing as part of the same software review. Also, **Arthur Cox**, in Dublin, Ireland, has purchased pdfDocs from **DocsCorp** as their firm-wide solution for the creation and editing of PDFs. In the UK, **Browne Jacobson LLP** also went with pdfDocs while **IBB Solicitors** acquired licenses for cleanDocs.

NORTH AMERICA **Nelson Mullins Riley & Scarborough LLP** has signed a multiyear contract with **FileTrail** to manage its physical records and its information governance policies, as well as retention and disposition workflows for both electronic and physical records. According to the firm's Records Department Manager **John Churchill** "Our team did a lot of research to find a records management solution to replace LegalKey, which isn't fully supported anymore. We needed to move to something more dynamic and specifically designed to meet the needs of a large law firm. FileTrail really fit the bill."

WINS & DEALS CONTINUES ON P.16



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WINS & DEALS CONTINUED FROM P.15

Thomson Reuters Elite has enjoyed a successful quarter with new Elite 3E deals including **McCague Borlack LLP**, a Canadian litigation firm operating 125 fee earners; **Lerners LLP**, one of Ontario's largest firms; **Fasken Martineau**, an international business law and litigation firm with more than 700 lawyers serving clients with eight offices; international law firm **Torys LLP**; Bermudan-founded **Conyers Dill & Pearman**; and Canadian firm **Cassels Brock & Blackwell LLP**. Conyers Dill has also signed up for Mattersphere, while McCague and Torys are implementing eBillingHub. Lerners is implementing Workspace.

Arnall Golden Gregory LLP has selected **Intapp Time** as its new time recording application, which will be rolled out to some 160 lawyers across offices in Atlanta and Washington DC. AGG CIO **Lance Edwards** said: "We recognized that we needed to take a serious look into our timekeeping practices, both from the perspective of user experience and financial impact. Investing in the cloud is particularly key for the firm, to make the best use of our resources, maximize availability and enhance lawyer efficiency."

TutorPro has won a contract from **The Legal Aid Society** in New York City to supply an LMS to enhance the Society's capacity to provide its staff with access to a comprehensive library of current, high quality training materials. The society's LMS selection had to fulfill several key requirements including a robust CLE module for tracking, reporting, and awarding of CLE credit; and it had to be securely accessible over the internet to authorized users. The Legal Aid Society, founded in 1876, is the oldest and largest not-for-profit legal services provider in the United States, over 2000 employees, including over 1160 attorneys, handling over 300,000 legal matters annually.

Winston & Strawn LLP has become one of the early adopters of the new Umbria Profitability module from **Prosperoware**. The module helps model firm and partner performance and compensation, as well as supporting a wide variety of cost and profit allocation methodologies.

Harper Grey LLP, **Kell Alterman & Runstein** and **Tucker Ellis** all chose cleanDocs from **DocsCorp** as their metadata cleaning application. **Rackemann Sawyer & Brewster** in Boston went with compareDocs Pro and **Blaney McMurtry** in Canada also opted for pdfDocs from DocsCorp.









The legal department of **Swift Transportation** is now using **Exterro** software to improve and update its legal and compliance processes, including ediscovery. **Rachel Monti**, VP of Legal Administration & Loss Prevention with Swift, said the implementation has "fundamentally changed the way work occurs across their legal processes."

AUSTRALIA **Maurice Blackburn Lawyers** have obtained licenses for pdfDocs Enterprise with Binder from **DocsCorp** for simple and quick collation of electronic binders.

Melbourne firm **Nevett Ford Lawyers** has implemented **Caseflow Acumen** to address the needs of its property department's off-the-plan work. Implementation was achieved in record time. From initial discussions, which included a review of existing technology and alternative options, to the evaluation and selection of Caseflow took 2-3 weeks. The time from contract signing to go-live was only a further 3 weeks. The firm's practice manager **Brooke Robinson** commented "We have a PMS that incorporates case management functionality but we hadn't been able to get it working the way we wanted."

LOD (Lawyers On Demand) is implementing **RedRain RedView Time** to allow its global workforce to capture time on mobile devices. LOD (UK) and **AdventBalance** (APAC) merged last year and started trading globally as LOD in October 2016 – the first cross-continent merger between NewLaw providers. The deal created one of the world's largest, flexible legal service providers with more than 600 lawyers and consultants in eight locations around the world. As a result of the merger, the two businesses migrated their systems to a single international solution. RedView Time is expected to be fully operational in the UK this spring. The offices in Singapore and Hong Kong will then follow.

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► Juniper Networks signs up to Axiom IRIS

Juniper Networks is the latest client win for Axiom's proprietary end-to-end contract management software IRIS, which helps clients to create and manage commercial contracts and offers in-built analytics.

The \$5bn a year international IP networking business is in the process of implementing the new system, as part of its bid to better analyse, report on and rationalise its legal spend (see Gleneagles, The Client View, page 9 for more details.)

The Juniper legal team, which spans 10 countries and has its largest office in Silicon Valley, where it is headquartered, is undertaking a technology-led transformation plan led by chief of staff, head of worldwide legal operations, Hans Albers. It currently automates around 50% of its NDAs using ThinkSmart Automation Platform, and is ramping up its use of DocuSign, which it began using over two years ago, and now signs 65% of all commercial and procurement contracts electronically. Albers said: "About two years

ago we decided to make DocuSign the default and we never looked back."

IRIS was launched by Axiom in 2015, winning a 'standout' award in the FT's most innovative law firms 2015. Key clients include BT, which in 2016 renewed a three-year, multi-million-pound managed services relationship with Axiom through to April of 2019, underpinned by IRIS.

► NextUp!

Legal IT Insider has entered into a strategic partnership with NextUp, a networking initiative aimed at future leaders of IT within professional services, formed by Clyde & Co's head of IT service delivery Jo Owen. Jo and Legal IT Insider editor Caroline Hill will work together to achieve NextUp's mission to build a community to help mentor, guide and develop the leaders of tomorrow. For more information and the next meetup date please email registrations@liti.co.uk

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