aka 'The Orange Rag'

legal it insider

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The new guard: Nick West to head entire IT function at Mishcon

In what may come to be viewed as the start of a new generation of IT leader, Mishcon de Reya's chief strategy officer Nick West is set to take over the role of chief technology officer, we can reveal, replacing outgoing CIO Simon Kosminsky, who is retiring at the end of the year.

West – an ex-Linklaters lawyer who before joining Mishcon was UK managing director at Axiom – will take over from Kosminsky in the new year. He will straddle a strategic and technology role: the four senior managers who report to Kosminsky will now report to West as well as a further senior manager on the strategy side.

West told the Orange Rag: "I very much believe that 'business as usual' and 'innovation' should operate as one team. The whole philosophy behind [Mishcon's startup venture] MDR Labs is to drive change at the coal face, with the client at the centre of what you're doing. Innovation has to be rooted in the here and now: I don't subscribe to massive blue sky thinking."

Kosminsky tells us that the change is one of new guard replacing old. He said: "Following my decision to retire, I'm delighted that Nick will be taking over responsibility for the whole IT function at Mishcon De Reya. He's a lawyer with a deep understanding of both technology and the running of a successful modern law firm."

IT heads are increasingly feeling challenged because of what is commonly referred to as 'shadow IT'- IT that enters the firm through routes other than the IT department – which goes against the command and control model preferred by many more traditional IT directors.

Kosminsky said: "I have no doubt that within the next 10 years, all CTO's / CIO's in law firms will be someone like Nick. People like me, who came up through the IT ranks, were a good fit for a law firm over the past 25 years. The requirements have now changed, and it is probably time for some of the old guard to make way for the next generation. A lot of the old methods are no longer appropriate and in many cases the IT function has become a barrier to change rather than a facilitator of it. Those that use technology in the law firm are so much more familiar with it than they were even 10 years ago. The work environment needs to be as good as any they encounter in their personal lives, at home or on their mobile devices. Our lawyers need to be playing a very active role (we have seconded some of them to the IT team at Mishcon) in making this happen.

THE NEW GUARD CONTINUES ON P.5

Date for Gleneagles!

Our Legal Leaders CIO Forum will once again be hosted at Gleneagles Hotel from the 25-27 February. In keeping with the previous two years' format, the conference is free of charge for CIOs, IT directors and purchasers of legal services.

Having taken into account the detailed feedback from the last two years, the content for the 2018 conference will be a blend of keynote presentations and practical workshops, which will offer an opportunity for valuable discussion and note swapping on best practice.

Given the popularity of this event we have already had a significant number of registrations and sponsors sign up, so if you wish to register to attend this event please contact **GlenLegal@liti.co.uk.** Sponsors should contact **sales@liti.co.uk.**

One change from last year is that Fulcrum Global Technologies has already signed up to sponsor the onsite networking activities, which will include shooting, golf and off-road driving.

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Editor's Comment: Let's get a grip in 2018

Even for those of us who eschew hype and hyperbole, 2017 was a big year for legal technology, characterised at many firms by a lack of clear firmwide technology strategy and IT teams who are, ironically, being undermined from all quarters by the new wave of enthusiasm for shiny things.

Starting with a positive, there was plenty to get excited about. In our State of the Industry – Financial Results 2017 report, it became clear just how many law firms are generating significant revenue from their own, niche client facing apps and tools. Leading the way is Allen & Overy, which long ago launched subscription-based derivatives product aosphere and has continued to build on that with new RegTech apps, followed by Clifford Chance, which we revealed has exceeded €1m in the first full year of its white labelled document automation service Clifford Chance Dr@ft. Pinsent Masons' alternative legal services businesses now contribute "well into the seven figures" as it expands its flexible legal resource Vario into areas including data protection.

The startup market is booming, reminiscent of the peak of inflated expectations in the Gartner hype cycle for emerging technologies, with many competing startups likely to descend into the trough of disillusionment. Startups that in 2017 raised over $5m include ROSS Intelligence ($8.7m) and LawGeex ($7m) while in the US, serial entrepreneur Justin Kan raised $10.5m in the first round of funding for his new legal technology startup Atrium LTS.

Contract management is the area where we've seen some of the most meaningful progress, with SaaS vendors such as Avvoka allowing users to create contract templates in the cloud via an in-browser editor and apply clever analytics to create performance heatmaps. As we revealed in October, ContractPod has launched an IBM Watson-backed contract analyst that is fully integrated with its contract management platform.

More firms than ever signed up with due diligence tools such as Kira Systems and Luminance, with the latter in November closing a $10m Series A funding round that values the company at $50 million. Kira in November signed Latham & Watkins and Davis Polk & Wardwell in a significant milestone for the Canadian-headquartered company.

And blockchain became more than just a buzz word, with K&L Gates for one, starting the ball rolling on plans to establish an internal, private and permissioned blockchain to assist in the exploration, creation, and implementation of smart contracts and other technology applications for future client use.

For heads of IT in their various guises, the advances of the past year to eighteen months have presented previously unfathomable challenges.

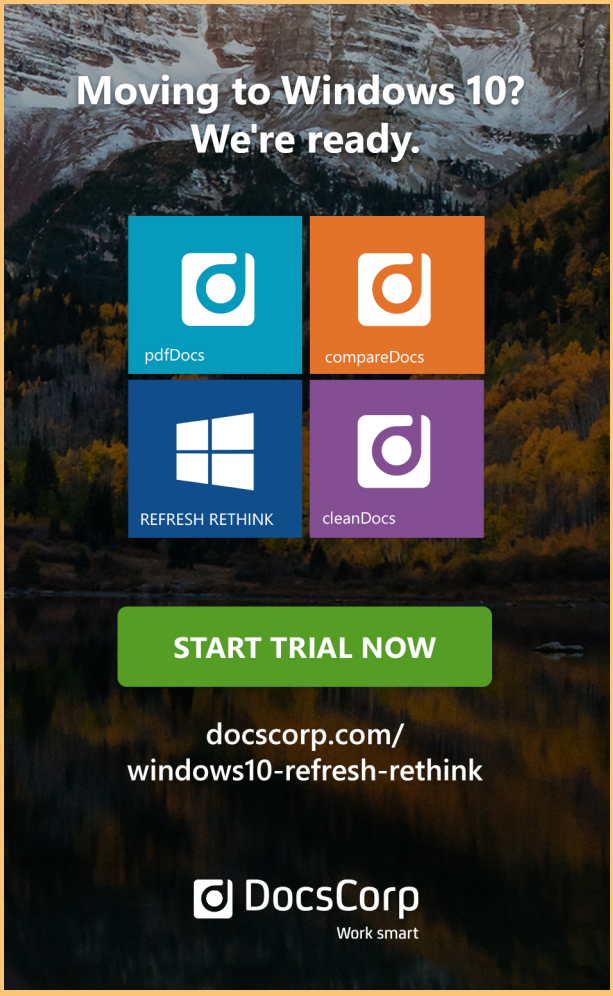
At one time, being a law firm IT manager meant banging a drum that no-one listened to because they didn't care. Now it's often the case that they aren't listening because they are all too busy banging their own drum, and the noise can be quite deafening.

Firms are going to have to find their own strategies not only to get to grips with but to embrace this new phenomenon.

Shadow IT doesn't sit well within the old command and control style of IT management but as we discuss this month with Nick West, who has taken over as chief technology officer at Mishcon, the solution going forward is likely to be to create a user experience that is at least comparable to what you would experience outside of the firm – legal tech vendors take note: you are going to have to up your game.

At ILTA Insight this year, legal technology vendors were repeatedly criticised for not knowing their clients well enough or how their technology fits in with law firms' long-term ambitions.

LET'S GET A GRIP IN 2018 CONTINUES ON P.3



LET'S GET A GRIP IN 2018 CONTINUED FROM P.2

That was echoed at Legal Week Connect, where I chaired a panel that included Lloyds Banking Group head of legal operations, Sophie Schwass, who commented on stage that many vendors know absolutely nothing about her business when they approach her. With Microsoft and Google snapping at your heels, the only question is why not?

In our State of the Industry report we found that Herbert Smith Freehills alternative legal services arm ALT grew by around 7% in the past year and generated over £30m in revenue. It is the in the process of developing two home-grown tools CEO Mark Rigotti told us: "We are tilting towards business-driven solutions that are developed internally at the coal face."

The change that affects the legal industry will have many faces. The days of legal IT directors taking decisions in a vacuum are gone and that really can be a good thing if you can tap into the needs of the business.

I suspect the days of vendors being ill-educated about their clients will last a bit longer. But beware. The new guard of IT leader will be cherry picking from a much bigger and more competitive technology bowl than ever before.

Workshare accounts show £1.6m loss

Workshare has published its latest set of accounts for the year ended 31 December 2016, which show that the London-headquartered company made of a loss before tax of almost £1.6m and has significant debt as it comes towards the end of a move from a perpetual cash to SaaS model.

The loss is down from £4,103k at the end of December 2015 and Workshare's chief financial officer Peter White(pictured), who joined from B2B mobile marketing technology and services group Lumata in August 2015, told us: "A lot of businesses have tried and failed to lose the perpetual cash drug – from a top line revenue basis those that can hold flat rather than go through the J Curve are doing well – but Workshare has got through that, we're 95% through."

He adds: "We're profitable. We've come through the other side and we're generating cash, which when I came in we weren't."

Workshare, which is backed by Scottish Equity Partners, has £23m of debt of which £18.3 is 'deep discounted' meaning it's not repayable until SEP sells. Included in that £23m is a £5.2m revolving credit facility (RCF) with Wells Fargo.

White said: "We have a £7.5m loan facility and at the end of 2016 had only drawn £5.2 and we've been in net repayment of that."

That £7.5m facility falls due in April 2018, when Workshare will have to refinance with Wells Fargo or another bank. White said: "I have never met a more supportive bank. The more forward-thinking banks don't require cash profitability to lend and that includes a number in the technology and SaaS space. Salesforce has never made profit, is Salesforce doing badly?"

Workshare has been investing in its secure file sharing capability and online workspace Transact, which White says it has been getting market ready and bolting on to the back end of the Workshare platform.

White said: "Secure and Transact revenue is growing by 247% CAGR [compound annual growth rate] albeit from a much lower base."

He adds: "The comparison business is great and it grows. Others are more nascent but growing exponentially."

Workshare was acquired in 2012 by CEO Anthony Foy and original Workshare co-founder and CTO Barrie Hadfield, through a merger with SkyDox. White says: "When they came in 2012 a lot of work needed to get done. A lot around the core product being updated, a lot of investment in products, and they made a conscious decision to invest in R&D and we've done that."

The most recent accounts show that investment in R&D to the end of December 2015 was £4.2m.

In a key performance indicator used to measure the current and past value of a company, average revenue per employee has gone up from £86.5k to £109k in 2016. The accounts say: "Revenue per employee has increased following as a result of the increase in revenue following the investment in 2015 in non-sales related staff numbers to enhance development and customer support."

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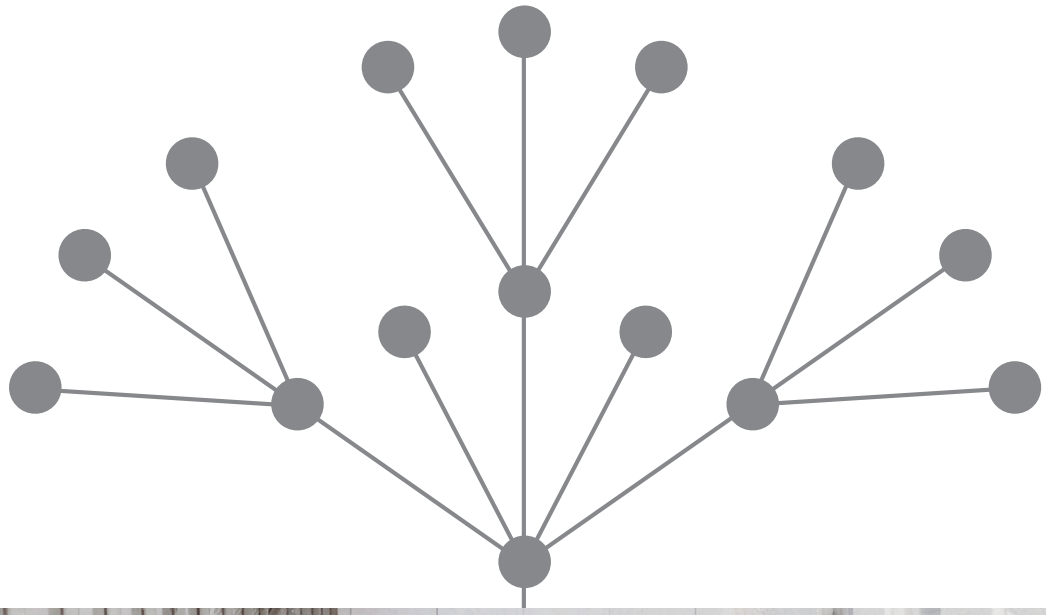

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The new guard: Nick West to head entire IT function at Mishcon

THE NEW GUARD CONTINUED FROM FRONT COVER

"We now have to take a radically different approach to the selection and deployment of technology within the law firm and people like Nick will drive through these changes."

West certainly doesn't subscribe to a central command and control model and says the focus should be on providing a good user experience. He says: "There are so many tech tools out there and if your entire approach is command and control you will lose. You have to deliver a highly flexible modern infrastructure. If you get it right you should have people from across the business coming to you with ideas for new tools to use and you should be discussing the pros and cons with them – how important is, for example, usability vs security vs ability to integrate with the rest of the stack? In different cases you may choose to focus on different things. It should be a grown-up conversation."

The battle that IT heads currently face often revolves around staff using technology from their personal lives for work purposes. West says: "Take, for example, the issue of sending large files. If you don't provide a good enterprise solution for allowing users to send large files they will use something they've got experience of from their personal lives. There is no point in saying 'this is our way of doing it' if the user experience is terrible. Users will find something simpler, even if it's not as safe – something they can use easily under the pressure of their client demands. Your job is to find a solution. People won't accept radically less usability because they know the alternatives."

Significant steps have been taken at Mishcon to integrate lawyers and technologists: each department has a technology partner and technology champions including associates and personal assistants. Those people have their hours reduced by around 20% to help them focus on new technology issues.

That swings both ways and West says: "One of my areas of focus for the technology team will be 'how many of you know how the litigation process works? If you don't understand, we need to get you out there, shadowing the business users to really understand.' You can't be a great technology department if you don't understand 70% of what provides our revenue."

West, who held roles as a strategy consultant at McKinsey and various senior executive roles at LexisNexis before joining Axiom, says that the fact that he has no background in very technical cybersecurity and network issues is not a barrier. "The technology organisation that delivers doesn't do so because of one single individual, it's a team effort. You work out what users need; what the options are to deliver against the time and budget you have available; and then you build a team with the necessary capabilities and knowledge to deliver. And that's what we're going to do – Simon has done a great job over the past couple of years in terms of building the team. I'll be benefitting from that.

"I don't believe that I have to have personal experience of every element of our tech stack from start to finish – that's what we have suppliers and different people on the team for. It does perhaps mean I'm not blinded by some of the limitations of many 'legal' technologies – quite frankly some of them are not very good. In some cases, there is a good reason to use a dedicated legal market product and in some cases not."

Rob Cohen launches Futurae consultancy

Charles Russell Speechlys longstanding IT head Rob Cohen has exited the firm and set up his own consulting and IT services venture.

Cohen joined what was then Speechly Bircham in November 2001 and, after Speechlys merger with Charles Russell in 2014, was successful in running against Lee Hanley for the Global IT Director role. He has since then been responsible for the global IT budget, strategy, operations and projects of the combined 170-partner firm.

Futurae, will offer services to help firms evaluate their current environments and, if necessary, restructure to help them realise competitive advantage.

"My recent experiences of completing a successful, highly complex, technical merger in a very short timescale will also allow Futurae to offer help, advice and support on technology mergers, a highly challenging area that more and more firms face," Cohen told us. Other services will include support on local and international offices setups and expansion, moving to open plan and agile environments, global infrastructure and telecommunication strategies.

Cohen adds: "The disruptive technology explosion of late offers many advantages to the business that can become agile and take advantage of them, but to do so requires modern well-structured IT departments and processes, equipped to deliver modern solutions in a new age. The business should no longer try to have a solution provider in the basement constantly reacting to issues that arise, and instead should free up IT and business departments to ensure the needs of the business and its clients are continually being met."

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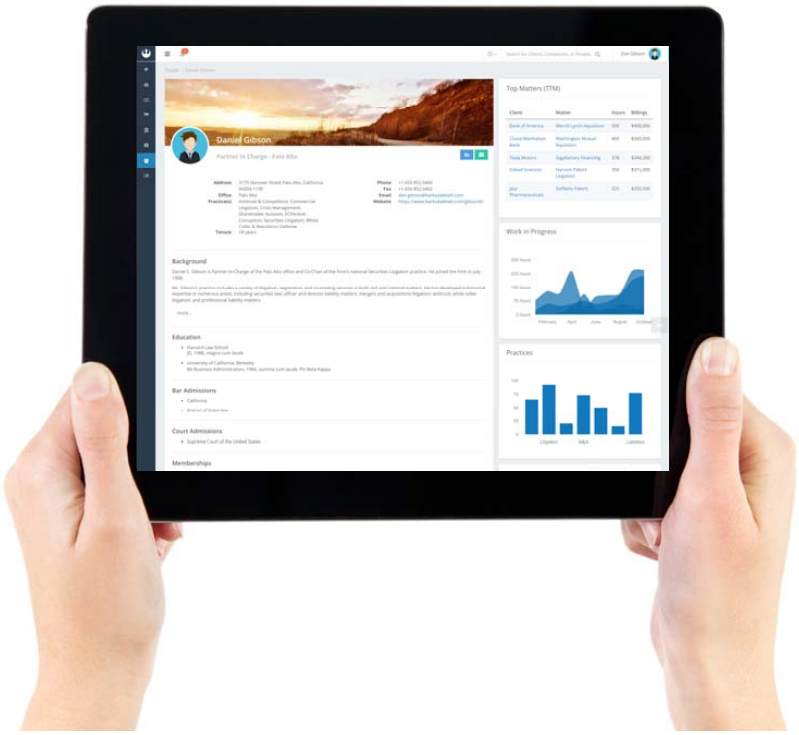

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Thoughts from the Market

Introduction

In this diverse collection of thought leadership and 'how-to' articles, we asked some of the best-known advisers in the legal technology industry to tackle a range of topics, including what are the barriers to cloud? What is the implementation and uptake like of some of the shiny news toys being bought by law firms? And what should law firms be talking about instead of the ever non-descript term "innovation."

We're grateful to all our contributors for what should provide some real food for thought in December and beyond, as we prepare to meet the challenges of 2018.

Cloud computing – take the Gene Kelly approach

By Peter Owen, founder of Lights-On Consulting

The term cloud computing has been around for a long time, being popularised with Amazon releasing its Elastic Compute Cloud ("EC2") as far back as 2006.

The world has changed a lot since 2006! The press and pundits have, as usual, hyped it up but little came of it for five to seven years leading to the trough of disillusionment after the peak of inflated expectations. Now however, there is money to be made, so things are hotting up!

The world has not asked for cloud. It is being driven by vendors as it offers them the ability to manage their software better, support only one or two versions, force upgrades, tie people in to repeating revenue with no licence in perpetuity and increase the financial multiplier for the vendor by many fold. There have been many vendors in the stampede but the Microsoft and Amazon buffalos have charged through to the front and are now leading the herd. Its no longer the choice of the buyer, its market led. It is inevitable and inexorable.

Whilst the drivers are less than idealistic for buyers, there are clear advantages to cloud. The vast majority of law firms cannot afford people of a level or with the skills to fight organised cyber crime or defend against nation states. We need the help of large companies and super giants to defend our assets and the security position has now spun 180 degrees where it may now be far safer to have your data in the "anonymous cloud" guarded by giants rather than sitting on your servers with a large IP address "sign" saying "Here's my data" guarded by little Johnny!

The time of technology enabled services is finally upon us and is gaining momentum. Tender questions like "Do you have a client portal and deal room?" that were typically treated with humorous disdain will, and are now, changing to serious questions that are beginning to affect buying behaviour of both B2B and B2C prospects.

Computing power and storage for a large one off discovery project would previously have been uneconomical for in-house, but now cloud rental, burst and decommission options for compute, AI applications and storage make it possible for firms to use internal resources and this will, in turn, affect market dynamics.

Firms can now spin up a tiny test bed of a client facing product and close it down if it fails to sell with little cost. Conversely, if sales grow, they can scale it up as required so the dreaded barrier to R&D and innovation is lowered to a level that even law firms may be tempted.

Just as IT departments can spin up solutions, so now can fee earning departments. They don't need IT now, they can go direct and hide it in other budgets, contracting with cloud suppliers and building solutions with just a few off-site, clandestine meetings following repeated "No" responses from the IT department to previous requests.

Infrastructure can now be managed by others and purchased as a service. So, what happens to the IT department? Well, it disappears unless it radically changes! If saying "no" means customers go elsewhere, then approaches (and controls) have to change. Infrastructure, DBAs and network teams will inevitably dwindle and knowledgeable buyers, financially savvy 3rd party management, business analysis, project management and customer account management will have to grow representing fundamentally different dynamics in the IT–business relations.

Cloud computing is both the biggest threat and the biggest opportunity in IT since the invention of the PC. So, ask yourself, are you a mainframe lover or up for change? Cloud is no longer the fluffy white stuff you can fly though, it is bringing a deluge of change to your land! And if the rain is coming, you might as well take the Gene Kelly approach to it!

Exploiting the Cloud to Increase Law Firm Productivity

By Nick Martin, managing director of digital transformation consultancy SystemsUp

An increase in productivity is what we all want for the UK economy. The good news is that it has finally started to pick up, according to the Office of National Statistics. The less good news is that the ONS's data shows that in the medium-term, productivity is growing at a much slower rate than we would want.

THOUGHTS FROM THE MARKET CONTINUES ON P.8

Thoughts from the Market

THOUGHTS FROM THE MARKET CONTINUED FROM P.7

In the legal sector one of the key productivity challenges is how to increase billable time for lawyers and support staff – enabling them to work more efficiently by giving them access to information wherever and whenever they need it. One of the ways this can be achieved is through the exploitation of cloud technologies and yet so many law firms are reluctant to make the move. This is despite the fact that many, and perhaps even most firms, are already using the cloud through Software as a Service (SaaS) – through the range of applications being used for activities such as document management and expenses.

So, what do we need to do to change perceptions?

Changing the language

We can stop regarding cloud as a blocker and instead recognise it as an enabler for greater productivity. We also need to address the security issue by understanding that when correctly implemented, cloud can be even more secure than existing on-premise legacy systems.

Technologies such as Office 365 and cloud secured Windows 10 for instance, can allow fee earners to collaborate and work from wherever they happen to be on any given day. There is no doubt that by exploiting cloud platforms, lawyers can access important information faster and improve knowledge-sharing with colleagues, resulting in a higher quality and more secure service to clients.

So how do you move to the cloud safely and securely?

The key questions

The most important part of planning your journey to the cloud is to outline in detail what you want to achieve and then understand the change that needs to take place to make it happen. A key set of questions need to be asked:

- What is the business outcome we want?
- How do we need to evolve in terms of skills and processes to support this outcome?
- What is the current status of our application portfolio?
- What level of change can we as a business absorb and equally as an IT team?
- What new partnerships should we forge as part of this journey?
- How effective are we at change management?
- How self-sufficient do we need to be to support our vision?
- Do we have the approach and resources to deal with on-going cloud "feature releases" and how they might impact on Business As Usual service delivery?

As you can see, a complex mix of technological transformation and organisational change is involved. However by having the answers to these questions you will be able to overcome some significant hurdles and achieve great business outcomes.

Investing in your network

One area that is often overlooked in the journey to the cloud is the investment required in networking and the associated skills needed to ensure connectivity. This is what I call your 'cloud plumbing' and it has to be addressed early on. Firewalls, security, Wi-Fi - it is all part of taking that first step to successful cloud exploitation.

Investing in your people

It's also a fallacy to see cloud purely as a cost saving measure. What you actually need is to make a greater investment in people if you want to fully exploit it for business advantage, both in terms of your headcount and the skills brought to the table. Automation clearly brings advantages and leads to time saving but, in my experience, it tends to be a cost neutral IT resource as costs tend to increase compared to traditional operations salaries, particularly in London where the demand for cloud skilled people is high.

One of the platforms for cloud success is where key staff are backfilled so they can fully immerse themselves in the change. This approach, for which we have a unique delivery model, ensures that the IT team is fully self-sufficient once the move to the cloud has been made.

Investing in your applications

What to do with your application portfolio is another critical area. For this you need to take a really in-depth look, first of all at the business level. Understanding how critical the apps are, how often they are used, the future roadmap, the vendor status and the security requirements, will help you to decide on the right migration approach. For instance, we often discover several apps performing similar functions during this process – this leads to a discussion about whether to consolidate or upgrade them. So formal discovery at the business level is the first step. We sometimes find that only 10% of the application portfolio needs a closer technical discovery - the rest can be consolidated, kept where they are (if they are nearing the end of their lifespan), or migrated in a structured manner to the cloud.

Conclusion

Simply adding cloud technologies into any organisation doesn't work. To achieve real gains in productivity, transformation has to be approached strategically. Management and staff need to understand why change is happening and buy in to the gains it will bring them in their everyday working lives.

Having a skilled team, using the right cloud technologies in the right way, is the secret to a more productive law firm. By not thinking it through properly you will affect your bottom line.

THOUGHTS FROM THE MARKET CONTINUES ON P.9

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Thoughts from the Market

THOUGHTS FROM THE MARKET CONTINUED FROM P.8

Is Legal Innovation Like Beauty - Only Skin Deep?

By Ron Friedmann, partner at Fireman & Company

When I started in the legal market almost three decades ago, few lawyers or firms thought to say or think the word innovation, much less tout it. Today, I read legal innovation articles or blog posts every day.

I have to ask though, does reality reflect the talk. The answer has two parts. First, we need to know what percent of law firms and departments that talk about innovation actually have more than a token innovation initiative? I suspect that the volume of talk is far higher than the amount of action. How much more, I leave for you to decide.

And second, we need to know the impact of substantive initiatives on how lawyers work. My conversations with many working on innovation leave me concerned about the answer. I fear that many innovation initiatives touch only a small percent of lawyers. And that for those touched, it's not clear the innovations dramatically change how they work. I welcome data to disprove this.

My skepticism notwithstanding, I commend the talk. It will eventually lead to faster change, which the legal market desperately needs. What type of change? With all the innovation talk, we sometimes forget that that unless lawyers change how they work, innovation may not matter, at least not to clients.

Clients want better value. That means doing less, delegating more, or practicing more efficiently. If I were a client, talk of innovation would not impress me. What would impress me is hearing how my outside counsel or in-house lawyers say things like:

1. "Our typical due diligence cost has gone down by X% since we started using a machine learning tool".
2. "Finishing matter type X used to take 100 days but now that we re-engineered our process and deployed better tech, it only takes 70 days."
3. "In litigation, we now do an early systematic look at documents and then run decision trees. That has improved our settlement rate from 70% to 85% and saved an average of 15% on our litigation spend."
4. "Five years ago, our budgets were, in truth, not that reliable. Today, 90% of our budgets are within 10% of actual cost because we have both collected better data and now manage our matters more actively"
5. "We have applied AI and data analytics to corporate operational data. That has let us see patterns relevant to law and compliance that we did not know existed. And seeing those patterns, we've been able to prevent some litigation and avoid some failures to comply. We have saved Y% doing this."

Innovation is a feature. But clients want benefits. Instead of talking about innovation, talk about results. That's my hope for 2018 and beyond.

Let's Talk About…IT Training

By Neil Cameron, founder of Neil Cameron Consulting Group

The room is full of elephants.
The legal IT room, that is.
Elephants, that is - full of them. Those things we just don't talk about any more – usually because we have just given up on them after decades of trying because things are about "as good as it gets" without either spending a fortune and/or giving lawyers mind-altering drugs to make them change fundamental working practices.

One of these things is knowledge management, and another is IT training. Another one used to be CRM, but intelligent automated email data harvesting has broken the back of that one – at least in the area of data gathering and maintenance.

I shall come back to KM in another article, here I shall consider the subject of IT training in law firms.

You measure the effectiveness of IT training by the ability of the firm's users - lawyers, secretaries and everybody else - to use the IT systems with which they have been – expensively – provided effectively, accurately and efficiently.

By that measure, as an industry we are poor, extremely poor.

THOUGHTS FROM THE MARKET CONTINUES ON P.11

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Thoughts from the Market

THOUGHTS FROM THE MARKET CONTINUED FROM P.9

I interview law firm workers all the time, all over the world, about the 'problems' with their IT systems. I am usually only there because there really are problems with their IT systems, but it is typically not that simple. For every major malfunctioning aspect of each under-performing IT application, there is broader range of problems that are directly caused by the fact that the users simply do not know how to use their systems' capabilities properly.

The overall level of IT skills throughout law firms – at all levels – still appears to be woefully low. This produces a wide range of inefficiencies and inaccuracies that not only affect the firms' productivity and profitability, but also engender risks relating to the quality of client service delivery, on one end of the scale, and even professional indemnity issues at the other.

Here are just two specific real-world examples out of many.

In one firm we discovered the confessed inability of any of the partners to be able to file a revised version of a document into the iManage system as a new version of the same document. Instead they would save every new version as a new document, breaking the audit trail of revisions, and - as they all admitted – leaving open the possibility of other users undertaking work on, or despatching to third parties, the wrong version of a document.

My other example also relates to documents – we all know that there are many lawyers who cause formatting and document instability errors due to their lack of knowledge of how to use Microsoft Word properly – especially not using Paste Special, Unformatted Text.

Related to that, and less often admitted, is that the secretaries are often not much better. I can recall two law firms, one of which employed over 1,000 secretaries, where is became obvious that the average secretary (never mind about the lawyers) did not know how to use automated paragraph numbering, table of contents generation or automated cross-referencing properly.

Instead, secretaries referred to 'Mavis' in the corner office on the 33rd floor, or 'Janet' the Word 'super-user', to whom they would send Word documents to sort out when they got into a mess.

Recent research indicates that most legal secretaries show only an average of 64% effectiveness on Microsoft Word with current 'normal' standards of law firm training.

These are just two simple examples out of a range of hundreds that I could have picked.

Taken altogether, throughout the industry, this is having a massive impact on efficiency, profitability and quality – the lack of ability to use their current IT systems effectively mean that much of the investment of law firms in IT is simply wasted as the full level of the potential benefits of the systems is never realised.

How did this come about? There are a number of key contributory factors.

Firstly, law firms – to be fair, in common with many employers - tend to assume that new recruits already know how to use Word, "after all, doesn't everybody?" Well, no they "doesn't". In fact, most Word users – who have not received proper professional training – habitually misuse Word, fail to format properly, do not know how to use any sophisticated functionality and hardly know how to use most basic functionality – because they have never been taught how to use it properly (if at all) or read even a basic Word manual; in effect they have earned by trial and error.

This results in woeful Word skills; for example, we found a long-time Word user who didn't know that there was a Footnote facility, never mind how to use it.

The next part of the problem is, of course, the lawyers; the screaming little prima donnas. They hate to think that there's something they don't know and that they're not expert in; and they feel it a badge of honour to be "too busy" to attend training courses, following the example of their older mentors.

Finally, there is the issue that senior management in Law Firms does not realise how much of their IT investment is being wasted by poor know-how at the moment, and (even if it does) is not usually willing to enforce a suitable on-going fee-earner training programme.

What to do?

Train users, obviously; but how?

Firstly, it needs to be recognised that training is a continuous process, not an event. Secondly, training needs to be promoted on a 'push' rather than a 'pull' basis – ideally on the basis of a set of defined Core IT Competences as defined below. Thirdly, the firm's senior management needs to promote the view that attendance at scheduled IT training sessions (even for senior lawyers) is not voluntary but compulsory, and is a factor that will be reviewed at their annual appraisal.

If it helps, perform an analysis of the money that the law firm is wasting as a result of poor use of IT systems, such as:

- the potential chargeable time not properly recorded due to the lack of understanding of time capture systems, even the latest time 'grabbing' software
- the opportunity cost of time wasted by lawyers misusing technology; either they are not charging this time to clients and losing income, or they are charging clients for it and thus reducing the firm's competitive edge

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- the cost to the firm of non-fee earning staff (based on their salary and on-costs) of the minutes/hours wasted per day time misusing technology
- the potential risk of professional negligence claims due to mistakes caused by lack of proper system use – for example, practices that might result in the transmission of the wrong version of a document
- the potential impact on clients' satisfaction and loss of future work.

Frightening numbers and consequences quickly become obvious.
As a first step to improving law firm training we recommend that firms adopt the following methodology:

- firstly; define the required Core IT Competencies, the base technology capabilities that you expect lawyers of different grades and seniority to be able to undertake effectively in order to be able to do their jobs effectively
- secondly; undertake a skills gap analysis to define – for every user – what training they need to be able to meet that defined level of skills – you will start with a large gap
- thirdly; define a set of training courses designed to bridge the most common gaps
- fourthly; execute a series of mandatory training courses, over a sensible period, designed to get everybody up to their required level of skill
- fifthly; enshrine evaluation against their required Core Competencies in staff and lawyers' annual appraisal process.

In order to be able to deliver training effectively, and make it more palatable to busy users, we would also recommend that:

- other forms of training should be offered as well as standard 'classroom-style' training; such as:
  - one-to-one
  - out of hours
  - video-based and other computer based training
- that, as far as possible, training is 'task-based' as opposed to 'software-based' – in other words 'how to create and manage documents' as opposed to 'Word' or 'iManage' training; and 'how to prepare a list of exhibits' as opposed to 'Microsoft Excel'
- that special short sessions on key elements of functionality that could significantly improve efficiency should be offered, such as:
  - using special fee rates in their PMS
  - matter costing and planning
  - effective time recording
  - managing document versions and revisions

We have worked with several firms recently that have benefited substantially by the adoption of tailored self-paced learning and certification software based on the independent LTC4 (Legal Technology Core Competencies Certification Coalition) standards.

The advantage of these systems is that they can be undertaken at the convenience and pace of the user, and in the case of specialist law firm training organisations such as Capensys and TutorPro, the training routines are undertaken in the live version of the law firm's own particular system – which has proven to be a breakthrough on lawyer training adoption.

If you can improve the ability of your users to exploit your expensive technology, over time you will reap considerable benefits in user satisfaction, quality of work output, basic efficiency of staff, client satisfaction and overall value for money from your IT investment.

Then you can begin to address knowledge management…

Technology isn't just for Christmas (I hope AI won't end up in the dog pound once the decorations have been packed away)

By Roy Russell, CEO, Ascertus Limited

You may be surprised to hear that HotDocs, a software product that enables the creation of intelligent templates for document production, has probably had more user licences sold than any other legal software in the UK marketplace. And yet, it is severely under-utilised in law firms. Why? In most cases we find that firms invest in the technology to address the needs of the first project for which the licences were purchased, but then don't assign further resources to properly roll out the solution to other practice areas. Consequently, not only don't firms realise the benefits of intelligent templates throughout the organisation, but they actively limit the return on their investment.

HotDocs and document automation is of course only one example where the use of the product, despite its proliferation, falls by the wayside. This attitude towards technology investment is very prevalent in the legal industry, and baffles me. It defies business logic and rational thinking. Firms deploy a variety of technologies such as case management, workflow and document management, but only scratch the surface of possibilities that the use of these systems offer. It's as if firms become bored of the solutions they have purchased and quickly discard them to move on to purchasing the next shiny new toy.

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The sentiment conveyed by the Dog Trust's slogan, "A dog is for life, not just for Christmas' seems apt in this context. Perhaps more so than in any other industry, I find that the legal sector is especially prone to being swayed by the latest marketing hype and buzz. Law firms are quick to move on to the next "big" thing; and presently, that new, cute adorable puppy, appears to be artificial intelligence (AI).

There is a flood of newly found AI tools coming into the market and many vendors are also looking to AI-enable their existing offering to keep up with the trend. What perhaps purchasers of these tools don't realise is that these products demand significant investment, not just financially, but in time and resources. AI isn't 'plug and play'. AI tools must be 'trained to be intelligent'. AI needs to be nurtured and developed for it to provide specific functionality/application – and then the process continuously repeated for iterative development or creation of other applications. It also requires an on-going commitment towards the ownership of the product, whether that be an investment in hiring and training internal resources or the sub-contracting of external resources.

Sadly, many software vendors are only interested in selling software licences and not in how well their product is adopted. The seller may possibly underplay or the buyer may not fully appreciate the extent and depth of skills that are required to fully realise the potential of the tools. An extreme example of this would be a Microsoft salesman telling a customer that a single licence for one of their programming languages is only £X and once they purchase it, they could use it to develop any functionality they need for their business. Whilst the claim is indeed true, it would of course take each individual organisation 1000s of software development hours to build and deliver the required functionality.

You can buy the latest and greatest piece of technology – and firms spend a great deal of time and effort issuing tenders for software selection – but the real success of the system will depend on how committed the firm is to organisation-wide user adoption. This in turn is reliant on how well the solution is configured to the firm's specific and unique way of working, both at organisational and individual practice area levels. From the point of purchase, focus, resources and tenacity are essential to effectively rolling out the point solution for the first group of users, ensuring that the product meets their business needs and makes them more efficient and productive. More crucially however, the same level of attention is necessary to repeat that cycle of system configuration, skillset development, change management and ongoing user training for the other departments that can also utilise that software within the firm. Only then can the benefits of the solution be truly leveraged.

It should go without saying that law firms must adopt technology based on a strategic vision for their business. However, to fully derive value from their investment, they need to develop a culture that continuously looks at where else that technology – and the skills learnt from the initial implementations of it – can benefit other areas of the business. This approach will ensure that the technology investments they make are fully harvested. Rather than being cast away early on in its life, this approach will guarantee that your 'puppy' becomes a loyal, rewarding and trusted friend for life.

The Legal IT Department of the Future

By Derek Southall, head of innovation and digital at GowlingWLG and founder of Hyperscale Group and chair of www.litig.org

Our world is changing fast but is this a massive opportunity for legal IT professionals or the end of life as we know it?

In big picture terms we all know the job has radically shifted. In the past projects like implementing DMS, CRM, Case Management or upgrading a Finance system were perceived as hard. In many ways they were. In terms of positives though they could be implemented with a relatively small pool of people, they would benefit our firms en masse and were relatively easily deliverable by leveraging Legal IT team's traditional skillsets. We all felt the responsibility, but life was on our terms and the projects fitted well into neat project programme methodologies.

Today's legal landscape though is now very different with other market forces dictating law firm's needs. Every firm now wants/needs to implement multiple projects which go to the heart of the delivery in their legal teams. This requires greater subject matter expertise, more people (ie there is a greater number of small projects), greater stakeholder management skills and importantly a knowledge of transformative and disruptive technology such as AI, RPA, Analytics and Blockchain. Project management is more agile by necessity and experimentation more of an accepted norm. Apart from initial views on data governance and light touch project management what can, or should a modern day legal CIO contribute? Is it realistic to expect them to have expertise on algorithms or how every one of the 100 teams in their firm work? In reality is the only route for a supplier to work directly with a legal team on "new world" projects with a legal IT team's input being minimal? Is being on the sideline of huge technological change the somewhat ironic new reality?

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To add to this, Cloud based infrastructure is gradually taking over - yes integrations and APIs are still not what we would like but the direction of travel will radically commoditise the job. Tools like Zoom are deskilling video conferencing and low/no code tools like Clarilis, Work 10, Manzama and Kim Technologies are again simplifying what law firms (and clients) need in this space in terms of technological support.

For years many legal CIOs have been disappointed by the low level of engagement of their lawyers with technology. This is a lesson in being careful what you wish for - lawyers now have suppliers engaging with them directly and the instances of shadow IT are increasing. Demand is growing exponentially. A by-product of cloud based service delivery with strong UIs is that more can happen under the radar. Legal IT Departments could be cut out of the equation with well received projects happening around them.

And so is the death of the Legal IT department or CIO on the horizon? Definitely not as far as I am concerned but it is vital to adapt and lead this change in focus. The future will be more about strategic advice, decentralised management, managing third party experts and partnering. There is massive opportunity for CIOs and other legaltech professionals to bring completely new operating models to their firms. To persuade at a time when technology is gaining traction. Delivery of new client facing/revenue generating products too present huge potential but making the right calls will be key. Experience will be key and Legal Tech professionals have it in spades.

Notwithstanding the waves of approaches from software suppliers, lawyers will still need to be educated and kept up to speed in this space and who else will do this? They will need advice on making projects happen and won't know what they won't know - also in a very active market who is keeping track of what is really happening to enable smart choices to be made? Where does/should this knowledge sit? CIOs can lead from the front, to help deliver valuable business focussed IT strategies and to be the source of real magic dust where needed. Boards crave strategic and smart advice in this space and so who better to deliver it? Who better to assess start-ups and the upside/risk? Senior tech leaders need to rise to this challenge and perhaps find new ways of dealing other things which hold them back?

Plus, the basics will still need to be managed - cost control will be key with consumption based cloud models and outsourced services. Security issues will only go one way and data knowledge/excellence will be a key differentiator. Protecting and managing data will be even more vital. Also with technology becoming a much more critical component of every business, IT budgets will need to reflect this, and every firm will need someone with great commercial acumen doing the very best deals and protecting their interests in this space.

Traditional budgetary metrics such as 4.5% of Turnover or £X per desktop are dead and are merely quaint facts from history. Senior IT leaders need to articulate what the new metrics and numbers should be? Savvy CIOs will already have the answers for their firms even if with strong "non-crystal ball ownership" caveats and Boards really want to know. As well as new technologies leaders will have a good idea of what will become obsolete and what our new delivery models should look like and so Legal Tech leaders should be modelling and articulating this.

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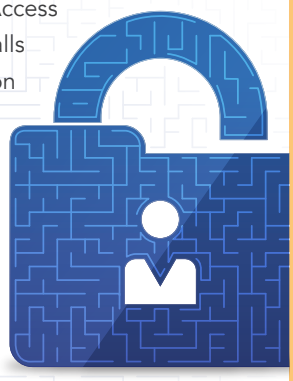

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Secures iManage, eDocs, NetDocuments, SharePoint, Windows File Shares, Elite, Aderant, LegalKey, IntApp Time / DTE, and almost any other core system used by today's firms.

Thoughts from the Market

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And so in my view we are entering a golden era for tech professionals but we need to shape the future if we want to be one of them. Be radical - work out what great looks like for your firm, you and your team working with other key stakeholders. Communicate, win people over, plan and make it make it happen. Recognise that the challenges ahead are true business challenges though, and so it is the time to partner with others - whether it be team leaders, KM experts (data and information being the new oil) heads of digital and innovation, suppliers and radically thinking and savvy lawyers. Everyone has something to bring to the party and no one person will have all the answers - it would be a huge mistake not to listen whilst leading. Above all recognise these are very challenging and fast changing times when firms need advice from the best people out there - those people are probably just like you providing you are willing to adapt in the way some of our lawyers already are. The future is bright but looks very different from today.

Transforming a business is not about Technology – it's about Leadership

By Tony and Jan DeCerce, DeCerce Consulting

Mergers, innovation, artificial intelligence, process reengineering, and other opportunities are pushing many firms to wake up to the fact that without a clear strategy for change and transformation in place their initiatives are doomed to fail.

Inevitably, many vendors and consulting organisations see this as an opportunity to sell software and change management toolkit and templates, to beef-up their bottom lines.

However, effective change and transformation management needs effective leadership from all aspects of firm management, it is not a technology solution. Just watch law firm partners' eyes glaze over when bombarded by slides and process diagrams.

This past year, more firms than ever before have truly embraced effective change management and transformation approaches: it is likely that all of the recent merger activity has helped law firm leaders to recognise change management as an essential part of a true transformation, as they realise a successful merger does not rely on technology, but a clear business strategy.

This is not to say that many great new technologies are not deployed to help firms leverage the merger opportunity. But the human element is the stress point: with change vying for the lawyers' attention as well as normal fee earning activity, managing the lawyers' time and attention is key. Managing this time usually falls to the PMO and transformation group - this is rarely just a technology "thing" that the CIO must make happen.

Change/transformation management is the enabler, no matter how intuitive the technology being implemented is. To transform the business, we need the roadmap which includes the current state or starting point and what the future state looks like, and how do we measure that success once we get there.

As the merger is a business initiative, the firms recognise that it requires strong business leadership and cross functional teams. However, firms need to look at the entire process and to realise the change manager is only human, and cannot effect the transformation from a silo. Innovative firms have created an overall change management or PMO to manage all initiatives, and this is embraced as a good thing for all technology projects as they have the visibility they need to succeed.

Many firms have in this past year come to understand the above and either have a firm wide change management team in place or consider it an important aspect of every project. The more seasoned CIOs have always been the advocates for having a change component in all their projects, even if the firm does not have an overall change management or PMO.

When transformations have issues, it is usually that the business leadership is either lacking or overburdened. Once the leadership has become inattentive, then the fee earners involved in the process feel they are not supported then they don't have or make time to dedicate to the project.

A firm can spend as much money as it wants to buy tools and templates, but without internal leadership the project is bound to fail. Self-reflection is difficult, so often times firms look for a scapegoat:

"It is the consultant's fault."

"The software didn't give us what we wanted or understand our business."

"If we get a new CIO, they will fix everything"…

It's a strong leader who can help the firm's management reflect on what is needed, it starts from the top, by adding some structure where everyone works together and the business supplies the sponsors, cross department leadership, and budget. The key is to focus on high impact projects that are well orchestrated and deliver high impact quantifiable results that inspire the transformation of the business into its future state.

The highlights of 2017

We've broken a huge amount of stories this year, but in an end-of-year trip down memory lane, we've picked the best from each month, judged by its impact at the time and how that has continued to be felt across the year.

January

In terms of the ripples it created, our favourite breaking news story of January was that leading Iberian firm and SAP accounting client Uría Menéndez has selected Thomson Reuters Elite 3E and associated time and billing solutions after an extensive 18-month evaluation process that put SAP, 3E and Microsoft Dynamics AX through their paces.

The Madrid headquartered firm, which has 600 lawyers across 17 offices worldwide, in December signed up with Elite to implement 3E alongside integration platform Workspace and eBillingHub – but Uria will retain its SAP general ledger.

For the past 25 years, Uria has used a bespoke practice management system and director of information systems, Santiago Gómez Sancha told Legal IT Insider: "Our current time and billing system works perfectly. The great advantage is that the database is so well designed we can get any information we like and Elite has a challenge as it has to be better. But the investment to refurbish it and make it more modern was huge and in two or three years time, we would almost certainly have compatibility issues and problems with it."

What was interesting about this story was that Fulcrum – which saved Baker McKenzie's SAP rollout and has just implemented SAP at Norton Rose Fulbright – was not brought in by SAP on the pitch. SAP, which has a notoriously competitive culture, still (short-sightedly, in our view) views Fulcrum as a competitor.

February

In February we broke the news that CLOC – the US-headquartered Corporate Legal Operations Consortium – is to launch in Europe, in what is likely to be one of the most significant events for the in-house legal tech community: whether you have felt that yet or not.

CLOC launched at the end of February led by VMware's vice president & deputy general counsel for worldwide legal operations, Áine Lyons, who talked to us about the launch.

The influential US organisation, which is driving change in the world of corporate legal operations and has united the leaders of many of the largest in-house legal teams and technology companies across the States, held its first meeting at BT's London offices in February and just under a year later, at the end of January 2018, will hold its first London conference, known as an 'Institute'.

March

On the front page of the Orange Rag in March we revealed that Tikit would be ending support and maintenance for iManage – period – and that clients will need to find an alternative vendor as their contracts expire.

The announcement followed the news in June 2016 that Tikit – once iManage's largest reseller - had entered into partnership with DMS rival NetDocuments.

The Tikit-iManage divorce has gifted iManage resellers including Phoenix Business Solutions, Ascertus and Tiger Eye with countless new law firm wins. Despite a number of big law firms turning direct to iManage for their support and maintenance, the DMS leader denied it was part of the plan with general manager Geoff Hornsby commenting: "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."

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April

Selected because we still get a huge number of hits on this story, in April we broke the news of a major double hire by PwC, with two of Radiant Law's co-founders, Andrew Giverin and Jason McQuillen, joining the Big Four accountant to build out its "new law" capability.

Giverin and McQuillen started at PwC's Embankment Place office on 19 April and sit within the legal function, which as of 1 October 2016 moved from being a separate arm to becoming subsumed within the body of the accounting giant, now a fully-fledged multi-disciplinary partnership.

The pair are partners within the technology and sourcing team headed by Juan Crosby, who joined in October 2015 from CMS Cameron McKenna.

The departures followed a fallout among the founders and senior members of Radiant Law, with Justin Cornish, formerly head of Radiant Services in South Africa also having left to become CEO of Lighthouse Law.

May

In May we revealed that CMS was to roll out Thomson Reuters Elite's sunsetted practice management system Elite Enterprise across the firm, following a three-way merger with Nabarro and Olswang, which are both Elite 3E clients.

The move, said by CMS to be driven by its need to achieve merger within a six-month period, saw the combined suite of Enterprise applications released to the finance and business support functions on 15th May and to the wider business on 22nd May.

The story was good news for Integreon because a key factor in the decision to move to Enterprise was said to be that CMS' workflow is heavily integrated with the legal process outsourcer – earlier news stories have suggested that the CMS-Integreon relationship was dead.

CMS went live on Enterprise in September, with Opes managing all the conversion work, testing and final switchover.

June

With the NetDocuments/iManage rivalry in full swing, in June we revealed on the front page of the Orange Rag that Allen & Overy had signed up with iManage in a major win for the DMS leader. Allen & Overy, which swapped out OpenText, previously road-tested cloud-based competitor NetDocuments.

The project has been run for A&O by chief technology officer Ian Storer and it is understood that a key driver in the selection process was mobility and the need for the DMS to integrate with the new suite of back office applications. A&O is moving to Microsoft Office 2016 and Windows 10, offering its fee-earners the ability to become more mobile, meaning they need to be able to access the DMS from anywhere and on any device.

The word on the street is that A&O asked NetDocuments for a hybrid cloud model and NetDocuments said 'no'.

July

In July we published our report looking into the revenue generated by alternative legal services, speaking to senior management at law firms including Clifford Chance, Freshfields Bruckhaus Deringer, Herbert Smith Freehills, Pinsent Masons, Macfarlanes and Mishcon de Reya, all of which say are winning business as a result of new delivery models.

Progress is being made in delivering better value to clients, in automating routine legal services, in project managing work and in using technology-led solutions such as document review tools to create client efficiencies. But what really jumps out is the number of firms that over the past year have built internally developed, revenue generating, tech-led products that are in some cases forming the basis of entirely new business lines.

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WHEN IT COMES TO CLOUD DMS,
EXPERIENCE MATTERS

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Key findings from our report include:

- Clifford Chance saved £15m in operational savings last year thanks to its 'continuous improvement' programme that includes using Kira Systems, Contract Express and a range of 'best delivery tools'. Its Clifford Chance Dr@ft document automation tool has exceeded €1m in its first full year of operation, with 2000 licenses sold to eight or nine different clients.

- Herbert Smith Freehills alternative legal services arm ALT grew by around 7% in the past year and generated over £30m in revenue. It is in the process of developing two home-grown tools as CEO Mark Rigotti tells us: "We are tilting towards business-driven solutions that are developed internally at the coal face."

- Pinsent Masons alternative legal services businesses now contribute "well into the seven figures" as it expands its flexible legal resource business Vario into areas including data protection.

- Mischon de Reya has over the past year developed its own data extraction and visualisation tools within the real estate department and is doing significantly more work with Contract Express to automate contracts, with plans to share that data with clients for a fee. The innovative firm was at the time of going to press about to launch its own brand management business and over the past year has launched Mishcon Cyber Intelligence to gain an advantage in litigation, as well as startup venture MDR LAB.

August

In August we revealed that, as part of an extraordinarily ill-timed leadership shake-up, ILTA, led by then newly-appointed CEO Dan Liutikas, had exited long term programme director Peggy Wechsler with just a week to go before the organisation's flagship annual conference, leaving many vendors and ILTA aficionados seething.

Others exited as part of the shake-up are conference lead and former ILTA IT director Clay Gibney, as well as director of learning Deb Himsel.

The exits sparked a record number of responses and debate in the comments section of the story, most of which were in support of Peggy, who during her 18 years at ILTA had formed numerous close relationships.

As we reported in the October Orange Rag, there have been further departures from ILTA, with four more senior staff set to pursue new jobs. The departures are: Kristy Cole, former manager of marketing and publications; Cristin Gaffney, accounting administrator; Missy McDonough, events co-ordinator and Joanne Kiley, former content coordinator.

The ILTA senior executive regards these stories as gossip, which shows a disconnect with the membership, who regard people as the lifeblood of the organisation.

September

Cybersecurity was not only a recurring but a growing issue in 2017, thanks to attacks on DLA Piper and Appleby. In September we revealed that Bird & Bird has said 'yes' to pessimistic security, becoming one of the very early adopters of the restrictive security model.

The story was significant on a number of levels: when we first broke the news in 2016 that Dentons was looking to restrict its document access to a need to know basis, the UK IT directors we spoke to said it would never catch on.

At Bird & Bird, IT director Karen Jacks has achieved management approval to restrict document access to client teams, with Jacks commenting: "We're seeing increasing expectation around data only being available to those that are working on the matter."

October

In October we revealed that Norton Rose Fulbright had gone live on SAP HANA with Fulcrum Global Technologies, after a project that signed in March 2016 and will ultimately consolidate five profit centres across the United Kingdom, United States, Canada, Australia and South Africa.

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While South Africa is not scoped in the initial roll out, the remaining sites on 8 October swapped out Aderant and Elite for one instance of SAP in the private cloud, using Fulcrum's time entry, CRM, matter budgeting, finance and billing and analytics modules. Time entry and CRM are software-as-a-service products.

The go live follows a planning stage that began in around April 2016, with implementation beginning in late August of that year. Just over a year later, NRF cut over to SAP on time and to budget, although it's still early days.

The 3,700-lawyer firm is now out of hypercare and, so far, there have been no reports of difficulty billing.

This is a huge development for Fulcrum and 2018 can be expected to be a big year for them. Although law firms will still have to work out whether they think SAP is the right PMS for the legal sector. Speaking to Legal IT Insider about Fieldfisher's roll out of LexisOne in November, managing partner Michael Chissick said: "I wouldn't touch SAP. It's not the right package for a law firm. It's great if you're manufacturing cars but it's not a law firm package and it's incredibly costly."

November

A huge month for news, our biggest exclusive of November was that Farrer & Co has selected digital transformation consultancy SystemsUp to help it move to a secure Microsoft Azure hybrid cloud platform and a desktop environment based on Office 365 and Windows 10. IT director Neil Davison and SystemsUp managing director Nick Martin talked to us about the process that they have engaged in so far and the two-year road map ahead.

The key point to note is that Davison attributes the success and speed of the project to date to a lengthy due diligence process, which involved consulting not only other law firms but commissioning Dell to conduct an architectural vision assessment that included interviews with Farrers' IT steering committee and board.

Davison told us: "We had a strong feeling that Azure would be the right thing for us and the due diligence confirmed that – including speaking to Dell and Nick."

In a statement that would have had Microsoft hopping up and down for joy, Davison added: "Frankly, it's a lot easier to sell an Azure Microsoft solution into a law firm than somebody known for selling books. There's so much on the Microsoft website in terms of compliance and GDPR and all the things we care about from a regulatory point of view."

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

IT'S ALL ABOUT THE DMS Despite the fact document management system are, and have only ever been, glorified digital filing cabinets for disorganized lawyers, once again this month the big deals all come from the DMS sector…

It's been a good month for iManage, as Linklaters' Australian ally Allens announces is to swap out OpenText eDOCS for iManage Work Product Management after a competitive pitch involving both NetDocuments and iManage. The firm also selected iManage Mobility to enable staff to access the entire electronic file from any device or location. Phoenix Business Solutions was selected by Allens to assist with the design and delivery of its iManage implementation. This is the second eDOCS to iManage swap in November with Stikeman Elliott also announcing it has selected iManage Work, Threat Manager and Records Manager.

There was also good news Ascertus which won the contract to provide iManage Work support services (previously handled by Tikit) for RadcliffesLeBrasseur. Additionally, the UK-based law firm will use Ascertus when it upgrades to iManage Work 10. Also in the UK, Bates Wells Braithwaite has moved its iManage support to Tiger Eye Consulting. The move to Tiger Eye follows the appointment of IT Director Chris Simmons last year, who said: "Upon my arrival in May 2016, there was a perverse sense of pleasure to find the iManage system wasn't up to scratch, enabling me to quickly re-engage with Tiger Eye, not only for their iManage expertise but also for the wider knowledge of VisualFiles migrations, KM systems, Mimecast and DocsCorp, all of which are in use at BWB."

UK & EMEA LexisNexis UK announced that its LexisNexis Newsdesk current awareness service has been selected by UK top 20 law firm Womble Bond Dickinson. The transatlantic law firm, which operates from 16 office locations in the US and eight UK cities including London, says the service has become an "essential component" of its lawyers' and bizdev team's business intelligence providing vital "deep sector insight" into their clients' businesses.

International law Wikborg Rein has partnered with knowledge automation specialist Sysero to develop and implement an integrated firm-wide knowledge management system, comprising a knowledge library, document automation and workflow management. Wikborg Rein will migrate its most frequently-used templates from its existing KM library to its new knowledge base, where the firm will be able to automate its highest-value model documents using customised workflows.

WHAT'S HOT & WHAT'S NOT CONTINUES ON P.21

WHAT'S HOT & WHAT'S NOT CONTINUED FROM P.20

With more pressure on the industry than ever to understand and use technology efficiently there have been some big wins for Capensys in the last six weeks, with Bird & Bird, Arthur Cox, Penningtons Manches, Seddons, and Withers among the firms that have signed up for training tools ranging from Elite 3E, Windows 10, Office 2016, iManage, LTC4 certification and security awareness.

Tikit's flagship deal this month was Peterborough-based Hunt & Coombs LLP who signed with Tikit for a 110-user P4W PMS/CMS and TikitConnect CRM to replace its Elite Envision system. Other Tikit P4W deals include Cooper Burnett, Parker Bullen, Hunt and Coombs, and Austin Moore & Partners, while Harold Benjamin has also gone with TikitConnect.

Transform Data International reports that Custodian for Legal has been chosen by Pact advocaten as its document, email and knowledge management system. The firm has been using Microsoft Office 365 for several years and was looking for a solution to improve end-user adoption. As Custodian for Legal integrates with Office 365, Pact advocaten is now taking full advantage of its advanced functionality designed for the legal market such as matter management, document and email-management, collaboration, archiving and knowledge management. Implementation began early October and was finished within 10 days. Custodian for Legal utilises the familiar interface of Microsoft Outlook and other Office applications to ensure the highest level of user-adoption. Custodian for Legal is used worldwide by law firms and corporate legal departments including Boels Zanders, Morris Law, KANA, Eversheds Sutherland.

Midlands firm Lodders Solicitors has turned to iomart company Cristie Data for Backup-as-a-Service after encountering issues with its existing backup solution. The firm was using traditional tape backup but decided to move BaaS when issues were noticed during a routine security patch.

Scotland's largest independent law firm Brodies LLP has selected encompass verify to support and enhance its Know Your Customer (KYC) compliance processes.

It was a good month for DocsCorp as leading UK firm Seddons will be replacing Safe Send with cleanDocs for metadata removal and for email recipient checking to prevent against unintentional data breaches. Luther Rechtsanwaltsgesellschaft from Germany choose contentCrawler to automatically OCR image-based documents in its iManage DMS. Dutch firm NautaDutilh and Afridi & Angell from the United Arab Emirates purchased pdfDocs for creating, collating and editing PDF documents. And French firm Latournerie Wolfrom Avocats went with compareDocs for comparing documents for changes.

Corporé, one of the largest rehabilitation and injury management companies in the UK, has selected Converge TS to provide a Hosted Desktop service. As a legal sector specialist, Converge TS was chosen due to their experience in building hosting solutions designed for the Eclipse Proclaim case management software used by Corporé and the new cloud-based infrastructure will be optimised for Proclaim.

NORTH AMERICA Foundation Software Group, a developer of next-generation CRM systems for large law firms, announced that 12 A Law 100 firms have selected Foundation Experience Management as their system for managing experience and expertise. These firms including Blank Rome, Orrick, Sidley Austin, Skadden and Troutman Sanders. "Experience management is key to our client retention and development efforts. Finally there is a solution that delivers," said Hans Haglund, Chief Business Development & Marketing Officer with Blank Rome. "We looked and even tried other products and nothing compares. Foundation is by far the best solution for large law."

WHAT'S HOT & WHAT'S NOT CONTINUES ON P.22

WHAT'S HOT & WHAT'S NOT CONTINUED FROM P.21

InOutsource, currently celebrating its 15th anniversary, announced that Loeb & Loeb will work with the company to upgrade to FileTrail records management from ARM/FileSurf. InOutsource will lead the implementation process and advise on information governance policies and procedures.

Canadian-based firm Stikeman Elliott LLP purchased cleanDocs Desktop and Server from DocsCorp to remove metadata from email attachments as well as compareDocs for comparing document versions. Goldfarb & Lipman in California and Saul Ewing in Pennsylvania also purchased compareDocs, as did Illinois firm Gozdecki Del Giudice in addition to pdfDocs for creating and managing PDF documents. California-based Tyson Mendes LLP implemented contentCrawler to ensure all image-based documents in their Worldox DMS were automatically OCR'ed for searching.

APAC Barry.Nilsson., an award-winning law firm with six offices across Australia, has chosen Aderant Expert for its legal practice management solution. The firm needed an all-encompassing solution to meet their ongoing client needs for handling critical business information and data while providing them with an easily customisable system for internal use.

Barry.Nilsson. also purchased pdfDocs from DocsCorp for creating and managing PDF documents as did Norton Rose Fulbright in Australia as part of an enterprise agreement.

Anaqua Inc announced that Taiwan-based semiconductor maker MediaTek has selected the ANAQUA platform to manage its IP activities, including the management of inventions and patents.

Chapman Tripp, New Zealand's leading full-service commercial law firm, has selected Luminance to provide artificial intelligence technology for due diligence for domestic and international M&A transactions. Chapman Tripp, ranked number one for M&A volume in New Zealand for 2017, chose Luminance after considering other artificial intelligence products.

Movers & Shakers

Exigent has appointed its COO Wayne Ramsay to chief strategy officer (CSO) as it says it plans to broaden out its pure play legal process outsourcing and contract management and automation offering to include working with the C-suite on more bespoke technology solutions including AI and blockchain. Ramsay joined Exigent in 2012 and before that worked as a strategic solutions analyst in the Cabinet Office, including advising Tony Blair's government on its post-911 ICT infrastructure risk profile.

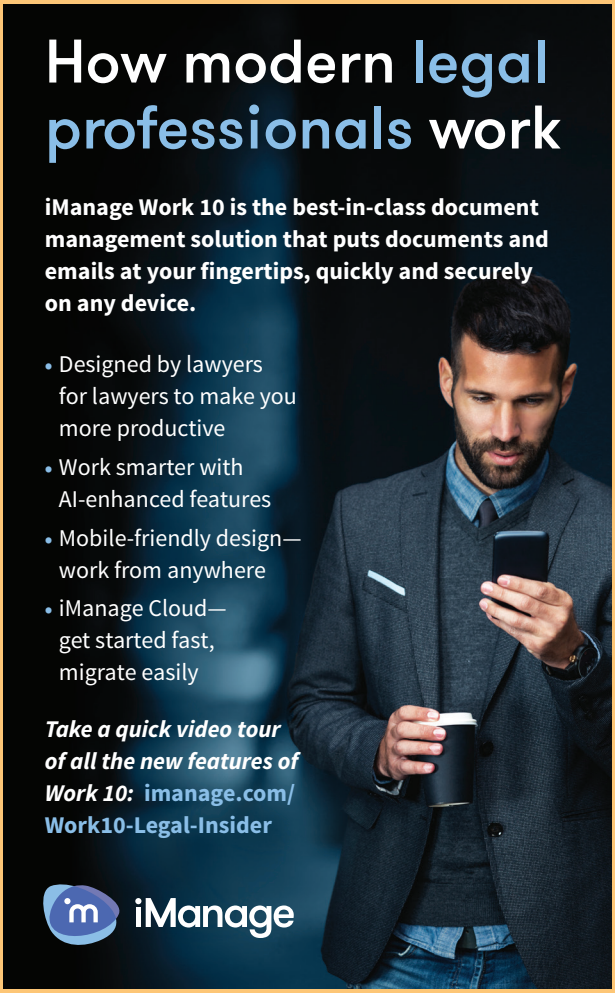
Intapp has launched a new standalone consulting arm to advise law firms on technology, data and change management led by Sanjeev Gandhi, who joins from PwC as vice president and head of Intapp Consulting. London-based Gandhi was at PwC for 17 years and a director at PwC Consulting since 2001. He has focused specifically on the legal sector over the last seven years, including working with many of the Top 20 UK law firms. Gandhi will lead the new Intapp Consulting group worldwide. Intapp's business consultants in the specialist practice areas of risk, client development and data strategy will now be part of Intapp Consulting. The Intapp Professional Services organisation, which includes implementation services, support and training on Intapp products, continues to be led by senior vice president Tariq Choudry.

Ediscovery and compliance specialist DiscoverReady has appointed of James Schellhase as CEO.

Before joining DiscoverReady, he was a global executive with IBM, where he led worldwide operations and strategy for a comprehensive portfolio of information management and governance businesses.

Quote/Unquote

"I got a call from one of my new sales guys asking: 'Who is this Fiona everyone is talking about?' After asking him what the context was, it turned out Fiona was actually fee-earner." **The managing director of one legal tech vendor also acts as a translator for a newby in the team.**



Funniest legal IT story of 2017

We get to hear a lot of funny stories but the best one this year, without a shadow of a doubt, comes from a legal consultant who was out for lunch with an IT director and became somewhat inconvenienced in the restaurant loo.

It's not what you might immediately think. The loo - located in a new-fangled, self-enclosed cubicle - turned into a bidet after use. Unfortunately, it malfunctioned, meaning that the legal consultant was forced to stay seated to avoid being covered in the water jetting out of the loo.

He called the IT director numerous times for help, but got through to voicemail.

Aside sharing this because we found it hysterically funny and it's nearly Christmas, we'd suggest there's a relevant moral to the tale. Not all new technology is a good idea and if you get it wrong, you or your users can expect to take a bath. You're welcome.

Twitterati

"The youngsters are obsessed with blockchain... an hour trying to explain that it's not a panacea to everything in life and that it is a well-designed database ... then have to explain we have had databases for a long time, even in the sepia era I grew up in." **Alex Smith, innovation manager at Reed Smith says he's #feelingold**

"Another example of the continuing need for humans" says **leading eDisclosure consultant Chris Dale,** after our social media channels picked up and distributed far and wide a Legal IT Newswire story about **Wobble** Bond Dickinson.

legalit insider

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