legal it insider

▸ Gateley selects LexisOne

Gateley has selected LexisOne as its enterprise resource planning (ERP) system, we understand, although contracts have yet to be formally signed and as a listed company Gateley said that it is unable to confirm the selection or comment in advance of any formal notice to the market.

The AIM-listed law firm has undertaken a lengthy RFP process involving multiple presentations that in the end came down to two: incumbent provider Thomson Reuters Elite and LexisOne.

This is a much-needed win for LexisOne, which despite a successful rollout at UK top 30 firm Fieldfisher, had yet secure another law firm win since UK top 100 law firm Wedlake Bell's dramatic U-turn at the start of 2018, which saw it opt to migrate to Elite 3E, four years after announcing that it had selected LexisOne.

It is understood that Lindsey Barthram, who led the roll out of LexisOne at Fieldfisher, will be assisting Gateley within his new role as director of consulting services for EMEA at Wilson Legal Solutions.

LexisOne is a cloud-native SaaS solution powered by Microsoft Dynamics 365 in Azure, meaning that Gateley will be one of the front runners in the sector in terms of putting their core financial data into the public cloud.

However, the firm is no stranger to leading the market, having been the first UK firm to list on AIM as long ago as 2015.

▸ The Law Society moves to Azure

The Law Society of England and Wales has moved to Office 365 and is in the process of moving its apps, data and infrastructure to Azure, we can reveal, as part of a £10m transformation plan kick-started 18 months ago, as the body creates its own IT department and moves away from the historic model of sharing back-office services with the Solicitors Regulation Authority.

As part of the transformation plan the Law Society hired Jane Deal as its IT director and Gareth Preece as head of IT, as well as building up its support functions.

Deal was previously a director of Experia Consulting, according to her LinkedIn profile, where she had "significant experience in IT leadership, business change, and business design."

We asked the Law Society about the move to the cloud, the hurdles and whether this shift is symbolic for the rest of the legal market, as law firms increasingly consider their own moves to the cloud. The Law Society, which initially had concerns over the security of cloud technology says: "We see more and more cloud-based services meeting and exceeding the standards around all these considerations."

When did you first start looking at moving to the cloud?

Our IT Transformation Programme, set up 18 months ago, has been considering and adopting cloud services for TLS over that time period.

THE LAW SOCIETY MOVES TO AZURE CONTINUED FROM FRONT COVER

However, our serious consideration of modern and cloud-based technologies pre-dates that - and originates in our drive constantly to modernise and improve our services to members. Indeed, moving onto more modern platforms was part of our reasoning for creating our IT Transformation Programme in the first place.

What were the key considerations in that decision?

Cloud and software-as-a-service technologies have now, in our view, reached a level of both maturity and inevitability in many common business areas that it is now a good time for us to consider migrating to them. Maturity can be measured in terms of functionality (how rich and flexible cloud technology offerings are), security (how safe cloud technologies are for our data and for that of our members), compliance (how cloud tech can meet evolving compliance needs such as GDPR), and affordability (whether it makes business sense to move to cloud technology).

We recognise that many people in the marketplace (including ourselves) have initially had concerns about the security and flexibility of Cloud services.

While we assess our technology choices on a case-by-case basis, we see more and more cloud-based services meeting and exceeding standards around all these considerations.

What were the hurdles and how did you get past that?

Broadly the hurdles of adopting new technology to improve business and customer process are similar regardless of the technology being implemented. They are around taking people in the business on the journey with you,and ensuring that business processes are addressed and modernised on an equal footing with the technology to drive out benefits. Fortunately, there are a host of change management methodologies, techniques and tools out in the market. We are adopting these best practices when it comes to our IT change, recognising that all IT change entails business change.

There are some specific challenges with Cloud services, for example:

- Moving from a commercial model and mindset of "buying" a piece of software to a "pay-as-you-consume" business case
- Moving from a mindset of "owning" data (on our premises and servers), to place of being a sovereign guardian over data.
- Moving from the idea of heavily customising "our" system to the idea of configuring flexibly to allow constant improvement and upgrade

But these sorts of challenges are part of the wider business change of becoming an increasingly flexible, customer-focused business that underlies the movement toward newer and better technologies in so many industries.

Who is leading the project internally?

We have a dedicated Programme team and Programme Management Office leading this change for our business.

Who are you using for advice/guidance/a systems integrator?

We have ensured that we have guidance internally (by building a programme team and technical office that has rich expertise in the changes we are making) and externally (by seeking initial advice on the formation of our Programme from a major systems integrator, and by continuing to build delivery partnerships with strong firms in the market).

Is your move symbolic for the rest of the legal market?

IT and business change are a constant in many markets - and the impact of cloud technologies is being felt across many industries at this time. While we imagine many law firms are facing similar questions and decisions, we can only talk about our own experience and our own systems changes.

We are also part of a much wider market - that is the marketplace of member-focused organisations more generally. Once again we imagine many peer member organisations are facing similar challenges.

For information, on 14th June the Law Society launched a Public Policy Commission looking to explore the impact of technology and data on human rights and justice. We have also recently unveiled a partnership with Barclays which aims to bridge the gap between emerging innovations and law firms creating an 'Eagle Lab' in Notting Hill, West London.

▶ LOD hires LexisNexis director of solutions Nigel Rea

LexisNexis' director of solutions Nigel Rea has joined LOD (Lawyers on Demand) we can reveal, helping the flexible legal services adviser to develop its growing projects-based managed solutions business.

Rea started on Monday 25 June with the title of service development director. His hire follows the news in May that Bryan Cave Leighton Paisner had sold off its entire stake in LOD, which in 2016-17 generated around £35m in revenue, to private equity firm Bowmark Capital

Speaking to Legal IT Insider in advance of the move, LOD co-founder and head Simon Harper said: "Nigel

has a deep understanding of the legal services spectrum and environment but also has a consulting background. He was a consultant at Accenture in the early part of his career and has a strategy background, and he has been involved in legal technology. That's a mix that really helps us with the wrapper that we are giving to our managed solutions business.

"In the middle of managed solutions are, unsurprisingly, people, who are the core of our business. But around that is a wrapper of project management, consulting, technology and data, and having Nigel with a mixture of knowledge of all of those will be really useful."

LOD is becoming increasingly global in reach, having opened recently in Dubai and Germany and in 2016 merging with Asia Pacific contract lawyer business AdventBalance, which gives the combined company offices in Hong Kong, Sydney, Singapore, Brisbane, Melbourne and Perth.

However, Rea will sit within the London team and work predominantly with LOD's UK clients.

Harper added: "One of the slightly unusual things about us is that although we're a business of 230 people, at any one time only 30 permanently sit in one space. In London the management team sits in one big space so that they can easily collaborate."

In-house teams are thinking increasingly strategically about how they run the department and lawyers in the LOD managed solutions space are increasingly helping clients with their own internal project management and legal technology needs, in a form of outsourced legal operations role.

Harper said: "For us 'managed services' means teams of LOD lawyers doing either a particular work stream, slice of work or large project, wrapped by our project management, consultancy and or technology and management information to provide a whole service."

Rea will be working closely with Gervais Carlton-Blake, who joined LOD as its first chief information officer in 2017.

However, Harper adds: "This is not about LOD becoming a tech business but about partnering with the right people to support what our clients want to do."

Speaking to Legal IT Insider Rea said: "I've got the utmost time and respect for Lexis and the team – they have an amazing batch of things planned and it's a good year for them.

"For me, I really like what the LOD team are doing here. They are working with their clients to deliver solutions in new ways and working with landmark clients joining up people, process and technology to deliver new ways of working. It felt like a great opportunity to join and help them to evolve some of the work they are doing really well and open up new opportunities."

Much of the emphasis going forward will be on partnerships that deliver mutually beneficial competitive advantage and Rea said: "What we'll be looking to do is ask what are the right partnerships for us and what are the right organisations that are really collaborative and what can we put together to tackle the problems our clients are facing."

He adds: "If you look at the legal market there is a huge amount of change. I've worked with a lot of technology and it is ripe for a human layer wrapped around it.

"Technology isn't just about buying the box and dropping it off; it's a more nuanced problem solved by applying people and process and that's what LOD are about."

▶ Duncan Eadie joins Charles Russell Speechlys

Charles Russell Speechlys has appointed Duncan Eadie as director of information technology.

Eadie was formerly IT director at Foot Anstey and in 2015 was made an equity partner at the UK top 100 firm. He is still one of the few UK IT directors to be awarded partner status.

Eadie's previous roles have included IT manager at White & Case for a year between 2002-03; and Head of IT for London, CIS and the Middle East at Baker McKenzie between 2003 – 08. Before White & Case he was senior international business liaison manager at Norton Rose Fulbright.

James Carter, managing partner at Charles Russell Speechlys, said: "Technology is a key element of the firm's strategic positioning and client proposition. We look forward to having Duncan at the helm of our technology change and innovation projects and I warmly welcome him to the firm."

It's not often we mention what IT directors do in their spare time, that could be dangerous. But Eadie was notably a member of the first British team to cross the Penny Icecap in the Canadian Arctic and has completed expeditions crossing Greenland and to the North Pole, resulting in his book Cold Feat: A Journey to the North Magnetic Pole.

He takes over from Sam Luxford-Watts, who was only appointed as permanent IT director in January 2018

after working on an interim basis for a few months.

Before that the role was held by Rob Cohen, who is now CEO of Futurae, a consultancy specialising in risk management and IT merger due diligence and restructuring.

Speaking to Legal IT Insider about his new role Eadie, who started at Charles Russell on 11 June, said: "It's obviously a great firm and they are a considerable size after their merger three and a half years ago. They are looking to take their technology to the next level and all the things I've done before in an international setting."

He adds: "The legal environment is becoming more competitive with a greater focus on technology and it is a great place for technology to flourish."

▶ In demand at thedocyard

Australian headquartered transaction management platform thedocyard is in pilot with DLA Piper as demand from the London market grows.

The docyard in June unveiled a major user experience upgrade which it launched ahead of its iManage and NetDocument integrations coming out in August.

Headquartered in Sydney, thedocyard's founder and CEO Stuart Clout tells us that plans are afoot for a move into the London market thanks to the volume of demand.

Speaking about the UX upgrade he tells us: "After consultation with our firms, especially the Australian firms we work closely with, we've taken the platform to the whole next level in terms of usability and interface. We compete with a couple of products and if you stick them all together, our USP is that you can do all of your transactions in our platform."

He adds: "For technology like ours, zero support is required and lawyers typically launch and manage the digital spaces themselves rather than having to ring a practice support manager or IT. If a deal comes in you can have a deal space live in minutes and it's multi tenanted. Lawyers can see the deals they are personally running in thedocyard and if there are other deals I'm involved in I can see it in my instance. In other platforms I would have to go into that instance separately. The big holy grail is that I can see it all together."

He adds: "I predicted two years ago that the technology needs to be driven by lawyers, it's no different to Outlook and email."

Transaction management is an area that will shortly see a number of major deals announced, if they go public. Clout says: "We solve a boring problem that has always existed: it's not sexy or AI or bullshit or hype. You use post-it notes and emails to run a $6bn deal and you know it's rubbish."

Thedocyard is working on an integration with Microsoft Office 365, which will allow full live collaboration within documents in thedocyard. Clout says: "You can launch a version of the share purchase agreement and the other side starts working on it immediately. There's one version and you're tracking all the changes."

He adds: "In two years' time there will be junior lawyers laughing in a bar saying, 'do you know that lawyers used to email documents around?!'"

▶ More on Weightmans' litigation decision engine

Weightmans in June announced that it has entered a partnership with the University of Liverpool and Kira Systems to develop an AI-backed decision engine to help identify arguments for settling cases – interesting in itself, there is more to the partnership than that.

In what you might call the first 'limb' of the project, Weightmans is using Kira's technology to extract routine client data that needs to be entered into its case management system in an often time consuming and repetitive fashion on opening a matter.

Weightmans' director of innovation Stuart Whittle said: "What we're trying to do when we open a matter is to take some of the documents from our case management system and pass them to Kira, then notify the case handler that Kira has read the document and extracted the data. A human can cast their eye over whether Kira has extracted all of the data and if not, then fill in any blanks and that the information that Kira has extracted is right, and if not change it. Once that has been signed off, we'll put the data into the CMS."

He adds: "Most of our clients require us to input large volumes of information. We want to make the capturing of that management information less time consuming, more accurate and more consistent. We also want to make sure our lawyers' time is spent in the best possible way."

This is a new way of using Kira's technology and Whittle said: "This is an unusual use case for Kira. However, it's been used by a lot of large firms so is proven technology. Plus, their approach to the proof of concept made it really easy and cost effective for us to test whether could help us."

The second limb of the project sees Weightmans partner with the University of Liverpool to develop a decision engine capable of assessing litigation outcomes, and Whittle says: "We want to get to the stage where we take the data from Kira and not only pass that to the CMS but also to the decision engine." Weightmans anticipates the technology being used by Autumn this year.

Kira might ask, for example, 'was the claimant provided with hearing protection?' and Whittle says:

"That's a question that the decision engine needs to know."

He adds: "We're using Kira to extract that information from, e.g. the claim form to enable us to turn it into a yes /no answer for the decision engine."

The decision engine has far reaching potential and Whittle says: "My hypothesis is that if it works in this area, we can use it for quite a lot of different areas, and we'll end up with faster, better decision making.

"It will either say 'yes settle' or 'no fight' or will tell us that if we get this and this bit of information we'll save a significant amount of time in reaching a decision."

This will be of most benefit in the likes of volume insurance litigation. Whittle says: "It's not going to work for a one off, enormous piece of litigation: that's not the problem we're trying to solve. It will potentially apply to anything where we have a sufficient amount of predictable and/or repeatable work."

▶ Linklaters to appoint a CTO

Linklaters is in the process of looking for a chief technology officer, after director of technology Matt Peers was appointed as global chief operating officer in addition to his existing role.

The new CTO will report to Peers and have overall responsibility for technology strategy, information security, architecture, and the delivery of technology programmes that support the strategy.

Peers currently has 23 direct reports but after the appointment of the CTO will have two: operations and delivery.

Peers was appointed as global COO on 1 May, replacing Peter Hickman, who remains global chief financial officer.

The global COO appointment saw Peers join the magic circle firm's executive committee, with the new appointment designed to help the firm drive and accelerate change.

▶ Blockchain for Law

Founded in April by Stevie Ghiassi, CEO of Legaler and president of the Australian Legal Technology Association, 'Blockchain for Law' is a new private network of verified lawyers from around the world dedicated to exploring the intersection of blockchain and the law.

As blockchain technology challenges everything from banking and financial systems, the role of governments, healthcare and personal data, the infrastructure of the internet and existing business models, lawyers are left questioning what role they will play in intermediating these new advancements. Even the most trusted commodity of a lawyer, the contract, is being completely reimagined by blockchain technology in the form of smart legal contracts: self-executing agreements that are expressed in lines of code.

With blockchain gathering momentum, Ghiassi said: "It is imperative that the legal industry has somewhere to share knowledge, explore ideas and discuss the regulatory landscape, with a sharp focus on the implications around law. Highlighting the growing interest in distributed ledger technology within the legal realm, the network received over 1000 applications in the first week from all corners of the world."

In the spirit of decentralisation and self-organisation, lawyers from the Blockchain for Law network put together a crowdsourced document outlining the regulatory framework for cryptocurrencies and blockchain technology for their respective countries, creating a valuable resource and covering many corners of the globe. Members also receive a regular digest highlighting key news, regulatory developments and global events. With many industry thought leaders active in the network, it has also become a place to share blogs, thesis papers, panel webinars and upcoming projects.

Blockchain for Law has processed 650 lawyers and has another 800 applications to get through.

Earlier this year, Ghiassi's legal tech startup Legaler announced it would be building a blockchain designed for the legal industry, with the first decentralised application being Legaler Aid, a crowdfunding platform that will allow the disadvantaged to access legal services through tax-deductible donations as well as match lawyers with pro bono work, in an effort to help serve the four billion people that without access to justice according to the United Nations. As a further part of the ecosystem, Legaler will also be building the world's first decentralised global legal network, which will become the new home for the Blockchain for Law community.

Interested lawyers can apply to join at http://blockchainfor.law

▶ Access to justice and the urgent need for a law tech revolution

by Gavin Sheridan, co-founder and CEO of Vizlegal

At the recent launch of the Barclays / Law Society Eagle Lab law tech incubator in London, Lord Keen of Elie (Richard Keen QC) said, "There is a lawtech revolution happening all over the world and I want to make sure the UK not only keeps pace with it but leads it."

Simon Davis, the deputy vice president of the Law Society also weighed in saying that "lawyers are being presented with a growing list of possibilities to augment their careers and their businesses with technology".

Clearly as a law tech startup ourselves, we wholeheartedly agree. But there are also fundamental barriers to entry in some aspects of the legal industry that may have gone unnoticed.

A prime example of this: access to information.

As a legal intelligence company Vizlegal's primary focus is on accessing public information such as court judgments, regulatory decisions or filings data, in many jurisdictions. We do this to help practitioners know what's happening right now, or to build products and tools in the area of analytics so practitioners can gain some insight into trends over time. We want to help practitioners to save time and energy on repeated tasks, and let software do more of the heavy lifting.

But unfortunately for us, and indeed for the public, enormous amounts of what arguably is "public" information is published in poorly formatted documents that are difficult or impossible to search or parse properly.

Or worse - it's simply not available at all.

Clearly, we share Lord Keen's view that the UK could lead the world in the space of law technology. But here's an exercise to try: find a court judgment published in an open, accessible re-usable format in England & Wales. You won't find it. Indeed, it's hard to find it in Scotland or Northern Ireland either.

Or try finding court diaries, or accessing court filing systems. They either don't exist, are inaccessible, open to some but not others, or are ephemeral in nature. Or even try getting clarity on who actually owns copyright on a court judgment. Everywhere we've looked there are very deep rabbit holes - with no clear answers to be found.

These problems lead to serious consequences: a lack of ability for companies - not just ours, but any company - to build products and services on top of

that rich public data. And of course the public are also largely left in the dark about the case law that affects their lives.

Recently the co-designer of ICLR.co.uk, Daniel Hoadley wrote some excellent provocative blog posts on the subject of open access to case law - particularly in the case of England & Wales. He laid out four fundamental problems with the system that he believes need to be addressed.

Firstly, he wrote, the supply chain that takes a judgment (whether handed down or given extempore) to the wider public is "messy and poorly understood by the Ministry of Justice". Secondly, the intellectual property rights over the judgments themselves is "needlessly uncertain". Thirdly, he argued there is no solid model for translating the way the common law works to the sort of open case law system we need and fourthly, he noted, "BAILII, in several key ways, itself acts like a publisher of proprietary content".

In a follow-up post he pointed out that BAILII is only publishing a small portion of the case law that is actually being produced. Only 19% of Court of Appeal (Criminal Division) judgments in 2017 are publicly available for free via BAILII, he noted. This is not the fault of BAILII, but is down to how the pipeline between judgments being handed down and how they are transcribed and distributed is largely broken - at a structural level.

If you're a member of the public trying to find or read a judgment or a business trying to build products on top of public information this is, as you might say in tech, sub-optimal.

There is a fundamental structural problem with accessing UK case law (in particular English & Welsh case law). Either much of it is not available to ordinary members of the public or to business, or much of it is not re-usable, or re-usable in suitable formats (something the EU's Re-use of Public Sector Information Directive encourages).

At Vizlegal we tend to look at this problem from a first principles perspective.

Access to justice and access to information are, we believe, fundamental rights in any democracy. As a company we've looked at most jurisdictions in the world to see how much, or how little statutes or case law are available freely - either in proprietary formats like Microsoft Word or Adobe PDF, or in open accessible formats like XML or via APIs.

For example, the EU's "Eur-Lex" legal data is probably the best in class. The statutes and case law that emanate from the EU's institutions is made available freely, without licence, in open, accessible, structured data formats. This means companies like ours can build products and services on top of that data.

When you start looking at other jurisdictions however, things tend to get worse.

Globally, there are many, many problems with open access to law. For statutes in common law

jurisdictions, it often comes down to lack of consolidation (something legislation.gov.uk has worked valiantly to address), while in other jurisdictions comprehensive open access to case law is a fundamental barrier. In other jurisdictions, filing systems are easy to access and build upon, but statutes and case law are difficult or impossible to get.

We've found that access to case law in particular in England & Wales - at least among modern Western democracies - is among the worst in the world. Not only are judgments of courts not really officially "published" but there are in fact barriers placed on their re-use. Many published judgments don't even tell you who exactly the judge was who wrote the judgment. To any citizen of any country, this situation should be deeply unacceptable.

If the UK does want to be a world leader in law technology, we would humbly suggest that a good place to start is fundamental reform of how legal information is made available to the public and to businesses alike.

Perhaps by encouraging or mandating that such information is available in open, accessible formats - whether it comes from the courts, or from any quasi judicial bodies like the Information Commissioner's Office - a shift could occur that other bodies could replicate. Such open data philosophies do exist within other UK Government bodies - but the judicial branch has often been left behind in this area.

Another way to think about it is this: if we were building a judicial / legislative system from scratch today: how would we construct the underlying technology to best serve the public, the legal industry and technology companies?

If the information playing field is levelled then new products and tools can be built on top of all that valuable public information. Of course Vizlegal would stand to benefit, but everyone - practitioners, the public at large and the entire nascent law tech ecosystem - would all gain from such a move too.

Vizlegal is a lawtech startup based in Dublin that aims to empower lawyers by indexing and graphing the relationships of all the world's legal information.

Sheridan is a former freelance journalist who specialised in freedom of information requests and has written for media outlets including The Sunday Times (Ireland) and the Daily Mail.

▶ Inspiring the next generation

The Women's Business Council has published a guide to inspiring the next generation in science, technology, engineering and mathematics (STEM).

The purpose of the guide – which says it's for small businesses but could really apply to businesses of any size - is to show how easy it is to connect your business with local schools and young people and the wealth of benefits you will get from doing so.

John Whelan HR Director, BAE Systems says: "As STEM employers, it is our responsibility to inspire, educate and support the next generation, entering the STEM industry for their careers. To ensure the UK has a sustainable talent pipeline we cannot just focus on our own organisation's future talent, but also the future talent for the organisations around us, our supply chain, and our partners in the extended enterprise. It's about making whatever time we have available to support schools and pupils of any age and inspiring them to follow into the industries in which we have built our own careers."

There are lots of ways that your employees can engage with young people to inspire them into STEM; just some of the ways include:

• giving careers talks or helping at careers fairs, mock interviews or CV workshops
• mentoring young people
• hosting workplace visits
• supporting enterprise/ engineering activities and competitions
• supporting school lessons by bringing real-world problems into the classroom
• supporting the STEM skills curriculum in local schools

The best and easiest way for your employees to get involved in all of these activities is to become a STEM Ambassador. The STEM Ambassador programme is specifically set up to link businesses with schools so it's a straight forward way for your employees to get started.

You can read the guide in its entirety here: https://www.womensbusinesscouncil.co.uk/wp-content/uploads/2018/06/Inspire-the-next-generation.pdf

And you can apply to join the STEM Ambassador programme here: https://www.stem.org.uk/stem-ambassadors/join-stem-ambassador-programme

▶ Gordon Arata goes live on 3E in the cloud - the details

New Orleans-headquartered law firm Gordon, Arata, Montgomery, Barnett, McCollam, Duplantis & Eagan in June became the first law firm to go live on Thomson Reuters Elite's 3E software as a service practice management solution hosted in Microsoft Azure, after a rollout that took around eight months.

Legal IT Insider caught up Gordon Arata's firm administrator Ray LoCicero and Elite's vice president of global product management Elisabet Hardy to find out more about the pilot, the challenges, and the roadmap.

Gordon Arata - a long-time user of Elite's Enterprise practice management system – was badly affected by the category 5 Hurricane Katrina that caused catastrophic damage along the Gulf Coast in 2005.

With offices in Louisiana, and Texas, the firm's data now resides in a data centre in Las Vegas and it went live on Microsoft Office 365 around a year ago, as it puts in place robust business continuity measures.

Already a good candidate for the new SaaS product, Gordon Arata also fits the size and profile of many of Elite's remaining Enterprise clients, who must make a decision over where to move from the sunsetted midmarket system.

For that reason, it is unsurprising that it was Gordon Arata that Elite approached about working on a pilot of its new cloud version of 3E, which is so far only available in the United States.

Elite, led by client account executive Ann Murphy, first approached the firm a couple of years ago and LoCicero said: "Let's talk when you're ready."

He says: "Last year, in Spring 2017, Ann said 'our cloud solution is going to be ready and we want you to be it.'

"I flew to vantage in Orlando, they pitched us and said, 'this is what we can do' and they had all the right people in the room, and we were sold."

LoCicero still had to go back and convince the firm but says: "It wasn't that hard a sell: it was getting them to think and follow the paths that the firm had already decided to go on."

The decision was made to press ahead last July, and the firm has been up and running for just over a month. LoCicero says: "We got rid of four servers right away, which is another step in terms of reducing our footprint and spend."

Hardy said: "Gordon Arata has been a fantastic partner on this journey and it's been a pretty fast project.

"For the first release of 3E in the cloud in the US what we're looking for are firms that are smaller in size. People think of 3E as being just for big firms but with the cloud it is a perfect fit for firms without the staff and resources of those big firms. Gordon Arata is a great representation of the clients that are left to migrate to 3E and it's a great option for them."

Key to Gordon Arata was being able to take advantage of automatic updates and LoCicero said: "There has already been three cycles of enhancements. It just shows you how we're able to stay on the latest technology and upgrades."

Security wasn't a particular concern for the firm, which had already become comfortable with cloud arrangements, but Hardy says: "We put in new privacy and security features. It's important to note that we haven't just taken our existing product and put it in the cloud. We've made improvements around security and privacy and taken advantage of Azure's security infrastructure."

The plan is for the cloud product to be generally available in the US in the third quarter of 2018. In the UK it will be 2019, and Elite is adding more modules before that happens.

Hardy said: "The focus is on widening the number of modules and pushing enhancements every other week. But we are not moving away from also offering 3E on premises: we understand that clients still want 3E on premises and in the cloud."

Speaking to us about Gordon Arata going live on 3E in the cloud, vice president of customer advocacy, Patrick Hurley, said: "When we were doing the data conversion it happened in a day with a massive machine cranking through the data: you're able to add and reduce power in a cloud environment."

He adds: "Normally you have to order in the server and that can take weeks, or once a firm wanted to get more memory and there was a worldwide shortage: there's a complexity to the interdependence of hardware that takes things out of firms' hands."

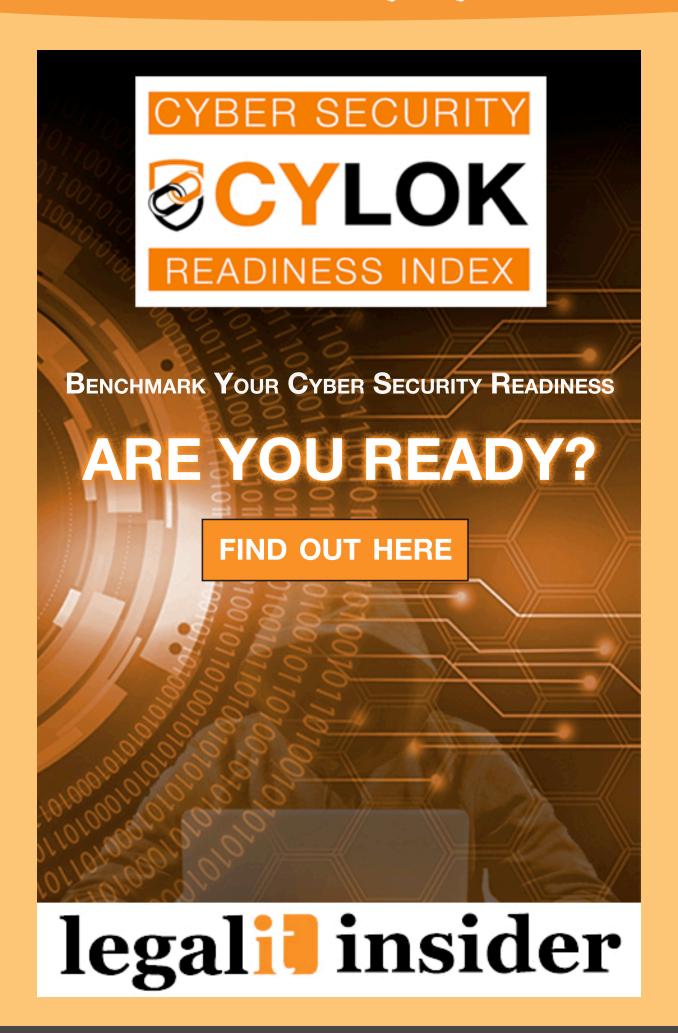# ▶ Happy 10th birthday Picture More

It's a big birthday this year for UK IT executive search and recruitment specialists Picture More.

The consultancy, which was founded a decade ago by Oliver Morris and Matt Pike, is focussing increasingly on the legal sector, thanks to the growing and changing demand for IT capability.

Pike and Morris have steadily grown the now 20+ Brighton-based team, of which the most attractive is Wilf Pike, the office dog.

▶ Strategic Technology Forum: Barclays to review tech capability as part of last panel review

Barclays will be scoring its law firms on their innovation and technology offering as part of its last ever panel review next month, with group general counsel Bob Hoyt actively involved in driving the bank's strategy on legal technology.

Speaking on a panel at Legal Week's Strategic Technology Forum in Lake Maggiore, Italy, David McCahon, global head of innovation and commercial for legal at Barclays said: "Technology is enabling us to achieve higher visibility on things like how law firms are staffing their work, and in our relationship meetings we make it very clear that we expect them to push their innovation agenda."

McCahon, a long term Barclays general counsel, started in his current role four months ago and has been engaging with innovation heads and multi disciplinary teams across Barclays panel firms. His initial observations? People don't naturally love change, and everyone is at a very different stage in their evolution. He said "Bob Hoyt is working very closely with me to drive our strategy on legal technology so it's coming right from the top."

He added: "If our law firms aren't progressing on the hygiene factors of driving down cost, increasing efficiency and using data analytics then that relationship is under threat."

The wider panel looked at how the role of the general counsel has gone from risk manager to strategic adviser in recent years, meaning that their needs have changed significantly. That presents new opportunities for law firms, which they are, according to the panel, still often not alive to.

Janet McCarthy, chief legal officer & company secretary, global relocation company Santa Fe, said: "This is not about tightening the screws but the entire industry working together to get better at what it does. You brilliant technologists have the ability to help this industry do things in a better way."

But she added: "There are no partners in this room: it's great to have this conversation but my challenge is what are you doing to get buy in when you get back to the office?

"I'm not a sexy brand and I need my firm to be proactive because I don't have the fantastic resources that Barclays does. If you can get that right you can roll it out across hundreds of companies like me."

The panel gave examples of positive examples of change, and McCahon said: "One law firm that we recently involved in a pitch brought their legal engineers in and they designed an approach I've never seen before, which the business absolutely loves."

However, McCarthy recently had dinner with the GC of one of the Big Four accounting firms who had gone out to market for a quote on eDiscovery work and come back with a quote of £90,000 from a Magic Circle firm and £15,000 from an alternative legal services provider. "The GC went back to the Magic Circle firm and asked 'if you collaborate with them will you pass on the cost savings to us' and the firm said no." The GC instructed the alternative legal services provider but still instructed the law firm on the strategic advisory piece.

Speaking from the audience the IT director of one UK top 30 firm said: "General counsel need to push back. Many of my suppliers are in this room and if they behaved in the way you have been describing I would kick them into touch."

Going forward Barclays will assess its panel firms on the basis of ongoing assessment.

The panel was chaired by Katie DeBord, chief innovation officer at Bryan Cave Leighton Paisner.

And Barclays Eagle Lab legal tech incubator launches: here's why you should embrace it

Barclays on 19 June formally launched its Eagle Lab legal tech incubator in partnership with The Law Society, which at its core is an attempt to help the legal sector catch up with its fintech peers and "turbo-charge London's law-tech ecosystem."

The launch, which took place at the Mayfair Hotel in Stratton Street, brought together an impressive array of City law firm Eagle Lab partners, senior Law Society representatives (who were notably out in force), startups such as Avokka, Legatics, Ruby Datum and Libryo as well as a significant number of the Legal Geek community, who joined later because of an unfortunate diary clash with the debrief of Legal Geek's round the world tour. CIOs were notably absent.

Respected Barclays UK GC Stephanie Pagni kicked off the launch, describing how Barclays' Notting Hill legal tech Eagle Lab incubator was inspired in large part by its flagship lab in Cambridge, where legal engineering firm Wavelength.law became its first ever member.

Just over a year ago members of the Barclays legal team visited the Cambridge incubator and were inspired. Pagni said: "Our judicial system is recognised and respected globally for its fairness and it should also be recognised for its speed and agility, underpinned by technology."

She added: "We want to be part of the force turbo charging that innovation."

Reading between the lines rather than putting words in Pagni's mouth, the legal sector, which seriously lags fintech, now really needs to get its act together in order to properly support the likes of Barclays and its financial institution competitors.

While the number of legal tech startups is growing every day, law firms remain risk averse and wedded to traditional practices. In a video played at the Eagle Lab

launch, Avokka co-founder David Howorth said: "Trying to convince people that there are new and better ways to work is one of our biggest challenges."

The hope is that Eagle Lab will provide more opportunities to have those conversations.

Being based in Notting Hill, the big question is whether City partners will take the time to visit the lab and engage in the way that it is hoped: one of the huge benefits enjoyed by startups in Allen & Overy's onsite tech hub Fuse is that partners regularly drop in to speak to them about potential use cases, which will inevitably be more difficult when the incubator is in West London.

It is early days, and, as Legal IT Insider was reminded gently by a senior member of the Law Society, this is a very good start as far a creating a London tech hub goes. We agree, but it would undoubtedly be better off located somewhere more central.

London may have law firm led accelerators but this is altogether different and speaking at the launch, incoming vice president Simon Davies said; "I urge you to go to the labs, to see the innovators and to find out what they are developing to save lawyers time and help keep the UK ahead."

Eagle Lab has the potential to be a hugely successful partnership for the Law Society: through its associations with Legal Geek and now the Barclays incubator, the Law Society is demonstrating its relevance to the City, at the same time distancing itself from its disastrous and costly joint venture to create conveyancing portal Veyo, which was scrapped in 2015.

It is also tapping into the growing sense of urgency and dare we say, even panic among the highest echelons of the judiciary, that if the UK legal sector doesn't get its act together when it comes to law tech, its global standing could come under threat.

Speaking at the launch The Rt Hon Lord Keen said: "There is a law tech revolution happening all over the world and we want to make sure that the UK leads it." There are 'threats' from overseas in the form of Canada's Legal Innovation Zone designed to improve the Canadian legal system and Lord Keen also highlighted efforts being made by the Singapore Academy of Law programme to incubate new ways of delivering legal services.

"Those jurisdictions that embrace technology will increase their share of the global pie," he said, adding that facilitating the adoption of legal technology remains a key focus for Lord Chancellor.

For some members of the startup community present, the talks appeared to be grey haired lawyers being lined up to say all the right things.

And therein, probably, lies the rub. Yes the legal sector is too set in its ways and in need of a shake up but the startup community also needs a far better understanding of the market that it is expected to help revolutionise.

Barclays' multi-partner incubator represents an opportunity – one that should be seized – for startups and the legal community to meet, find common ground, and help develop a new common language.

▶ Pulling teeth and permission to fail

Catherine Bamford, CEO and founder of Bam Legal starts a conversation

Caroline Hill, editor of Legal IT Insider, asked me about knee-jerk reactions. I had a bit of a rant.

It went something like this…

Caroline: "One thing I'm really interested in is how many firms are looking at their processes before jumping into automation. Seems that there is still very little strategy and a lot of knee jerking around?"

Me: "I like what you are saying on the processes before jumping into automation but my experience has been different and I think the opposite is the problem.

Whether its automation, or some other potential improvement / change to current working practices, I find that most firms:

• over-analyse
• focus too much on business cases
• put in place too many red-tape procedures
• stifle those trying new ideas with a need for 100% proof it will work
• are inherently risk adverse
• have way too many meetings about meetings about meetings
• spend too much time and money before even looking at proof of concepts / pilots where you could get real user feedback
• spend too much money on consultants to make sure they are 'doing' the right things
• focus too much on the PR / winning an award
• focus too much on established tech others have already tried
• essentially try to make sure that if a project fails no one gets fired / held back from promotion / blamed.
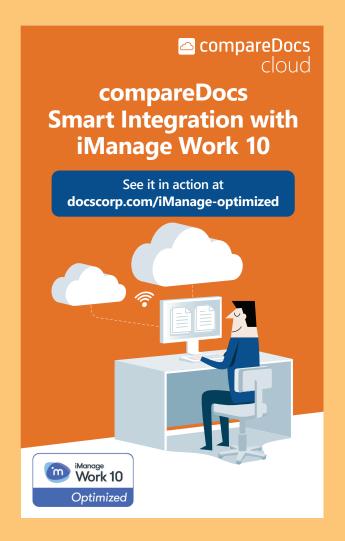
In addition, "PEP Protection" is a serious cultural problem in law firms holding true R&D and innovation back.

Those in the business charged with changing strategy, innovating, implementing new ways of working etc, need to be given budget, space, access to lawyers and clients and permission to fail. Only by coming up with lots of new ideas, trying them and failing at some, will the truly great ideas develop and will anything really happen in the timescales we all want.

Innovation and disruption in legal industry is painfully slow and there is too much back covering going on.

There are exceptions. Jonathan Patterson's Engine 1 and Engine 2 approach at DWF Ventures is one of them. Radiant Law have created an optimum slack style led environment in which anyone can suggest an idea without fear of ridicule. It can be mooted, deftly built, tested and played with to see if it has legs. Their life-changing-for-lawyers "RemarkableX" product for Word is a fantastic example of what can result from this permission to fail culture."

Author's Note: This is the shitty first draft. I decided it was best left unedited as I am hoping to start a conversation.

Eigen who? The startup with £13m world domination plans

We speak to founder and chief executive Lewis Liu and general counsel Adam Eastell about Eigen Technologies' ambitious plans to classify and extract data across the firm, across all practice areas, and across the front, mid and back office.

Eigen Technologies in June announced that it has completed a £13m ($17.5m) Series A funding round co-led by Goldman Sachs Principal Strategic Investments and Temasek, and for many people in the legal sector it was one of the first times they'd heard of the London-headquartered company that counts Linklaters, Goldman, Evercore and ING among its clients.

Founded in 2014, Eigen's natural language processing technology automates the extraction of unstructured, qualitative data. It has 50 staff based in London and New York and began gaining profile in the legal sector towards the beginning of 2017, when it won Linklaters as a client. The Linklaters IT team and lawyers collaborated with Eigen to launch what we described at the time as a homegrown AI-backed data analysis and extraction tool called Nakhoda.

Liu told us: "Linklaters was our first client but we rapidly moved into financial institutions and have a wide range of banks like Goldman and ING and banking clients in the US Asia and Europe.

"Only Goldman and ING allow us to name them publicly but imagine those types of banking clients and that's what we have."

Eigen works across the front, middle and back office, working with legal teams as well as with bankers to help them automate banking transactions.

Liu said: "We work across the entire spectrum of an organisation: the idea of the platform is that it is industry and language and document agnostic."

The same applies in the legal sector where, while Linklaters is the only official law firm client, Liu says Eigen is working with other global law firms of Linklaters' calibre. In November 2017 Eigen appointed Slaughter and May partner Adam Eastell as its first general counsel, and Eastell is bringing his experience to bear in how the product is developed and marketed.

Eastell tells us: "To achieve user engagement you do need to understand how law firms work and you do need to work with the clients to come up with a thoughtful approach to using the technology. You can't just roll it out in a law firm and that's that."

However, he adds: "I'm very conscious at the end of the day that we're extracting information from contracts - the workflow that goes with that are

applicable to whoever is extracting that information, whether that be law firms and bank."

The tech startup or scaleup now has plans to enter the insurance markets and works with top management consultants.

For a small company to work in both the financial and legal sector alone must be a stretch leading one CIO to ask 'How can a small company retain a focus across multiple industries? Does it not make most sense to specialise?'

However Eigen is bullish about the scalability and instant usability of its tech. Liu says: "We are working with a legal department in a bank and we have a larger scale legal AI mandate where we've analysed every single finance agreement that the bank has ever entered into and we have extracted information across all of those documents. That's a scale I don't think any of our competitors have done."

Part of its optimism stems from the fact that the users themselves can train the machine. Eastell says: "The user is the person that asks the question, trains the machine and runs the extraction. Over time you have users who will be super users and can train others. For that reason it is highly scalable."

Liu says: "The way to think of it is not to think of as a platform that does a task but what one of clients called an 'instantly scalable workforce.' Any non tech user, for example a lawyer or human resources manager can take the machine and give it a couple of examples and teach it to answer a specific question, for example 'what is the prevailing law' or 'is this release about buying and selling shares': we require less training data so the user can very quickly train and identify the task it has to do."

Eastell says: "The other point is that it doesn't just pull out the clauses for humans to review, it gives you the answer, for example 'what is the license fee' - it gives you the answer. Or 'what is the governing law' - it doesn't just give you the clause, it says 'England and Wales'.

Liu says: "For a complicated document you might need 30/40 training documents but for something simple you might only need two to get started."

He adds: "The really key point here is that we have a lot of scientists and mathematicians and will continue to heavily invest. We haven't just taken a random machine learning model and built a sexy product around it. We have a way of modelling language that is extremely unique in certain mathematical forms, enabling our machine learning model to be very fast to learn.

"We have been very thoughtful about the mathematics we've deployed and extremely targeted about how you build a product that is user driven. A lot of our competitors need an engineer to come in and code. Ours is all about the user teaching the machine itself."

Eigen also has a full suite of APIs and for a couple of banking clients, this means that any time an agreement is issued it gets pushed into Eigen's system, where it is used for risk modelling and to assist and educate the in-house legal team in terms of how to negotiate.

Liu freely admits that the technology is still immature and key to making progress going forward – and this is in part where the money from Goldman and Temasek comes in – will be investing in further top level technical expertise.

He says: "We have made it clear that we're just starting up: we have great wins and we can do things with machine learning that no-one can do and we've made clear we will be doubling down on hiring in PHDs and NLPs and the right type of mathematicians.

"The dream that Adam and I talk about is when we can interrogate every piece of qualitative data: we're just getting started. At the click of a button you could ask the machine 'hey I want to know what the mood of the company is today.' Or 'what is the average notice period?' That is our vision. We do have a way to go to put that together but we have the right seeds to build that technology and that's why Goldman invested in us."

It is true that for two such prestigious investors to inject this level of funding in a Series A is unusual and you can rest assured that they crawled all over the technology.

Eigen will now use some of that funding to invest in marketing, press and sales. Seventy percent of its staff are technical and Liu said: "Generally a lot of people do wonder why we have been under the radar so long. We just wanted to get the product and the technology right. We don't want to disappoint our clients. We want to set realistic expectations. We're just starting to invest in marketing and PR and sales. For the longest time didn't have a sales team, we were just focussed on the product."

The announcement of Goldman and Temasek's investment has already put Eigen firmly on the map and Liu says: "Since the announcement we have already seen a massive spike in interest. Take the top 50 global law firms in terms of revenue: around 50% have reached out to us in the last two weeks."

The use cases within law firms so far have been varied, from those who use Eigen to analyse their invoices, to their precedent banks and Eastell says: "Precedents are one of my big bug bears and I would love to break down a precedent bank and by doing this produce a precise M&A due diligence tool as well as intelligence on how people contract; what provisions are normally agreed; what percentage have break fees. I'd love to see that information broken down and analysed and made available to lawyers on a transaction, so if a lawyer doesn't know something, instead of walking to another office for a chat they can get the definitive view. There is a huge amount of information waiting to be analysed."

One US law firm is using Eigen to analyse how the terms of its fixed instruments have changed. "I can ask Eigen 'in the last 100 transactions, is this a deviation from the market norm,'" says Liu.

He adds: "We want to be the piece of technology that is used across the entire firm: by the back office; by the knowledge management team and by lawyers."

These are big ambitions but with £13m in its pocket and the backing of Goldman, Eigen has the potential to be truly disruptive.

We also put a few questions from the market to Liu as follows:

Do you expect to create specific legal products and if so how will you get traction in a crowded and immature market?

There are a couple of angles to think about. Do we plan for our platform to be specifically for lawyers? Yes and no. There will be features for lawyers incorporated in our general platform including being able to review multiple documents at once.

The platform has specific features that our legal clients have requested and Adam has provided guidance and those product features will be in our platform or already are. But those features could also be useful if you're an investment banker looking after a collateralised loan portfolio. The point is that our legal clients drive a large part of our functionality but that doesn't mean that functionality is exclusive to our legal clients.

How will you encourage firms to put sufficient lawyer time into products to make them viable / how much can any solutions be developed without specific legal input?

We do have a lot of input from legal clients. Keep in mind that within banking clients are the in-house legal teams. Obviously Linklaters is a client and we have Adam as well.

We quite like being a second mover in the legal space and we can learn from the mistakes of those before us. Most of the successful Silicon Valley players are second movers. Facebook learned from MySpace. Google learned from Yahoo, which created portals that didn't scale. Google came along with a general engine that scaled up and became extremely powerful.

It does take a lot less time to train our machine. You only need five minutes to get something started. The ability of the machine to learn quickly is one of the biggest hurdles. So much time is taken teaching the machine of our competitors that people feel like they can't be bothered.

Do you see a time when this is just plug and play and requires very little training?

There are two modes of operation for the platform. Our API platform is not plug and play. When a banking client needs to pipe their data through to Eigen and back you need to get engineers to control that and probably always will.

Then there's the product out of the box. You can push a button and get an instance in five minutes, we have that capability. But unlike our competitors we don't have a set of pretrained questions yet. Luminance or Kira have up to 50 questions where you don't need to teach the machine. When you get the Eigen platform it's generally a blank slate. You do need to teach the machine. That being said, you can ask it any question you want and we've seen big law firms changing to our platform because of that flexibility.
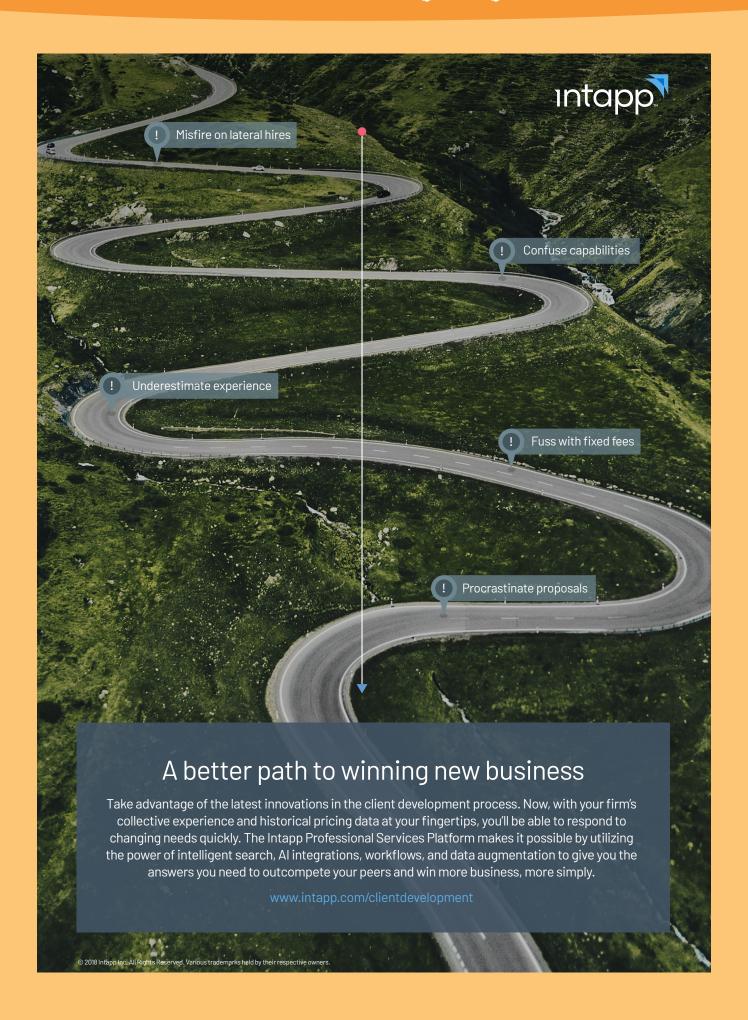
We do have plans to put in pre-trained questions and that's in our roadmap.

How can a small company retain a focus across multiple industries e.g banking and legal. Does it not make most sense to specialise?

For us the focus is on solving the problem of natural language extraction. I look across our technical staff and 25-30% have PHDs and that is the problem we are solving.

If you are literate and able to learn you can go from industry to industry. You do need specific industry knowledge to understand the pain points of an industry but that lies more in the sales side than the core technology. The technology is the most difficult piece to get right.

Forsters: Transformation ahoy

New CIO Anthony Stables says that "leveraging cloud providers will be key going forward."

In May we reported that Anthony Stables had been appointed as CIO at Mayfair real estate and private wealth firm Forsters, and we subsequently caught up with Stables and Janders Dean about the technology and change management strategy review underpinning his appointment.

Janders Dean was called in by Forsters partnership board after a significant growth spurt that saw the size of the firm's partnership almost double in two years. Janders Dean founder Justin North said: "The attitude of the partners was approaching a culture of curiosity: they realise that technology could and should be used to change the way we practice law."

After presenting at a partner retreat in November 2016, Janders Dean was brought into Forsters in the middle of last year, spending time getting to know the firm's practice areas; partners; and the way technology is being used and North says: "The firm was ripe for the creation of a dedicated CIO role."

Prior to Stables, IT was headed by Douglas van Jijl, who held a dual finance and IT role. He remains head of finance.

North said: "The dedicated IT role means the firm can look at both foundation technology and keep the engine room running but also improve the life of staff and fee-earners in the way they work."

Stables when we spoke shortly after his arrival at the firm was "very much in discovery phase." He said: "There is nothing that is fundamentally broken but we're in a situation where we do need to make key moves in the way we deliver technology. There are commercial pressures and we're in a position where we can help take the firm forward."

The IT team is comprised of around 20 people and Stables will be reviewing its makeup and whether it's fit for purpose.

Stables will be looking at Forster's onsite infrastructure and will be looking at "what goes into the public cloud, what to the private cloud, and what stays on premises."

He adds: "Leveraging cloud providers will be key going forward.

"We will be looking for lots of partners as we review the infrastructure, software applications, and services we provide. We will be going out looking at lots of different vendors and partners.

"I will put together an IT strategy for the next five years, which will be presented to the partners in the next couple of months," Stables told us, adding: "There is the appetite and realisation that the firm can't operate without the IT it needs, and that to become more efficient and agile takes investment."

North said: "There has been a firmwide realisation that technology is not just keeping the lights on; it's an investment and the firm is seeking to get a return on that investment.

"The partners understand that technology will enhance the client experience and they understand the link between and impact on a number of things from training of junior lawyers to retention."

Stables said: "This is not jumping into buying technology; buying and investing in a solution is just one element of the equation. You can spend millions on buying and implementing a solution and not using it. We need to make sure that the investments we make help us to focus on the things that allow us to be more agile."
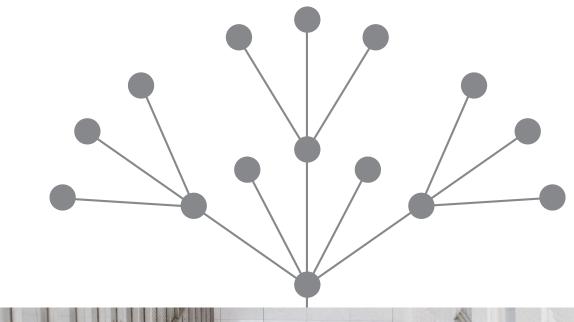
Forsters's document and practice management system is provided by Norwel Computer Services, which was acquired by Civica in 2016. It uses BigHand for dictation and HighQ for client extranets and dealrooms.

The firm will be looking at its underlying processes and where it can drive efficiencies, and North said: "The firm especially at the partner and board level is really open to learning and understanding this."

Highlights from the 4th Annual AI Summit

iManage RAVN legal subject matter expert Alistair Wye gives a brilliant summary of the AI Summit in London

The 4th annual AI Summit at the London Excel Centre was a huge event. 15,000 attendees, 6,000 delegates, 400 speakers and 180 exhibitors. A million conversations. It's hard to summarise the key highlights given the breadth and depth of the conference, which also covered blockchain and quantum computing. But I'll do my best.

Finance

Finance had an entire stream dedicated to it. Most interesting was the headline panel of experts from Microsoft, Lloyds of London, Lloyds Banking Group, Société Générale and UBS discussing the impact of AI in the financial sector.

Key takeways were these:

1. Digital transformation is hot. Société Générale described their 2 – 3 year digital transformation strategy focussed on automation, chatbots, RPA and A.I., which is already starting to pay dividends in terms of operational efficiencies.

2. As part of that transformation, Microsoft stressed A.I. model building as a "core competence" within future FS.

3. All agreed that banks and other industries need multidisciplinary teams, expert at identifying, testing, implement, curating, auditing and explaining A.I. use cases. For the time being, this is a shallow talent pool that the UK education system underserves!

4. UBS agreed with Microsoft – banks need to be proactive at understanding, auditing and explaining their A.I. models. The reason? Readiness to explain the same to regulators, who are inevitably turning attention to A.I. systems, especially those automating compliance processes and /or decision making. Ironically such systems are being necessitated by the increasingly complex legal and regulatory ecosystems within which banks operate.

5. To help banks (and other A.I. clients achieve the above), Microsoft explained A.I. providers must provide greater telemetry to help users audit their A.I. systems and understand how and why it is making decisions. "Blackbox" systems won't suffice as A.I. becomes more widely adopted, increasingly involved in decision making and regulated where it touches compliance / ethics.

Explainable A.I.

Separate from the above, but closely linked was the unveiling by PWC of their "Explainable A.I." call to action and whitepaper.

In essence, as A.I. decision making becomes common place, it no longer suffices to have "blackbox" systems providing little to no feedback. Windows into the blackbox will imbue transparency, understanding, confidence and trust in the decisions made by such systems. Further, it will drive adoption as understanding of such systems becomes more evenly distributed beyond data scientists.

It's an easy ask but a difficult delivery: PWC stressed opening the blackbox will require:

1. Focussing on the business needs, informed by well-defined business requirements. This ensures systems solve real problems and provide both general feedback, but use case specific metrics as necessary.

2. Clear accountability for A.I. systems. If this falls on executive shoulders they need to understand the risk. It's here that increased telemetry to audit such systems and in-house experts who can not only understand but explain these systems become critical.

3. A.I. systems are designed, built and trained by humans so stakeholders need to ensure bias doesn't creep in. Examples exist today where A.I. systems were trained on data, which inadvertently skewed decision making, sometimes to harmful effect.

4. Interpretability futureproofs the system. Once regulators and law makers catch-up, being able to interpret and explain systems will enable those system owners to be compliant from day one, rather than have yet another reactive regulatory challenge to solve.

5. A.I. systems should be explainable by design. As systems mature, it's likely more decision making will be delegated. Inability to see inside the blackbox might stall A.I. development, adoption and any effort to audit decisions. Explainability by design also avoids the jumble of bolt-ons that make legacy infrastructure so painful to manage.

Digital Transformation (is also Business Transformation when it comes to A.I.)

iManage RAVN delivered a "Practical A.I. for Financial Services" presentation to a full house. This session's themes were threefold and touched on some raised during the main FS panel:

1. There is a common misconception that FS A.I. is for quantitative structured data only, hence the prevalence of algorithmic trading, robot advisers, customer behaviour and fraud detection systems highlighted in most A.I. for FS discussions or articles.

2. That misconception hides the fact quantitative structured data is just the tip of the data iceberg. 80% of any FS organisation's data is sitting below the waterline, unstructured, qualitative and underserved by A.I..

3. The iManage RAVN platform is one ecosystem through which to digitally transform that 80% of the estate, making documents and contracts machine readable and using A.I. to classify, search and enrich that data by automatically extracting key metatdata (e.g. parties, clauses, dates etc).

Processing this data using machine learning and search are impossible without first getting your house in order.

As the main FS panel noted, given the transformative impact of new technologies like A.I., RPA, blockchain and quantum computing, the scale of digital transformation will ultimately morph into a true end to end business transformation.

One bank described itself as increasingly a tech giant with a huge balance sheet rather than a bank in the traditional sense. Naturally the structures, personnel and strategy will radically alter via these business transformations.

Integration

At iManage we believe A.I. as a point solution has limited value. Rather, the greatest A.I. return on investment ("ROI") comes from frictionless integration with upstream and downstream processes and tools. We aren't alone in this opinion.

Attendees and speakers across industries expressed efforts to integrate different tools, including A.I., RPA and document / transaction management to create end to end automation or augmentation of routine cognitive tasks. Without integration, A.I. is a clever toy without purpose.

Innovation

Tied to integration is innovation. However, as ever, start with the problem not the technology. This was also a big message. Throwing A.I., blockchain, quantum computing, RPA and / or [insert latest buzzword tech here] and hoping for miracles won't work. Start with the problem, process and people and then think about the tech. Don't put the cart before the horse.

Benchmarking and AI Return on Investment

Nearly everyone met had "tried" something to do with A.I.. Few could confidently point to clear-cut success stories within their organisation or network.

In part, this seemed to stem from two things:

1. Benchmarking A.I. is notoriously hard. Benchmarking A.I. against a BAU process is easier, provided you time and a historic or existing transaction / process that is well understood and easy to horse race against the equivalent A.I. system. The tricky part is finding the time and resource to dedicate to such testing.

2. Harder still is benchmarking one A.I. system against another. Very little data exists in the public domain and buyers are cagey about discussing their own benchmarking given the competitive advantages to be gained as early experts vs. rivals.

Given the difficulties above, quantifying and qualifying an ROI sufficient to justify replacing BAU for new is a challenge executives and future leaders need to grapple. Likewise vendors need to help enable buyers in this regard.

Legal

Karen Jacks of Bird & Bird gave an excellent presentation with frank advice about legal use of A.I.. Core messages were:

1. GCs recognise the A.I. revolution has begun, but they are not yet participants.

2. Very few GCs are actively testing, let alone implementing fulsome A.I. systems.

3. Many GCs are naturally cautious advocating new technology (A.I. or otherwise) unless clear and proven tangible benefit to operations and efficiency (see above regarding difficulty benchmarking A.I. systems, let alone explaining them).

4. Unlike law firms, in-house teams are traditionally cost centres not profit centres and therefore legaltech hard to justify except from the pessimistic cost reduction perspective when in fact it's both that plus potentially a profit generation tool when used right.

5. Globally, Bird & Bird have found GCs in the USA more open, enthused and active with A.I.

6. Lawyers in general need to understand the capabilities, limitations and workings of A.I. in sufficient detail to know the right questions to ask of A.I. and the most appropriate use cases.

Point (6) was echoed elsewhere around the conference, not only by law firms. In many cases delegates expressed a desire to "have some A.I." without necessarily knowing what problem to solve.

As Karen noted, without this understanding and focus, expectation management is somewhat a minefield when the last two years of mainstream press has massively overhyped A.I. capabilities, often exaggerating outcomes and completely ignoring the huge quantities of good quality data and expertise necessary to achieve such outcomes.

Education and focused experimentation is key to solving this challenge, both within law firms and across other industries.

▶ What's Hot & What's Not: Wins & Deals

UK & EMEA Mobile-only bank **Monzo** has selected the **Apperio** legal spend management and analytics SaaS platform to help it track and analyse legal spend across all law firms, in real-time, in one place.

Monzo was said to have been frustrated with the limitations of their current manual process where they received spend updates on an ad-hoc basis from their law firms. Dean Nash, head of legal & compliance, commented "We're pleased to announce we've chosen Apperio to manage all of our external legal spend. Apperio gives us increased visibility over our external legal costs and enables us to spot anomalies in spending quicker."

Dentons, the world's largest law firm, is adopting the **HighQ** intelligent work platform to enhance the way it engages clients and transform its delivery of legal services around the globe.

With a diverse group of law professionals in 73 countries, Dentons needs to build agile, tailored solutions to meet the local, national and global needs of private and public clients of any size. The firm will now be delivering those services with the support of HighQ'sSaaS platform. "Our clients digital experience is core to our value proposition, and we are delighted to be partnering with HighQ," said Scott Saundry, Dentons' global chief digital officer.

Ipswich law firm **Prettys Solicitors** has swapped out **Thomson Reuters Elite** for SOS Connect from **Solicitors Own Software**. "We had been with our previous suppliers for several years and looked at an upgrade with them, as well as seeing what some of their competitors could offer," says CEO Ian Carr. "We decided to adopt SOS Connect mainly because it was a well-established, prudent product with a proven track record. In addition, as a firm we are looking to drive our efficiency in the coming years, and SOS Connect will help us to do that. The level of support, security and knowledge provided by the SOS team so far is very, very good and we are now in the process of rolling out the second phase, which involves the probate and litigation modules."

And in another SOS deal, **Allington Hughes Law** has signed up to **SOS Connect** as part of a "natural progression." The firm, which has offices in Wrexham, Chester and Llanrwst in North Wales, was a long-standing SOS customer when it decided to upgrade to SOS Connect.

The Scottish Legal Aid Board (SLAB) has gone live with **Oracle Cloud**. The move, which is in line with the Scottish Government's Digital Strategy for Scotland, means that it is the first public body to make this transition. At SLAB's Edinburgh HQ, Oracle platinum partner **Inoapps** has now implemented finance (ERP), i-expenses, and procurement in the cloud, including sourcing and invoice scanning. Following shortly will be Oracle Cloud HCM and Payroll. This will also be the first public sector implementation of Oracle Payroll Cloud in both Scotland and the UK. John McLeod, Head of Information Systems at SLAB, said "By consolidating financial, HR and payroll processes into one system, we hope to achieve far greater visibility of these activities across the organisation. This, combined with the improved reporting capabilities available in Oracle Cloud, should lead to improved insight and decision-making."

Commercial law specialist **PG Legal**, has implemented Proclaim practice management software from **Eclipse Legal Systems**. Established in 2011 and specialising in commercial property transactions, PG Legal has grown to provide a range of legal services to businesses of all sizes and sectors in the North East and throughout the UK, including dispute resolution, debt recovery and employment law.

Odi-sé Avocats Aviation Finance has become the first independent French law firm to adopt **Workshare Transact**. Transact runs deal checklists through a secure online workspace, removing the pain of multiple emails. The checklist provides online access to the latest version of all transaction documents and simplifies the process of collecting conditions precedent and reviewing progress.

It's a double win for **Tikit** and **BigHand** as Peterborough-based law firm **Hunt & Coombs** selects case management system P4W and BigHand Digital Dictation. The selections were kickstarted when Hunt & Coombs, which has four offices and over 100 staff, set about a review of their internal processes with the aim of driving increased efficiencies. Hunt & Coomb's legacy case management system was time-consuming to use, with the legal secretaries having to copy and paste case numbers from one system into another in order to complete transcriptions effectively. Yes, really. The decision was made to review the technology and explore other ways of streamlining their processes to ensure optimum efficiency within their secretarial teams. Other **Tikit P4W** wins this month include **A&N Care Solicitors** and **Wartnaby Hefford**.

Wakefield law firm **Catteralls** has selected the Liberate case and practice management system from Linetime, as has **Bradbury Roberts & Raby**, who are part of the **QualitySolicitors network**.

Ayfie, a leading provider of search and text analytics solutions, has won Norwegian law firm **BAHR** as its newest customer. Aimed at managing BAHR's vast domain knowledge, Ayfie will combine and leverage different technologies from its portfolio to get BAHR's lawyers the information they need. All documents will now be automatically classified for efficient recall and BAHR can easily search for internal competencies, clauses, terms and documents.

Norwegian firm **Advokatfirmaet Hjort** has picked

compareDocs from **DocsCorp** to provide its users with a fast, accurate, and reliable document comparison tool that compares all file formats natively. And, two UK firms went with contentCrawler from DocsCorp but for different reasons. Edinburgh firm **Shepherd & Wedderburn** bought it to reduce document management costs by freeing up space. (contentCrawler reduces document file size through compression.) And, London firm **Collyer Bristow** will use it to ensure all image-based documents (legacy and newly profiled) are OCR'ed for full-text searching to ensure all relevant documents are returned in every search.

Brodies has deployed artificial intelligence platform **Luminance**, following a successful trial of the technology in M&A due diligence and real estate transactions. "Our decision to implement Luminance is driven by our client-first agenda. As a firm we are continually investing in ways where we can deliver greater value for our clients" said Brodies partner Will McIntosh. And **Tadmor Levy** has become the first Israeli law firm to select the Luminance AI platform, which will be used in domestic and international M&A transactions.

Claims management specialists **Winn Solicitors** is using the **Panintelligence Pi** business intelligence platform to provide an easier way to report on and interrogate the data within its existing **Eclipse Proclaim** case management software, while still complying with GDPR. Pi dashboards sit on top of Winn's existing systems to provide clear data visualisation capabilities, with reports are instantly available by displaying real-time data across over 20,000 live files in the source database with zero movement or extraction of data required. All of Winn's data remains secure in the source database and allows users easy access to key metrics.

NORTH AMERICA Saul Ewing Arnstein & Lehr, a full service law firm with more than 400 attorneys and 17 offices across the United States, has gone live on **iManage Work** in the iManage Cloud for document and email management. Shortly after selecting iManage, the firm merged with Chicago and Florida law firm **Arnstein & Lehr**, which had an on-premises installation of iManage Work. To help make the merger a seamless process, both firms deployed iManage Cloud to have a single platform for accessing and managing critical work product and collaborating with one another. "We were already planning on moving to iManage," said Saul Ewing CIO Todd Corham, "in hindsight the decision was even more beneficial than we'd expected because it allowed us to combine the firms' platforms more quickly and enable all our professionals to immediately start working together. Getting access to all of our documents and filed emails was critical to a successful combination and facilitated collaboration early in the process."

Nashville-based **Bass Berry & Sims** has selected **Aderant Expert** and **Handshake** as its practice and financial management software and knowledge management solution. The firm's CAO (chief administrative officer) Craig Bingham said Bass Berry

& Sims were looking for software that could provide additional insights into the firm's finances in a way that would make the data actionable for attorneys and streamline the financial system without being disruptive during implementation, making the combination of Expert and Handshake the clear choice for their needs.

New Orleans-based **Gordon Arata Montgomery Barnett McCollam Duplantis & Eagan** has become the first law firm to go live on **Thomson Reuters Elite 3E** in the cloud, after serving as the pilot site for the development of 3E as a cloud-based offering, the firm is the first to utilize the market-leading enterprise business management solution in the cloud. And, **Howard & Howard** is the latest US firm to transition from Elite Enterprise to 3E. The firm has also selected 3E Workspace, which puts all business management functionality, from time and revenue management to client and matter management, into one intuitive view for users.

Chicago firm **Chilton Yambert Porter**, and Harrisburg (PA) firm **Thomas Thomas & Hafer** have both purchased pdfDocs from **DocsCorp** to create, edit, and manage PDF content.

IPfolio, a provider of IP management systems, just announced that global technology company **Lenovo** has purchased and implemented the IP Portfolio Manager for Patents, Inventors Portal, and Reports & Dashboards

products from IPfolio. Lenovo chose IPfolio because of its cloud-based flexibility, ease of use, collaborative tools and fluid connection to the company's Chinese and Rest of World (ROW) IP operations. Lenovo began its search for an alternative to its incumbent solution Memotech back in 2016 with Charles Dixon, Lenovo's Global Legal Systems Patent Project Manager, led the evaluation process.

Anaqua Inc, also a provider of IP management systems, reported that IP law firm **Morris & Kamlay** had entered into a multi-year agreement to use the ANAQUA software platform to provide enhanced patent management services for its growing client base. In another Anaqua win, **Tokyo Electron**, a leading supplier of semiconductor and flat panel display (FPD) production equipment worldwide, has selected ANAQUA software to replace its previous IP management database.

▶ Movers & Shakers

UK & EMAE Following the injection of private equity funding this year, **Converge Technology Specialists** has continued to build out its c-suite with the heavyweight hire of former PwC corporate finance director **David Byrne** as the company's chief financial officer. He will join former Thomson Reuters Elite's EMEA sales head **Peter Gill**, who, as we reported last month, is joining Converge TS as chief commercial officer.

Matt Fiske-Jackson has joined **Practice Evolve** who are well established in Ireland (as Documatics) and Australia, with around 700 clients and are now entering the UK market. Matt says the company's practice management solution is "the software the UK mid-market is crying out for in the absence of other viable options."

We are sad to report the sudden passing of **Paul Crouch** earlier this month. Paul was a pioneer of the UK electronic legal forms market and can take much of the credit for establishing Laserforms as a market leader in the 1990s. More recently he worked with SDLT.co.uk on esubmission forms conveyancing and property tax applications. Archie Courage of SDLT said Paul's key achievement was recognising the legal secretary (and fee earners) mustn't be frightened of the technology and that the data entry format must be identical to filling in a traditional typewritten form.

NORTH AMERICA **DiscoverReady** announced that **Michael Ciaramitaro** has joined the company as director of forensic advisory services. In his new role Ciaramitaro will lead the DiscoverReady global forensic services team, offering consultation in support of corporate and law firm clients in the identification, preservation and collection of stored data to effectively respond to litigation, government investigations or other legal matters.

▶ Marie Bernard, CEO of Nextlaw Labs talks 'innovation as a service'

In December 2017, Marie Bernard was named as the new CEO of Nextlaw Labs, to coincide with a change of focus and strategy for Dentons accelerator of early-stage technology.

Bernard took over from Dan Jansen, who as CEO of Nextlaw Ventures is focusing on further startup investment, as Bernard steers Nextlaw Labs 2.0 towards its goal of designing, developing and delivering innovation in all its many guises to Dentons and its clients.

"We're now focussing on innovation as a service and making sure it happens at Dentons and its clients," Bernard tells Legal IT Insider. "The reason why I'm here is that we are trying to learn from the past three years: how to tackle pilots; how the market tackles pilots and moving into a more structured pilot approach to test new technology and ideas.

"The initial assumption is that it's easier for the lawyer if you start from a product that's fully developed. And start-ups have products that are developed and you can put in front of lawyers. That's what we started out with, with Dan investing in startups and Nextlaw Labs acting as an accelerator.

"We still do that but realised that we need to be more diverse, agile and flexible in order to adjust to more technology. There are only so many start-ups you can accelerate and mentor. They can't be in every market and we are in every market.

"That means we need innovation partnerships working maybe with technology partners or competitors to mitigate the risks and to go faster. We are looking 360 degrees at every single opportunity and where we are the missing the dots, and treating that as an opportunity."

In one recent example of working in tandem with a technology partner, competitors and clients, Paris-based legal analytics company Predictice wanted to test their assumptions around how different practice groups would react to a dashboard presenting the outcome of court decisions.

They tested small groups within a number of different practices across several law firms as well as corporate counsel teams. At Dentons, two practices said they liked the product but wouldn't include it in their day to day practice but the employment group saw huge potential to having a product like Predictice in the toolkit to give them an advantage in advising clients.

Bernard says: "This is not just a pilot to fill the marketing books but because there are things happening that are transforming how you work."

She adds: "It was very interesting to have GCs reflect on the technology at the same time as our lawyers."

Each user was given KPIs and the in-house teams had, Bernard says, "10 times more logs and assumptions tested," which is perhaps easier when you are not wedded to the billable hour.

Much like every law firm CIO in the world right now, the challenge for Bernard is to escape from the superficial buzz around AI and make sure that the pilots that Nextlaw Labs and Dentons are engaging in have real value. She says: "There is a buzz around AI and everyone wants their version of it but my mission is to make sure it actually transforms the business."

She adds: "Clients are tired of having law firms approaching them with a pilot but no real innovation."

That doesn't mean that Nextlaw Labs and Dentons aren't listening to their people's ideas. On 14 June, Dentons rolled out a global ideation platform underpinned by innovation management platform IdeaScale.

Dentons has had ideation platforms in Australia and Europe before now but this will "join the dots" across the firm, Bernard says, and enable global teams to collaborate more effectively.

Bernard says: "Once you open Pandora's Box we already see new opportunities for crowd sourcing development. When checking our user feedback there were people, for example, in Africa who can't play in the same playground because they are not as tech ready. So, let's schedule a campaign to see what we can make happen in practice to effect change with a more modest budget."

Frugal innovation - innovating even when there are limitations on resources - is being practiced across the globe by brands including Bentley.

Bernard says: "It's amazing when you unlock people's creativity and give them a challenge. I'm one of the drivers of change and my mission is to deliver innovation globally. If people feel they are not empowered because they don't have the technology to play in the same playground we can use frugal innovation and we can innovate with clients."

Innovating with clients is one thing but it's worth revisiting in more detail Bernard's point about collaborating with competitors, which looks set to become a regular occurrence.

"I'm on the board of ELTA [the European Legal Technology Assocation] with three of our largest competitors and we all agree that if we want to get to the next level, we need to explore those technologies that will get the industry to the next level. There are risk and costs involved so that's not going to happen if we act alone. Also, if Dentons comes up with a solution and we're the only ones using it, that's a narrower entry point, but if we work together, that's much more powerful."

Bernard is part of a tech-forward part of the sector that see each other regularly at client briefings and she says: "When I talk with clients who are asking law firms to come to a panel and we all know each other and sit in the lobby for hours saying, 'what are you talking about today?' 'Oh they've asked me to do a briefing on blockchain.' 'Oh me too.' That's the most fantastic brain power. We could

make so much better progress if the client said: 'This is the project, please find a way to work together to make that happen for me."

Much of the work Nextlaw Labs does independently with startups revolves around helping them to make sure their platforms and pilots are compliant with regulation.

Its focus is also discovery and making sure that pilots are not reinventing a wheel that has already been invented.

It helps that Bernard is heavily integrated in the startup world through a partnership with Legal Geek, which just got back from a round the world tour to extend the startup community that Legal Geek founder Jimmy Vestbirk is so successfully building.

Bernard says: "We operate in an environment backed by the largest law firm in the world but out there are sole practitioners or startups and we need to support all of the community and one of the great skills of Jimmy is doing that in a non-commercial way."

There is no doubt that Nextlaw Labs' ultimate goal is to achieve a competitive edge for Dentons rather than the greater good of the industry.

But if it teaches us anything, it's that real progress and disruption cannot be achieved in isolation.

▶ Legal IT Insider BD Tech Report 2018

This month we publish our first annual BD Tech Report, in association with Lexis InterAction.

This is the first of many analytical, content-driven reports, benchmarking surveys and market intelligence, distributed to our readers under our new Legal IT Insider Intelligence brand.

Collaboration with leading vendors enables us to commission the best writers to conduct the reports, which, in keeping with our brand, are entirely editorially independent.

Our BD Tech Report 2018, includes interviews with chief marketing officers, directors of business development, and technologists from within the largest law firms in the world. This inaugural BD Tech Report explores, how:

- The new technology that is coming to market is trying to drive better collaboration within law firms, with BD at the helm;
- Collaboration really is essential in order to be successful in the new era of legal services: a driver for law firms' increased investment in BD tech;
- We look at the market and client trends that are driving this change.

Topics include:

- **Powering Up:** Business development teams are the engine rooms in most law firms, to ensure peak performance they need the best tech tools for the job

- **Under the Spotlight:** Customer Relationship Management (CRM), E-Marketing and Proposal Generator tools

- **The Innovators:** Other serious kit for the BD Tech toolbox.

By completing the _sign up form_, you will be added to the Legal IT Insider digital distribution/readership, gain full access to read and download the Legal IT Insider - BD Tech Report 2018.

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