▸ Lexis to launch litigation analytics tool for UK market

LexisNexis will in 2019 launch a UK analytics solution that will enable lawyers for the first time to analyse the language of judges to help argue their cases, we can reveal.

The solution will be a spin-off from Context, which only became available in the US in the third week of September and which combines the capability of Ravel Analytics (after Lexis' acquisition of Ravel Law in June 2017), Lexis Advance and the former Lexis Litigation Profile Suite.

Unlike Lex Machina, Lexis' flagship analytics tool that mines the metadata contained within vast quantities of public dockets, Context examines in great detail the language used by judges, including the cases they cite.

Speaking to Legal IT Insider, Lexis' vice president of product management, Jeff Pfeifer told us: "Context allows people to analyse language to make informed decisions.

"By mining the data, we can isolate the argument the judge will find most persuasive. Judges generally apply the law consistently and we can say 'in more than 100 motion types, the judge has ruled this way on a motion to dismiss' and we can see if the motion was granted, partially granted or denied and what the rationale was.

"The next level of citation analytics looks at what language does she cite. For example, she cites *Adams v Johnson* 37 times, or repeats it at every instance. So, from that you may conclude that your case is unlikely to be persuasive."

While in the UK case law is not as widely available as it is on PACER, Lexis has long been curating case law within Lexis Library and it is here that the language analytics capability will become available, whether that be as a separate product or baked into Lexis Library itself.

▸ Lewis Silkin ditches the parrot for NetDocuments

Its efforts to turn SharePoint into a viable legal document management system have been the subject of many column inches, with Legal IT Insider founder Charles Christian famously comparing the DMS to the Monty Python dead parrot. But, we can reveal, Lewis Silkin has literally just signed on the line with NetDocuments in a move that will give the Utah-headquartered cloud-based DMS challenger its seventh site in the UK top 100. Nikec Solutions is the implementation partner.

The selection follows a two-way pitch between iManage Cloud and NetDocuments that began in around April and involved both a project board and reference group of 16 people that included partners, associates and business services people, who had significant input into the decision.

▶ Lexis to launch litigation analytics tool for UK market

CONTINUED FROM FRONT COVER

Lexis is planning to launch Context in Canada in early Q1 2019 and will then focus on the UK, which significantly trails behind the US in terms of its ability to use analytics to help guide decision making within the litigation process.

Pfeifer said: "We spend tens of millions of dollars collecting data and we enrich it and add value and that differentiates it from other data available. It's labour intensive."

He adds: "We're working at the intersection of law and human behaviour. When we talk to judges, they say 'I tell you what to argue – the roadmap is in the judgment.'"

In the US, Context extends that analytical capability to expert witnesses, where Lexis has refined its language recognition capability and applied it to much bigger data sets.

Pfeifer said: "We've been collecting expert data for a while. We can say 'this expert was either admitted or fully or partially excluded, and work out what has the judge said about his appearance. It's very difficult to get this information and there have been no good sources until now. If you're trying to impeach you can see if the expert has been challenged before and the reason for that."

But while expert witness analytics is likely to form part of the product release in Canada, the UK will have to wait a bit longer.

The release is part of a big play by Lexis to dominate the analytics scene and it's doing a good job. Seventy of the top 100 US law firms now use Lex Machina as well as "dozens" of corporates.

In the run up to ILTA Lexis released a suite of practice area focussed tools under the brand Lexis Analytics, dividing its analytics offering into three pillars: litigation, regulatory and transactional, leveraging the analytical firepower of Ravel, Lex Machina and Intelligize.

Transactional analytics offerings include Intelligize and a new offering, Lexis Search Advantage | Transactional Powered By Intelligize, which applies contract analytics to in-house and law firm document collections.

Pfeifer said: "Lexis Analytics is a map of analytics that is applicable no matter what area of law you work in.

▶ Lewis Silkin ditches the parrot for NetDocuments

CONTINUED FROM FRONT COVER

The project board consisted of head of IT Carol Skinner, service desk manager Michelle Taylor, chief executive Ian Jeffery and COO Graeme Wood.

Vendors were given two two-hour sessions: the first to demo the solution in broad terms and the second to demonstrate any advanced capability.

Skinner and her team then sat down for a one-to-one with the reference group and walked them through the two systems side by side, asking them to do what they do on a daily basis to see how the two systems compared in performance.

Skinner told us: "The group preferred the UI of NetDocuments. iManage felt disjointed; they have done some good stuff in Outlook but the web view looked a bit antiquated and not joined up.

"The whole look and feel of NetDocuments was more joined up."

With cloud the only option for the firm, Skinner says that speaking to other firms was of little help in terms of comparing the two systems because "no big UK firms have yet rolled out the iManage Cloud."

Questions over performance and uptime were largely handled by the RFP and Skinner says: "We spoke to Travers, but they hadn't rolled NetDocuments out yet and were just going through the process of setting it up."

Things that swung it for NetDocuments in the feedback included:

- Users liked NetDocuments dashboard. Skinner said: "The expectation is that they will live there and that's the thing they will see at home and everywhere."
- iManage doesn't have an Android app and a third of Lewis Silkin users use Android
- Cloud maturity: Lewis Silkin preferred NetDocuments' longstanding accreditations
- NetDocuments has been integrated with Microsoft Office 365 since 2016 and users liked the seamlessness
- The feedback from users was that NetDocuments' UI within Outlook is really flexible in terms of where it sits, and it can be as large or small as you want it. Skinner said: "iManage takes up a third of the page and is a bit intrusive."

While much has been made of iManage's acquisition of RAVN Systems and the additional search and analytics capability that brings, Skinner said that didn't factor in the decision and "was an extra cost."

"NetDocuments has good search functionality and I'm happy that it meets what we need," Skinner said.

While NetDocuments was cheaper, Skinner says that wasn't part of the selection process and the reference group weren't told the cost in advance. "We didn't want that to become the decision maker: you can always negotiate on costs," she said.

Lewis Silkin is another example of the growing confidence of law firms, in particular Mimecast users, in moving their core systems to the cloud and the firm did not explicitly ask for client permission. "We answer so many client surveys and they are not worried about the cloud but they want you to have the right security," Skinner said.

Lewis Silkin long ago outsourced all of its infrastructure with Exponential-e and uses cloud solutions such as ObjectiveManager for appraisals and business plans.

With regard to the parrot, Skinner says: "We're on SharePoint 2007, which is now out of support. It's been brilliant and done us proud for 10 years, but we now need more cloud functionality without having to use Citrix and need to work differently."

▶ Exclusive: Macfarlanes gets rid of its tin with Proact

Macfarlanes is moving its entire on premises IT facilities to a dedicated, off-site environment split between two UK datacentres, having turned to data centre and cloud storage specialist Proact as its Infrastructure as a Service (IaaS) partner after a four-way pitch.

In a project that is expected to take four months to complete, Proact will provide a 24/7 managed service around the infrastructure.

The deal, which was signed within the last couple of weeks, was led for Macfarlanes by director of IT Andrew Powell, who undertook a similar exercise while at Nabarro (now part of CMS), where he was also director of IT.

Powell said: "When we issued the RFP for this project we were very clear about the end requirements - uptime, system performance, business continuity, cyber security and so forth - but were deliberately vague about how we wanted to get there as I wanted to take advantage of the creative ideas from the shortlisted companies.

"In the end there were really only four organisations of the right size and culture that had the relevant experience and expertise to deliver what we need. The Proact solution stood out despite there being three very high-quality responses from the others. The team fit is excellent and we look forward to working together in the coming months and years."

As to why the firm opted for dedicated infrastructure, Powell adds: "Right now at Macfarlanes there is not a great appetite for shared cloud services: service levels are really important - at this scale, and for this client base, there is relatively little cost differential between dedicated and shared infrastructure. The former gives us far more control around performance, encryption, changes and information security. Ultimately, that gives us greater confidence that the solution is fit for purpose and gives our clients the comfort they need when performing infosec audits."

Many firms are in something of a hiatus where the direction of travel is clearly cloud but there are too many barriers to get there.

Powell said: "Looking a couple of years ahead though, it is pretty clear that cloud services will be the norm for certain applications - Exchange and Skype are obvious contenders, along with DMS - and our planning, including our licensing commitments, allows us to move in that direction when the time is right."

Proact works with around 30% of the UK top 100 and three of the top five and was instrumental in helping DLA Piper to recover from its cyber breach. It provides firms such as Howard Kennedy and DWF with both storage as a service, and IaaS to firms such as Pinsent Masons.

While storage means that firms' infrastructure remains on premises, they pay on a consumption basis and have the benefit of an Opex model. Nonetheless firms are increasingly looking to move their "tin" off premises in order to free up resources to focus on other areas.

Jessica Edmonds, account manager at Proact in the United Kingdom said: "Working within the legal sector, I've seen a trend whereby law firms are moving to 'as-a-service' models, whether that's for infrastructure or security projects. Many law firms are transitioning the way they consume IT and are improving the bottom line by only paying for what they use."

▶ Exclusive: Seddons selects Converge TS IaaS

Another firm is moving their tin off premises, as towards the end of September we got this exclusive announcement from Converge TS: *"After an extensive selection process Seddons has selected Converge TS to provide a fully managed private hosted infrastructure solution, creating a secure, high performance environment to deliver the firm's suite of applications."*

We spoke to IT director James Temple about the move. Our thanks to James for chatting while on holiday in Miami, on his birthday to boot.

He told us: "We already utilise Office 365 and cloud services for our backup and disaster recovery so having successfully proved that it is a platform we wanted to use, we decided to move our entire infrastructure to a merged service provider. We went to market and spoke to a number of organisations and ended up selecting Converge as they not only provide the platform we're after in terms of infrastructure but also have a detailed level of expertise around the core business applications we use at the firm and can ensure we have a platform that performs well, is scalable, enables us to expand our flexible working and supports the core applications across our business.

"The decision to go with a merged services was probably for economic reasons more than anything else: we get from a functional perspective everything we need including great redundancy and security but it also provides the flexibility we need to scale up and down as the business grows. To go down a completely private route wasn't on the cards.

"Having utilised other cloud services we've managed to get the business comfortable with using these types of service and to provide the same security and availability internally I would struggle within the same budget. These companies spend far beyond my budget and all we're doing is benefiting from the economies of scale across multiple organisations.

"I woudn't say this is public, it's a managed service – a set of dedicated servers in Converge's data centre. So you rent a set of services and a load of computing power from Converge.

"But it's a step before Azure or AWS and already means that you're moving towards that world. The point is with these guys that you have people dedicated to you that you have close contact with and that know your infrastructure and applications. You're buying that extra layer of support you wouldn't get with a public cloud.

"Re performance, we haven't gone live yet and have a detailed set of benchmarking against our current level of performance in our on premises world and before we sign off to go live, we'll make sure this infrastructure delivers benefits.

"This is a major leap towards the cloud for us."

▶ Exclusive: ContractPodAi now integrates Workshare doc comparison

IBM Watson-backed contract creation and lifecycle management tool ContractPodAi has teamed up with Workshare to integrate its document comparison technology into the CLM platform, which is primarily aimed at in-house lawyers.

ContractPodAi users assemble, automate, approve, sign and manage their contracts within the platform and the new integration with Workshare Compare Server will enable them to save time during the contract review or renewal cycle.

The integration follows a 12-month period that has seen ContractPodAi, which incorporates out-of -the-box Watson-backed contract analyst "E:V", double its client base. In January, ContractPodAi reported an annual recurring revenue increase of over 500%, having completed its evolution to a pure legal tech SaaS player.

The London headquartered company has won as clients household names such as Freeview, Wonga, Ikea, LendInvest and Total.

"We see embedding and automating elements of file comparison in the contract review process as the intuitive next step in developing and enhancing our user experience", says Sarvarth Misra, founder and CEO at ContractPodAi. "Workshare are by far and away the obvious partner for this and we are delighted to be working with the team."

▶ Quote/Unquote

"We find that junior lawyers often haven't used a keyboard or screen or Windows when they join the firm: it's all about the smart devices."

DLA's head of IT customer engagement Neill Morley reveals why computer training is essential for technologically savvy millennials, see page 13.

▶ "We the 97": The ILTA Ultimatum

ILTA's board has responded to an ultimatum delivered in a fairly dramatic fashion at its flagship conference in Washington, at which it was required by 18 September to answer 10 questions ranging from how the board is elected; to how it will select a new CEO; to how it will prevent a recurrence of the mistakes of the past, as volunteers and vendors seek to heal an organisation dogged by internal politics.

At the ILTA Town Hall on 22 August, senior volunteers led by Kelley Drye & Warren's CIO and former ILTA president Judith Flournoy posed questions agreed before the meeting on behalf of a group of 97, many of whom were present at the Town Hall.

Asking those present to stand, Flournoy said: "How we heal will be critical, let's heal together."

We caught up with Flournoy and members of the board now that deadline has passed.

The run up to the Town Hall

In June of this year, ILTA's co-chair Chris Hunt wrote a letter to the board sharing his frustration around the lack of communication or lack activity around everything from the selection of a keynote speaker (which previously co-chairs have been involved in); to the diminishing role of volunteers and how disjointed things have become at ILTA; to concerns that then CEO Dan Liutikas was not suited to ILTA.

Flournoy was contacted and asked if she would sign the letter alongside 24 others, asking the board for a phone call around the issues raised and how they would be addressed.

What started as 24 quickly grew to 97, and before a phone call on 19 July, six people were selected to raise and answer questions on behalf of the bigger group. Those people were Flournoy; Hunt; Jackson Kelly's CIO Jeffrey Brandt; Armstrong Teasdale practice area solutions consultant Kara Portwood; IT project manager Sandy Mikita; and Rodey Dickason's IT director Jim McCue.

Flournoy says: "Six of us took the things that were most important to the larger group, now at 97, and took questions on July 19, in a call attended by some 70 people including the board, who were listening in.

"Everyone was in listening mode and six of us presented the questions based on the concerns of the growing group. These people were raising their voices and all had a long tenure of volunteerism. We gave the board all of our names and histories with the organisation.

"We felt that it was a good conversation. We laid out the questions around volunteerism; vendor relations; the role of staff and the CEO; and the election process." On 10 August, ILTA announced that Liutikas had resigned and that the board had accepted his resignation. Flournoy says: "Once that announcement was made we also asked the board to hold a Town Hall for other people to ask questions and present their concerns."

In advance of the Town Hall, the 97 – of which 38 were voting members and 34 anticipated attending the Town Hall - were asked what questions they wanted to raise in order of priority.

Of the 34, 12 were willing to stand up and speak on behalf of the bigger group. Flournoy says: "That led us to assigning questions – the question typically aligned with their area of responsibility as a volunteer or area of concern."

At the Town Hall it was standing room only and at the front addressing the audience were board members Rick Krzyminski; Chris Boyd and Jim McKenna, with the rest of the board on hand to answer questions.

Board priorities

Speaking for the 97, Jim McCue kicked off with the question that concerned the election process: "What are the board's near and long-term priorities for ILTA given the former CEOs departure and specifically how will ILTA operations be handled in the coming months?

Given that we are now very close to a CEO election, the brief answer is that the board has been working with professional staff and Flournoy says: "Jim McKenna was very helpful in sharing where they are."

Election process review?

More contentious was the second question: "Will ILTA assemble a task force to review the election process?" The process by which the board is elected is a massive bone of contention for many volunteers, albeit it was passed with a majority north of 80%. Under the current process, the Town Council selects individuals who become part of a 'slate' and Flournoy says: "The bone of contention

is the fact that we have moved away from a ballot where individuals were voted for, to a group. If you don't think one person is suitable, you don't have any option."

There has only been one election so far under the process, but Flournoy adds: "When the current system was presented in 2016 the membership truly didn't understand the impact of this process."

This issue wasn't specifically addressed in the reply on 18 September, however, speaking to Legal IT Insider on 25 September, ILTA board member Kate Cain said: "We're not going to throw the baby out with the bathwater but we welcome feedback. There will be lots of opportunity to continue the conversation and we are open to refining the process moving forward but not to convene a task force to completely rethink the election process: we don't think that is in the best interests of the organisation."

A robust volunteer program

The third question revolved around the volunteer program and what plans the board has to ensure a robust volunteer program, after the past year saw a bigger emphasis on employed staff. Flournoy said: "There are a lot of things that volunteers were responsible for but are no longer and that has led to huge frustration."

The board pointed out that a volunteer task force facilitated by Krzyminksi and Ginevra Saylor and including Hunt, Mikita and others has already been set up and Flournoy says: "We are happy with the progress being made." Cain told us: "The task force has done an assessment of the current volunteer structure and are now working on recommendations as to how to refine and expand it."

Repairing relations with vendors

The fourth question asked: "Who from the board will be the liaison on the Partnership Advisory Council?" Flournoy said: "This comes out of a lot of business partners being very upset with the way they are being treated."

Jason Stookey was in 2017 appointed as vice president of partner development and Cain told us: "Jason is working with the Advisory Council and partners have always been an important part of the ecosystem. It can be challenging in terms of establishing the right opportunities and boundaries but we understand that partners have a business to run and we are committed to working with them."

However, Cain says that there won't be a permanent board assignment to the PAC. She adds: "As the new interim CEO comes on board that person will be involved with the members and partners and the board as a team will be involved with the PAC."

The CEO election

Moving on to the CEO election, and the fifth question at the Town Hall was "What process is being brought to bear in the selection of the next leader and how is the selection process being modified?"

Flournoy says: "The membership wanted to understand how we got to where we got to and a CEO was hired whose personality did not align with ILTA's core values."

Flournoy says: "The board feel they are addressing that most prominent concern by having a job description aligned with ILTA's core values."

Speaking to Legal IT Insider, Cain said: "We're seen some amazing candidates and talked to some really intelligent people and I'm optimistic that we will make an announcement very soon."

A request for a list of voting members

Cue the most contentious request of the Town Hall: a request for a list of voting members. Flournoy says: "The request to the board for a list of voting members was a very contentious part of the conversation and this request had been outstanding for a long time."

Pressed at the Town Hall as to why the voting list was required, Fish & Richardson's director of applications, Beau Mersereau stood up and said that he wanted to get a voting group together to review the bylaws, with the inference being that the plan is to review the board election process. He and one other have now been sent that list, which they are not permitted to circulate.

Cain said: "According to our bylaws a member has a right to request the list for a specific business reason. Two people requested the list and the board has provided the list to those two in the express purpose they were submitted. What's interesting is that we were contacted by more than one member concerned that their information was being shared, so it's a real challenge to strike the right balance."

Organisational chart

ILTA was then asked to deliver on an outstanding request for an organisational chart, which is now available to members via the online community. Cain said: "The reason this is challenging is that there were a couple of bad actors that have been stalking staff members and asking for information they are not entitled to. We put a lot of thought into what we publish and how we do that and so it's not out of a desire to hide things or a lack of transparency but the need to strike the right balance."

Reviewing ILTA staff and their purpose

The next question was what process ILTA will take to review its staff and their purpose, given that a number of new roles were created in the past year.

ILTA responded to this point at the Town Hall, saying that the board will work with the new CEO. Speaking to Legal IT Insider, Cain added: "Over the past month and a half the board has had a chance to work closely with the leadership team and they are an amazing group of people who have done an amazing job to keep everything moving forward while in the middle of a search for a CIO."

Volunteer participation in the PAC

This leads to the penultimate question, as to whether there should be volunteer participation in the Partnership Advisory Council.

Flournoy said: "That group has always included vendors and Jason Stookey and maybe Dan. The volunteers thought it might be helpful to have some volunteer participation." This is an outstanding issue but Cain said: "It's not a matter of making an assignment but continuing to develop relations with the Partner Advisory Council."

Where is ILTA's HQ?

The last question related to property: ILTA's Austin office is up for sale and members wanted to know if it has been sold and whether operations are moving away from its Texas roots to Chicago.

While this question wasn't asked at the Town Hall because they ran out of time, the board has subsequently confirmed that the Austin property is in the process of being sold and ILTA will be run out of Chicago.

What does the future look like?

It's important to acknowledge that there was huge consensus after ILTA that the organisers had delivered an outstanding conference in 2018, with a record 4100 attending.

The organisation is held dear to many and at the Town Hall, Tony McKenna from Gowling WLG stood up and spoke passionately about how much the organisation meant to him, while Mersereau shared that if it wasn't for ILTA, it was unlikely that he would have achieved a career in technology."

Is the future of ILTA assured? Not everyone is optimistic. On top of issues with internal politics one volunteer told us: "Personally, I'm not sure ILTA will be successful. Legal tech is changing and power is shifting to CLOC. At ILTA we just go round in a circle with IT people but at CLOC we're doing it with clients and that adds value."

What is for sure is that the vendor community are rooting for ILTA not to fragment, which would add huge cost to their conference calendar.

What is also certain is that things are better than they were. Flournoy said: "I feel very strongly that we're in a much better place and I'm very optimistic about ILTA's future. If you had asked me in January or February, I would have said I'm very pessimist. But the board is doing everything humanly possible to sustain what ILTA has been, and to get up and stand up in front of that standing room only room for two hours was difficult. They did it, and they did it with professionalism, and people left feeling that it was the best dialogue we ever had."

She adds: "There is a long way to go. It is now that the planning begins."

▶ Exclusive: Lexis appoints former lawyer as new director of solutions

Danielle McCormick has taken over as UK director of solutions at LexisNexis, we can reveal, filling the position left by Nigel Rae, who as we revealed in June, has joined Lawyers on Demand..

McCormick, who joined Lexis as a professional support lawyer and has spent four and a half years in Lexis PSL, started on 17 September, reporting to director of legal markets for the UK & Ireland, Simon Collin. She was formerly a commercial litigator at Walker Morris and, before that, Thomas Eggar.

In her new role McCormick will be responsible not just for precedent, forms and drafting, as Rae was, but also its AI and machine learning capability. She told Legal IT Insider: "It's really exciting, especially for someone who has come from practice and suffered from a lack of time but still had to churn out the same volume and quality of work."

In the UK R&D is being led out of Lexis' new tech hub in Chancery Lane, which McCormick says is "unrecognisable". The London tech hub builds on work being done out of tech hubs in the US and China.

LexisNexis solutions include its flagship LexisDraft Microsoft Word toolbar as well as forms and precedents and automation solutions (based on Exari), which include Lexis Bespoke, its automation as a service offering.

As we reveal in our front cover story, Lexis is beginning to roll out some of its analytics capability developed in the US and will in 2019 launch a

language-based analytics capability within Lexis Library.

McCormick says: "It all comes back to making lawyers more efficient and able to stand out from the crowd: we're upteching the work we do.

"The strategic remit is to make people more efficient either by expanding what we do, such as automating packs of documents so you fill them in once not 26 times, through to deploying machine learning to drill down in to a group of data to deliver insights.

"We're applying technology to what we see as the most sensible use cases. There are some great examples of really interesting technology out there but it doesn't do what lawyers want it to do."

In a theme that we saw in the launch of LexisNexis Analytics in the US, Lexis will be looking at how to broaden the application of technology so that it is applicable across different practice areas. McCormick says: "Most lawyers are taking similar steps along the route, which means the problems are pretty pervasive across practice areas whether that's bundles or bibles, litigation or transactional it takes similar technology in terms of slotting the documents together."

She adds: "Lexis wants to be lawyer-led and its sending a bit of a signal out by putting me - a lawyer, not a techy – in charge. I know what I would have wanted in practice."

▶ QuoStar launches CIO as a service led by Chris White

IT consultancy QuoStar has launched a chief information officer-as-a-service offering led by HFW's new interim CIO Chris White.

Initially we thought there had been some confusion, given that White has just started at HFW in a full-time, albeit interim role. However, the former global CIO of Clyde & Co told Legal IT Insider: "The last few years I've always done something outside of my main job and that's the same here. I've been on the board of QuoStar for the last four years helping with their business and advising mainly SME's on the South Coast. We've always had this idea of QuoStar beefing up their consultancy arrangements and when I came out of Clyde & Co I spoke to [QuoStar founder] Rob Rutherford, and he said, why don't we formalise it.'"

The idea is that White and others who enlist with the consultancy will be hired out to advise smaller firms on anything from engaging the board in IT to developing a firm's IT capability and strategy.

White said: "There are other things we can help

with, such as if the incumbent IT manager is very technical and doesn't understand how to interact with the board, or maybe they need help negotiating with suppliers.

"Technology these days is so central, whether you're a big corporate or high street business, and unfortunately a lot of SMEs don't have the money to hire a strategic thinking CIO but need one just as much, so a lot of them struggle. By launching this service we're giving them access to experienced people in a way they can afford. The 100+ law firm in Bournemouth doesn't need me full time but needs access to the same level of expertise sometimes."

While White will be doing this work on the side he says: "I won't do anything that conflicts with HFW."

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▸ iManage's acquisition of Elegrity gets a thumbs up

Described by one legal tech partner as "a better purchase than RAVN", iManage in September announced that it had acquired risk and compliance software and solutions business Elegrity, in a move that provides the market with a credible alternative to Intapp when it comes to matter opening and client onboarding.

The acquisition, which is part of iManage's platform play unveiled at ConnectLive 2018, fills a gap in the Chicago-headquartered document management vendor's bid to provide a cradle-to-grave matter lifecycle service.

Elegrity, founded by Joy Spicer and headquartered in San Francisco, has gained market recognition for its industry-leading solutions for managing conflicts of interest, new business intake and other key risk mitigation processes in law firms.

Within the iManage stable it will feed into need-to-know security and ethical walls product Security Policy Manager.

Reacting to the acquisition Oz Benamram, head of knowledge management at White & Case told Legal IT Insider: "This is a great move, both for Elegrity and iManage, and for the industry as a whole (since this creates a credible alternative to Intapp which 'owns' matter opening, and competition helps the market).

"The combination makes iManage a more serious player in legal, going beyond documents to managing matters, which is the holy grail."

Speaking to Legal IT Insider about the acquisition, iManage's chief marketing officer Dan Carmel said: "Elegrity has built up years of experience in risk management for some of the biggest names in the legal sector and we are all are very impressed by Joy and the team."

One of those names is Mayer Brown, where CIO Doug Caddell said: "We recently selected Elegrity for conflicts management because of its well thought out product and strong customer references. The combination with iManage, with whom we have partnered with for over 15 years, is exciting because it has the potential to simplify and enhance what these solutions can do and what it takes to manage and maintain them."

Elegrity consists of around 25 employees and Carmel said: "Part of the opportunity is that Elegrity has been hampered by its size and ability to grow. For law firms that raises the question of vendor viability."

Spicer added: "Because we have deep expertise and that has been put very thoughtfully in to our product, the large law firms know we have that expertise and want to work with us but a common hesitation is 'how will you survive and sustain it?' - even though we've been in business for 20 years."

Reacting to the acquisition, one iManage partner, who was very much in favour of the deal, nonetheless observed: "The challenge is that they will need to operationally scale it. Who will be responsible for doing this is the big question. Currently they have all of the risk management out of Dublin with Ian Raines running the show. So how do Joyce and Ian go to market together? Joyce is out of San Fran.

"On the new business intake, the engine is an OEM but the front end was written by Elegrity. This is where engineering is needed."

iManage's platform approach is interesting because, despite or perhaps because of the amount of new tech flooding the market, it taps into the desire among IT heads for simple and integrated back-end solutions. Carmel said: "Clients are saying that the cost of integration and maintaining technology across each of these areas continues to be a friction point that hinders innovation and we believe law firms need to respond and we intend to be the platform for that integration."

The acquisition also answers the problem of poor metadata that is hampering extraction and analytics work further down the line. Carmel said: "We start as the key system in which users get work done. Elegrity can now make general counsel and risk officers' manual steps better and provide faster clearances of conflicts to enable them to manage risk more comprehensively.

"It allows for the flow of data: at matter opening the same data is needed as for classification."

The move by iManage could make for an uncomfortable relations with Intapp at times but Carmel said: "Intapp has always been a cooperative relationship but the companies have never gone to market together. We have a very broad ecosystem and any move we make will make some happy and some not."

In terms of logistics, Elegrity will remain in San Francisco and continue to grow in the Bay area. Spicer, who will continue in her role, said: "I live in Florida and we have people dispersed across the Midwest. iManage have proven they've done these acquisitions and kept the continuity because they recognise that the people have the input and the domain expertise that are the important things."

In the short term the priority will be to work on the UX of Elegrity to make it look and feel the same as iManage.

Longer term will be making sense of the flow of information and how classification and extraction can be automated and improved.

iManage will also look at how to stay on top of changes such as attorneys and counterparties that present huge challenges in terms of conflict of interest.

▶ Barclays Eagle Lab launches with not a CIO in sight – your reactions

Causing what one innovation head described as "a bit of a shit storm" on social media was one comment this month on the formal launch of Barclays Eagle Lab, or Legal Eagle Lab, which was notably devoid of mainstream legal heads.

The Lab launch and demo day included pitches from eight legal tech startups, three of which have been involved in Mishcon de Reya's incubator MDR LAB and two that are part of Allen & Overy's incubator Fuse.

Ruby Datum, Law Panel and Third Fort pitched alongside Legatics and Avokka. Ayfie, Data Solver and Legal Utopia made up the eight, covering between them a range of IT-led services from the management of contracts, transactions and trademarks to the provision of text analytics and information retrieval.

The Law Society, which is partnering with Barclays on the Lab, was out in force, as was Barclays itself, including senior lawyers such as general counsel UK Stephanie Pagni and Barclays former CFO and forthcoming mayor of London Peter Estlin.

The Law Society has made considerable effort to engage with startups, including backing Legal Geek (itself now an Eagle Lab Partner), and over drinks Law Society's executive director of business development Simon Drane said to Legal IT Insider: "It's strange that there is such a huge degree of separation between this world and 'mainstream' legal tech – it's weird that there are no CIOs here, it's mainly lawyers."

He is absolutely right but first a confession: it turns out that there was one CIO there – Stuart Rowlands from Simmons & Simmons, although our paths didn't cross.

His presence ruins our headline but not the overall message, which is, why is it that the senior echelons of the mainstream legal tech world typically and collectively eschew startup events and gatherings? It's often the lawyers who are there.

We put forward a few suggestions:
1. Because often startup relationships in the first instance belong to the growing infrastructure within law firms dedicated to new tech, such as innovation heads (we hear that one well known recruitment firm is looking to fill 17 of those roles.)
2. Because if an IT director wants to meet a startup, they just have to pick up the phone and the startup will come running.
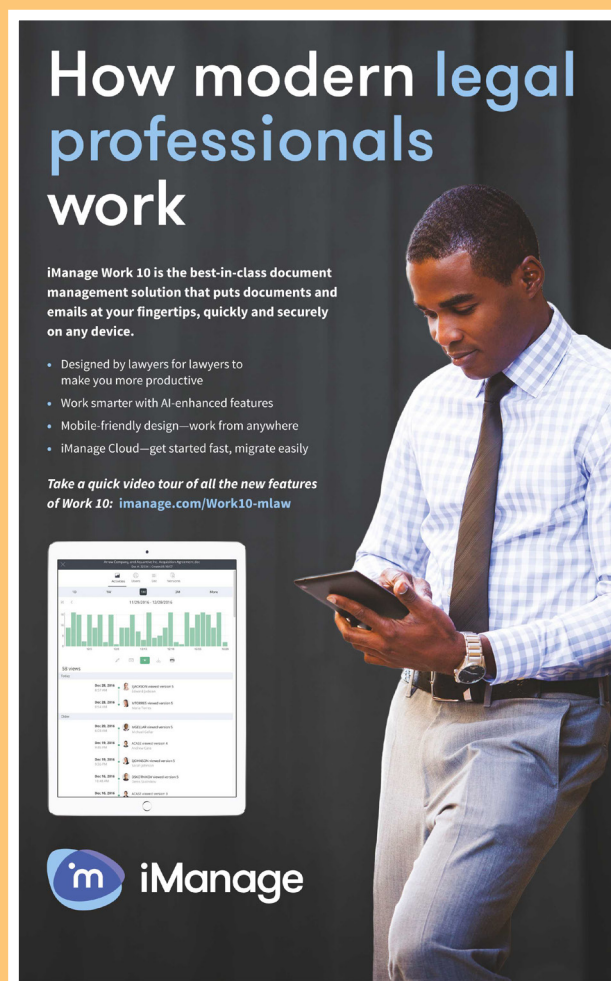3. Because who knows how many startups will exist in 12-18 months' time.

Responding on LinkedIn to our comment, a number of people queried the publicity around the Eagle Labs event and Chris White, who recently took up the role of CIO at HFW, said: "Well if I had known about it I would have been there. I didn't so I wasn't. Granted many legal CIOs and indeed firms would not have been interested but many would."

But it was the point about the changing infrastructure that caused the most stir.

Writing on LinkedIn, Alex Smith, innovation manager at Reed Smith said: "Apparently 17 open positions to deliver innovation, efficiency and new things in UK law firms right now ... time for all the commentators and consultant to get back in the trenches and be the change ... that fact stood out here. Maybe even some of the start-up gurus could switch to the other side ... great article Caroline Hill." [We had to leave that bit in, of course.]

To read his discussion with Graham Laing, founder of professional services marketing company Rokman Laing, on how to make the change happen, click here.

To read our comment in full, including our thoughts on why CIOs and legal tech heads must engage with the startup world, click here.
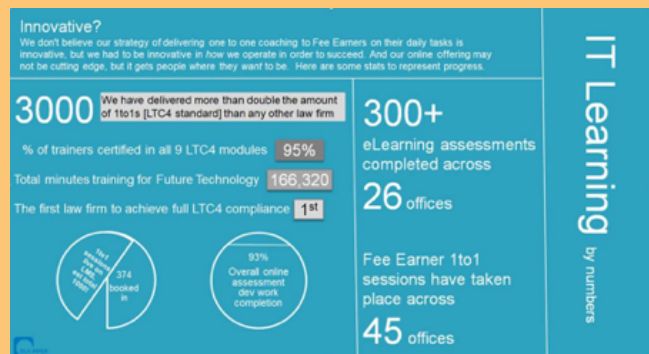
▶ DLA Piper achieves record LTC4 certification

DLA Piper has smashed LTC4's record for training fee-earners to be technically competent by hitting three thousand one-to-one accredited coaching sessions across 45 offices.

LTC4 – which in its lesser used long form is the Legal Technology Core Competency Certification Coalition (no wonder it's abbreviated) - offers certification across nine different modules ranging from "managing documents and emails" to "security" to "time and billing" to "client relationship management".

Certification is achieved in person or via remote one-to-one coaching and shows a commitment to technology proficiency and efficiency – a key driver for clients as they work out that they shouldn't be paying for lawyers using slow manual processes out of incompetency.

Interestingly, junior lawyers are often most in need of training, thanks to the fact that they have had little experience of keyboards or Microsoft Windows, according to DLA Piper's head of IT customer engagement, Neill Morley, who is leading the training push.

DLA, which is one of the earliest adopters of LTC4, has spent a total of 166,320 hours training its fee-earners. Many firms still only train secretaries and assistants.

Morley says "I believe the business will appreciate the confidence and visibility external recognition brings.

"While we don't believe our strategy of delivering one-to-one coaching to fee earning staff on their daily tasks is innovative, we had to be innovative in how we operated the programme in order to succeed. In addition, our online offering gets people where they want to be."

Joanne Humber, marketing consultant at LTC4 said: "Neill has really taken training on board and put a lot of time and lot of money into it, concentrating on the fee-earners across the world. The lawyers are the people who in general are not using technology properly and Neill has said they must ALL be able to do so. Some people only certify their secretaries but nowadays a lot of people don't have secretaries and the amazing thing about DLA is their holistic approach."

▶ New professional benchmark for software vendors

Legal Software Suppliers Association (LSSA) implements new Code of Conduct

The LSSA has recently introduced an enhanced code of conduct to which all member companies have agreed to adhere. This code of conduct is a commitment from LSSA member companies to the high standard of professional excellence law firms can expect to receive. The code is backed by the Association's disciplinary procedure. This new benchmark will give law firms confidence that LSSA members will operate to high professional and ethical standards.

LSSA Chair Julian Bryan comments: "The LSSA code of conduct ensures that LSSA members act as 'good and upstanding' suppliers to the legal services market. The code gives law firms the confidence that if they use the services of an LSSA member company they will be treated ethically and with the utmost professionalism."

Tackling an industry issue head-on, one of the key tenets of the code is that LSSA members must recognise the right of customers to move between software systems and facilitate such moves with provision of customers' data in a reasonable timescale and at reasonable cost. This is covered by a data transfer white paper shortly to be released.

In another move, the LSSA, established for 22 years, has now formalised its legal status into a company limited by guarantee.

The full code of conduct is shown below and can be seen on the LSSA website here.

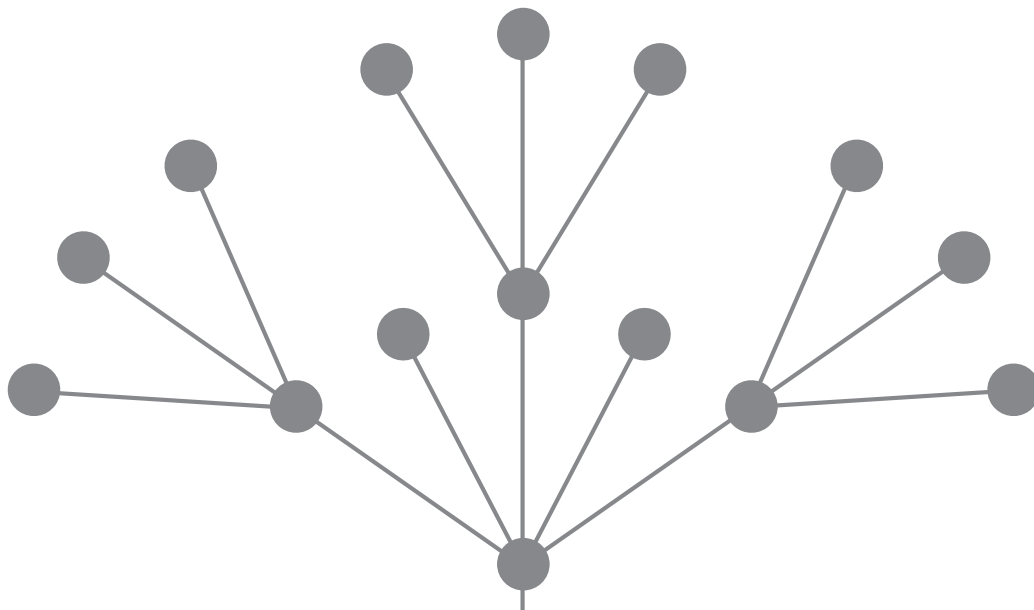# ▶ Quote/Unquote

Overheard at a meeting among senior IT heads:

"At the moment we have a virtual CIO."
"Is it Alexa?"

▶ Lights-On, Hyperscale and Kingsmead launch the Intuity Alliance

Referred to by one commentator as The Holy Trinity but we prefer to visualise them as the three muskateers, industry veterans Peter Owen, Derek Southall and Chris Bull have teamed up to launch an advisory support and consulting service to meet clients' increasing needs for holistic advice on integrated technology, operations and innovation.

The Intuity Alliance draws together the brainpower of Lights-On Consulting, Hyperscale Group and Kingsmead Square, whose founders, between them, have many years of combined experience in advising businesses and in-house functions, as well as having held C-Suite roles in three of the UK's largest law firms.

The Intuity Alliance will offer the combined expertise of more than 20 senior consultants who will advise on a number of areas including strategy & planning, information technology, reviews & audits, procurement, innovation, digital, knowledge management, legal operations, and in-house systems. Advice will be delivered through specific projects and programmes, training and education as well as embedded, longer-term retained advisory appointments.

The three businesses, which have regularly informally pitched for work together, will remain separate but the new alliance is designed to ensure that clients receive a cohesive offering.

Speaking to Legal IT Insider, Southall said: "We're responding to the demands of the market, where advice can no longer be one dimensional. Clients want people with real experience and who are joined up.

"We've all got businesses, each with its own focus and we're happy with that. We're not merging and we're all carrying on with our individual businesses but we're trying to formalise a bit more what's happening: people want a great, capable and joined-up team."

The precise commercial arrangements have yet to be formalised and, particularly to begin with, will be decided on a case-by-case basis.

Southall said: "We've listened to people and think the direction the market is going in is that you can't make one decision without thinking about new services that go alongside it. More has happened in the last three years than in the 20 before and things have become complex quite quickly. It's not just about the right finance system, and the right advice needs to be all encompassing."

In a release out on 21 September Owen said: "We share the vision that it is no longer effective in the modern professional organisation to address these areas in isolation and that an integrated, joined-up approach is necessary for solutions to be identified and to drive change."

Bull said: "We are all actively engaged in the big changes taking place in the rapidly changing legal and professional market and are united by our aspiration to support leaders across this market and beyond in finding effective solutions to real business problems."

How LawWithoutWalls Can Help You Unlock Client Solutions

We asked Leah Cooper, founder and CEO of Leah Cooper Consulting and a LWOW sponsor this year, to tell you all about it: because it's cool, not because we're getting paid.

Innovation, collaboration, transformation—our clients want it, but how do we deliver it? How do we change the way we practice law to provide holistic business solutions rather than giving only technical legal advice? How do we shift the mindset in our firms and our in-house legal teams to embrace technology and change the way we deliver legal service?

These questions are being asked every day by senior law firm leaders and GCs but most don't know where to begin.

Answer: LawWithoutWalls(LWOW).

What is LWOW?

The marketing blurb: LWOW is a part-virtual experiential learning programme designed for practicing and aspiring lawyers that brings a human-centered design perspective to law. Its mission is threefold: First, to create innovations at the intersection of law, business and technology that solve real problems and fill real needs; second, to hone skills in these areas; and, third to change how lawyers and clients collaborate.

Reality: I learned about LWOW about a year ago and was immediately intrigued by the concept and decided to jump in with two feet and sponsor a team earlier this year. I had no idea what I was getting into but I strongly believe that the only way we shift the legal profession is to start with the students - exactly what LWOW does. By creating a community of some of the world's brightest law and MBA students and partnering them with legal leaders from law firms and corporate legal teams, real issues are solved in ways I never imagined.

LWOW is designed to spur new business ideas by combining the law and tech. Law firms and corporations sponsor a "challenge" and it is up to the LWOW team to solve it in a manner that delivers a tangible product or solution that the firm or corporate can actually implement. This is not a drill! LWOW calls them Projects of Worth, a name fitting when you see what comes out of the minds of our future legal leaders.

How does LWOW work?

As a sponsor, I created my challenge based upon a real client need focussing on the relationships between in-house legal teams and law firms. Other projects ranged from access to justice, AI in legal project management, managing GDPR, aviation regulatory compliance, access to insurance in micro economic conditions and more. All real business and legal issues that needed practical business solutions.

I was assigned a team of students with support from former LWOW participants as mentors and had access to a network of experts ranging from tech developers, venture capitalists, judges, marketing executives and even an improv coach!

We began our 16-week journey in person at a KickOff at the University of St Gallen (St Gallen, Switzerland), where everyone, from students to managing partners, were all on equal footing - no hierarchy in the room. For two solid days, we worked together to learn *how* to work together. I always thought I knew how to collaborate, but in those two days I was shown a set of tools I would have never used but for this experience and now use every day with my own clients.

After KickOff, the team met virtually using the 3-4-5 Method of Innovation designed by Professor Michele DeStefano, specifically for lawyers and a variety of tech tools (e.g., Skype, FaceTime, email, WhatsApp, Adobe Connect, etc.) to define and solve our problem. Working the problem through the eyes of the students and learning new ways to think, collaborate and build solutions was beyond rewarding. Ultimately, we created a product that we presented at the ConPosium in Miami and was judged along with all the other teams. Win or lose, every team in the room came out on a high.

Snippets of what we learned:

1. True collaboration between people, disciplines, the law and tech
2. How to apply business solutions to legal issues
3. How to create a business case and proper financial plan
4. Marketing and pitch skills
5. Presentation skills - including creating a commercial

A handful of reasons why your firm should participate in and sponsor LWOW:

1. It's a great way to partner with a client to solve a client issue in a unique way
2. Lawyers learn new skills that truly aid in client collaboration and innovation
3. You build lasting relationships within the LWOW community, including your target clients
4. You will be part of the new practice of law
5. You will change the way you approach a client or firm problem

I keep in touch with my LWOW team and I feel invested in each of them as they start their legal

careers. I got as much out of the experience and learned as much as the students did. For example, one of my key take-aways was learning how to properly define a client issue rather than jumping to a solution. Being a "seasoned" (aka grey haired) lawyer, I remarkably learned new ways to use tech to work with my team while my students learned what a pencil was. Approaching a challenge with a group of differing mindsets and skillsets was the key to true legal innovation. Each team created viable products that firms and clients could use and technology experts wanted to invest in.

The 2019 LWOW class will be even better as each year the program grows with new experts and thought leaders and a stellar team of motivated law students.

2019 Team Sponsors confirmed as of 20 September 2018 are all here - http://lawwithoutwalls.org/2019-sponsors/ - and include Leah Cooper Consulting (obviously); Accenture; Microsoft; iManage and law firms such as Pinsent Masons and White & Case.

Deadline for Sponsorship is October 31, 2018. www.lawithoutwalls.org

It's all about the CRM, CRM, CRM

Following the announcement that respected sales manager Gareth Thomas is leaving iManage RAVN for CRM challenger OnePlace, the comments have flooded in, and things in that market are starting to look very interesting.

Before joining RAVN, Thomas was sales director at former iManage partner Tikit and, among those commenting on his move was iManage's general manager EMEA, Geoff Hornsby, who said on LinkedIn: "I am sad that Gareth is going as he is both a great friend and also one of the best salespeople I have worked with. But I am also delighted for him to step up to the next stage in his career."

Also commenting on LinkedIn was former Allens (and before that Mayer Brown) CIO Philip Scorgie, who said: "Good move Gareth. I think the OnePlace architecture where it leverages the Salesforce platform is a compelling model. The reduction in deployment complexity, built-in resilience, flexibility and global presence leave the legacy client-server legal applications in the dust."

Adding further comment, this time on the legaltechnology.com website, slicedbread's David Thorpe said: "This is a great hire for OnePlace. Gareth is one of the elites of this market (no pun intended) and OnePlace's gain is iManage RAVN's loss."

At ILTA we picked up on some nervousness around the Salesforce platform but, speaking to Legal IT Insider, former sales director Guy Phillips, who is now at NetDocuments, told us: "Salesforce is aimed at high volume, low value producers of widgets but OnePlace has stripped it out so that it's more akin to what law firms need. Native Salesforce is not suited to law firms and they would have to do too much to get it to the point they can use it but OnePlace has done all of that for them. It's a good platform."

He adds: "The cloud platform is so powerful and way more advanced than Interaction. The only downside is that Salesforce is not in the law firm tech stack."

With law firms so wedded to Microsoft that last observation is key. However, OnePlace has been winning some big mandates including Reed Smith and Bird & Bird to name just two.

With business development now firmly at the forefront of law firm priorities the CRM market has never looked so interesting, and more competition for Lexis Interaction is a good thing.

Things could be about to get crowded, though after Intapp in August bought cloud-based CRM DealCloud, which is big in the financial sector. Intapp plans to plug it in to its cradle-to-grave legal offering. Intapp president Dan Tacone told us: "Business development is now front and centre of law firm priorities" - we agree: take a look at our exclusive BD report if you missed it first time round.

With Thomas involved, OnePlace is in a strong position and 2twenty4 business tech consultant Tim Hyman said: "Great hire for OnePlace. If LexisNexis InterAction weren't looking over their shoulder already, then they should now."

Neota brings in customer success head from Intapp

Neota Logic continues to bolster its UK presence with the arrival of Will Richardson, who this month joined from Intapp as head of customer success, EMEA. At Intapp, Richardson was customer success director and before that he worked at BigHand as client solutions director, UK healthcare.

Rick Seabrook, MD Europe told Legal IT Insider: "We're happy to have Will on board with us in what is a very exciting period of growth for Neota."

▶ ICYMI. A new regular column from industry veteran Jonathan Maas

A digest of the more important eDisclosure / eDiscovery news from his BONG! email updates over the past month.

Plans to tackle UK's "monster" disclosure levels approved by Civil Procedure Rule Committee https://maas-bong.io/2vtuVKM

The Law Society Gazette announces that "long-awaited" reforms to the Civil Procedure Rules have been approved and the two-year pilot will start in the Business and Property Courts in the Rolls Building in London on 01 January 2019. The Disclosure Working Part (DWG) recommended the reforms included in the pilot in late 2017.

Interestingly, the DWG was set up in May 2016 in response to concerns expressed by the GC100 and other court users. They had observed, rather loudly and publicly, that, despite other recent reforms, the costs of disclosure were still increasing.

Linklaters LLP launches a new global eDiscovery service using software from Servient https://maas-bong.io/2vtlLy4

Linklaters announced their new in-house eDiscovery service. Not particularly news-worthy in itself, but what made it stand-out was that they had bucked the trend of being yet another scalp for the clear industry leader, Relativity. Instead, they had selected a relativity unknown American company called Servient. Who?

I expect (and hope) to hear more about and from Servient over the coming months.

Out for public comment: Principles and Commentary on Defensible Disposition https://maas-bong.io/2M3Ff7t

The Sedona Conference is a not-for-profit US research and educational institute dedicated to the advanced study of law and policy in the areas of anti-trust law, complex litigation and intellectual property rights. They seek to "move the law forward in a reasoned and just way".

Over the years they have produced a phenomenal amount of thought-leadership, protocols and best practice guides in the field of eDiscovery (and other legal disciplines). These emanate from a very active series of international Working Groups (12 at the last count).

In their words, "the leadership recognized that, with the staggering amount of data that is produced daily, there was a need for guidance for organizations and counsel on the adequate and proper disposition of information that is no longer subject to a legal hold and has exceeded the applicable legal, regulatory, and business retention requirements."Essentially, how can organisations safely defensibly delete data without the courts and regulators coming after them at a later date?

Have anything to say about this? Consultation on this commentary closes on 24 October 2018.

Elusion Random Sample Test ordered under US Rule 26(g) in a keyword search-based discovery plan https://maas-bong.io/2MD3KZp

US litigator and international eDiscovery commentator, Ralph Losey, told us about an interesting discovery order handed down by a Chicago Magistrate Judge. The order is entitled "Order Establishing Production Protocol for Electronically Stored Information". The order is particularly interesting because Judge Johnston explores what parties should do about Donald Rumsfeld's "known knowns/known unknowns" that may or may not be found during a party's statistical sampling of otherwise unreviewed tranches of documents.

Judge Johnston emphasises that new eDiscovery method of random sampling and statistical analysis can empower lawyers to know what they never did before. Lawyers, he says in his order, should embrace this sort of technology, not shy away from it.

The parties in this case had agreed on a great many of eDiscovery issues but had failed to agree on whether to include a document review assurance test in their protocol. The judge ordered that random Elusion sample be taken after the defendant had completed its production.

This is important because, as Ralph observes, it is the first (US) case to hold that a QC procedure should be used to meet the reasonable efforts certification requirements of FRCP Rule 26(g).

Allen & Overy invests further in advanced delivery offering with RelativityOne https://maas-bong.io/2Ca3nkv

Unlike the Linklaters story above, this is interesting because not only have A&O gone with the de facto industry standard but because they have gone all in: they are the first "global elite" law firm to sign up to cloud-based RelativityOne.

A&O are one to watch in the eDiscovery space, having recently hired Scott Robson from EY as their new Head of eDiscovery. The firm's Advanced Delivery Services now include: document and data review; hosting; advanced text and data analytics; trial presentation; and project management.

Whither their much-loved Ringtail?

Threat to Privacy Shield as the EU and US approach a critical European Parliament deadline to

suspend data transfers from the EU to the US https://maas-bong.io/2wrCGlF

A large part of an eDiscovery specialist's work seems to revolve around dealing with the friction between the discovery demands of the US courts (who still seem to think they have jurisdiction over the rest of the world) and European data protection laws (now GDPR). Non-compliance or compliance with an order from either can carry a custodial sentence for the person stuck in the middle of the Atlantic Ocean, bobbing about between Scylla and Charybdis.

Obviously Safe Harbour is no longer safe (and, in my opinion, never really was). Ditto the Model Clauses. Now, as revealed in late August, even the skimpy Privacy Shield appears to have its back to the wall. America has failed to comply with an EU requirement to ensure that Privacy Shield is improved to enable it to provide the adequate level of protection required by data protection law and the EU Charter.

The law, the European Parliament has said, is clear and, as set out in the GDPR, if agreement is not adequate and if the US authorities fail to comply with its terms, then Privacy Shield must be suspended until they do. This ultimatum expired on 01 September and nothing has so far been done by the EU (or, I believe, the US). Transfer of data between the EU (and, soon, the UK) and the US remains in flux. Or, in other words, SNAFU!

Beyond eDiscovery: Relativity's legal tech "app store' strategy https://maas-bong.io/2LKjdBB

An interesting article appeared giving some insight into the dominant eDiscovery software's growth strategy: "we just want to be a meaningful software company". Read on.

eDiscovery market will reach $19.8 Billion by 2023; eDiscovery market opportunities and demand forecast to 2023 https://maas-bong.io/2NlHwe9

P&S Intelligence revealed the research that led them to make this prediction. The starting point was a value of around $8.3 Billion in 2016. The increasing prevalence of social media in eDiscovery and globalisation, they say, help to fuel this growth.

Nuix acquires Ringtail eDiscovery platform from FTI Consulting https://maas-bong.io/2CGiUsu

Well, knock me down with a feather! Who saw this coming? Announced a few weeks before the annual RelativityFest and a few days before the annual Nuix User Exchange (and release of software version 7.6). Interesting eDiscovery news, indeed. Good for FTI, who shed Ringtail to focus on RelativityOne; and good news for Nuix, who have long been looking for a sophisticated document review platform.

eDiscovery in South Africa - Significant development on Discovery Rules change https://maas-bong.io/2xlPmuR

After a successful, and long, career in litigation support and as a discovery service provider in the UK, Terry moved to South Africa some four years ago. Since then he has been waging a single-handed battle to get the South African judiciary and lawyers to recognise the importance of ESI as evidence and to enshrine it in their Uniform Rules. Occasionally he reports, via his blog, of his snakes-and-ladders journey, like walking on scree (for you hill walkers). Whatever the situation, this evangelist remains indefatigably optimistic.

In the latest report he has found an ally. A senior, albeit retired, judge called Ismail Hussain. They are now collaborating on bringing awareness to the country's Chief Justice, Mogoeng Mogoeng.

South Africa will be one of the last common law jurisdictions to begin developing legal procedure and jurisprudence in relation to eDiscovery. It has been a fascinating journey to follow and I look forward to seeing how South Africa decides to implement in into its Uniform Rules.

Legal services provider UnitedLex receives CVC investment https://maas-bong.io/2xuna9s

Perhaps on the back of the anticipated growth in the eDiscovery market I mention above, CVC Capital Partners is the latest to inject serious capital into a provider of services to the legal profession (from eDiscovery to cyber security). It is billed as "one of the largest transactions to date with any legal services provider". CVC previously invested in AlixPartners (2012). This investment must be quite a tidy sum, given the other eDiscovery investments in 2018 alone:

Everlaw ($25,000,000)
Exterro ($100,000,000)
CS Disco ($20,000,000)
Logikcull ($25,000,000)

Not surprising, then, that so many US vendors are eyeing up UK offices, despite the uncertainty of the UK's European status after 19 March 2019.

AI-driven discovery process produces millions of unresponsive documents https://maas-bong.io/2PZecYH

It was bound to happen sooner or later: someone cocked up their TAR exercise in the US. In public. To me it isn't unusual for part of a large eDiscovery exercise to go wrong, but none of us wants it to surface post-production. I know we'd all crave for an extension of time to sort it out pre-production rather than for it to become an issue in court.

I don't think the "black box" nature of such technology can be to blame. We all get to see the reports and test the data and findings. This was human error, plain and simple, not artificial intelligence (not that predictive coding is "AI") gone rogue.

▶ How the other half do tech

We will shortly be publishing a report looking into technology within the accounting sector. Here is a teaser:

There is much that binds the sister professional services industries of accountancy and law. Both are fundamentally knowledge-based, client-centric and steeped in tradition. Ownership is concentrated in the hands of a small number of senior, practicing individuals. The engrained business model is based on billable hours.

Both law and accountancy have also been subjected to an unprecedented barrage of new technology over the past decade, as the advent of everything from cloud to big data and automated analytics to AI, has created the opportunity – the necessity – for organisations to reposition themselves as indispensable strategic partners.

But here the similarities end. As an industry, the accountancy sector embraced the deluge of digital advancement from the outset, in full recognition of the role that it would play in revolutionising the demands on their business. It has taken the legal industry far longer to wake up to the critical implications of inertia.

With quotations from BDO, EY, KPMG, Grant Thornton, Moore Stephens, as well as Hogan Lovells, Tikit, Litera Microsystems, DocsCorp, HighQ and more, to be among the first to read the report click here

▶ Countdown to Legal Geek

Legal Geek is counting down the days to its third conference on the October 17, at the Old Truman Brewery, E1 6QR.

Legal IT Insider Caroline Hill will be speaking on the second stage, which is new to the conference and, Legal Geek founder Jimmy Vestbirk tells us, created in response to the demand for even more content on the day.

Legal Geek is expecting over 2,000 attendees from 40+ countries. To buy your ticket click here: https://www.legalgeek.co/conference/#tickets

▶ Profile: Simon Drane, the Law Society & the age of legal tech

Has anyone else noticed that the Law Society (of England and Wales) has really got with the programme when it comes to legal tech? Their contribution used to be confined to a gargantuan annual report but now they are at many of the main legal tech events and fully engaged in the tech conversation. And much of that is largely thanks to Simon Drane.

CH: Simon, what's your role at the Law Society?

SD: I lead the commercial arm of the society as executive director of business development focusing around our for-profit activities. Although the organisation is a not for-profit membership organisation we undertake certain for-profit activity in order to subsidise the wider work of the organisation and thereby keep the practicing certificate fee lower for our members. I have teams focused around commercial development, marketing and sales.

CH: Tell us a bit about your background.

SD: I've worked in the legal sector my entire working life both within a law firm and providing products and services to law firms. Before I joined the Law Society I was at LexisNexis as Director of Business Development and led a team that launched many of the newer workflow-based offerings, including the LexisSmart document automation tools and LexisDraft.

I guess my role was really product strategy and figuring out how to make lawyers lives easier and then turning that concept into a real product and taking it to market. Incidentally, I think the easy part is building something and the hard part is really driving adoption. A lot of the offerings from the large information providers were historically in the legal research camp but I was part of the push towards the integration of content and technology and the shift in focus to where lawyers spend more of their time in areas like drafting documents. I think the evolution of the drafting space still has a way to go and many of the solutions seem to still focus on the creation or review of drafts, whereas I think there is huge opportunity around how lawyers collaborate on documents.

CH: The Law Society seems more relevant in the area of legal tech now than it was.

SD: Back when I joined a few years ago there was relatively little focus in this area, and it's fair to say that while at LexisNexis I didn't really come across the Law Society at all when we were talking about the evolution of technology with lawyers.

I think this has changed massively for a whole bunch of reasons. We really see legal tech as an area of great change for lawyers and we need to be a core part of helping them embrace the changes and also to ensure that the implications are really understood in the wider legal context, for example around areas like AI and ethics. For my part I have been keen that we build more links with commercial organisations that are pioneering these changes so that everyone can benefit. I sort of see us sitting at the centre of a wider legal ecosystem where we can help connect lawyers to providers and connect to government on changes so that all parties collaborate more effectively.

CH: How does the Barclays EagleLabs fit into this and why did you get involved?

SD: It really started for me further back than that. I met Jimmy Vestbirk of Legal Geek a few years back and he talked about his idea of a conference around legal tech. We got on really well and I think Jimmy is an amazing guy, and on the spot I said we would be part of it and get behind his event as a lead sponsor.

So many people commented that it helped show the Law Society in a different light. We then got to thinking about who else we could partner with to help, and this led to a view that we could help connect startups looking for funding so put in place a partnership with Seedrs as we really liked their crowd funding model.

We were then approached by Barclays with an idea to do an incubator as part of their EagleLabs as the first sector-specific for them. Again, it just sort of seemed obvious that we get behind this as a way of helping to connect lawyers to the exciting businesses that are starting up in legal tech. We had already seen a massive increase in startups coming direct to us and this gave a model through which for them to get engaged. I think Barclays were really amazed then by the number of firms that got involved as partners and it was great when it finally launched in the summer. It's been great to see such a good take up and the demo day recently was really good both in hearing from the startups but also the law firms involved. I think this will have real impact in the legal tech space for years to come.

CH: What trends do you see in legal tech at present?

SD: I think that just over the last couple of years things have changed so much. Just look at Legal Geek and the fact the event doubled in size from year 1 to 2 and then again to this year's event coming up shortly.

Over the last year I met with a load of VCs to explore their thinking and there is real interest in legal I would say. I think we have now started to see this recently with some of the big investments, with

each one seeming to eclipse the one before.

What people see is an industry that to date has been pretty slow to adopt new technology. I saw this when we were pushing document automation which as a concept was not that new, but many were resistant to change. But now I think a number of things have changed including client pressures, technology catching up with people's vision, and outside interest from VCs. In any market where you have a model that is largely unchanged, demand for change from consumers, the technical ability to deliver change and the funding to achieve this then you will see big shifts.

CH: What challenges do you see?

SD: I do think there is a lot of hype that goes along with this space at present and there are now so many startups emerging that it can be hard to keep up with them all. However, I also think the UK can become the global home of legal tech as it is for fintech. Some of the challenges I see are around startups really having done their homework on the use case they are trying to solve, including who else has tried or is trying to solve it.

I've come across some who just haven't done the analysis up front. I also think that there are quite a lot of point solutions emerging and while these might solve a specific problem (which is often one an ex -lawyer had, and so started a business) I think we may start to see challenges from CIOs around the practicalities of integrating yet more solutions when the direction of travel for them is often simplification.

On that note also I think there needs to be thought around how the ecosystem evolves as it kind of feels like on the one hand you have the established tech providers working with the CIO community and then on the other the lawyers working with the legal tech startups.

CH: You haven't mentioned AI and Blockchain and the potential impact?

SD: I went to a great conference recently about disruptive technology and these were obviously key topics, and AI in particular was mentioned in pretty much every session.

I think it's very of the moment in that every conversation seems to mention AI and it really needs unpicking as, from my understanding, there are around 15 underlying technologies that sit under that heading so I think it is perhaps more about understanding the problems lawyers have and how they are solved more effectively than the technology labels.

This is not to say that AI won't have a huge impact as I think it will, but we need to focus on the application of it to fix a problem not the technology itself.

The Law Society is doing a lot in this area to try and help our members with understanding of the potential impact of AI, not just on how they practice but on the entire legal system.

The same is true of Blockchain. Things like smart contracts seem like a really logical progression but it perhaps becomes more accessible to lawyers to talk about smart contracts rather than Blockchain as, after all, when do we ever talk about TCP/IP which powers the internet as opposed to the websites that sit on it? I wonder if the best thing for Blockchain would be not to talk about it as most people seem to confuse Blockchain and Bitcoin anyway! I think from what I see Ethereum has a far more interesting application for law. I thought it interesting to see recent announcements from both LegalZoom and Rocket Lawyer in this space. A statistic I heard at a conference recently really made me think: Blockchain processing power was greater than the top 500 super computers in the world by 1000 times, and that it consumes 1% of all the world's electricity! Seems truly staggering given the early stage of evolution if that is correct!

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

UK & EMEA   After an extensive selection process **Seddons Solicitors** have selected **Converge TS** to provide a fully managed private hosted infrastructure solution, creating a secure, high performance environment to deliver the firm's suite of applications.

One of Spain's largest law firms, **JAUSAS**, has selected **LexSoft Systems** to roll out their instance of **iManage's** cloud-based document management system.

Clifford Chance has announced that it has selected **Workshare Transact** as its global transaction management platform. Workshare Transact will provide the firm's lawyers with a clear and simple online tool to manage transactions, with the initial stages of rollout targeting Conditions Precedent or closing checklist processes in their transactional practice groups. **Oliver Campbell**, Global Head of Client Service Solutions at the firm, said: "An important element of our strategy is an unwavering focus on adding value to our clients. This is based on an appreciation that we must constantly challenge ourselves to be more innovative in how we deliver our services. Technology is an increasingly important element of this and Workshare Transact is an excellent example as it provides a clear, efficient and transparent way to collaborate even more effectively with our clients."

Conveyancing specialist **Red Rose Law** is implementing **Compact** from **Eclipse Legal Systems**. After an in-depth review of case management offerings, the firm selected Compact to enable them to manage caseloads efficiently and to embrace larger volumes. **Patrick Flaherty**, a director at the firm, commented that Compact offered the firm "a simple pricing structure and inbuilt workflows with task management features that will enable us to easily manage increasing volumes whilst still providing an excellent service to clients."

Tanners Solicitors LLP (UK), **Dillon Solicitors** (Ireland) and **Advokathuset Helgeland DA** (Norway) have all selected **pdfDocs** from **DocsCorp** to create and manage PDF content as well as to collate and bind large documents. **Birketts LLP** (UK) added **compareDocs** to compare document changes. **CFG Law** (UK) chose **cleanDocs** from DocsCorp for its metadata cleaning and recipient checking solution.

City of London law firm **Silver Shemmings Ash LLP** has selected **Tikit's** Partner for Windows (**P4W**) as their practice and case management system.

In a big win for **LexisNexis**, the **John Lewis Partnership** legal team has selected **Lexis Draft** as its preferred solution for legal drafting and proofreading. As part of on-going efforts to adapt operational processes and governance to changing commercial objectives and expectations, the John Lewis Partnership legal team set out to assess how to increase its agility, rigour and productivity in engagements with internal stakeholders and external legal partners. A key objective was to use new technology to improve the legal document creation and reviewing process without increasing administrative overheads or operational risk. The Lexis Draft solution has been selected as an enterprise-ready personal productivity solution without the risks usually associated with "big tech" deployments. **Maria Passemard**, head of legal operations at the John Lewis Partnership, said: "LexisNexis spent time with us working through the extensive proof of concept to test Lexis Draft on our own documents as well as those of our panel firms. The results were very impressive and influenced our decision to roll-out Lexis Draft for our in-house team."

Leading Norwegian law firm **Advokatfirmaet Raeder** has selected **Smart Time 5** from **Smart Time Apps** as its time entry and capture system. They will roll the new system out in the autumn alongside the implementation of their new accounting system, **Xledger**, from Bristol-based Xledger Ltd. **Vegard Ertsås**, an accountant and administrator for Raeder, said: "We know Smart Time will complement the Xledger system and provide our lawyers a very innovative and intuitive method to track and capture their time to maximise billing."

Following its unfortunately-timed selection of Thomson Reuters Elite Enterprise shortly before that product was sunsetted in 2016, UK top 100 law firm **Howard Kennedy** has now selected **Thompson Reuters Elite 3E** and has also chosen to utilise **3E Data Insights** and **Xcelerate Budgeting and Forecasting**. The end-to-end financial management solution will be implemented using the **Blueprint Accelerator Pack**, chosen by the firm to facilitate going live on budget and on time. 3E Data Insights is a self-service analytics model that creates insights from a dashboard on both desktops and mobile devices, enabling fee earners and managers to manage performance.

Top 50 Dutch law firm **BANNING** has selected time capture system **TIQ Time** from Dutch start-up TIQ. Says **Peter van Asten**, Chief Operating Officer at BANNING: "'Staying ahead of the legal game is part of our newly-established mission statement. By continuous investments in knowledge, quality, innovation and state of the art systems, we will be able to maintain our lead. The decision to work with TIQ Time is in line with this vision. It will improve our way of working and create more transparency together with clear and accurate time entries."

Oury Clark Solicitors has swapped out its incumbent practice and matter management system for **SOS Connect**. Oury Clark is part of a larger professional services group, which has offices in London and Slough and includes a team of chartered accountants, and recruitment and financial consultants. "We have been growing at quite a rapid rate in recent years," says partner **Simon Walsh**. "Although there were no issues

with our previous incumbent, we became aware that our practice management software required a greater degree of customisation due to our growth and this was what prompted the switch to SOS Connect."

Dittmar & Indrenius (D&I), a top Finnish law firm, is adopting **HighQ** to improve collaboration, productivity and client experience by leveraging HighQ's intelligent work platform to create added value for clients. "We're excited about the tremendous possibilities of HighQ in enhancing our customer experience through increased interaction, availability and overall ease of doing business with our clients," says **Katja Hollmén**, D&I's Director of Client Relations. "Collaborate offers us unique tools that will be immensely valuable to our Powerhouse service model, providing strategic cross-silo solutions in complex matters." Bottom line, she says: "Everyone has to respond to the clients' evolving needs and to prepare for the future of the practice of law. Our focus is on exceeding the most demanding corporate clients' service expectations and to make sure that the digital transformation is an enjoyable and rewarding experience." D&I is known for its landmark references in Nordic cross-border transactions, complex disputes and cases relating to digital business transformations. Their 60 lawyers are spread across various practice and industry groups, all serving their clients through three "Powerhouses" - Transaction, Dispute and Innovation - as one team in one efficiently managed process.

NORTH AMERICA   Cheng Cohen LLC (Illinois) has swapped out its legacy metadata removal software for **cleanDocs** from **DocsCorp**, which includes recipient checking in its offering. **Smith, Sovik, Kendrick & Sugnet**, **PC** (New York), **Boyd & Jenerette**, **PA** (Florida), **Pereira Neto | Macedo** (Brazil) and **Patten**, **Wornom, Hatten & Diamonstein**, **LC** (Virginia) all purchased **contentCrawler** from DocsCorp to automate the process of converting all image-based documents to searchable ones. Canadian firm **Farris, Vaughan, Wills & Murphy LLP** replaced its legacy document comparison software with **compareDocs** from DocsCorp to compare quickly different versions of a document for amendments.

Tennessee-based immigration firm **Siskind Susser PC** has incorporated the **ROSS Intelligence** legal research platform into its workflows. Stated named partner, **Greg Siskind**: "Having outstanding systems to deliver thoroughly prepared petitions on behalf of our clients is why we're growing rapidly. And having the best legal research tools is critical. ROSS is going to be important to the way we continue to differentiate ourselves from the competition".

Drinker Biddle & Reath LLP has selected **3E** from **Thompson Reuters Elite**. As part of the multi-product deal, the firm will also deploy **Xcelerate Budgeting and Forecasting**. Ranked 74th in the Am Law 100, and with 11 offices in America and London, Drinker Biddle chose 3E following an extensive competitive review process. 3E says that it was selected for its state-of-the-art technological capabilities and long track record of success in the legal enterprise marketplace.

Lane Powell, a litigation firm in the Northwest, has chosen **Intapp** to consolidate, speed up and manage its conflict-checking process. The firm has reported reduced administrative costs and faster delivery of results.

Hangley Aronchick Segal Pudlin & Schiller has selected **eBillingHub**. Hangley has three offices across Pennsylvania - in Philadelphia, Harrisburg and Norristown - and one in Cherry Hill, New Jersey. With 47 lawyers serving a broad range of clients the firm chose eBillingHub, following a rapid review process, to help handle an increasing volume of e-bills.

Following a year-long review, corporate and litigation firm **Stole Rives LLP** is replacing its in-house Relativity instance with **Casepoint LLC**'s cloud-based eDiscovery solution. "The choice to switch to Casepoint from Relativity was clear to us," said **Kelly Roberts**, Director of Practice Support. "Casepoint's functionality, ease-of-use and advanced technology allows our attorneys to be more effective and efficient. This, in turn, allows us to improve our end result to clients, while also providing them with a lower total cost of eDiscovery. In addition, moving to Casepoint provided the firm with a significant reduction in total cost of ownership and allowed us to immediately provide our clients the benefit of lower eDiscovery costs, making it the clear choice for our eDiscovery needs."

Anderson Kill P.C. has selected **Aderant Expert** as its legal practice and financial management software solution. With six offices across the United States, Anderson Kill needed to move away from their current, paper-intensive process by digitising their business. "We feel that Aderant Expert, combined with its support team, will enable us to manage our financial operation much more efficiently and effectively," said **Paul Schwartz**, Chief Financial Officer. "Expert is sophisticated enough to meet the needs of our multi-office, domestic firm with expertise in large insurance recovery matters, and the Aderant team took a genuine interest in understanding our needs, culture and team."

Corporate and litigation firm **Clark Hill PLC** has implemented **iTimeKeep** from **Bellefield Systems**. "Timekeeping results in direct communication to our clients about the work that we do for them; therefore, submitting accurate and compliant time entries is a priority for our firm," said **Joan Holman**, CIO at Clark Hill.

APAC   Price Sierakowski Corporate, a boutique commercial law firm in Perth, Australia, has selected **Workshare Transact** for use on its cross-border IPO matters. **Connor Graham**, senior associate, said: "Workshare Transact will assist in the due diligence process enabling the firm to launch, pivot and scale transactions when all parties are ready".

▶ Movers & Shakers

UK & EMEA   Following Legal IT Insider's report last month of his departure from **Clyde & Co** as global CIO, **Chris White** has resurfaced as interim CIO at **HFW LLP** (Holman Fenwick Willan). His remit, he tells Legal IT Insider, is "to put in place fit-for-purpose IT across the firm's 20 global offices and also to create and drive an innovation initiative." He replaces **Paul Thurston**, who joined HFW from **Freshfields Bruckhaus Deringer LLP** in 2014.

iManage RAVN has hired **Workshare's** former Chief Revenue Officer **Nick Thomson** as General Manager to grow the business and help accelerate adoption, including further expansion outside of the legal sector. Thomson told Legal IT Insider, "I'm looking after the whole unit and we have big plans to grow the team and expand out so that we can capitalise on all of the really good innovation going on at RAVN, which is transforming how lawyers work in the document management system." iManage CEO **Neil Araujo** comments, "Nick's expertise in product strategy and development will help iManage continue to accelerate the adoption of practical AI solutions across legal and other corporate markets."

Consilio LLC, a global leader in legal consulting and services, has appointed **James MacGregor** as their new UK Managing Director responsible for the UK sales team. Prior to joining Consilio MacGregor held senior positions at Inventus, FRONTEO USA and BDO. "As our client's multijurisdictional needs for eDiscovery, document review, risk management and consulting services expand, it is increasingly important for us to provide deep expertise, insights and relationships between international markets," said **Meredith Kildow**, Managing Director and Senior Vice President of Global Revenue Organization at Consilio. "James brings strong sales, marketing and client relationship management expertise in both the US and UK markets, which will be beneficial in driving cross-border business development."

Ashurst LLP has appointed former Fieldfisher LLP banking partner **Christopher Georgiou** as co-head of their alternative services offering, **Ashurst Advance**. The other co-head is **Mike Polson**, a frequent speaker at Legal Leaders Gleneagles. Whilst at Fieldfisher Georgiou built and headed the firm's alternative legal solutions platform, Condor. Polson said: "Through Ashurst Advance, we have established and substantially grown our alternative resourcing capability, increased use of legal technology and successfully applied process methodology and legal project management in the delivery of major matters. Chris' appointment is part of our significant commitment to continue to develop a broader and more diverse integrated legal services delivery model for clients in what is a strategically important asset for the firm."

Fresh from its appointment of new CEO Gary Young and Chief Sales Officer Tony Cox, **Peppermint Technology** has appointed **Nicki Grundy** as its new Chief Finance Officer, as the Nottingham-headquartered company builds up its C-Suite and sales infrastructure after founder and former CEO Arlene Adams handed over the reins in April. Grundy joins from digital healthcare solutions provider Exco InTouch, where she was also CFO. Prior to that she worked across a breadth of other industries including start-ups, growth companies and multinationals and has several years' experience at two of the Big Four accountants – EY and PwC.

Hot on the heels of its appointment of **Daniel Pollick** as CIO, UK top 50 law firm **DWF** continues to invest heavily in its R&D function with **Jonathan Badrock** promoted to head of R&D at **DWF Ventures**. Badrock has also recruited as his R&D manager Pinsent Masons' knowledge engineer **David Sutherland**. DWF Ventures, a wholly owned R&D company launched towards the end of 2017, is headed by managing director **Jonathan Patterson** (who, incidentally, is referred to by most people who know him as "JP"). Ventures is DWF's vehicle for developing new ideas and stands out in the profession for facilitating real exploration. Badrock told Legal IT Insider, "I have increasingly been taking on more responsibilities within Ventures over the last six months or so. I'm now heading up the R&D priorities within Ventures, whilst JP, as managing director, is also focussing on the early growth services, idea generation, and spends more time than I do developing our connections with the likes of the academic institutions."

Repstor, the ECM software and matter management specialist, has appointed a new head of legal & professional services. **Leigh Smith** joins from global law firm **Eversheds Sutherland** which, together with Repstor, has developed Office 365/SharePoint matter management solution **ES/Unity**. At Repstor, Smith will spearhead ES/Unity engagements among corporate in-house legal teams.

RPC's long-standing director of infrastructure **Julie Berry** has left to join UK top 20 chartered accountants **Saffery Champness** as IT partner after 27 years at the UK top 50 law firm. Berry told Legal IT Insider that her reasons for leaving are that she wants to experience an alternative professional services offering and "they offered me a partnership, which is hard to turn down". Accountancy Age ranked Saffery Champness as the 12th largest chartered accountancy in its 2017 rankings, with a UK income of just over £78m.

Having recently lost sales director Guy Phillips to NetDocuments, Salesforce-based CRM provider **OnePlace** has hired iManage RAVN sales director **Gareth Thomas** as its regional vice president of sales, EMEA to lead its growth plans in the UK and the rest of Europe, Middle East and Africa. According to founder **Tim Smith**, OnePlace is in expansion mode after seven consecutive quarters of growth and is looking to recruit further senior talent to its team.

NORTH AMERICA   **LDM Global** has appointed **Conor Looney** as Chief Executive Officer. He replaces founder and former CEO Chris O'Reilly, who will take up an advisory role in the company. Looney was previously Regional Chief Executive of Digicel, the largest communications company in the Caribbean. Based in Florida, USA, Looney will lead LDM Global's ambitious

plans to expand their global reach.

Relatively new eDiscovery service provider **X1 Discovery Inc**. has appointed **Craig Carpenter** as CEO. Carpenter has an enviable business pedigree, having previously held positions in Fronteo, Kroll Ontrack, AccessData and Recommind. On his new position, Carpenter says, "X1 makes what is technically an exceptionally difficult process incredibly simple and easy. The sky is the limit for X1's future." **John Patzakis**, Executive Chairman of X1 commented, "We are ecstatic to have such a widely respected leader in charge of X1 and are confident Craig will help accelerate the strong growth X1 is experiencing."

Former **Intapp** VP of Marketing, **Dan Bressler**, has launched his own strategic marketing consultancy, **Meridius LLC**. He tells Legal IT Insider: "My value proposition is bringing a diverse set of skills coupled with an understanding of the market and this is resonating with clients… I help with the overall messaging and go-to-market strategy by applying the fundamentals of strategic marketing." He already has four large clients under his belt: **FileTrail, Aurora North Software, InOutsource** and **Wilson Legal Solutions.**

Following **Clifford Chance LLP**'s launch in July of its Applied Solutions digital services business, the magic circle firm has hired former Thomson Reuters Practical Law Company US Chief Executive and legal tech entrepreneur **Jeroen Plink** as CEO. Plink will help drive the business forward globally but, notably, will be based in New York and focusing on tapping into new opportunities in that market. Clifford Chance this year approved a change of structure to facilitate the launch of **Applied Solutions**, which is a separate corporate entity and the home for all of its subscription-based digital products, including document automation product CCDr@ft (which Plink will now head) and a Neota Logic-backed MiFID II tool. Plink will work closely with the firm's clients, technology partners and lawyers across the world to develop and bring to market new technology-led solutions to major client challenges. The initial focus will be on the regulatory and compliance space, where the demands on organisations globally are growing at pace and the need for automated and smart solutions, informed by deep legal expertise, is increasingly important.

UnitedLex, the enterprise legal services provider, has appointed **Nick Hinton** as their Chief Financial Officer. Hinton joins from Cunningham Lindsey, a leading global provider of technology-enabled risk, benefits and integrated business solutions. "I am fortunate to welcome such an accomplished executive to our management team at this pivotal juncture in UnitedLex's history," said UnitedLex CEO **Dan Reed**.

"With his strategic vision, deep financial and operations expertise, and demonstrated success in achieving results, we expect Nick to drive transformational change both within UnitedLex and across our client base."

Colleen Osborne has joined **Wilson Legal Solutions** from Intapp to accelerate its growth outside of the legal industry. Wilson Legal is a provider of software and services that help professional services organisations improve business performance. Based in Boston, Osborne will develop and follow leads in the accounting and consulting markets in America and the UK.

## ▶ Clifford Chance selects Litera Desktop in move to one drafting vendor

Clifford Chance has elected to significantly extend its relationship with Litera Microsystems and has rolled out Litera Desktop to the entire global firm, moving in the process to a single vendor for document drafting.

Litera Desktop is comprised of products for drafting, proofreading, comparing, repairing, cleaning and securing documents.

Avaneesh Marwaha, Litera Microsystems CEO told Legal IT Insider: "Having one ribbon that has a full workflow that can create, check and collaborate means it becomes so much simpler to produce high quality work and move product forward. And to me the trend is towards simpler, cleaner innovation and workflow. Having one vendor also reduces costs."

He adds: "For us it's really exciting to have that stamp of success and approval from one of the largest firms in the world that this is the right path forward."

Paul Greenwood, CIO at Clifford Chance said "Our best delivery is all about securing the best outcomes for our clients, coupled with greater value and efficiency in legal service delivery and legal technology is playing an increasingly important role. We've worked with Litera Microsystems for many years, and our lawyers are using their products daily. Litera Desktop is a natural progression for us as it enables us to provide our lawyers with a single interface for their drafting needs that will fit within their workflow more efficiently and with greater quality of documents."
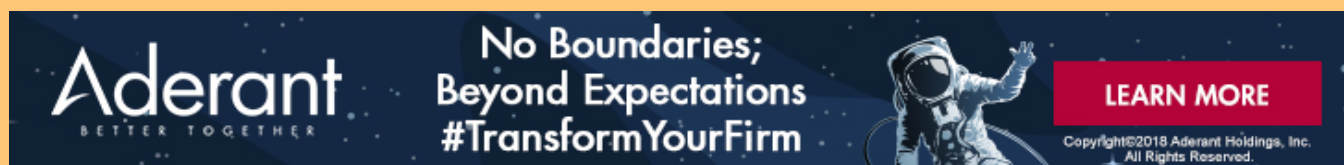
▶ Talking tech with junior lawyers at JLD

Our thanks and congratulations goes out to the Law Society Junior Lawyers Division, which on 8 September hosted its annual JLD Forum in Chancery Lane, at which Insider editor Caroline Hill sat on a panel with Weightmans business services and innovation director Stuart Whittle and DLA Piper's legal technology manager Ben Hunt to address 122 delegates on what legal tech means as a junior lawyer.

In a discussion chaired by JLD executive committee member Nicola Wilding (a DLA commercial real associate by day) the panel covered topics and questions ranging from "will technology replace me" to "how is data being used by law firms" to "should lawyers learn to code".

The temptation is to assume that millennials have a natural affinity with technology but many feel overwhelmed by the changes taking place in the market. What was surprising was how many delegates said they felt they know very little about legal technology. Wilding said after the event: "The legal tech session went down really really well, as a lot of people said they understood what they needed to do/what legal tech meant for them much more than they had before."

The JLD forum is aimed at equipping those who are at the start of their careers with skills and advice necessary to progress, diversify and develop within the legal profession.

There is another forum coming up on 06 October aimed at LPC students and graduates so be sure to spread the word.

▶ Quote /Unquote

"I couldn't get in to the nightclub after the iManage ILTA party because I didn't have my passport, so I went to my hotel room to get it. When I returned to my hotel room in the early hours, my room had been burgled. The door was open and the room had been ransacked. I took lots of photos and decided to wait until later that morning to report it to security. Which is lucky because when I woke up, I realised it was me who had ransacked the room looking for my passport."

One marketing director at a leading vendor recalls why gin is bad.

legal it insider

The next Insider newsletter will be published on Wednesday 24 October.

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MOVING YOUR INFRASTRUCTURE TO THE CLOUD:

What are you waiting for?

Legal IT Insider and enterprise cloud provider Nutanix gathered with law firm IT leaders from some of the UK's leading firms to discuss where they are on the journey towards moving their infrastructure to the cloud, what the barriers are, and what the roadmap looks like.

Despite wide adoption in other sectors, most law firms are still at the very beginning of their journey towards moving their infrastructure to the cloud, albeit that public consensus and, you could argue, sheer common sense suggest that is the direction of travel.

Much centres on the client: financial institutions, for one, are positively allergic to the word cloud when it comes to their legal advisers, although internally the picture is often less clear.

In something of a volte-face, security is now mostly a driver rather than inhibitor, and wherever they currently sit on the cloud roadmap, most big law firms are looking seriously at their cloud options.

But with a mishmash of case management systems and a legitimate fear over performance and cost issues, the real question is not just when but precisely what arrangement to put in place.

legal it **insider**

▶ The Current State of Play

If you take our group of seven respected top 50 UK law firms from magic circle down to mid-market as a highly informal metric for gauging cloud uptake among law firms, you get a fairly representative insight into the wide spread of experiences across the sector, with only one, Cripps, fully in the cloud, and the majority at the start of their journey.

Speaking at the roundtable, which was chaired by former Clyde & Co global CIO Chris White (now at HFW), CIO Jo Owen said: "We are fully infrastructure as a service with AWS, we've moved the lot."

Cripps opted to move to AWS prior to Owen's arrival in October 2017, thanks to the firm moving from three different offices to one. Owen said: "We needed an IT strategy to back that up. The firm had a couple of options: to stay on prem and invest in hardware or move to the cloud. They had a beauty parade of various suppliers and chose what they felt was the best supplier to do that."

Cripps doesn't play in the financial institutions markets unlike magic circle firm Slaughter and May, where head of systems and infrastructure Mark Sawyer said: "We have a very small amount of infrastructure in the cloud. I'm interested to see what we can move to the cloud but our banking clients are hyper cautious about their data and quite insistent that cloud is not the thing to be done at the moment."

If firms are using the cloud in any meaningful way it is likely to be private cloud, and that is the case at Charles Russell Speechlys, where infrastructure and security manager Andrew Wilson said: "We've invested significantly in our own private cloud as opposed to public cloud and while we're keeping an eye on the market to move our infrastructure and services into the cloud we do have some services applications already in the cloud."

The private cloud decision was borne out of the merger between Charles Russell and Speechly Bircham and the need to merge those two firms' infrastructure. There were different infrastructures and platforms on both sides and some of them were in need of a refresh, Much like at Cripps, 'there was a decision to be made on a technology whatever that technology happened to be," said Wilson.

But many firms are at the stage of actively looking at their options and Jeff Wright, operations director at TLT, told the group: "We've got no infrastructure in the cloud and are currently looking at our options as part of a major change programme."

Neither Freeths or Gateley have a cloud strategy but both are looking at options and at Freeths, which is on the hunt for a CIO, senior implementation manager Kathryn Gray said: "We don't have a particular cloud strategy but are midway through a massive transformation plan and keen to learn what the key considerations are in moving to the cloud."

And from Gateley (we have to stress speaking in a personal capacity as Gateley is listed), IT solutions delivery manager Jas Bassi said: "We haven't yet moved to the cloud, although I'd imagine like most firms we're looking at our options.

▶ **The Barriers**

It feels as though cloud has been on the agenda forever and once upon a time law firms cited security as a major barrier. That has, particularly since the cyber-attack that temporarily felled DLA Piper, largely been flipped on its head as law firms increasingly recognise that cloud providers, who invest millions in their security arrangements, represent a safer bet for client information than the basement.

Wilson said: "The questionnaires come in and one of the first questions is some form of compliance: are you ISO compliant and where is our data. Some of our clients are surprised we're not already in the cloud. So, at some point we'll have to use a hybrid solution because clients like the idea that it's in the cloud because their perception is that it's more safe secure and flexible."

Speaking at the roundtable White said: "Putting the client to one side, I'm interested to understand if there are any other blockages to moving. What is stopping people moving? Round about 2009, I spent a while working for Mimecast and in those days people had real concerns about moving the cloud. They cited security, they cited data sovereignty, they cited ownership of data and IP and by and large most of those are concerns that any cloud provider worth their salt these days can overcome. Even Microsoft have overcome data residency issues by putting data centres in various jurisdictions around the world. I'm just interested as to what resistance we find in law firms to moving to the cloud. I think one of them is probably IT people who want to keep power themselves."

Owen said: "We have challenges around service delivery and our internal IT team say, 'we still want to have control'. We have a Citrix environment which has turned out to be a success but because our service provider delivers Citrix front end in to our hosted environment our IT department find it quite scary because it's outside of their control and they don't like it. Which I understand because if it goes wrong they can't fix it."
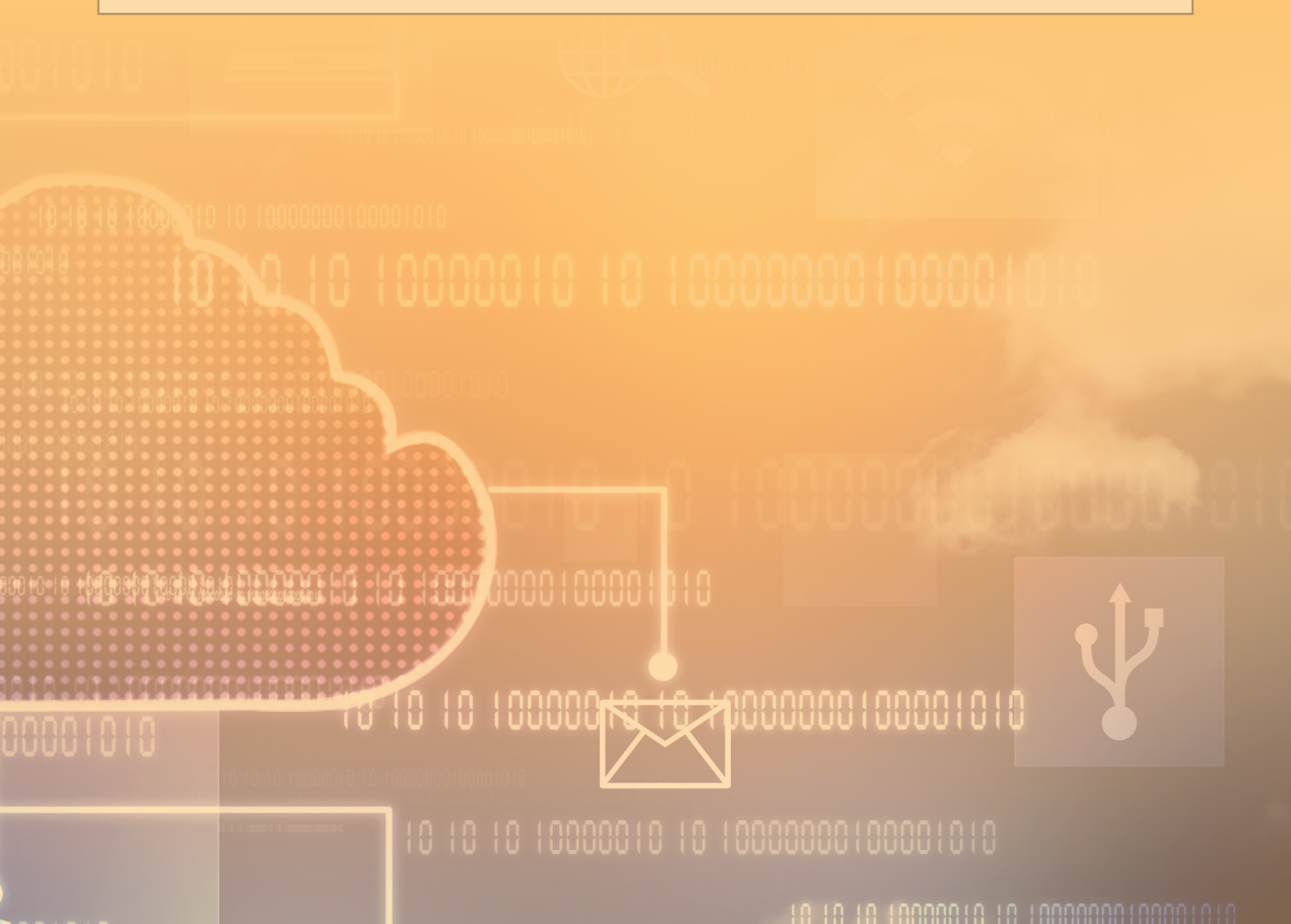
▶ Performance

For many firms the big concerns revolve around performance and cost.

TLT is a mid-size law firm with a mix of transactional volume work and more complex advisory work, Wright said: "We've got more than our fair share of case management systems and have grown massively in the last ten years by organic and inorganic growth, and with the inorganic growth we've acquired some more case management systems.

"One of the massive barriers is the technical achievability and the fear about performance when you see what you've got left. That's because what we spent the last 15 years doing is buying best of breed apps and putting massive amounts of effort into bolting them together. So now we have a million things plugged in to our document management system and Outlook, and reverse plug ins to our case management systems and what stuff goes into the cloud? Can you stick it all into the cloud? And what does that performance look like when you look at all the handoff points between the systems and the complexity and ugliness of what you've actually built.

"So that's a huge barrier certainly for mid-size law firms and I would imagine has some applicability for small and large."

"I understand the complexities around the integration of all the system but is it not getting easier to integrate?" White asked.

"It's not so much the ease of integration but what does performance look like," said Wright. "Does it all go out? Do you keep some of it in and put some of it out? Can you put it all out and into the same place and get the same performance, it's that kind of conundrum that we need to break through if we're to make that transition."

For Cripps this wasn't such an issue because, Owen says: "We put everything in the cloud: we had the same integration in the cloud as we had on prem. It was the skills and the processes behind it we had the challenge with.

"The only performance issue we had was we put everything in AWS except for email, which we put in Intermedia. So, there were some challenges with things like scanning to email which went from Dublin to Reading and back again, so that had a performance issue other than that we didn't have an issue," she said.

The real lessons at Cripps were around licensing and service delivery. Owen says: "There's a lot we have learned along the way particularly around licensing. We are fully multi-tenancy environment and our licensing doesn't support that so the total cost of ownership of that is far higher than it should be and we're looking at our options for that."

Conversely, one of the biggest lessons Cripps learned is that the infrastructure "is not that hard - it's just tin." Security similarly. "We had a few hefty security SLAs and we went to the clients and said, 'how do you feel about us moving to the cloud?' and they said 'What, you're not already in the cloud?" Owen said.

▶ The Client

Questions about the cloud are a fixed feature of most RFPs whether your clients are financial institutions or not.

Speaking at the roundtable, Legal IT Insider editor Caroline Hill said: "The client issue comes up time and time again. I spoke to Neil Davison at Farrers - they are moving their infrastructure to the cloud - and I asked how he had addressed the client issue. He simply said: 'We have used Mimecast for years.' I think firms are starting to be more confident in the way they approach the client.

Wright said: "We've been called out on that very point by a client in the last few months. We've just gone through an extensive client audit as part of an enormous tendering process. We answered the question very honestly on what cloud services we use and explained that our relationship with Mimecast is twice as long as our one with the client, and we got castigated for not asking permission even though the security question came long after. We've had to retrospectively gain permission."

Sawyer said: "People are saying 'we're already in the cloud because we use Mimecast' but we're not using Mimecast. So, we've got to go through the process now of going back to the client and going through that whole process of 'this is what we're going to offer.'

"I know Slaughter and May is known as very traditional, do you think if the partners were different they'd be likely to say 'don't be so silly'?" asked White.

Sawyer replied: "It's really the banking clients, which have massive procurement functions, and we have teams of auditors who come in for a week and a half or two weeks and they come away happy but they say do not put our data in the cloud."

"How does this reconcile with the fact that we hear that fintech makes lawtech look so behind when it's financial services causing the problem?" asked Hill.

Bassi said: "The investment banks are a bit more advanced but the retail banks, unless they are challenger banks like Metro, many of them are still using legacy technology, legacy platforms and legacy processes around that."

Sawyer added: "But they are also using cloud - we know they are using the cloud to try to cut costs."

In fact, cloud is hard to avoid, and Nutanix regional director, enterprise James Kenny said: "Everybody uses SaaS services everybody uses Office 365 we are all using some form of cloud service. We might be backing up into an environment which is ultimately offloaded into a public cloud but everyone is using it."

Sawyer said: "I think eventually [banks] will flip round and say 'we aren't paying for all this expensive on premise stuff.'

"I think the solution is going to be hybrid. You're going to get the 80/20 rule. The majority goes into the public cloud because it's sensible, secure and you've got the full availability. But you Mr Client if you want your stuff in the basement we can do it."

▶ Cost

Cost is where the practicalities start to bite, and Kenny said: "Our experience with public cloud is that security is just fine; data sovereignty - fine; service levels - fine. Our experience is, wrong workloads, pigging expensive."

Nutanix, which is something of a hybrid cloud broker, melds private, public and distributing cloud operating environments, with predictable workloads kept on premises in Nutanix and elastic in the cloud.

Kenny said: "IDC says 80% of workload in most businesses are predictable and for those workloads it's typically half the price to have those services on premises. For the remaining 20% which are elastic workloads it's about 25% of the cost to have them in the public cloud. We adopt that ourselves. We have Salesforce and ServiceNow and a whole load of other providers so we see cloud as the Big C rather than just private or just public. It's multi cloud/hybrid cloud. That's what we're helping our customers with.

He adds: "Have you heard the car analogy for cloud? If you go to work every day in your car you should probably buy the car. You wouldn't rent a car. But you go on holiday to the US for two or three weeks are you going to buy a car? No. You'll rent. It's horses for courses. And at Nutanix we're trying to help customers where it makes sense to have on prem IT requirement to help them to do that and to assess if it should be on prem or not."

Cowan said: "Our CIO came from an interesting background at Yahoo and then GoPro; she's not part of the engineering team and she's not part of the sales team and she inherited a mixed bag of technologies and had to make sure that our hybrid cloud model was best suited to enable the likes of myself, James and everyone else to be as efficient as we can be.

"So our website is hosted on AWS; we use O365; Salesforce and Workday where it makes sense but all the on prem stuff - Oracle, SQL and predictable workloads in our datacentre on Nutanix and that was the first thing we did because she said if we're not eating our own dog food or as she says drinking our own champagne then why should anyone else be. And the cost savings she has delivered as a global CIO of a scalable company are incredible, because she's accepted the fact that the end goal is hybrid."

Nutanix acquired Indian SaaS company Minjar in March whose focus is to optimise public cloud utilisation. Cowan says: " You enter your AWS credentials and they go out and scan all the instances associated with that account and tell you you're spending XYZ million and if you did this that and the other, with one click to improve that optimisation you could be saving this amount."

What's interesting is that law firm IT departments don't appear to be on the hook for delivering cost savings in the same way as teams in other sectors are.

Cowan asked: "Are law firm IT departments being challenged to take the cost out of the business? Because outside of legal, in financial services, insurance, property and even the accountancy firms, most of our first conversations we have are 'what does the cloud mean to you'; and 'what are your objectives for the next 12-18 months because we have to save 5-10% of costs' and so far I haven't heard any of that as an objective."

Wilson said: "Over the last few years investment in IT has increased but the business is looking to IT to deliver cost savings, whether that's going agile and reducing office space."

White asked: "So am I right in thinking we're required to drive down day to day operational costs, so we can spend a large % of our IT budget on investment in the business to provide a better service at a lower cost?"

Wright said: "That's part of it but not all - most is investment to drive efficiency in the way we deliver services to increase profitability."

▶ The Roadmap

In real terms, what are the next steps for people in terms of moving to the cloud?

Well, vendors may be forcing change, as Sawyer observed: "We're getting to the stage where only SaaS will be available and they will do the knitting together, the disaster recovery, they'll do everything."

White added: "Most providers are going down that path and their future roadmap is all SaaS and pretty soon they won't provide any on premises services."

Wilson said: "Although we're focusing on infrastructure where we see the two strands of the cloud are is infrastructure as the cloud and what that means to the IT department but there's also cloud service offerings from an application perspective to the business. So our business units are going out and demanding new platforms, new services from their vendors or vendors that we work with and there is no on prem version of some of these services. Some accounting systems and HR systems are becoming cloud only."

"So you wouldn't be averse to using the public cloud?" asked White.

"No but also aversion implies choice," Wilson said, "and with some of these things, if the business has defined the scope of the application it needs to support its own internal processes and the only offering happens to be a cloud service offering, then we have to link up with that."

Is the future hybrid? Sawyer said: "I'm sceptical that the future isn't just public cloud. We have problems using it but I don't know that won't flip. At home I don't have to pay for any infrastructure: I use Google and O365 why is that different when I come into the office and why does a partner have to pay?"

Cowan said: "The boomerang effects we're seeing is that public cloud isn't that new and people are coming back to us to save money. The end goal will be a split because of legislative; regulatory; cost; mindset; process.

"There won't be one solution for all."