legal it insider

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Well hello, Project X

"Game-changing" is an overused term wheeled out by copy writers when they run out of different ways to say "new", but in the case of Thomson Reuters' legal workflow solution "Project X" - which today (27 February) finally sees the light of day after three years in development - that term is justified.

'Panoramic', as we now know the worst kept secret under the sun is called, has been designed to meet law firms' complex needs on pricing; cost and process; project management; and knowledge and data. It leverages TR's deep resources in everything from practice management to practice notes.

The brainchild of PLC editor David Rawson, Panoramic enables fee-earners to plan how a transaction or case will be resourced, how much it will cost and what it should be priced at. Once those figures have been decided (the UI is impressive) the system will track and flag the impact of any changes down the line so that they can be revisited as a transaction or case twists and turns.

Created with heavy input and testing from law firms throughout its development, Panoramic includes brand new customisable matter maps created in conjunction with the PLC editorial team, which breaks down the stages it takes to execute a legal matter, with embedded guidance both in terms of practice notes and links to precedents - both PLC/TR's and the firm's own previous documents.

TR has invested a lot of time in creating out-of-the-box sequential matter map tiles, but firms can also switch tiles around and create their own maps from scratch.

Once a matter is planned, partners can assign tasks and there is a dashboard that gives them easy visibility into the projects currently on the go and where those projects sit against budget.

No wonder, then, that during our ahead-of-release demo, Elizabet Hardy, vice president of product management, told Legal IT Insider: "A lot of our clients, when they see Panoramic for the first time, say, 'This is the holy grail'."

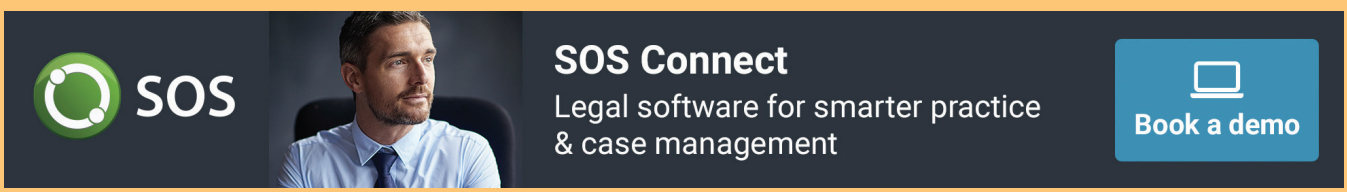
WELL HELLO, PROJECT X CONTINUES ON P2

HealthTrust Europe to create first-time ALSP panel

In what should serve as another enormous wake up call to traditional UK law firms, central purchasing body HealthTrust Europe is to put together a first-time panel of tech-led alternative legal service providers (ALSPs) from which the University Hospitals of Coventry and Warwickshire NHS Trust will be able to source legal services ranging from high volume, process orientated work to deep specialists. The value of the legal work that the Trust puts out to tender has been previously quoted as anything from £30m to £90m.

HealthTrust Europe is a subsidiary of leading Fortune 500 hospital operator HCA Healthcare. Speaking to Legal IT Insider, chief legal and ethics officer Dale Robinson said: "One of our requirements as an organisation is to put in place a framework agreement for our customers and we do that across all the different categories of things that healthcare might want to buy."

HEALTHTRUST EUROPE TO CREATE FIRST-TIME ALSP PANEL CONTINUES ON P3



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Well hello, Project X

CONTINUED FROM FRONT COVER

Law firm partners

Panoramic has been developed in conjunction with two major law firms - LeClairRyan and K&L Gates, which Thomson Reuters has turned to over a long period and refers to as their "co-design" partners. There are a further 10 firms in beta testing across the UK and US and, out of those 10 firms, 108 fee-earners are using the product.

A further 22 law firms took on the role of innovation adviser, giving lighter touch input on the product and its development.

Hardy said: "Having a process like this with our clients has helped us to validate pain points and informed the design. Both we and they believe this is a game-changer - it's a product like no other - it really has been designed and built by lawyers for lawyers."

She added: "This gives us the ability to connect the business of law with the practice of law through data and we believe that we're uniquely placed to do that. We're incorporating data from our financial system coupled with guidance and providing a new way for lawyers to work. It doesn't replace PLC or 3E but our clients have been long saying 'you have great business operational systems at the same time as the best know-how and content that helps lawyers practice more efficiently. You should bring them together': in Panoramic that's something we've done."

Who is it for?

Partners, fee-earners and pricing directors.

Thomson Reuters has spent time working out what each of those groups needs and has come up with this:

- partners need the ability to communicate with the client; manage their team; focus on high value activity; scope and price new matters; and achieve matter profitability.
- Fee-earners, on the other hand, need to deliver work; master precedents; find guidance; track and report their time; and show value.
- Pricing directors need to support the firm's profitability; help to achieve the goals set; and develop best pricing practices.

Who is behind it?

Rawson describes Panoramic as "my life's work."

He tells us: "I came up with the concept six years ago when at Eversheds and joined PLC to set up the restructuring and insolvency practice: part of the reason for that was that I had a belief that we ought to be able to benchmark knowledge."

How does it differ from what's out there?

There are a number of workflow solutions and case management systems available in the market but Rawson describes them as "sausage machines" that work within high volume scenarios but break down in complex M&A or litigation where there's no defined methodology and you have to react and adapt to change. Or, as Rawson puts it, "where you don't know what you don't know at the outset."

He adds: "We've seen a fundamental shift from the lawyer saying, 'here is my bill and it's more than we agreed, please pay up,' to the client saying, 'tell someone who cares'."

"Lawyers need in-the-moment financial information and a multi-disciplinary team that is able to respond immediately. How they handle that, well that's what this is all about."

More about the workflow tools

From Thomson Reuters Elite 3E the fee-earner is able to see the budget and deadlines - or what Rawson describes as "what's on fire": where a task is against budget and the time agreed for completion.

If there is an alteration along the way and someone takes £8k of work out of the matter, the budget and work plan are connected, so you will be notified of the impact that will have on the final figure.

The realisation breakdown really is presented in a way that lawyers can understand (TR consulted with a UX team and have even used a colour scheme that's "not boring").

The work plan consists of a "tile a task", e.g. one tile equates to one step in litigation. You can drag and drop the tiles, and each block retains its own reactive guidance - if in a piece of litigation you stipulate that there is a single expert, the nuanced matter engine will adapt to that automatically. The same applies as you discover more information about the case or transaction.

Assigning tasks appears to be fairly easy, and each tile comes with a check list (for example, to remind fee-earners they will need a cheque for court at this stage of filing). Task guidance, precedent and best practice are neatly woven in.

A sophisticated search tool enables fee-earners to search for similar documents of their own.

One of our favourite bits is that you can start a

timer against a task that will then automatically be entered into your 3E time sheet. A graph shows how near or far you are off your billable goal.

In-built analytics means that the system can help you price more accurately next time.

Which practice areas are covered by Panoramic so far?

Initially the deepest content will be in private M&A and dispute resolution with less detailed content across an array of other practice areas. This will obviously grow over time.

Where will it live?

The second half of this year will see TR look at integration with Microsoft Office and how the platform hooks into Word.

Editorial backup

Perhaps one of the other coolest things is that TR has realised that tech often fails not because of the tech itself but because of the lack of resource and project time within law firms to roll out said tech.

Hardy says: "We've carved out a separate set of senior editors from PLC that are focussed on building matter maps. Nothing about creating the matter maps is difficult but we can help: lawyers can teach lawyers."

Conclusion

We've tracked Thomson Reuters' restructure over the past year and at times it has been anything but smooth sailing as the publishing giant refocuses along customer segments, as opposed to product lines.

The restructure has shaken the market's faith in TR and in some cases left giant holes in customer plans, but we predict that Panoramic will prove hard to resist.

HealthTrust Europe to create first-time ALSP panel

CONTINUED FROM FRONT COVER

One of those things is legal services: the last mainstream four-year legal services framework was decided in 2015 and the Trust is out for tender on that again right now.

However, the Trust is taking advice on the creation of a brand new, alternative ALSP panel that will run alongside the traditional panel with the clear intention that it will grow - perhaps dramatically - as the often-traditional public bodies that the trust works for become more au fait with what ALSPs have to offer.

Robinson said: "This time we're thinking about innovation. We engaged Derek Southall [founder of Hyperscale Group] who gave us an insight into the legal landscape and we've decided that, while maintaining a traditional model on the one hand, we would expand into the ALSP market.

"We recognise that the public sector is quite traditional in its view of legal services. We wanted to explore how ALSPs that have a very technology-focussed outlook would assist our customer base to move into a more efficient practice using technology over time. All of those potential applications of technology to the legal space can be put into some of these more traditional public sector-type bodies."

The Trust has to follow strict procedural rules and, before it goes out to tender on the ALSP panel, is asking for interested suppliers to get in touch in order to help put together the framework agreement by attending a supplier day.

The Prior Information Notice (PIN) says: "Suppliers who respond to this PIN and express their interest in this procurement are advised that a maximum of five suppliers will be invited to the supplier day. These suppliers will be chosen at random by HealthTrust Europe. The supplier day will consist of a one-hour time slot with engagement with the end user and HealthTrust Europe."

The Trust will use the information gathered to put together an ALSP legal framework that "can be expected to cover legal services focusing on high volume, process-orientated work, ranging from entry level document review to highly skilled and experienced specialists."

Robinson says: "We want ALSPs to take public bodies on a journey from 'I have a law firm I like' to a different stage where we can say 'what is the art of the possible in legal services in light of the legal technology available now and downstream?' so they can become more efficient. Ultimately our aim is that there is more money in an NHS provider or a community provider for patient care."

Those who engage with the Trust now are likely to benefit as Robinson says: "As it stands, we are advertising the opportunity to come and talk to us about how ALSPs see the market and what they would advise us to include in a tendering process. If ALSPs are involved up front, they will have the capability to shape that."

The traditional law firm panel is comprised of 15 firms, including leading healthcare practices Browne Jacobson and Capsticks Solicitors as well as two local authority teams: Staffordshire Legal Services and nplaw (a Norfolk-based public sector shared legal service). [See below for the full list.] They cover legal services such as: corporate governance; healthcare; contract and commercial; employment-related services; property; finance; and digital and environmental. The tender for the new panel closes on 6 March.

Panel firms are graded for their various specialisms and capabilities and those procuring legal services use a score system to work out who to instruct, facilitated by the Trust.

Dale said: "One of the ideas we have is that we

have potential for a really long-term relationship with an ALSP to grow the footprint in that organisation so that they cover, for example, our litigation, commercial contracts and medical contract work."

He adds: "If I have on day one 100% that goes to a traditional law firm adviser on an hourly rate to a state where 30% is done using AI technology and another chunk outsourced to a lower cost LOD [Lawyers On Demand] type and the remainder through a more traditional law firm, the idea is to make efficiency gains from doing that using the art of the possible."

The engagement process will last another couple of weeks from the time of going to press and Dale said: "We're looking generally for anyone who can help us with a technology solution - not necessarily just ALSPs. It's a question of how we make sure we're making the best of what's emerging."

It is envisaged that the ALSP selection process will be completed by August/September.

FRAMEWORK SUPPLIERS

Below shows an overview of the Legal Suppliers awarded to the framework and detail the lots under which they supply.

Updated in line with the extension period 23rd December 2017- 22nd December 2018	Lot 1 – Corporate Governance	Lot 2 - Healthcare Law	Lot 3 - Contract and Commercial Law	Lot 4 - Employment, Pensions and Employee Related Tax Law	Lot 5 - Property Law and Estates	Lot 6 - Corporate Finance and Private Finance Initiative/ Public Private Partnership Law	Lot 7 - Intellectual Property, IT, Telecoms, Media and eCommerce Law	Lot 8 - Environmental Law
Bevan Brittan LLP	✓	✓	✓	✓	✓	✓	✓	✓
Bird & Bird LLP	x	x	✓	x	✓	x	✓	✓
Browne Jacobson LLP	✓	✓	✓	✓	✓	✓	✓	✓
Capsticks Solicitors LLP	✓	✓	✓	✓	✓	✓	✓	✓
Clyde & Co LLP	✓	✓	✓	✓	✓	✓	✓	✓
DAC Beachcroft LLP	✓	✓	✓	✓	✓	✓	✓	✓
Hempsons Ltd	✓	✓	✓	✓	✓	✓	✓	✓
Hill Dickinson LLP	✓	✓	✓	✓	✓	✓	✓	✓
Kennedys Law LLP	✓	✓	x	x	x	x	x	x
Nplaw, Norfolk County Council	x	x	✓	✓	x	x	✓	x
Pinsent Masons LLP	x	x	✓	x	✓	✓	✓	x
Potter Clarkson LLP	x	x	x	x	x	x	✓	x
RadcliffesLeBrasseur	✓	✓	✓	✓	✓	x	x	x
Sharpe Pritchard LLP	✓	x	✓	x	✓	x	✓	x
Staffordshire County Council - Staffordshire Legal Services	✓	✓	✓	✓	✓	x	✓	x
Ward Hadaway Partnership	✓	✓	✓	✓	✓	✓	✓	x
Weightmans LLP	✓	✓	✓	✓	✓	✓	✓	✓

Framework Status Key: Provider available against this Lot ✓ Provider not available against this Lot x

"Own the eDiscovery process": Microsoft unveils compliance center

Microsoft Office 365 has been moving ever closer to helping corporates own the eDiscovery process but what the debut at Legaltech19 of the new Microsoft 365 compliance center showed us, is that the software giant is now a serious threat to external early case assessment providers.

The compliance center, which is being rolled out in order to help corporations better manage their data privacy risks and avoid the risks associated with sending data out to third parties, enables managers to safeguard sensitive data, manage the data governance process and use new in-built eDiscovery tools.

To help protect sensitive data across various platforms the new Microsoft Information Protection capabilities enable users to classify content and apply labels to documents and emails directly from Office apps on Mac (Word, PowerPoint, Excel and Outlook) and Office mobile apps.

A user can now assign a 'highly confidential' label while working on an important document in Word, which results in an appropriate protection policy, including encryption.

During litigation and investigations, new capabilities in Advanced Discovery (available to users with an Office 365 E5 subscription) help users communicate with custodians, isolate case-related content for processing within static sets and use the new review and redact capability to modify sensitive portions of documents before exporting them as part of a legal matter.

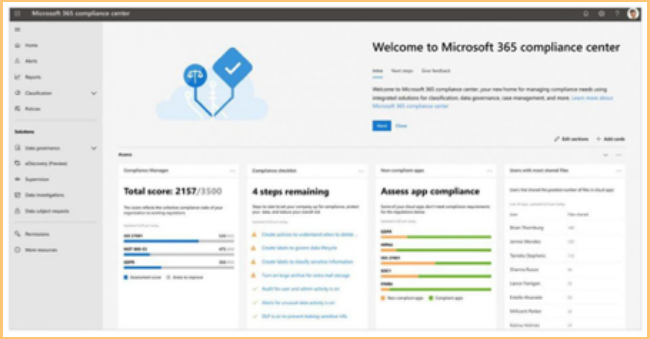
Addressing a packed room in a demonstration of the new capability over breakfast at #Legaltech19, Shilpa Ranganathan, general manager of mobile product experiences at Microsoft, said: "This will help the corporate to own the eDiscovery process and removes third party dependency. If you buy E5 licensing, it's in there. We're very much focussed on serving large corporates' problems and that includes helping them to own the early part of the eDiscovery management model."

Partner director of program management Rudra Mitra said: "What does modern compliance look like? The workplace is more complex than ever and data is so fragmented. Our customers need integrated tools that leverage intelligence to reduce risk.

"We want to make sure that our compliance systems are end-to-end. It's no good if you have to take data to some other system or location or third-party tool.

"We're providing an end-to-end system with no compromise as to productivity. It offers full coverage and extensibility across all communication channels and offers collaboration in a modern workspace. Plus, our data and security investments are helping to meet and exceed customer data security expectations."

One senior counsel present at the meeting observed: "Because companies often grow through acquisition it can create a fragmented way in which data is stored or managed. The opportunity here is centralisation: you can create one set of rules around the data and it's in one place, which helps align with your acceptable use policy. This is not just about preservation but how data is managed when you have a core set of tools where data is preserved."



In a blog post Mitra said: "In the Microsoft 365 compliance center, you can easily access solutions to help you assess your compliance risk through Compliance Manager, protect data through features like Data Governance, and respond to regulatory obligations like Data Subject Requests.

"Along with the new Microsoft 365 security center, these specialized workspaces are designed for security and compliance professionals to centrally manage Microsoft 365 services with a unified experience and insights powered by artificial intelligence (AI)."

Attending the breakfast briefing was Wendy Butler Curtis, chief innovation officer at Orrick, who told Legal IT Insider: "The Microsoft 365 Compliance Center is empowering our clients with better data management, visualization and security. Through one intuitive interface, companies can use AI-enabled features for eDiscovery, investigations, and compliance. Without moving data or hiring vendors, companies can apply retention periods, enable preservation, execute on GDPR requirements and supervise data to ensure compliance with company policies."

As before, in companies that have no dedicated eDiscovery resource or training, bringing the process in-house is still unlikely to be a good idea.

But it's worth doing a cost / risk calculation. And judging by the reaction in the room in New York, Microsoft have nailed it this time.

Claimbot wins Manchester #GLH19

Manchester was a host location for the Global Legal Hackathon, a worldwide event occurring over the weekend of February 22-24, 2019. The local node of the event brought 30 participants from law, business and technology to rapidly create tech solutions to progress the legal industry and access to legal services. The winning team was Claimbot, an online B2C chatbot powered by machine learning which analyses claims and predicts probability of success. They will move to the second round to face other winning teams from more than 40 host locations around the world. Runners-up were communication platform Medeia and educational legal game Realiteen. This event was co-sponsored by the University of Manchester and Manchester Science Partnerships. Lauren Riley, founder and CEO of the Link App, was a judge alongside Chris Sykes, BPP law tutor, and Andrew James, (wait for the snappy title...) associate dean for business engagement and external relations in the faculty of humanities at the University of Manchester.

Freshfields wins London leg of #GLH19

Congratulations to Clausana which, on Sunday 24 February, won the London leg of the Global Legal Hackathon 2019 and will be entered into the virtual semi-finals in March.

The Freshfields Bruckhaus Deringer team, which was one of eight to compete in the intense two-day challenge, created a terms and conditions app that enables consumers to identify where the T&Cs deviate from their expectations and build a profile of the digital services they consume. With high enough adoption, the hope among the team, led by innovation consultant Shawn Curran, is that the app may put providers under pressure to change their terms where they deviate significantly from expectation.

Legal IT Insider's editor Caroline Hill, who was a GROWL (global rise of women in legaltech) mentor said: "One thing that jumped out about the winners is how utterly focussed they were very early on – by Saturday morning they had decided on the concept, their place in the market (what the competition looks like – not much) and then it was over to the engineers while the rest of the team worked on the presentation."

The winner was selected by a team of judges that included Christina Blacklaws, president of the Law Society, Ben Gardner, chief scientific officer at Wavelength.law, Jeanette Nicholas, assistant head of Westminster Law School, Dr Richard Sykes, chair of the cloud industry forum, and Jelena Madir, chief counsel of the European Bank for Reconstruction and Development.

The event was hosted by the University of Westminster and organised by Wavelength.law, Cambridge Strategy Group and Agile Elephant. You'll recall that Wavelength won the online courts hackathon in 2017.

Highlights of February

Axiom to float and spin off software business

Axiom Global on 19 February announced it was to take the long-anticipated first step towards an initial public offering, in doing so splitting off its enterprise contracts intelligence solution Knowable and Axiom Managed Solutions (AMS) into two new independent companies, effective 12 February, 2019.

This is major news and our first question is: when did Knowable apparently become a market-leading solution and how come we don't Knowaboutit?

Back to the drawing board for us on the comedy front, but Prosperoware's co-founder and CEO Keith Lipman puts it better, saying: "Here's the thing I find fascinating as a technology publisher: who knew there was a major software company hiding under Axiom?"

Splitting off Knowable and Axiom's managed service business before a float makes sense given the different multiples involved in valuing the companies (a software company would go for a much higher multiple than an outsourcing company) and given the potential to derive further revenue from their sale at a later date.

Chris DeConti, chief revenue officer and head of strategy at AMS said at the time the spin-off was announced: "Both Knowable and AMS require and deserve the sharpness of focus, capital and leadership energy that come with being independent growth companies. Independence will also allow us to seize unique opportunities and better serve clients, with an efficiency of focus, dedicated management teams and tailored investment strategies."

Both will be retained under the Axiom umbrella.

What was more curious was the fact that Axiom appeared to announce its "confidential" intention to float before filing its S-1 form with the SEC, leaving journalists slightly confused as to whether we could publish the news or not.

Joy Heath Rush appointed as ILTA CEO

In an announcement that comes as no surprise (in a good way) and well before the end of her expected interim year, ILTA in February confirmed that Joy Heath Rush will assume the position of chief executive officer, effective immediately. Rush has served as the interim CEO since October 2018.

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"When we brought Joy on as interim CEO, it was with the hope that ILTA would become her new home. In her first four months, Joy has demonstrated the skills, leadership and spirit required to lead our dynamic organisation," said Angela Dowd, ILTA board president.

Rush was brought in as interim CEO after a period of deep instability at ILTA and her temporary status was designed to give the organisation a get-out-of-jail-free card if the appointment didn't work out.

Dowd said: "With Joy's leadership and contributions from our volunteer leaders, members, professional staff and business partners, ILTA's future is brighter than ever."

We agree but, as well as doing a great job of healing the organisation, Rush must help ILTA recognise and act on the need to more closely align itself to the in-house community – it's biggest competition for the vendor dollar is now CLOC (the Corporate Legal Operations Consortium) which, under new president, Google's head of legal operations Mary O'Carroll, is actively looking at how to involve law firms in the organisation.

"Seismic shift": Luminance partners with EY Law

EY Law has entered into a global framework agreement with Luminance. Having trialled the legal AI platform in its M&A centre in Belfast, EY has rolled the service out for large scale document review across its entire legal advisory and legal managed services offerings, comprising more than 2,100 lawyers in 84 jurisdictions. According to Luminance CEO Emily Foges, the review software is now the primary product for due diligence across the entire practice group.

"With three of the Big Four accountancy firms now using Luminance, we are witnessing a seismic shift in the legal landscape as law firms need to innovate to keep pace," said Foges. "In today's climate, the adoption of this machine-learning technology is essential for law firms looking to stay competitive. It's an incredibly exciting time as organisations across the world are beginning to see real results from this technology, and our agreement with EY Law is proof of that."

Allen & Overy launches collaborative due diligence platform ReportRoom

Allen & Overy has launched ReportRoom, a collaborative due diligence platform created by Wizdocs, a California-based legal software company, in collaboration with the firm's own M&A lawyers and legaltech group. A&O says it is the first firm to implement this technology globally - Paul Hastings did much the same thing in 2017 but perhaps that doesn't count as 'global'.

ReportRoom is a secure, online platform hosted within A&O's own IT infrastructure. It enables everyone working on a report to review and edit sections simultaneously and benefit from easy two-way communication between reviewers and coordinators.

"Previously due diligence exercises have been run through templates and shared via email, with the coordinator collating information and reports," Dirk Meeus, global co-head of A&O's corporate practice told Legal IT Insider.

"Launching across our global M&A practice, this platform moves this process away from email, automating collation of work across the world, and so making multi-jurisdictional due diligence easier to coordinate, track and report, wherever coordinators or clients are."

DWF confirms £75m float on the London Stock Exchange

DWF in February confirmed that it is to float on the main market of the London Stock Exchange and expects to raise around £75m, which it will "invest in operations and infrastructure including in additional IT systems and certain strategic initiative change programmes in support of its managed services work."

Whereas the likes of Keystone Law floated on the AIM stock exchange, DWF will trade on the main market, which imposes higher standards of regulation and corporate governance and costs more to list. Firms looking for a standard listing must have an expected market value of at least £700,000. There is no such requirement for AIM-listed businesses.

DWF said that, in addition to investing in its infrastructure, the money raised will fund working capital for general corporate purposes as well as potential funding for future acquisitions.

Eversheds Sutherland and Clifford Chance split innovation and back office tech teams

Both Eversheds Sutherland and Clifford Chance have recently restructured their legal technology teams, separating client-facing innovation from back office IT.

Eversheds Sutherland IT director Andrew Mcmanus now focuses exclusively on client-facing technology and also spearheads the firm's innovation push. [See page 16 for profile]

"A separate team looks after the platform of technology that sits behind the scenes, making sure we are billing correctly, storing our documents in the right place, that our emails are working and our data is secure," Mcmanus told Legal IT Insider as part of our new series of profiles of the top 200 firms' legal technology operations.

William Jenkins, also IT director, heads up this delivery and operational IT team. Jenkins joined Eversheds Sutherland from Hogan Lovells in September last year.

"When I joined four and a half years ago, I was IT director of both areas," Mcmanus explains. "But four and a half years ago, were our clients and our lawyers demanding so much technology? Was technology affecting the legal sector as much as it is now? Clearly not. And we are keen to make sure that we don't spread ourselves too thinly."

While not everyone on social media understood the canoe analogy, Mcmanus described this as the two-canoe challenge. "If you stand in two canoes long enough, they are going to drift apart," he says. "We have one canoe that is keeping the platform working well, making sure you can log in anywhere in the world and that our clients' data is being looked after. Then there is the opportunity that technology offers in terms of disrupting the legal sector. That focus on the future and innovation is the other canoe. Trying to do both at the same time – not just me, but the team as well – is a real conflict of priorities."

HSF goes large with Contract Express

Herbert Smith Freehills has put into production a large Thomson Reuters Contract Express capability this year. Speaking to Legal IT Insider (see page 16) CIO Haig Tyler said: "Our legal automation team, which is part of the legal ops function, has done a lot of work to develop that capability, which has been particularly focused on real estate.

"Alongside that, we also went live with a new platform focused on share purchase agreement automation. These are the first two systems to have emerged through our innovation and technology process, so it is great to get those into production."

According to Tyler, Kira Systems is "getting a fair bit of usage." He adds: "We are expanding the use of our Relativity platform with regards to our discovery capabilities and we are also checking out its document review capabilities."

New tech alert - Agnes Intelligence

At Inspire Legal in New York at the end of January we met the co-founder of Agnes Intelligence, which recently came in fourth place in IBM's North America Watson Build Championship.

Agnes Legal is the result of a partnership between John Snyder, a top New York City litigator, and John Macartney, a data scientist and pioneer in the field of concept clustering. Together they are turning their large brains to the problem of eDiscovery.

Agnes (named after Snyder's daughter, or perhaps it was the other way round…) extracts key words and related concepts from across multiple channels including text, audio and video.

In the demo that Snyder gave us, the search was against hours and hours of wide-ranging radio chatter in The Joe Rogan Experience show. The show was transcribed by Agnes and we searched for the word "hunting", which was instantly highlighted in the text. Click on that word in the text, and you get taken straight to the part where they talk about hunting in the radio show.

Each action is recorded and factored into Agnes' algorithm, so that the technology learns iteratively as the user evaluates more and more documents.

Based in Brooklyn, Agnes, which Snyder says is "a mix of IBM Watson, opensource and stuff we've developed," launched at the beginning of 2018 and has been in development since then. It's just about to come to market.

What we like about Snyder? He says: "My philosophy on AI is that you shouldn't notice it. If you have an app and it says, 'here is the AI', it's probably a gimmick. We use AI in circumstances where the AI does something that the human brain can't do. But the first thing about AI is to get the fact that it's AI out of your head."

But now all we can think about is AI.

Shadow IT: Are you in or out?

Legal IT Directors discuss whether unauthorised tech projects are to be embraced or avoided at all costs

A growing number of IT Directors at law firms view shadow IT as a positive force, which democratises technology and drives innovation. But this is a topic of stark contrasts, with many heads of legal holding very widely differing views.

Nick Capell, IT Director at Gateley, believes that shadow IT has an important role to play in challenging the IT function and enabling people outside of the tech team to feel empowered.

"I am perhaps a little unusual amongst CIOs, in the sense that I don't view all shadow IT as bad news," Capell says. "But – and it's a big but – you need to make sure that any ideas that come out of shadow IT have a logical place in the medium- to long-term strategy and, of course, that they follow policies, especially information security-related policies."

Eversheds Sutherland IT Director Andrew Mcmanus also believes that it can be beneficial for IT teams to allow a degree of shadow IT to exist within a firm.

"I'm a big fan of it. It sounds a bit weird, but sometimes people think we, in IT, have to control everything," Mcmanus explains. "If we can get our lawyers, and our support teams, to find solutions that improve the way we service clients or make our operations more efficient, then that is a good thing.

"As long as we can control the risk and the interaction of any system with the core data set, then I encourage it," Mcmanus adds. "Do I want them to go out and buy lots of things without telling me? No, I don't. But do I want more than just the IT department looking at opportunities for technology? Absolutely. I think that's what shadow IT is all about."

Indeed, while IT has historically been the realm of a small number of deeply technical individuals, the nature of the tools available, plus growing tech awareness in all walks of life, means that there is more latent tech capability in non-IT teams than ever before.

"I am very keen to embrace that," says Haig Tyler, CIO at Herbert Smith Freehills. "We do need to be able to maintain a degree of control, however, particularly around the use of data, the quality of data and access to that data.

"We are starting to take some relatively small steps in terms of looking at the capabilities of Office 365, in particular. There is some tremendously rich capability there that can be used in a really simple way. So, I don't really worry too much about shadow IT. We want to embrace all the capability we have across the firm."

Mission control

For others, however, shadow IT is still something that is to be avoided and structures and procedures to limit its prevalence are a priority.

"I can understand why it happens, but I don't think it should happen in an ideal world," says Chris White, CIO at HFW. "The reason it happens is that users become frustrated if they feel that central IT cannot deliver what they want, so they go off and do it by themselves. That may solve the immediate need, but it creates lots of long-term issues. My view, very strongly, is that we should have a single IT strategy for the business, with standardised tech across the world."

White adds that one of his primary objections to shadow IT is that it isolates technology solutions, preventing them benefiting the wider firm.

"One of the reasons I don't necessarily like shadow IT is that if someone goes off and finds something that makes their lives easier, we really need to make sure

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other people in the firm can benefit from that," he says.

Paul Greenwood, CIO at Clifford Chance, believes that a centralised budget is key to controlling unwanted shadow IT. "I don't think we really have very much of it, thankfully," he says. "Everything is kept in a single global IT budget. Offices then receive a recharge. Everything is consolidated in one place to manage total IT spend for the firm."

Withers, meanwhile, uses a combination of centralised IT spend, rigorously enforced policies around security approval for new services, and increasing capability for tracking what applications and services are being used across the firm to monitor and control shadow IT.

"Between those things we are typically aware of anything new that is coming up," says Withers' global IT director Stewart Crane. "It's not perfect. There are always things that slip through the net. But, on the whole, shadow IT is not a big issue."

By Amy Carroll
This is a topic that will be in focus at #GlenLegal19 on 3-5 March when Razvan Cretu, CIO at CMS, talks to the audience about his approach to eliminating shadow IT

Solomonic talks data

Litigation data and analytics startup Solomonic was recently rolled out by Herbert Smith Freehills across its UK disputes team and they are working closely with Stewarts Law. Don't know much about Solomonic yet? You do now.

Who are you and where you do come from?

We are Solomonic, a UK based and focused litigation data and analytics start-up. Started in late 2017 we have our first commercial offering, analytics and data covering the past 15 years of the Commercial Court, live in the market. We bring together legal experts, (our founders Gideon Cohen, a barrister at One Essex Court, and David Cohen, a tax solicitor with Keystone) and data science (co-founder Dr Henry Stott, a behavioural data scientist who also runs professional services consultancy, Decision Technology). Our chair is experienced M&A strategist Natalina Bertolli and we have Chris Style QC and Ian Terry as our advisors.

Can you tell us a bit about your tech stack?

To build our minimal viable product (MVP) we quite quickly jettisoned any AI or other seemingly fashionable technology and used very smart trainees and barristers to triple review every judgment. That rigorous data does have some sophisticated multi-variate predictive models thrown at it, but in the main we use tried and tested robust statistical modelling to drive a dashboard which contains a series of data views that users can filter against by legal subject, judge, compensation sought, application types and so on.

As we move beyond MVP into fast growth we have gone back to looking at and investing in machine learning tech to make our data mining, extraction and ingest more efficient, without removing the need for experienced barristers to review each judgment.

Ultimately, the best results and outcomes for clients will come through the intelligent combination of the litigators' expertise and experience and our analytics.

There is a reality check here, which may not be that exciting to those believing AI is going to take over the world, but the good news (for lawyers anyway) is that the technology of today is not good enough to replicate their analytical, interpretive and decision-making skills.

We know that in the high stakes and high value world of litigation, our analysis has to be rigorous to be trusted so we can't afford to produce sloppy data.

The good news is that Innovate UK shares our vision for augmenting human intelligence and has awarded us funding to optimise the role AI can play in the expansion and acceleration of our business through machine learning and neuro-linguistic programming (NLP) and we will be working with our partner, Warwick Business School, to do just that over the next 12 months.

And the clients you work with?

We have been extremely lucky to have developed some great partnerships, especially with Stewarts, who are a very smart and innovative firm and with Herbert Smith Freehills, who have a really sophisticated vision for the way in which litigation and risk advice is designed and delivered.

Right now, with our focus on the Commercial Court, our market is mainly with the leading UK firms, but we are seeing interest from US firms and from litigation funders. Our next area is the Chancery Division - we have already started on that, planned for release in May and then tax and employment. Thereafter we are going to be led by where the market demand takes us – that may be international.

What problem is it that you are trying to solve?

We help solve two problems. The first is around helping litigators and their clients better evaluate risks, probabilities and therefore decision-making related to a piece of litigation. Today so many of these decisions are

made without access to rich data, especially valuable where the outcome slides towards the 50/50 mark. This is especially painful for clients in data-driven businesses and particularly at board level.

The second problem we help solve is the litigation research task. Our data and analytics are focused on outcomes and variables that impact your strategy and prospects – which claims and applications win, which don't, what impact the judge has, which barrister you should use and which experts you should select. All our data resolves to the underlying case law so it makes it very quick and easy to get the right answers. In addition, because we have tried so hard to be comprehensive, you are less likely to miss those needles-in-a-haystack cases because we have mapped them, whether by outcome, by judge or by case type.

Can you give us a cool example or two of your tech in action?

We had one a couple of weeks ago. Our data shows in nice and very statistically robust terms that Section 68 arbitration appeals fail over 85% of the time. The litigator knew the prospects were poor, but to have the data to hand (all S68 appeals for the last 10 years) in a simple–to-grasp set of pie and bar charts made it that much easier to persuade a client that appeal was not really an option.

What do people assume is possible that isn't? 95% outcome prediction of a piece of commercial litigation, in a world where cases that go to judgment take on average over three years. No sane litigator or client believes that's possible.

Where do you see this going in terms of future roadmap?

Well, we want to provide a comprehensive commercial litigation view by covering Commercial and Chancery, then areas with high value litigation, tax, employment and potentially others. The Appeal court has come up and we also think once we have our operating rhythm right, we can focus on other jurisdictions so users can compare prospects.

What are the challenges?

Data, data, data. Data in the UK is so hard to aggregate, mine and ingest because it is so piecemeal and patchy in how well it is assembled, recorded and stored.

How do we address the lack of publicly available case law?

By getting HMCTS to focus on the basics, not just basic document provision, but all the basics. It feels like we have been seduced by online courts and dispute resolution where, right now, what everyone wants is for the basics to be done better. That and a couple of court document API's would be nice.

BLM: "You don't get AI in a box"

BLM's IT director Abby Ewen this month talked to Legal IT Insider about the UK top 40 law firm's selection of iManage RAVN and it's worth flagging a couple of points she made about the dos and don'ts of using AI technology.

BLM is using RAVN Extract to help capture unstructured data from its documents and emails which, working together with its data analytics team and in partnership with the London School of Economics (LSE), will form the basis of predictions around costs and claims outcomes.

BLM handles nearly 70,000 cases per year on behalf of insurance companies and currently much, if not most, of its data is held in unstructured form in documents stored across the business.

What sealed selection of the RAVN tool was a proof of concept in which RAVN was able to locate an accident report form that was located in an attachment containing multiple documents within an email box containing 7,000 emails.

Ewen told us: "We have all kinds of use cases in mind and we are forming a triangle between RAVN, our data analytics team and our partnership with LSE: we're using RAVN to extract the data which the LSE team can then use to inform their thinking. We have loads of data, including structured data, that comes out of our case management system and this is a way to amalgamate all our data and then to build complex algorithms from which we can make predictions and build tools."

But the bit that is worth revisiting is her observation that law firms can't just buy complex tech and expect it to work without further input. She told us: "We often don't have the right capability to know how to use this kind of technology and many people struggle to make it work. What is a shame is that many expect these kinds of tools to work out of the box, and when they don't the tools get the blame."

She added: "You don't get AI in a box – you need the business input because the business needs to be defining the question you need to answer. What is the client problem you're trying to solve? It has to be defined."

Quote/Unquote

"It took NetDocuments 10 years to be an overnight success, and that's how this works. We've been at this 10 years, and this year or next year we're going to be an overnight success."

Epona's US senior consultant Keith Vallely can taste "overnight success", although we warn you: NetDocuments has been at it since 1999!

PayneGroup launches template tool

PayneGroup has just released new template creation and management software designed for small to mid-sized organisations. It's called KIT, which stands for 'keep in touch'. The software works with Microsoft Office 2013 and up (Office 365, 2019, 2016 and 2013) on a Windows platform.

Founder and CEO Donna Payne tells us: "KIT provides an easy-to-use wizard and plenty of bells and whistles for creating your own customised templates including letter, memo, fax, envelope, label, agreement, DocID functionality and more. These templates include branding and formatting and can be set up in 30 minutes or less, without technical expertise. The wizard walks you through the entire process. For the individual user of the software, creating documents will be easy and seamless."

KIT is intended to be an affordable, subscription software and Payne says: "It is available at a fraction of the cost of traditional, large firm macros and template solutions. For larger firms, however, PayneGroup also has Forms Assistant which includes even more customisation options and features useful for international firms."

PayneGroup is creator of the first metadata removal tool, Metadata Assistant, along with Redact Assistant, Outlook Send Assistant and Numbering Assistant. They also offer master classes, migration consultation, training and support.

To sign up for a webinar on KIT, visit https://new.thepaynegroup.com/calendar-of-events or email CustomerRelations@thepaynegroup.com.

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Glenn LaForce joins Shearman

The start of this year saw Handshake Software's chief strategy officer and EVP Glenn LaForce join Shearman & Sterling as global director of knowledge and research.

A great role for LaForce, it has nonetheless led to speculation that the Aderant marriage (the knot was tied in August 2017) with the knowledge management vendor isn't working out.

Speaking to Legal IT Insider, Aderant's executive vice president Chris Cartrett says that couldn't be further from the truth.

"From our side Glenn was outstanding and I was as impressed with him as anyone I've worked with. Our Handshake business has taken off. After we acquired them it was almost like they needed a larger investor: the growth we had last year was their biggest year.

"We hired a new product manager three months ago and we've been expanding the team and adding more people in London. The growth has been outstanding."

In addition to the hires Cartrett adds: "By being a part of Aderant, Handshake has a far greater capacity because they have the entire Expert team at their disposal."

Declan Tyrell joins Google

Technology consultant Declan Tyrell has left Oracle for a new role at Google, starting in March. He's taking on a global programme manager role with Google Cloud and tells us: "It's an enablement role focusing on empowering sales reps to confidently engage senior executives."

Founder of Lucid Solutions, Tyrell was previously head of finance at leading Irish firm Matheson. He was at Oracle less than a year, having worked as an evangelist to help sales accelerate the CFO's journey to the cloud.

What is a legal technology practice stack and why does that matter?

By Dera J. Nevin

Almost all the work that I do in evaluating, buying and implementing legal technology for use by lawyers is directed at strengthening the practice stack. I distinguish the practice stack from enterprise technology or stand-alone (ad hoc) technology. I define the practice stack as being the technology toolkit containing features and functions unique or tailored to the delivery of legal services. While the ability to apply this definition gets muddy in practice, I find it helpful to focus on the practice stack because it draws attention to how any particular tool under consideration falls into the total enterprise architecture and ecosystem. Considering the part as it relates to the whole helps clarify whether any individual new tool, or tools in the aggregate, place undue pressure on the computing architecture and particularly the desktop.

Let's dig into what the legal practice technology stack is by first looking at what it is not. The first and biggest distinction I make is between practice technology and enterprise technology. This latter generally divides into two main slices. First there are the back-office and administrative technologies: things needed to manage and run the business that lawyers and fee-earners may or may not touch. Examples include the finance and accounting systems and, because these are law firms, conflict and new business intake related-technologies. But these can also include enterprise content management and record-inventory systems, Human Resources and payroll systems, marketing systems for contact and prospect management, pitch development and management, banks for brand identity and, increasingly, expertise management systems. Increasingly, these systems are becoming more sophisticated, and significant attention is being paid to data flows between these systems. Most of these are server-based and are increasingly customisable (not just configurable) and are commanding greater capital expenditures. Only a limited number of these systems are truly cloud-based.

Second are the enterprise productivity technologies that everyone in the business might use, such as a Microsoft productivity suite or email (or similar communications channel, such as Slack). Because so many lawyers use email, Word (or Excel) to develop work product for clients it can, at first, seem that these are practice technology tools; however, consider that everyone in the firm is using these tools (for different things) and also that usually some other technology or attribute brings the content created by these tools into the practice file. For example, email must be filed into the client file (not all email is client-related) and text-based documents are often manipulated (including through secondary technology) into appropriate formats that are practice-ready (think of the extensive macros and styles needed to turn a Word-created contract into something that links defined terms to key clauses, for example).

Practice stack technology is that which is essential for lawyers and fee-earners to deliver services and outputs unique to law. Most of the legal tech phenomenon is concentrated here, and examples are legion. Legal research systems and eDiscovery technologies may have been among the first unique and fully interoperable examples, but other examples now include applications and systems to manage IP assets (patent and trademark filing and management), due diligence systems, contract management and automation systems. Consumer law applications, such as family law child and support calculators and real estate closing managers are also in this category.

One characteristic I highlight for practice stack technology is that it gets deployed across an applicable practice group. This distinguishes this category from stand-alone (or ad-hoc) deployments which are applications that may be deployed to just one or two

users or machines. One example of this might be trial management technology which may only be needed by personnel in hot seat roles. While this is certainly practice stack technology, such applications are in a category by themselves, usually due to their deployment profiles (and sometimes cost).

Practice stack technology remains fragmented, even within a category (like deal support) with many individual applications not "talking" to each other or allowing for easy data-in/out scenarios. Many have features and functions which either don't play well with enterprise technology (i.e. integrating the app into Word breaks something else) or don't integrate at all, creating data silos or lakes of data with unique metadata attributes. Generally I find that vendors of these technologies cannot do a "lifecycle of data" journey, leaving it to buyers like me or other users to understand the full downstream impacts of adopting individual applications in context.

Additionally, while most practice stack technology can give you specifications of what infrastructure is required for performance, there's little communicated about the impact overall on desktop engineering. Increasingly the action in legal technology is happening in these applications, many of which still need to fall behind the firewall, and the likelihood of adoption and sustainment decreases with the number of individual icons confronting any lawyer as they choose to do work. It's not just your technology, its the drive to create and implement dozens of individual apps requiring launching that are increasing adoption challenges. This reduces the likelihood that firms can adopt true "thin client" strategies (which, for some, might be ideal and further facilitate movement to cloud-based systems).

The reason that attention to the practice stack matters when buying for lawyers is that this is where so much of the specialised, fee-earning works gets done. If there is to be any change to the way lawyers work, in terms of efficiency or business process, it is likely here. Sure, lawyers can learn to use Word and Excel better, but systematic changes to workflow are likely to happen outside productivity applications. The deployment and configuration of practice stack technology also significantly impacts IT and security arrangements: these are among the firm's most risk-sensitive assets. Finally, in these systems lie significant data assets that could be tapped for value, either as precedents or predictive exemplars. Getting the practice stack right could yield both efficiency (bottom line) and revenue generation (top line) benefits. The practice stack may also offer untapped opportunities for lawyers to bring new net value to clients, and is the place where lawyers may experience the greatest gains in work enjoyment (for example, through productivity or better UX).

I don't foresee any short-term change in how we generally approach the practice stack, but the impact of dozens of individual applications directed at practitioners may be a significant barrier to widespread re-engineering of service delivery workflow. This could, in its own way, be slowing down greater adoption of technology by lawyers and fee-earners. Certainly, in my first domain of eDiscovery, adoption levels didn't increase until the technology became integrated; that's because systems, application and data integration increases ease of use and drives down overall adoption costs. For this reason, while the current explosion of interest in LegalTech is, on balance, a good thing, merely having more applications is not necessarily better if these do not play well together in the practice stack ecosystem and, overall, increase the complexity of navigating the desktop environment.

Dera J Nevin practices Information Governance and eDiscovery at Baker McKenzie LLP and is affiliated with its WhiteSpace Collab Innovation Hub. Opinions expressed in this article are the author's alone. In this space she proposes to address common questions from readers about the evaluation and implementation of legal technology. You can contact the author at dera.nevin@bakermckenzie.com.

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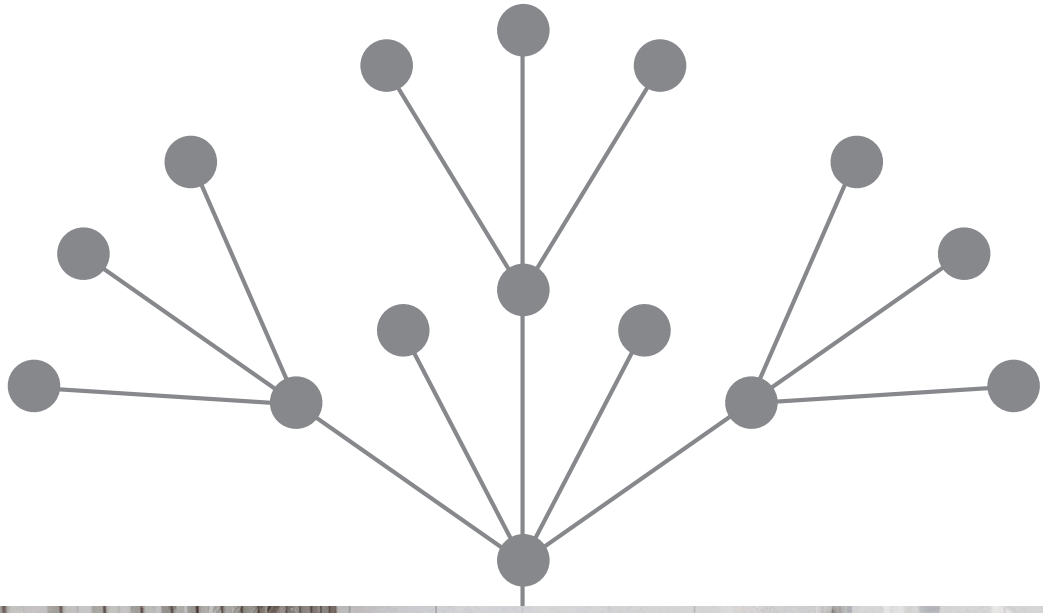

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Top 50 Law Firm Profiles: HSF and Eversheds Sutherland

Continuing our huge project to profile the legal technology capability of the UK Top 200 firms, here we have two of the biggest: Herbert Smith Freehills and Eversheds Sutherland, where we discussed the make-up of the team in terms of people, core systems, investment in IT and strategic priorities.

Herbert Smith Freehills: At a glance

Team size: 280 - 290

Leadership:
Haig Tyler, CIO (global remit, reports to Nicole Bamforth, COO. Tyler also co-leads the firm's innovation and technology activity)
Steve Casey, IT Director, UK, US & EMEA (based in London, reports to Haig Tyler)
David Turner, IT Director, Asian & Australia (based in Sydney, reports to Haig Tyler)
Stephen Andrews, Head of IT Architecture (global role, reports to Haig Tyler)
David Robinson, Head of IT Security (global role, reports to Haig Tyler)
Beth Clapton, Head of IT Assurance (global role, reports to Haig Tyler)

Investment in IT:
In line with industry norms at 4 – 6% of revenue

Innovation:
Co-led by Chief Administrative Officer Alan Peckham, based in Melbourne, Australia, and Haig Tyler.

Newly introduced technology:
- New contract express capability
- New platform focused on share price agreement automation
- Kira for contract review
- Relativity for discovery and possibly for document review
- Developed own dispute decision support tool
- Developed own risk management tool

Priorities:
Digital workplace including move to cloud, ie Office 365; delivering on new technology roadmap for Alternative Legal Service (ALT) practice.

Haig Tyler, CIO, Herbert Smith Freehills

What is your remit at the firm?
My job title is chief information officer. That is a global role looking after the firm's approach to technology, including the obviously enormous remit of running all of our tech platforms.

What is the size and make-up of your team?
We are in the region of about 280 to 290 people. That waxes and wanes depending on any large project activity. Our main locations are London and Sydney. I have five direct reports. Two are regional roles. I have IT directors for each end of the world. Those are the roles to which most of those IT people report. Then there are three global functions. One is head of IT architecture and delivery. One is head of IT security. Then we also have a head of IT assurance, which encompasses finance and risk management. I report to Nicole Bamforth, our COO.

You have recently launched a dedicated legal ops team. Where does legal ops, and innovation, fit within the broader IT team?
I should have said, alongside my CIO role, I also co-lead the innovation and technology activity within the firm, alongside chief administrative officer Alan Peckham, who is based in Australia. It is a very tight matrix-style structure where we all work closely with the innovation leads who are part of the legal operations team. We also have legal process improvement, and legal project management functions within the legal operations team. I very much see those as key to building our legal operating model. You have to have those things in place before you can really benefit from transformative tech.

What are your top level strategic objectives?
Our key objective is differentiation. We want to use technology to differentiate our client experience and our firm. We try to remain tremendously client-focused in everything that we do.
We have an increasing focus on cloud capabilities and that is underpinning a fair amount of our innovation and technology activity. New lawtech capabilities are in the most part cloud platforms and we are becoming far more accomplished and comfortable with cloud.
In terms of internal systems, we remain a very global firm, so we continue to build our tech capabilities on a global basis. And I guess finally, I would add, that we are increasingly recognising that there are a lot of tech capabilities in all our people. It's a societal factor. So, another objective is looking at ways that we can get the best out of our people and their use of technology.

And what are your more immediate, and specific, priorities at this point in time?
At this point in time, our biggest priority within IT is what we call the digital workplace. The digital workplace is about driving a far more mobile and effective working environment. We are basing that around Microsoft 365.

We are looking to adopt as much of the Microsoft 365 estate as we feel comfortable with over the next couple of years. Obviously, that is very much a part of the move to cloud services, but we need to make sure that our clients are happy with the move as well.

There has been a huge amount of effort this year putting in place various pilot activities, as well as starting to have those conversations with clients around their level of comfort with moving to the cloud. What we are seeing, almost universally, is a far greater degree of comfort now than perhaps even a year ago. A number of clients are very actively using Office 365 themselves, and we are targeting some of those with client-facing pilot activity. Some of the most exciting stuff Office 365 has to offer is around collaboration.

Alongside the digital workplace, our Alternative Legal Services practice has just agreed a multi-year road map of technology and that is something that we are just starting to deliver.

How much investment does the firm make in technology?

We are pretty much in line with the market. At any point in time, investment will be sitting at between four and six per cent, depending on where the lines are drawn. We are broadly in the middle of the pack in terms of investment. What's increasing, at the moment, is the focus on investment around innovation. It is still relatively small in terms of the overall IT budget, but it's growing.

What key pieces of technology have you introduced recently?

Importantly, we have put into production a pretty large contract express capability this year. Our legal automation team, which is part of the legal ops function, has done a lot of work to develop that capability, which has been particularly focused on real estate.

Alongside that, we also went live with a new platform focused on share purchase agreement automation. These are the first two systems to have emerged through our innovation and technology process, so it is great to get those into production.

Then there is Kira, in terms of contract review. That is also getting a fair bit of usage. We are expanding the use of our Relativity platform with regards to our discovery capabilities and we are also checking out its document review capabilities.

It is worthwhile pulling out a couple of homegrown systems as well. As part of the technology and innovation stream, we have developed a dispute decision support tool. This effectively provides structure to what would otherwise be a very subjective matter and is something we have written ourselves.

There are also a number of cyber tools that have been developed within the cyber and IP practice, which have attracted attention. We've got a risk management tool we have been developing as well. That one is really interesting because it followed an extensive set of design and thinking workshops with a number of clients and partners. The intention was to create an interactive tool that enables a rich and memorable discussion around risk management. It brings something visual to a subject that can otherwise be somewhat dry.

Do you have any plans to change your core systems?

I think we are very happy with the core systems we have in place. What we are focusing on now is how to better interconnect those systems, and how to better open them up for internal usage and also to clients, through various client portals and client dashboard capabilities.

There is a real latent demand from clients to have better visibility. One area we are working on at the moment is WIP management. We are enabling people to actually see the amount of time building on the clock. We are still only working with a small number of clients but it has proved the concept so we are really quite excited about expanding on that through next year.

What is your approach to shadow IT?

We've got to make more use of the capability and capacity of all of our people. IT has previously been the realm of a very small number of deeply technical people. But the nature of the tools these days is such that there is a lot more that our users can do. I am very keen to embrace that. We do need to be able to maintain a degree of control, however, particularly around the use of data, the quality of data and access to that data.

We are starting to take some relatively small steps in terms of looking at the capabilities of Office 365 in particular. There is some tremendously rich capability there that can be used in a really simple way. We are using forms, for example, to help prioritise our sprint development goals.

So, I don't really worry too much about shadow IT. We want to embrace all the capability we have across the firm. But we do have to do that within various controls, particularly around data.

What is your biggest challenge or frustration as CIO?

Working within a law firm is a unique environment. When I came into the role, everyone said it would be impossible to get anyone to agree and impossible to get anything done. I have been here six and half years now, and while there is no doubt that working with a partnership of 450-plus comes with its challenges, I have really not had any particular problem getting investment for the things that we need to do.

I would say that the big challenge at the moment is around cloud adoption - how to balance the huge upside in terms of security, functionality and capability, with any concerns out there in terms of jurisdictional access. That is our major challenge at moment, but I remain very optimistic and confident that we can get through that.

If we were toasting your success in five years' time, what would we be toasting?

I would like to think that we would have created a highly integrated and cohesive firm that had really built bridges between the legal and the non-legal sides of the business.

I would also like to think that technology had played an enormous role in that, as well as building bridges into our clients' processes and communities. Finally, I would like to think we were doing some really differentiating stuff with our technology. That is what I would like to be toasting.

Eversheds Sutherland: At a glance

Team size: 100 approx

Leadership:
William Jenkins, IT Director – Delivery and Operations (responsible for internal tech systems, reports to international managing partner Keith Froud)
Andrew Mcmanus, IT Director (responsible for client-facing technology and innovation, reports to international managing partner Keith Froud)

Investment in IT:
Unable to provide figures but the investment is growing, particularly in client-facing technology and cyber security.

Innovation:
Led by Andrew Mcmanus. Outsources app development, partners with tech companies for co-creation, leverages Idea Drop

Core systems:
LexisNexis InterAction (introduced 2017)
Intapp – conflict management
Sharedo from slicedbread – Client portal (introduced 2018)

Priorities:
Client technology solutions; solid management systems; innovation

Andrew Mcmanus, IT director, Eversheds Sutherland

What is your remit at the firm?
I am the IT director, but my focus is exclusively on client and legal technology. I also spearhead our innovation push, making sure we are constantly looking at different ways of working. That is not just about tech, but about coordinating our team's ability to come up with new ideas and supporting those ideas, and not necessarily just with technology.

So you have another team keeping the lights on, as it were?
Yes, we have a separate team that looks after the platform of technology that sits behind the scenes, making sure we are billing correctly, storing our documents in the right place, that our emails are working, and our data is secure. Will Jenkins heads up that team. He and I work very closely together as you can imagine.

This change is something that has happened in the last six months. When I joined four and a half years ago, I was IT director of both areas. But four and a half years ago, were our clients and our lawyers demanding so much technology? Was technology affecting the legal sector as much as it is now? Clearly not. And we are keen to make sure that we don't spread ourselves too thinly.

One of an IT director's biggest challenges is what I call the two canoe problem. If you stand in two canoes long enough they are going to drift apart. We have one canoe that is keeping the platform working well, making sure you can log in anywhere in the world and that our clients' data is being looked after. Then there is the opportunity that technology offers in terms of disrupting the legal sector. That focus on the future and innovation is the other canoe. Trying to do both at the same time - not just me, but the team as well - is a real conflict of priorities I think.

How big are the teams?
We have around 100 people in the team, collectively. The majority are in delivery and operations. We also outsource a fair chunk of the work. Our data centre and our service desk are run by a third party. We also outsource an increasing amount of application development.

How are the internal teams structured?
Both Will and I report into international managing partner Keith Froud and I have close links into our co-chief executive officer, Lee Ranson. Within Will's team there is a fairly simple split between operational delivery, programme delivery and security. My team primarily focuses on client technology and innovation. We then have our business partners who are embedded in the organisation and who, frankly, are there to encourage shadow IT. I also have a platform manager, looking after client facing systems. We have a team of people who look after those as product managers. We have a product manager for document automation, for example, and a product manager for client portals. Finally, we have an enterprise architect, just to make sure everything is being looked after and is fitting together nicely.

What is your top-level IT strategy?
Top level, we are certainly focused much more on client delivery. What is it clients need from Eversheds Sutherland and how is tech supporting that? Then we have the delivery of solid management systems: practice management, document management, time capture, as well as core email systems. Third, we have innovation. How can we do things differently? How can we understand the art of the possible and get our lawyers up to speed and aware of our current and future technology capabilities?

What level of investment does technology receive from the firm?
I'm afraid I can't share numbers but it is growing. We benchmark ourselves and we compare with other law firms favourably. We are investing more in all those elements that I mentioned. With client-facing solutions, in particular, we are investing more and more each year. Cyber security is another big growth area, in terms of people and investment. We benchmark to make sure we are investing wisely but,

more importantly, that we are not doing too little and are finding great investment opportunities.

What core systems do you use?

We introduced LexisNexis InterAction, in the US and the UK, in 2017. We use Intapp, heavily, around conflicts and process automation. Most recently, we introduced Sharedo from slicedbread. Rather than replacing existing systems, Sharedo is effectively a client portal solution for our major global clients.

What are your plans regarding new technology?

Loads! The challenge for us, just like every other law firm, is that there is always so much that you could do when it comes to practice management, document management or even email migration. We are looking at refreshing a lot of those systems, making sure we have best of breed. Most interesting is the growth in the numbers of client-facing, or client-impacting, systems. Clients obviously have their own data. A property business, for example, will have its own property portfolio. As a law firm, we also hold the legal information in that area. What we are seeing is those two sources of data coming together. That is where most of our client-facing systems are focused. It means we are able to advise clients on their own business opportunities, not just the legal aspects of it.

You mentioned your business partners encouraging shadow IT. So you clearly view shadow IT as a positive thing.

I'm a big fan of it. It sounds a bit weird, but sometimes people think we, in IT, have to control everything. If we can get our lawyers, and our support teams, to find solutions that improve the way we service clients or make our operations more efficient, then that is a good thing. As long as we can control the risk and the interaction of any system with the core data set, then I encourage it. Do I want them to go out and buy lots of things without telling me? No, I don't. That's where our business partners come in. But do I want more than just the IT department looking at opportunities for technology? Absolutely. I think that's what shadow IT is all about.

What is the firm's philosophy when it comes to innovation?

If we are going to disrupt and change the way we do business, we can't do that alone. I don't think we can go and develop all the systems we need by ourselves, or buy all the systems we need off the shelf.

We invest in application development, through our third party. And whilst we haven't formed a JV, that model allows us to expand that service to deliver client-facing solutions with agility. We also partner with tech businesses, effectively co-developing products that we offer to clients. The tech vendor fronts those up.

Then there is the work we have done with Idea Drop. Idea Drop is effectively an ideation platform that we have recently deployed. Idea Drop allows anyone in the firm to drop an idea, from something we can do differently in the staff restaurant, right up to, 'why can't we have a client portal that is interactive'? Those ideas are funnelled up through a voting system and at the end of the week those ideas with the most votes are progressed.

Idea Drop is really the biggest change we seen over the last six months. It means that a lot of people in the firm that don't normally get air time, such as junior lawyers and operations teams, are coming up with absolutely fantastic ideas. They are not necessarily massive tech programmes. Sometimes they are things we can just do without huge investment.

If we were toasting your success in five years' time, what would we be toasting?

If we can change the way we are working as a firm and that change is not driven just by me and my tech team through the traditional IT project route, but if lawyers and innovation teams are coming up with new ways to service clients using technology themselves, I think that would be a tremendous success.

The other thing would be seeing data as a tangible asset that we measure. There is a move away from people viewing a transaction as a manual, stage-by-stage process, and towards collecting data so that we can start to automate those processes using AI and machine learning to increase speed and reduce cost. In five years' time, I would like to see us valuing data as an asset in much the same way that we value our property, or our lawyers or other tangible assets.

Intapp hires high performance coach

When Intapp announced on 5 February that it has hired a high-performance coach as practice group leader in its professional service firm leaders and partners group, our initial reaction was, say what?!

Darryl Cross will be focusing primarily on the legal community through "audience-oriented thought leadership, evangelism and strategy engagement".

His role, and we're giving you the official line first here, will be to "build communities of managing partners, practice leaders and senior partners and combine them with their clients to give both sides proactive, synchronized choices in how to grow and prosper together. Intapp makes this possible because the future of high performance will be the fusion of technology, training, and teams. His job is to show them how to do it as well as build the culture of trust required to support it."

We spoke to Cross.

Cross comes to Intapp from HighPer Teams, where he was chief performance officer (and founder). He also has years of experience at LexisNexis, including as vice president, performance development and coaching and at Benesch Law, where he was chief marketing officer.

He's worked with law firms for over 20 years including at LexisNexis for 12 years on client development, but he specialises in building teams and helping firms to improve their performance. He told us: "My role within Intapp is how we build not just IT and marketing or risk management and conflicts but with the managing partner, practice group leaders and the fee earners to have a strategy for the use of technology.

"How do we help our clients grow? Strategically, these people have been users of technology, but we are helping them to make better decisions. How do we pair them with the buyer? Not just the GCs but the people they work with like accounting firms and banks, connecting these people so that there's not just silos of technology and data but something that we can make decisions on and apply analytics and AI to.

"We're making decisions on the present but what do we do next? What does the client want? Better transparency in fees and billing and not such an adversarial but a transparent relationship between law firm and client.

"The reason we have alternative fee arrangements and fixed fees and are moving from the billable hour is that the client doesn't trust that they are getting value, but this will obfuscate that."

Intapp at the end of 2017 launched its own consultancy led by Sanjeev Ghandi but Cross says that he will be working independently of that.

For him the elephants in the room are compensation, culture and trust. Build the tech that people trust, then the culture changes and then you compensate people based on the new way of working. "People don't use technology because they don't trust it and we can fix that working with the client. If you can't work without technology, it's no longer a choice, and talking about that is a big part of my role."

HSF gives staff 10 "innovation days" a year

Causing a bit of a stir on social media this month was Herbert Smith Freehills, which has launched a new initiative that will allow its global staff to spend up to 10 days per-year working on "innovation projects."

The new "Innovation 10" initiative will support staff to work on projects that find new and innovative solutions to the challenges faced by the firm and its clients. These projects could include activities such as building legal apps, working on document automation and artificial intelligence tools or working on the firm's blockchain and smart legal contracts project.

The initiative, which was rolled out globally on 11 February 2019, is open to all staff and aimed at further increasing the growing momentum behind the firm's innovation and technology strategy.

Commenting on the move on social media, Legal IT Insider editor Caroline Hill said: "What do clients think of this type of initiative @Hans Albers or @Aine Lyons? To me it shows willing and I suppose that clients realise they will benefit from the output? I do think in many cases the time will be best spent on legal design type projects working hand in hand with the client."

Both Eric Fiszelson, a partner at HSF in Paris and Alex Smith, innovation manager at Reed Smith, which has a similar innovation hours initiative, said: "This is exactly what we're trying to do/doing."

Albers, who is Juniper Network's chief of staff and head of worldwide operations, said: "Well, in itself this is good, of course, although its mostly marketing. As a client in general I expect my firms to work on innovation all the time and first of all define what that actually means. The number of days is irrelevant. Does this mean the billable target is reduced? What does the client want, do we want law firms building apps? No, not really. We want predictability of cost, collaboration and value-added services such as training and knowledge-sharing and management. I can't say it enough: innovation does not equal shiny tools. Technology is sometimes a solution but more often it doesn't solve anything. I don't have the answer either! Innovation at a law firm is a hard nut and from that perspective I appreciate every effort to crack it."

More face to face time

BUILD SOUND MINDS

Creating a positive space to promote mental and emotional wellbeing.

HOW ACTION FOR CHILDREN WORKS

buildsoundminds.org.uk

Registered charity nos. 1097940/SC038092. Company no. 4764232. AfC 0866

ICYMI

A digest of the more important disclosure / discovery news from industry veteran Jonathan Maas' BONG! email updates over the past month

New Discovery Rules / Procedures / Protocols

Disclosure rules "could encourage" partnership litigation

https://maas-bong.io/2Gb48de

This article was written just a few weeks after the start of England & Wales's two-year pilot disclosure scheme but already anticipates with positivity that the new regime will encourage an increase in litigation, especially in the area of partnership disputes in the shadow of Brexit.

NEW: UK eDisclosure Exchange Protocol

https://maas-bong.io/2HXH1p1

With superb timing the ILTA UK Litigation Support Special Interest Group released an Exchange Protocol with accompanying guidelines. Its utility speaks for itself, whether you are in the pilot scheme or not.

Litigators must tread carefully on shifting sands

https://maas-bong.io/2UTRHXp

In the same month The Law Society urged litigators to show caution in the Wild West of the disclosure pilot scheme, a costs-capping pilot and an expected reform to existing procedures related to witness statements. This is all stuff anyone litigating in this jurisdiction needs to be aware of.

EDRM publishes TAR guidelines

https://maas-bong.io/2Xa52gf

In the meantime, EDRM / Duke Law released its technology-assisted review guidelines, intended to "provide an authoritative and clear understanding of the reasons to use TAR" and the processes by which it works. The list of contributors is a roll call of the business' most influential professionals.

Five key takeaways from The Sedona Conference's Social Media eDiscovery Primer

https://maas-bong.io/2SgbXAL

Finally, we hear from The Sedona Conference, another American discovery powerhouse. Their primer "provides best practice guidance on the corporate use and management of social media, as well as their preservation, collection, and production in the form of electronically stored information (ESI)." Another must-have in our growing discovery reference library.

Discovery Decisions

Lessons learned for 2019: Spotlighting the top eDiscovery cases from 2018

https://maas-bong.io/2HH5Cy7

Providing us with a useful look back at top US discovery cases from 2018, with context, is lawyer and eD expert Philip Favro from service provider Driven.

US courts issue conflicting work product doctrine opinions: Part II

https://maas-bong.io/2GdjuOh

This brief article reminds litigators to research courts' and judges' interpretation of applicable work product rules and concomitant privilege calls.

Judge rejects bid to exit shorter trial scheme and compares scheme to new disclosure pilot

https://maas-bong.io/2GUJ3nK

The two-year pilot disclosure scheme is heavily dependent on the judiciary stepping up to the plate and getting considerably more involved in the management of disclosure. I have been public in my concern that judges do not currently have enough time or knowledge to deal with detailed procedural points about disclosure. Here, HHJ Pearce proves that such generalisations do not always work!

New York Appeals Court extends discoverability of social media photos to "tagged" photos

https://maas-bong.io/2S9ju4w

The US courts have permitted the discovery of a user's "private" social media messages, posts and photos where they may contain information relevant to the matters in dispute. Included were photos taken by third parties in which the user was tagged. Online, everyone can hear you scream.

When litigation becomes a "verbal brawl": disclosure must be proportionate

https://maas-bong.io/2UWjW7S

But don't scream in an English court. Passion is good, but shouldn't get in the way of the parties' duty to co-operate.

No bad faith means no sanctions for failing to preserve video of altercation

https://maas-bong.io/2X9M9tH

Breathe easy – you can incompetently destroy evidence and not get sanctioned by the US courts, as long as you did so in good faith!

Discovery Discovered

Some final steps and key takeaways: processing fundamentals series Part 5

https://maas-bong.io/2G8wKUz

Matthew Verga from Xact takes us through some data processing fundamentals that often don't get hauled out into the spotlight.

Managed review, eDiscovery, and artificial intelligence
https://maas-bong.io/2HMBilT
Rob Robinson from ComplexDiscovery provides a synopsis of a longer piece describing how AI tools can be used in high-volume document reviews.

Streamlining the eDiscovery process
https://maas-bong.io/2Gcx0C4
Monica Enand of Zapproved here "discusses the strategies and tactics that in-house law departments can use to transform their litigation response from a reactive situation into a routine business process."

Enabling remote eDiscovery? A snapshot of DaaS
https://maas-bong.io/2HRDxUX
This time Rob Robinson from ComplexDiscovery breaks down the "desktop-as-a-service" concept, the providers of which are "becoming important contributors to the overall technology solution as they allow for the deployment of virtualised desktop experiences delivered to end users on demand from remotely hosted locations."

Understanding electronic discovery: Not just for Biglaw
https://maas-bong.io/2HUHgBn
Megan Zavieh of Zavieh Law explains why every litigator needs to be familiar with the conduct of eD and educate their clients. The interesting, and refreshing, angle of this article is that this is just as important for solo and small firm lawyers as it is for the larger firms.

Discovery for a modern age: eDiscovery, metadata, and cost savings
https://maas-bong.io/2UHPOgi
In this article JD Supra repeats Zavieh's message, but adds more technical detail (such as what is metadata).

The Discovery Iceberg
https://maas-bong.io/2S4RleS
This article of mine gets its annual outing. I explain why it is never possible to provide budgets, let alone single estimates, for discovery exercises, regardless of whether you are working with paper or electronic evidence.

The cold, hard, truth behind "the cold hard truth behind eDiscovery deadlines"
https://maas-bong.io/2X6PObT
Martin Nikel provides a light-hearted, but earnestly meant, piece on the importance of communication and empathy in conducting a cost-effective discovery exercise.

Three ways in-house lawyers are using eDiscovery software to reduce legal spend
https://maas-bong.io/2SeyXA1
Eleanor Brock of Logikcull dives head first into setting up a discovery exercise with the right software. Tip: it's no longer as scary and expensive as it used to be.

EDRM: The eDiscovery energy wheelhouse
https://maas-bong.io/2Xhcmqa
Jen Polzer from QDiscovery playfully likens the seven EDRM stages to the seven Chakras of the body. This may help you get through one more all-nighter!

Interesting Interviews

Live video from Legalweek 2019: Judge Andrew Peck and Craig Ball blow the roof off the joint
https://maas-bong.io/2GcwLqv
Gregory Bufithis' Project Counsel Media team have been videoing interviews with many of the people whose names litter this column each month. Here his team has US eD stalwarts Andrew Peck and Craig Ball in to talk during Legalweek 2019. Both are always worth a listen.

Interview: Retired US Magistrate Judge Andrew Peck of DLA Piper on cross-border discovery and technology-assisted review
https://maas-bong.io/2S88BzC
Same subject, different subject. Here, Chris Dale asks Andrew Peck about the two subjects listed above, plus a little bit more.

Ten years in, and still passionate about eDiscovery
https://maas-bong.io/2XdV6lJ
As you know, I like a good personal insight. Here Alexandra McCombs of PAE talks to Hanzo about her career in discovery.

Distant Discovery

The eDiscovery landscape in 2019
https://maas-bong.io/2HS7J2n
The good people at Lineal look at what lies ahead in the world of discovery: disclosure pilot, continuous active learning (CAL), data breaches and more.

Will lawyers ever embrace technology in eDiscovery?
https://maas-bong.io/2S1yCAF
Brad Mixner's extensive research finds the answer to be a resounding "Maybe".

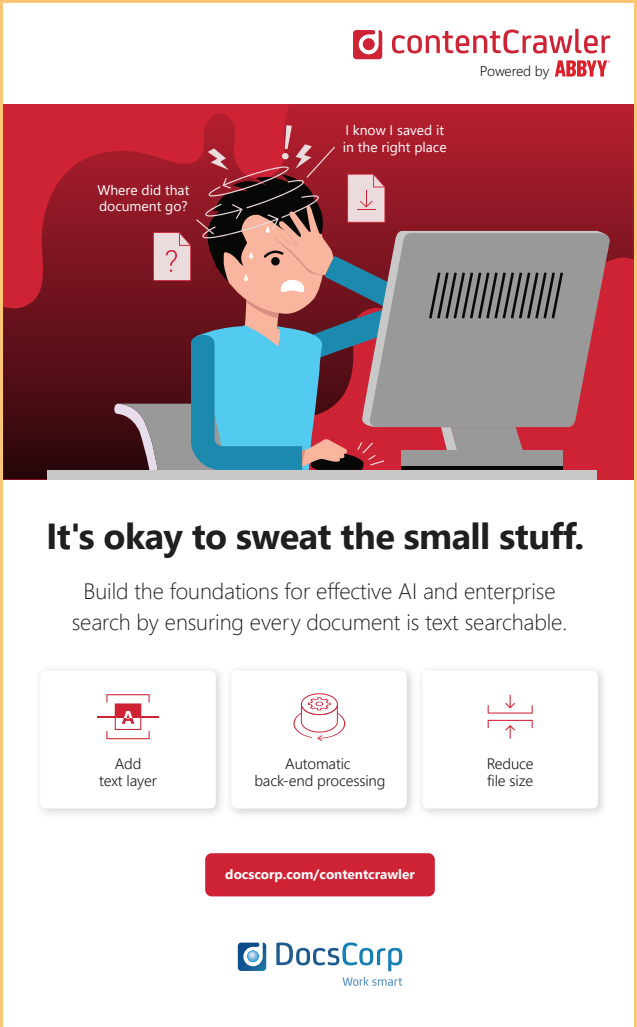
eDiscovery in South Africa - using eDiscovery technology is too expensive for SA??
https://maas-bong.io/2XcMX19
Consultant Terry Harrison is tireless in his efforts to get electronic evidence recognised as a "thing" in South Africa's Uniform Rules. Month by month he inches closer and I look forward to hearing of his success in due course. In the meantime, I encourage the community to follow his journey.

Global eDiscovery market 2019: Research in-depth analysis, manufacturers, and forecast to 2024
https://maas-bong.io/2XcX06n (£)
Last month I mentioned a report by MarketInsightsReports in to the eDiscovery market to 2025. This month it's the turn of MarketResearchNest to look at the market growth. As for the last report, I haven't looked at the 156-page document and I assume it comes at a price.

Lawyers' eDiscovery competence improving, US judges in survey say
https://maas-bong.io/2GUG4eW
Respected American eD commentator Bob Ambrogi reports on the findings of an eD survey of 264 sitting and retired federal judges. The survey was conducted by Exterro and EDRM.

Discovery Diversions

eDiscovery is dead! Long live eDiscovery!
https://maas-bong.io/2HQwOeb
Martin Nikel's slightly irreverent take on the future of eD.



Did eDiscovery undermine the Mueller investigation?
https://maas-bong.io/2ULopu8
Eleanor Brock of Logikcull poses the question and muses the answer.

Zero to sixty in eDiscovery: The value of on- and off-the-job training
https://maas-bong.io/2UUEDRI
This is an insight by Hanzo into the professional life of Richard Brooman, a litigation support manager at Saul Ewing.

The only way is ethics when it comes to eDiscovery
https://maas-bong.io/2Xc6xuf
In this thoughtful article, Lineal ponder the duties, responsibilities and obligations attached to discovery in the UK and the US.

One law school advancing discovery technology education, one student at a time
https://maas-bong.io/2GXLB4r
Mike Quartararo tells us about an upcoming US eD conference that anyone can attend via live stream, at affordable prices.

Interesting Product / Provider News

Relativity brings reduced data fees, unlimited analytics, and a more flexible licensing model to RelativityOne customers
https://maas-bong.io/2G6QPKI
Everyone wants to hear what Relativity are up to, so here's some pricing news you may have missed.

FTI Consulting expands eDiscovery managed services offering to the Relativity platform
https://maas-bong.io/2GbeLwz
And everyone also likes to hear what FTI is up to, so here's the news of their Relativity offering.

OpenText buys Catalyst Repository Systems, Inc.
https://maas-bong.io/2HLTSL3
I'm not sure how anybody in the business could have missed this piece of industry news, but here it is, warm on the heels of Nuix acquiring Ringtail last year.

ayfie to provide groundbreaking artificial intelligence workflows for the Relativity ecosystem
https://maas-bong.io/2HNg3jU
I predict we're going to be hearing a lot more about ayfie in 2019. Here's the first bit.

Deloitte, Relativity partnership produces a Freedom of Information Act workflow tool
https://maas-bong.io/2UGuIPq
And here's my final piece of Relativity news, via Brad Mixner.

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

UK & EMEA Europe's leading human rights organisation has selected **NetDocuments** in partnership with **Tikit**, in a huge win for the two vendors that first partnered in 2017. **The Council of Europe** selected the new document management system after a year-long competitive process that looked at "several suppliers" of document management systems. Founded in 1949, the Council currently includes 47 member states, 28 of which are members of the European Union. The organisation assists these states in fighting corruption, terrorism and undertaking necessary judicial reforms. In addition, the Council promotes human rights through international conventions and makes recommendations through independent expert monitoring bodies, as well as the Committee of Ministers, Parliamentary Assembly European Court of Human Rights, Commissioner for Human Rights and the Congress of Local and Regional Authorities. **John Hunter**, Head of IT Division at the Council of Europe, said: "We went through a rigorous process in which DMS providers were invited to showcase their software to us and take part in an extensive proof of concept. We wanted a best of breed, highly customisable system that could support our user base of approximately 2,500 employees. Tikit and NetDocuments were selected after an extensive call for tender process and demonstrated that they were the best fit for our diverse and complex needs." Hunter added: "The documents we produce are highly sensitive and need to be accessed remotely from our offices in over 23 countries and by over 6,000 external users. NetDocuments ticked the right boxes in terms of our overall needs, in particular security, collaboration, mobility and compliance, and has a solid, proven multi-tenant platform solution. We are confident that, with Tikit's implementation and project management expertise, the implementation will be a success."

After what is described as "a solid and detailed process", Benelux-based international law firm **NautaDutilh** has swapped out its in-house AS/400 project management system with **Aderant Expert**. With more than 400 lawyers working in multiple countries, the firm found Aderant to be the best fit for their current and future requirements, including delivery, scope and risk. "We're looking forward to working closely with NautaDutilh," said Aderant's director of sales for the EMEA region, **Eric-Jan van Alten**. "We feel very honoured to be chosen by one of the largest firms in the Benelux region."

East Anglian law firm **Birketts** has signed a firm-wide deal with client lifecycle management specialist, **OnePlace**. The cloud-based platform will be rolled out across all four locations at the top 100 firm at the end of 2019 following a project led and managed by OnePlace. It will support business development strategy and deliver critical insights into the firm's client relationships, eliminating the existence of data silos and consolidating information in a central location. The improved visibility and new client insights will enable the firm to deliver a superior client experience and focus on the most effective business development initiatives. As the chosen implementation partner OnePlace will provide project management, data migration and all design configuration. The implementation features extensive integrations with other applications, including the firm's practice management and marketing campaign systems and those used for document and pitch management. Mobile functionality will give lawyers access to business-critical information whilst on the move. **Janet Rudge**, director of client services at Birketts said, "A key attraction for us is ease of use - we are confident everyone across the firm will benefit from day one. We plan to use our new CRM system to better understand our valuable client relationships in order to further improve client service and continue to grow our business in strategic areas." OnePlace CEO, **Tim Smith**, commented, "Birketts is growing year on year and we're excited to have been chosen as they move their CRM approach up a gear."

In its biggest UK accounting win to date, **NetDocuments** has been selected by top 20 accounting firm **Saffery Champness** after a competitive pitch process involving five document management systems, with email management cited as a key reason for the selection over and above specialist accounting systems. The selection process was assisted by professional services consultancy **3Kites**, which helped with the requirements-gathering process before an RFP was issued. Recently-joined IT partner **Julie Berry** told Legal IT Insider: "We decided based on a variety of things. We definitely took into consideration that we're UK mainland: we haven't got international as one of our challenges and we were adamant that we just wanted cloud. Some international firms are challenged jurisdictionally and from a client point of view need blended cloud and on prem, but we didn't face that. Berry added: "The biggest area for us to address internally is email management and that was a big part of the requirement, but the specialist accounting DM systems don't deal with that."

Thomson Reuters Elite has announced that legal spend software provider **Apperio** is to enter its partnership ecosystem. Apperio's selling point is that it enables in-house lawyers to track and analyse legal spend across all law firms, in real-time, in one place. Founded by Nicholas d'Adhemar in 2013, it counts the Trainline, Network Rail, Monzo and Just Eat among its clients. This type of partnership means that 3E and Enterprise will now have an integration option with Apperio, which notably works directly with law firms to provide the data to their clients. They will also engage in "co-marketing". The integration is said to be "representative of a sharpening focus by Elite to bring together data, analytics and insights to drive lawyer and law firm decision-making."

Pinsent Masons is working with **CoVentured**, a platform designed to promote collaboration by connecting corporates with start-ups around the globe. "We don't invest directly in start-ups like Allen & Overy or Mishcon de Reya," said **David Halliwell**, the firm's director of

knowledge and innovation delivery, "but we do have a combination of different things we are doing in a similar space." The firm has a track record of building its own internal capabilities, including workflow platform Matter Management, developed over the last two years. Pinsent Masons has also collaborated with technology companies to create joint venture propositions, including cloud-based compliance platform Cerico which it built alongside Campbell Nash, a consultancy owned by technologist James Armstrong.

UK top 200 London law firm **Anthony Gold** has selected SharePoint/Office 365 document and email management system **Repstor custodian for Legal**. The O365-based software, which benefits from a similarity to Microsoft Outlook, will restore order to email filing, enhance remote collaboration and provide more granular content security. Anthony Gold employs around 170 people across three locations in London, and at least half of its fee-earners frequently work from home. The firm turned to custodian for Legal to make remote collaboration easier and to reduce the time being lost daily to email filing. "Filing and email management are huge consumers of time because of the sheer volumes of messages transmitted each day in relation to client matters," said managing partner **David Marshall**. "The software makes fuller use of our existing Outlook 365 investment - cloud space we have already paid for - which makes custodian for Legal a very economical option," Marshall added. Anthony Gold will roll out the new software in stages over the next six months so it can build on each practice group's experiences. In due course the firm wants to make use of shared workplaces with clients so legal teams can collaborate and share documents securely online. "The discrete security options with custodian for Legal are very useful," Marshall notes. "It means we can lock down individual matters or practice groups so only certain people can access the content

Legal AI platform **Luminance** has raised a $10m second round of funding from existing investors, including Invoke Capital, Talis Capital and Slaughter & May. The latest financing values the business at $100m. "Where we need the additional bandwidth is having people all over the world who can work with our clients and help them understand how to get the best out of the technology," Luminance CEO **Emily Foges** told Legal IT Insider. "Then back in Cambridge, where the development team sits, we are really building the expertise in machine learning that has been behind our success so far. Those are the two places where we will be deploying this capital," Foges added. Launched in 2016 by a group of mathematicians and software engineers from the University of Cambridge, Luminance machine learning technology is already deployed in over 130 organisations on six continents. The company has recently expanded from offering a single due diligence product for M&A to include products focused on compliance, discovery and real estate. Luminance has raised $23m in total since 2016.

DAC Beachcroft LLP has selected a machine learning-based email security platform from Tessian to support their new cyber security strategy. Deployed across its offices in Europe, Asia Pacific and Latin America, the platform helps prevent the firm's 2,500 employees from sending misaddressed emails that could potentially lead to loss of confidential client data. **Tessian** also detects highly sensitive information leaking out of the business via emails sent to unauthorised or personal accounts. "Our colleagues deal with highly sensitive client data on a daily basis and we wanted to be able to support them to work with that information confidently without the fear of a data breach," said **Andrew Keith**, COO at the firm. "Having Tessian in place has given us confidence that the risk of a data breach at DAC Beachcroft has significantly reduced. Within just four weeks we saw how Tessian mitigates the risk of potential data breaches, and the benefits have been almost immediately recognised by all at the firm." **David Aird**, IT director, added: "Our lawyers are busy with client work, and the simplicity of the platform has meant we don't have to worry about simple human errors such as entering the wrong email address. Tessian stood out from other solutions on the market because its machine learning approach meant we could automatically protect the firm from misaddressed or unauthorised emails and non-compliance on the network without any end-user behaviour change, something we believe is essential for our busy colleagues."

BLM has selected **iManage RAVN** Extract to help capture unstructured data from its documents and emails which, working together with its data analytics team and in partnership with the London School of Economics (LSE), will form the basis of predictions around costs and claims outcomes. BLM handles nearly 70,000 cases a year on behalf of insurance companies and currently much, if not most, of its data is held in unstructured form in documents stored across its network. What sealed the selection of the RAVN tool was a proof of concept in which RAVN was able to locate an accident report form that was located in an attachment containing multiple documents within an email box containing 7,000 emails. Speaking to Legal IT Insider, BLM's IT director **Abby Ewen** said: "The fact that the tool could pick through thousands of emails and attachments and, within a big PDF, locate the form and extract the information we needed to put it in a database impressed us both in terms of that specific task but also what that means for what we can do with it in the future."

Leading independent Dutch law firm **Van Doorne** and UK-based **Nalytics** search and discovery platform have jointly developed the **Bulk Document Compare** solution as part of the product's Legal Toolkit. This new innovative solution makes it easier to compare documents in bulk in order to quickly and accurately identify differences to further decrease the margin of error in Van Doorne's work. **Jos van Doorn**, R&D manager at Van Doorne, said: "We needed, for our corporate clients, to be able to compare Land Registry extracts and mortgage-related data in a fast and more effective way. As there is a lot of pressure to provide this information to the Land Registry on time, we needed a solution to address this and to help deliver the best possible service to our clients. Before, our notary office was managing the comparison of these bulk documents manually. This process was sub-optimal and, with the

Simplifying Security for the Legal CISO
iManage | Workshare Change matters
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newly created solution, we save valuable time and also decrease the risk of errors."

Innovate UK, the UK's innovation agency, has awarded national law firm **Weightmans** and software developers **Frontier Labs** a six figure sum for a research project to help better predict the cost of personal injury matters in order to inform the money that their insurance clients put aside for payouts. The grant will enable Weightmans and Frontier Labs to research, design, develop and test a proof of concept over an 18 month period, with the aim of creating a product that augments and guides legal experts when estimating the amount that insurers will have to pay. **Stuart Whittle**, director of business services and innovation at Weightmans said: "The legal industry is facing increased demands from clients for data-driven intelligence, but data alone cannot provide all of the answers. Through our work this year, we recognised that, to create truly useful intelligence, a human-centric approach is key. Working with Frontier Labs we identified a real market opportunity to disrupt and innovate by developing this data-driven reserving tool with our people at its heart. The funding will enable us to push our proof of concept further, turning a great idea into a true innovation. The potential is huge and, if successful, the value of this product to clients could be in the hundreds of millions."

Global firm **Herbert Smith Freehills** (HSF) has confirmed that it has completed the first stage of its development deal with **Solomonic** to test how data extracted from judgments might help better prepare clients facing litigation. The firm has now agreed a deal to roll out Solomonic's litigation analytics platform across their UK disputes team. This HSF partnership looks to provide all HSF's lawyers with hard data and analytics on all the sitting judges in the Commercial Court - as well as the most recent eight retirees - going back more than five years. **Donny Surtani**, a partner at HSF, said: "We are very excited to be further cementing our relationship with Solomonic. The use of litigation data and analytics is an important tool shaping the future of how litigation is practiced." **Gideon Cohen**, barrister and Solomonic co-founder, said: "2019 is off to a great start. Herbert Smith Freehills are top ranked globally for their litigation work, and we are very excited to be deepening our relationship with them. In particular, we look forward to working with them to mould the new offerings we are developing for settlement data and Chancery Division judgment analytics."

Norwegian firm **Brækhus Advokatfirma DA** has partnered with UK-based **Sysero** to automate and streamline its document creation process. The firm will use Sysero's technology to enable its lawyers to turn frequently-used documents into re-usable templates that can be shared across the firm. **PSA Consulting**, Sysero's Nordic implementation partner, is implementing the firm-wide solution. "We wanted to minimise the work interfaces that a lawyer needs to access in order to provide legal advice," explained **Christian Bendiksen**, a partner at Brækhus. "Sysero will help us take our template management to the next level by enabling lawyers to create, automate, share and save documents from directly within Word. Over time, we expect to tap into more of Sysero's potential as part of our strategic plan for technology implementation."

Dorset-based **Frettens LLP** have selected **Hubshare** from **Nikec Solutions** as their client portal and document collaboration platform. **Jane Newman**, IT manager at the firm, said: "At Frettens we pride ourselves on understanding our clients' needs and offering the best ways to communicate with them. Hubshare allows us to enhance the way we share documents and communicate with our clients in an efficient way. We always try and use technology to enhance our client offering and Hubshare now allows us to do that. Being able to create portal templates, brand and customise at the click of a button makes life so simple. We are looking forward to pushing the boundaries of the platform and really enhancing our clients' experience in dealing with us." **Damian Jeal**, managing director at Hubshare, commented: "working with the team at Frettens has been a pleasure. Our client engagement team has worked alongside Jane and her team to help them get the best from the platform. It's great to see a firm invest time and effort into implementing a solution, which we all know is key to making a project successful."

North America In the latest eDiscovery consolidation move, **OpenText** has bought **Catalyst Repository Systems** for $75m. Catalyst will be integrated into OpenText's Discovery Solutions, helping customers further leverage their technology investments and benefit from OpenText's continued investments in innovation. "The joint strength of OpenText and Catalyst confirms our position as a leading provider of eDiscovery technology and combines a powerful set of solutions to help corporate legal departments and law firms seize the opportunities of automation, digital transformation, AI and machine learning," said **Mark J. Barrenechea**, OpenText CEO & CTO. "The legal industry is at an important crossroads and OpenText is a strategic choice for legal industry leaders, ensuring they can continue to offer compelling service, help their organisations navigate uncertain regulatory environments and secure successful outcomes for their clients."

IP management platform **Anaqua** has announced it will receive a "significant equity investment" from **Astorg**, a leading European private equity firm. Astorg will become the controlling shareholder, replacing Insight Venture

Partners and Bessemer Venture Partners. The transaction will accelerate Anaqua's global organic growth and acquisition strategy. "Astorg will be a great partner going forward and this strengthens Anaqua's capacity to pursue strategic growth initiatives," said **Bob Romeo**, CEO of Anaqua. "This is a clear vote of confidence in Anaqua's direction, products, services, people and clients." **François de Mitry**, managing partner of Astorg, observed: "From our initial interactions with the Anaqua team, we recognised a unique ability to deliver consistently innovative market-leading, differentiated solutions." **Michael Beetz**, a director at Astorg, added: "Anaqua's unique partnership with its clients, combined with a clear vision to transform IP into business success, will be a game-changer for the IP industry."

Contracts AI company **Evisort** has announced $4.5m in seed funding. **Jerry Ting**, CEO and co-founder, remarked: "The AI-enabled contract review and data extraction space is one of the most active, fast-growing and exciting segments of today's legal technology industry. Evisort has had a remarkable evolution since our founding in 2016 at the Harvard Innovation Labs. Our company has grown exponentially, in large part thanks to our customers who are invaluable collaborators. Our clients are now working side-by-side with us as we design a contract review product to be uniquely useful and customisable for our present and future clients' specific needs."

FileTrail Inc. has announced that Am Law top 10 and leading global law firm **Hogan Lovells** has selected FileTrail to replace its legacy records management system. The firm selected FileTrail for its seamless integration with **NetDocuments**, as well as its ability to integrate with other data repositories in the future to gain a more comprehensive and cohesive records management system. Looking beyond its RM needs, the firm is implementing **FileTrail GPS** – Governance Policy Suite - to move its information governance forward. Hogan Lovells chose GPS for its ability to apply both internal IG policy and outside counsel guidelines across multiple data platforms, along with its automated retention and disposition and its advanced matter mobility tools. "We chose FileTrail for their holistic approach to information management. Their advanced RM and IG solutions will automate review cycles and move our IG programme forward," said **Joanne Smith**, Hogan Lovells senior manager, Document Management Applications.

Movers & Shakers

UK & EMEA Drafting automation provider **Clarilis** has hired respected former UK top 50 law firm partner-turned-consultant **Richard Haywood** as its chairman, as the private equity-backed, UK-headquartered firm looks to refine its strategy and scale its offering. Haywood, who is currently a consultant at RPC, was a corporate partner at Wragge & Co (now Gowling WLG) for 25 years and served as managing partner of the firm. He joined RPC as a partner in 2013 and was a non-executive director of CloserStill Group Limited prior to a successful exit for Inflexion Private Equity and NVM Private Equity - NVM invested £3.1m in Clarilis in 2018. Co-founded by James and Kevin Quinn, Clarilis launched its solution in 2015 and has quickly established itself as a leading platform in automated document drafting for the legal community - it combines automation capability with an in-house team that helps to keep projects on track (lack of resource is often cited to Legal IT Insider as one of the biggest reasons that automation projects fail). Haywood said: "I first came across Clarilis when RPC became an early customer. I was very impressed. The business combines a proprietary technology platform with an internal team of experienced lawyers and automation staff. This not only provides customers with the software, but also with the help they need to implement it."

DWF is continuing to expand its legal technology capabilities with the recruitment of **Jamie Whalebone** as head of legal service delivery and transformation. Whalebone previously ran Freshfield Bruckhaus Deringer's legal technology operations team, created at the start of 2018 in order to connect fee earners with the firm's global technology and innovation division. DWF has made a number of senior tech hires over the past year as the firm gears up for an IPO on the London Stock Exchange.

BigHand has announced the formation of a newly expanded account management function to better support

its customers in operating more efficiently as businesses. **Dan Wales**, strategic accounts director, will lead the Top-100 and EMEA account team, reporting to **Dan Speed**, managing director UK & EMEA. Joining Wales's team are: **David Jones**, business development director dedicated to Top-100 customers; **Matt Dobson**, strategic account manager, joining from Thomson Reuters; **James George**, strategic account manager, joining from Oracle; and **Mohamed Ahmed**, business development manager dedicated to European customers. **Rachel Gray** takes the reins as regional sales director, UK, having worked client-side for a law firm. Matthew Davis, recently promoted to client solutions director, leads this team. Speed commented: "Following our success in voice technology BigHand has evolved to help law firms become more efficient across the whole of their back-office operations, as well as understand and improve profitability in the front office. Dan Wales has slotted into our team perfectly since our acquisition of DW Reporting in April 2018, and we are delighted to give him the resources he needs to build on this success in the Top-100 and European segment."

London-based Fintech and legal data consultancy, **D2 Legal Technology LLP** (D2LT), has announced the appointment of **Jason Pugh** as a managing director. Pugh is an experienced derivatives lawyer and banking professional and brings to the role a range of legal, financial services and risk management expertise from his background at Clifford Chance, Morgan Stanley, Barclays and Deutsche Bank. He will also bring a comprehensive understanding of the challenges currently facing financial institutions and the role that legal technology plays in standardising numerous documentation processes across the sector in the face of advancing regulatory change. "This role perfectly combines the components of my experience in risk management, the legal sector and financial services," Pugh explained. "It is a huge opportunity to leverage my experience and support the D2LT growth strategy of developing new and sustainable offerings at a very exciting time for the firm." **Akber Datoo**, founder and managing partner of D2LT, added: "We are thrilled by Jason's arrival and have every confidence in his abilities to provide strategic input at such an exciting time of innovation in the way legal services are provided and the embracing of Legaltech in the face of the relentless onslaught of regulatory change for our clients. The company has a huge opportunity to leverage his experience and background, enabling us to develop our product offerings and positioning as market and thought leaders at this intersection of Fintech and Legaltech."

North America **Enable Business Solutions** has hired legal tech industry veteran **Jake Laliberte** to head-up further growth in North America, supporting the expansion of its proposal software PitchPerfect in the region. **Michael Davis**, formerly at Thomson Reuters Elite, will support Laliberte. Laliberte, who previously worked as senior vice president, enterprise solutions at Fulcrum GT and, before that, at Intapp as vice president, global accounts, has worked in the legal technology sector for 30 years. He is best known for his role as director of sales, global accounts at Elite, where he was for 16 years. **David Lumsden**, CEO of Enable, said: "With our expanding PitchPerfect client base around the world we are very excited to announce that Jake and his team have agreed to represent us in North America and Canada. With his knowledge of and expertise in the legal industry this will substantially drive growth in this area". Enable PitchPerfect clients already include Gibson Dunn, Reed Smith and Baker Botts. The solution is accessed via a ribbon in Word and PowerPoint and enables users to create pitch documents and marketing collateral complete with images and text extracted from multiple sources across the firm without experiencing the usual formatting issues. Laliberte, now VP of North America, said, "David and I have been discussing this for six months and hit it off as we have lots in common. I took a look at the product: it's innovative and I know clients such as Reed Smith well. I'm really looking forward to working with the team." Davis has worked with professional firms for over 30 years, including over 20 years at Elite. He will be responsible for working with firms in Northeast America.

Iridium Technology LLC, a global provider of business information solutions for law firms, has announced the appointment of **Rod Wittenberg** as vice president of sales, North America, where he will lead Iridium's direct and channel sales efforts. Wittenberg will be responsible for developing Iridium's sales strategies to accelerate revenue growth as well as align company resources to deliver business and technology solutions that enable client success. Previously he spent 25 years with LexisNexis, most latterly serving as the senior director of sales, LexisNexis IP. "We are incredibly excited to have Rod join the Iridium team," said **Tom Jones**, CEO and president of Iridium. "Rod has a deep understanding of the business of law. He has spent the last 25 years focused on helping legal and professional services firms improve their profitability and processes. Rod is a consummate professional, and we are proud to have him represent Iridium in the marketplace." Wittenberg said: "Iridium has a great entrepreneurial spirit and a strong commitment to customer success. They have been achieving 50%+ revenue growth year-over-year for the past five years. I am excited to join an organisation that is experiencing exceptional growth and is recognised as a market leader in business information for law firms."

CMS Report - get involved!

Our case management system survey is just about to go out and will form part of the basis of research being conducted by Neil Cameron, who is writing an extensive - and we mean extensive - report on the legal tech CMS market. The object of the study is to break down the market into the various different types of software; identify the range of functionality that is being provided to law firms by these systems; what is current best practice; and the likely future direction for CMS. It is a big project for us, please give it your support whether you are a user or vendor. Contact neil.cameron@liti.co.uk.

Quote /unquote

"I'm not sure those differentiators are enough to make it a 'world first'! If I ran a similar programme and threw in a 15-minute yoga session and ended the day with dark chocolate Tunnock's tea cakes I could no doubt call it a world first."

Brian Inkster of Inksters Solicitors takes umbrage with a law firm claiming a world first on LinkedIn

legalit insider

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