legal it insider

▸ CC selects iManage Cloud after "close" contest

After the first exhaustive side-by-side evaluation of iManage Work 10 in the cloud and NetDocuments, Clifford Chance has selected iManage, we can reveal, following what CIO Paul Greenwood is at pains to stress was such a close-run selection process that it had to be extended.

The process, which began around 18 months ago, saw the magic circle firm led by Greenwood evaluate four options: upgrading its current SharePoint document management system (DMS); a Netcompany application built on SharePoint; iManage Cloud; and NetDocuments.

Greenwood told us: "We were only looking at the cloud with the option of on premises library an essential feature."

The due diligence was led by a project team that included a wide variety of people from across the business, and which has been praised within the firm for its extensive efforts. According to Greenwood the team worked with 300 lawyers across the firm to ensure a detailed assessment of what ultimately came down to an iManage versus NetDocuments contest. That input was then passed to a business advisory group to assess, verify and give an overall view to the project board, which was chaired by structured finance partner Jessica Littlewood and included four other partners, plus Greenwood, two members of the IT team, and the head of procurement, Nancy Apcar.

Greenwood said: "The business advisory group's view was that both systems were good. One of the points I'd like to make is that this is the first time in decades that law firms have a really good choice - we have two excellent vendors and systems and they are both viable options, and that's almost the first time we've had that. It's great to have choice."

The final decision was made by the project board and Greenwood said: "We really did say 'Well, this is not a bad position to be in, but we have a positive decision to make'. We went through a lot of different factors, including the overall vision and strategy; the detailed user feedback in terms of the user interface and the usability; a detailed evaluation of the merits of the different security; performance; implementation; and obviously the commercials.

▸ Exclusive: Diligent acquires Manzama

US-headquartered information governance vendor Diligent Corporation has acquired Manzama Inc, we can reveal, in an acquisition that comes as Diligent begins strategically targeting the legal sector for the first time, including hiring a VP of legal sales.

Manzama counts among its clients firms such as Skadden Arps, K&L Gates, Mayer Brown, White & Case as well as Allens in Australia and, in the UK, a raft of top 50 firms such as Addleshaw Goddard and DAC Beachcroft.

Its content aggregation and analytics software will continue to be available as a standalone product but will

▶ CC selects iManage Cloud after "close" contest

CONTINUED FROM FRONT COVER

Both won in some categories but iManage won in slightly more categories. In fact, we had to extend the process because it was so close."

The project board's decision then had to be signed off by the international firm's executive leadership board and Greenwood said: "They obviously wanted to understand the process was correct and that the project board was properly constituted and were happy to accept those recommendations."

While NetDocuments is known for its incredible encryption, it is interesting to note that iManage came out on top for security. Greenwood said: "You can't fail to be impressed by [NetDocuments' CTO Alvin Tedjamulia's] vision and what he's done in shaping the conversation. But what we liked about iManage was the maturity of the basic operation such as how much effort they have put into their Belfast centre; the security model of the new architecture; and security policy manager (SPM)." The iManage Belfast office was launched in 2016 to focus on how to provide professional services firms with the highest level of governance and security.

While Clifford Chance has yet to make a final decision on SPM, Greenwood said the team is impressed by the fact that, if a document is blocked by ethical walls, you can still see that it's there and take steps to access it.

Interestingly, the need for a hybrid solution was not a big deciding factor as between the two main systems, and Greenwood said: "Both offer the ability to have on premises libraries: just look at what Orrick has done with NetDocuments. They approach it in slightly different ways so there are pros and cons. The beauty of iManage's storage and processing is that it's on premises. So, in a given jurisdiction if you need to guarantee that a document never leaves that jurisdiction, you can guarantee it. The downside is that it is a separate library and you have to switch to that library. With NetDocuments, the beauty is that wherever you are it's one library, but the downside is that it's in a single location.

But whereas the NetDocuments versus newer iManage Cloud offering would, until recently, likely have left users far preferring NetDocument's interface, Greenwood said: "The lawyers really liked the iManage interface; they have managed to get the equivalent UI in

the cloud as they have on premises, they have done a lot of work." He added: "Going back to the point about it being great to have a good choice, the amount that both vendors have done in the past two years is phenomenal and that is down to healthy competition, it's really impressive on both sides."

Clifford Chance will use the RAVN search engine but has not yet taken any final decision on using its extraction technology.

The 6,000 global user firm is the largest law firm to move to a cloud-based DMS, although Dentons has secured iManage Cloud licenses. Greenwood told us: "We had a lot of conversations with our project board about the cloud and they met with each vendor. We went through the technology generally and the security. On everyone's mind is that you're making this decision for the next 10 years: do we really think we'll be running an on premises document management system in 10 years? No-one thought we would be and, if we were, it wouldn't be a good position to be in particularly when it comes to collaboration with clients and innovation."

Clifford Chance, which was Microsoft's test case for a legal DMS, is one of the last of the original big law firms to move away from a SharePoint DMS and Greenwood told us: "It was an option to upgrade and would have been cheaper and given people less change: quite a few people asked why we need to change and, if we did change, we wanted to be sure it was worth it. The biggest reason for moving was being able to see email and documents in the same place. In SharePoint you need separate email filing. Our lawyers didn't want that. There's also a number of different ways of accessing iManage: through a traditional web browser; through Outlook or through a folder on your laptop."

▶ Exclusive: Diligent acquires Manzama

CONTINUED FROM FRONT COVER

also be plugged in to the tools that Diligent uses to help senior executives govern their organisations. Diligent, which has not publicly announced the Manzama acquisition, is an SaaS business that counts as its clients 70% of the FTSE 100, 50% of the German DAX, and globally 50% of the Fortune 1000.

There will be many private practice law firms that aren't familiar with Diligent but, speaking to Legal IT Insider, Diligent's EVP and chief financial officer Michael Stanton said: "Today we're the most widely used software

company by senior executives to govern their organisations, from the governance of their documents and information to their voting and reporting. We provide automated boardroom governance in a very neat and intuitive software app that makes it easier for board members and company secretaries to administer and track in a secure and efficient way."

He adds: "It could be that you're talking about executive compensation or a piece of M&A or any development where that information needs to be highly secure in a way that traditional paper isn't: you can't have people leaving printed documents lying around. Sending those kinds of communications on email with a PDF attached is not the most secure." That is particularly, in a situation recalled by Stanton that many readers will relate to, where the PDF is a password-protected file and the password is circulated with the PDF.

The risk and compliance market is worth around $40-50bn and, of that, enterprise governance management is worth around $6bn. Stanton says: "We believe we're not just an early leader but a category definer. There are a lot of organisations that focus on risk and compliance but if you look at the 'G' in GRC [governance, risk management and compliance], that's our sweet spot - the privileged C-Suite relationships."

Manzama will help Diligent to enhance its new insights and analytics offering where a real-time dashboard of curated content can be consumed by board members and GCs.

While Diligent has a number of law firm clients, it has never specifically focussed on private practice law firms. That is about to change as Diligent hires a VP of legal sales and plans to build its resources to focus on a sector where it sees "massive market opportunity."

Stanton says: "Law firms are big businesses that can take advantage of working with Diligent. They have the same governance structure as corporates and if they are deciding partner compensation, I really hope that they are not emailing that communication around."

He adds: "For us, law firms have not been a core focus, but we are in the process of hiring a VP of legal sales and we will put our money where our mouth is: we think the legal sector is a massive market opportunity. We've worked with law firms for years but our sales representatives were covering regions as opposed to industry verticals and if they sold to a law firm it was because that firm was in their territory, not because it was in the legal market. We're still largely region-focussed but now there is more focus on legal: law firms and private equity firms."

Diligent in 2018 acquired German-founded virtual data room provider Brainloop which, aside from some of the biggest corporates in the world, counts law firms CMS, Stewarts and Noerr among its clients.

Stanton says that the due diligence process in the run up to buying Manzama has been an eye-opener. "The newer insight for me into the law firm market as part of my teams' due diligence, in which they spoke to CIOs at the biggest law firms in the world and talked about all the tech they buy, is that it's not so different to listening to corporate CIOs but that there is a vast array of technology being deployed."

Another example of technology consolidation, Stanton says: "Manzama is a beautiful product that we can continue to scale on a standalone basis as well as integrate into our broader offering for both corporates and law firms. The value we can bring is a broader platform: you don't need to assemble five different technologies - we can do that."

▶ Kevin Harris takes over as EMEA CIO at NRF

Former Taylor Wessing chief information officer Kevin Harris has taken over as CIO for Europe, Middle East and Asia at Norton Rose Fulbright, where he is responsible for over 30 offices spread across the EMEA region.

Harris started at the beginning of March and will be based in London. In the UK he also heads NRF's "legal process hub" in Newcastle, which is the centre for much of its legal technology and innovation efforts and where it has links with Newcastle University. The hub opened in 2017 and last year NRF announced that it would be doubling its team from 70 to 140.

In London Harris will head a circa 100-strong team, as well as IT support across NRF's regional offices, and he told Legal IT Insider: "Creating seamless IT support across the whole of the EMEA region is key."

Harris replaces Claire Hamon, who in September last year joined rail and bus company Arriva as group CIO. His appointment also follows the departure in October last year of global CIO Edie Dillon, who was based in Houston, Texas: that role has yet to be filled.

Harris said: "I'll be looking at everything, from how to attract clients with our use of innovative technology to how we service clients, and will be taking a more holistic view of technology. We're doing an awful lot with clients and now is the time to look at how we get more value from that."

NRF has largely stayed under the radar when it comes to its use of technology, but partners such as Nick Abrahams have been working in a semi-outsourced legal operations manner, providing corporate counsel with advice, guidance and training on their use of process and technology.

Harris added: "Instead of running around making a song and dance of the work we're doing with technology and clients we have quietly got on with it."

NRF is among the first UK clients to roll out SAP Fulcrum and is an iManage client. It is working with a number of different AI providers, including RAVN Systems (part of iManage) and Kira Systems for contract review.

Harris said: "Most people seem to be focussing on 'innovation' but we're focusing heavily on the client and their specific needs."

▶ LexisOne redundancies at SAGlobal

Following our coverage of LexisOne's sale to SAGlobal, we've received a comment on the Legal IT Insider website as follows:

"Extremely surprised that there is no further follow-up article around the raft of redundancies announced at SAG for the unfortunate ones who came across from LexisOne.

"Guess the quote around the IP being safeguarded rings more true than the requirement for keeping the legal knowledge within SAGlobal 'Software', as the separate entity was called."

We were previously unaware that there are redundancies at the Seattle-headquartered company but, it turns out, the reader above is quite right.

The LexisOne team includes around 60 members of staff from product development, to product architecture, to those working in implementation and client support. However, it is understood that not all staff were TUPEd across to SAGlobal as part of the acquisition.

SAGlobal, which is a gold-certified Microsoft Dynamics 365 global partner, has around 200 people working in product development in India, and SAGlobal's CEO Stephen James said: "We have restructured some parts of the development and product management in line with our overall group strategy to leverage our product and development capabilities in India. We will no longer be doing the majority of core development in Leeds."

Overall the strategy at SAGlobal is to increase the size of the team, particularly those working in a client-facing role and James added: "The total headcount is set to increase not reduce. We have not put any of the delivery or support team at risk."

More to follow.

▶ Bakers to roll out Onit

Baker McKenzie, led by global director of legal operations David Cambria, is in the process of building Onit as a matter management system, we can reveal.

Speaking to Legal IT Insider about new tech being rolled out at the firm (see interview page 16), Cambria says: "The primary technology we're going to use is Onit, which found its legs doing workflow but also matter management - I've bought from them before and have had input into the product.

"The first thing is that it brings work to the people and pushes work to that individual when I need them

to do it. The underlying system of record is good at breaking down processes into micro-processes, so the workflow goes to the next person. When I've rolled it out elsewhere often people are interacting but don't know - that's the magic of it. You don't have to change the stack, I want to use it as an overlay. It replaces what they were building out in SharePoint."

It is hoped that Onit will enhance the holistic engagement of different stakeholders. Cambria adds: "I'm building it now. Their toolkit understands how to deal with workflow and as an underlying relational database it is highly configurable - I'm configuring it to do what I need to do.

"They don't have an out of the box product but our past history convinced them to do it. They are focussed on corporate but may have one law firm client."

▶ Richard Newton launches echo.legal

Three years after he sold Contract Express to Thomson Reuters, Richard Newton has left the publishing giant and returned to his entrepreneurial roots and has some big hires to announce to boot.

echo.legal is a new consultancy to help law firms set up document templates and provide the people skills to ensure automation projects don't fall by the wayside. It has already become an accredited TR partner - the first Contract Express partner in the TR partner ecosystem. Newton resigned from TR on 5 December 2018 and simultaneously signed a master services agreement to become a TR partner, with echo.legal formed on the same day.

Newton held off launching echo.legal until partner Julie Saliba was ready to join from Linklaters as client services director, responsible for all aspects of client delivery. Julie joined on Tuesday 26 March 2019. Philip Maskell, previously a partner at Business Integrity (the company behind Contract Express) is chief financial officer, and Newton is managing director.

Newton says: "Julie and I have worked together forever - she joined us back in 2004 and was our lead solutions consultant at Business Integrity and the person that opened our operations in the US - she just got on a plane and went to New York and we opened in the States. She ran our knowledge base and started our training programme; she's been a product manager and latterly moved into a technical account role. Now she's an implementation consultant."

Emma Bond joined from Linklaters in January as a legal automation consultant on the delivery side." Newton says: "I've known her as a customer for over a decade. She's a mathematician by background but has long been in law firm knowledge management: at Nabarro, then Olswang, then Penningtons. Linklaters hired her at the end of 2016." It is understood that Bond

was about to move to another UK top 20 firm.

Newton adds: "What I'm trying to do is build a team of exceptional talent: our USP is experience, 'we've done it before and have high quality people': there's more in the pipeline."

Newton says the plan is to scale up so that echo. legal becomes a cost-effective alternative to law firms building up their own internal resource. "We've done three customer engagements so far, for UK top 20 firms," he says.

The company will compete on a service level with Clarilis which, to date, has been one of the few companies that understand that for law firms, acquiring automation technology is only half the solution.

It will also compete on some levels with BamLegal and SYKE, although, with more firms automating their documents than ever, more service providers can only be a good thing.

Why echo.legal? Newton's previous projects have followed the phonetic alphabet. His previous project was Contract Express, which was referred to internally as Project Delta.

Speaking to Legal IT Insider, Newton said: "It's three years since we sold Contract Express to Thomson Reuters and they have done a fabulous job: they have invested heavily and exceeded the acquisition objectives and grown the business substantially. They've now got 18 or 19 of the UK top 20 firms as clients.

"As a consequence, there are lot more people out there who need help putting it in: buying a license is one thing but getting it to do something useful needs people to set up document templates. While Contract Express is the easiest to automate, it still needs resources and there's a shortage in the market - head-hunters everywhere are approaching people, and law firms are doing the same thing, and there is a noticeable shortage of skills. For 18 months I've been observing this and thinking, 'I really ought to take advantage of this and use my knowledge and my network' - it's a bit wasteful if I don't, quite frankly."

echo.legal will work on a fixed fee or managed service basis, where it takes care of a project from the setting up of templates to maintaining and upskilling people in the firm. Newton says: "People don't want to be completely dependent on a third party."

▸ HighQ to launch corporate legal platform

HighQ is set to launch a new platform for corporate legal teams that will include work and collaboration tools for enterprise legal management, document management, matter management, legal intake and self-service, contract management and vendor management.

The launch follows six to 12 months of research into the corporate sector, including engaging with legal teams ranging from big banks and manufacturers to small teams, to work out what their needs are and how the HighQ technology can be productised to address them.

While HighQ has long had relationships with in-house teams, particularly through its virtual data room, the corporate sector has for the first time become a core focus, and the London-headquartered vendor is creating a dedicated team to support and help evolve the new offering, which is being led by director of legal solutions, Rob MacAdam.

HighQ's chief product and strategy officer, Stuart Barr, told us: "While we've been working with in-house teams for a long time what has what changed is that this is a proper focus for us now. We recognise that law firms, including Addleshaw Goddard and Osborne Clarke, have been providing some fantastic solutions to corporate legal teams and we're taking on that market more directly.

"With the rise of the legal operations movement; the shift towards in-house teams taking on more work themselves; and in-house teams being under the same pressure to be efficient and demonstrate value but also to manage and engage with their outside counsel more effectively, they struggle.

"They don't have the same access to resources as law firms. They aren't set up in the same way and often end up with access to generic technology like SharePoint and often don't have document or contract management systems, so we're saying and our USP is we're not a point solution and we can give them access to our intelligent legal operations hub and give them a platform that gives these six core solutions in one."

HighQ has already partnered with corporate legal teams from companies like HelloFresh, Zillow, HSBC and more.

Keep an eye out on http://www.legaltechnogy.com for a forthcoming in-depth interview with Barr about the new HighQ platform and what it says about legal sector data trends.

▶ Win! Kennedys selects Hubshare

Kennedys has chosen Hubshare from Nikec Solutions as their collaborative project management tool to manage their Thomson Reuters Elite practice management system upgrade to the latest version of Elite 3E, we can reveal. This is Hubshare's biggest win to date and its first law firm in the UK top 30.

Kennedys has offices internationally and specialises in insurance, dispute resolution and advisory services.

Mark Lawrence, head of projects at Kennedys, commented: "To ensure our upgrade of 3E goes smoothly we need to make sure it will be managed closely and effectively for both the internal project team and external parties. Hubshare is perfect to help us achieve an efficient transition, providing us with a functional portal where we can collaborate on the numerous tasks within this project."

Hubshare combines the secure file sharing of Nikec Docstore and the extranet and collaboration functionality of Nikec Hub.

This is another big win for Hubshare, which has also won as clients Collyer Bristow, Wilsons Solicitors and Freeths, where it has been used to manage an Aderant implementation.

▶ #Glenlegal19 survey sees dramatic spike in SaaS migration

A survey conducted by Macfarlanes CIO Andrew Powell ahead of #GlenLegal19 has revealed a dramatic increase in cloud adoption rates, with well over three quarters of law firms saying their HR and payroll systems will be in the cloud next year and just under three quarters saying it will be SaaS.

The survey was returned by 64 international firms from across the UK, Europe and United States with annual turnovers ranging from £18m to £1.8bn. The firms had a combined IT budget of around £700m.

It reviewed the rate of cloud adoption broken down by different systems such as practice management, document management, and, of course, HR and payroll. The survey looked at which of those systems are or will be on premises; PaaS; IaaS; or SaaS measured across last year, this year and next year.

Last year more than 50% of law firms had their HR and payroll systems on premises but next year that is projected to drop to less than 15%, with just under three quarters of firms saying they will use a SaaS product.
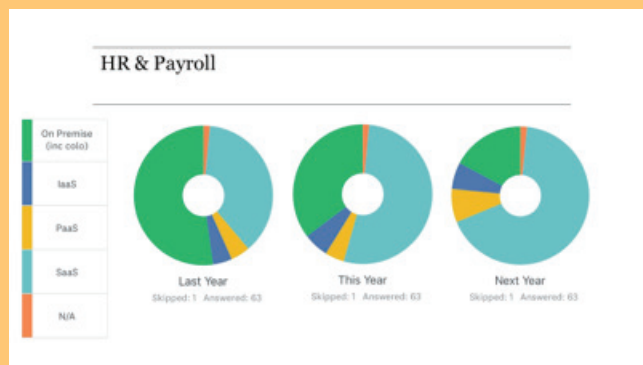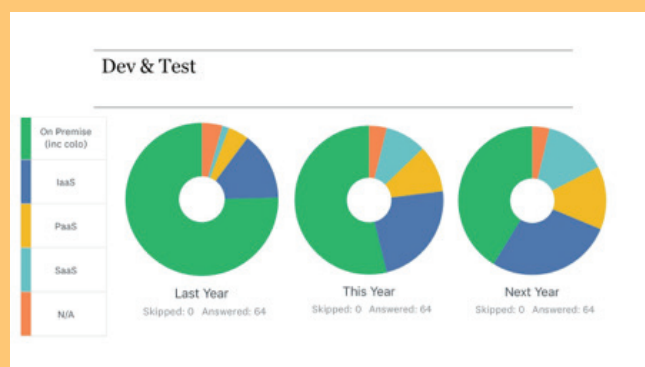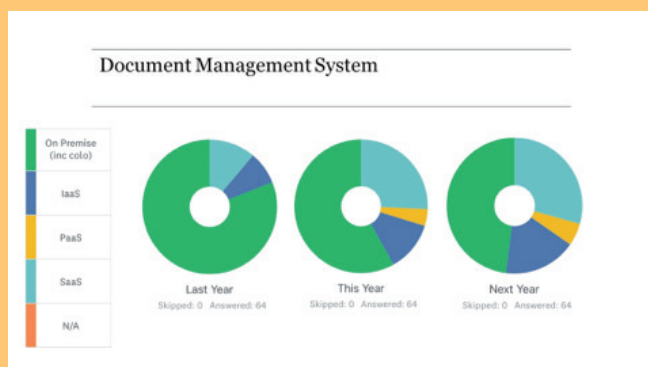

Speaking to Legal IT Insider about the results, Powell said: "We changed our HR system recently and have put it live in SaaS - it's all cloud-based and everything is accessed via a web interface, including a recruitment module. I think one reason that cloud adoption has gone up in this area is that the HR system doesn't have to deal with integrations to the extent of 'core' legal tech - no billing system or client matter intake or archiving to worry about. With a DMS or PMS you have a central system with multiple touchpoints that you can't just pick up and move to SaaS without some very careful planning."

While you could argue that law firms' email has always been in the cloud there is an undeniable shift to Exchange Online: last year around 90% of firms said their email was on premises and this year that percentage is more like 30%, with around half saying they will move to SaaS email.

Powell said: "Microsoft Enterprise Agreements have been changing for some time now. There is a clear drive towards cloud services such as O365 and M365 and, as time goes on, fewer on-prem alternatives are available. I think firms are embracing Exchange Online because Microsoft's licensing model is driving them towards it. Once you have an O365 commitment and are actually using it for Office deployment, there seems little point in building and running Exchange yourself."
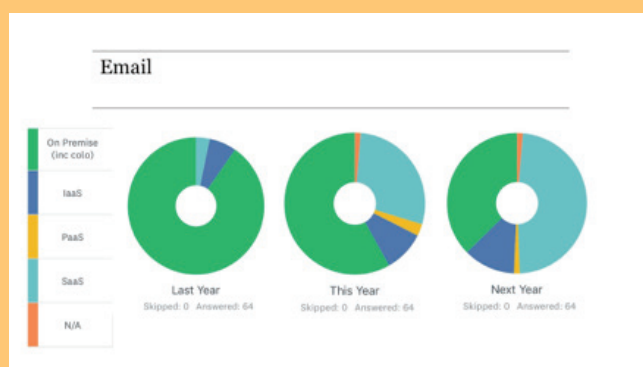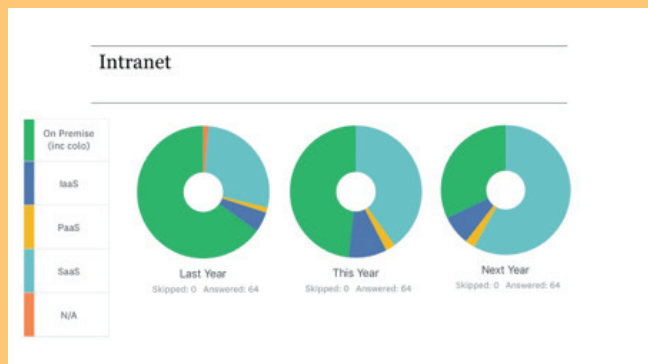

Document management will see a fairly dramatic increase in cloud adoption: over three quarters of firms said their DMS was on premises last year; just over half this year; and next year that figure is expected to creep to less than 50% with an increase in SaaS and IaaS.
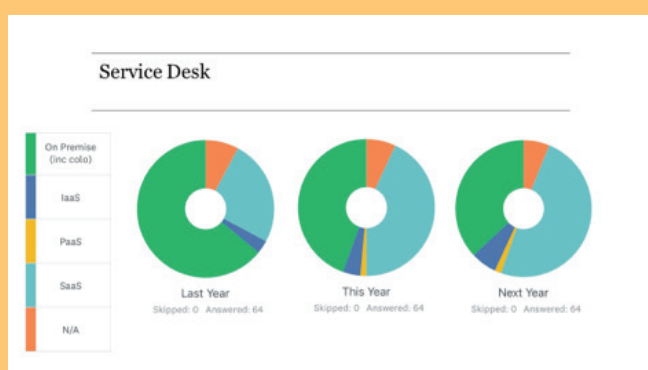
Document Management System

Last Year Skipped: 0 Answered: 64

This Year Skipped: 0 Answered: 64

Next Year Skipped: 0 Answered: 64

On Premise (inc colo) / IaaS / PaaS / SaaS / N/A

Dev & Test

Last Year Skipped: 0 Answered: 64

This Year Skipped: 0 Answered: 64

Next Year Skipped: 0 Answered: 64

On Premise (inc colo) / IaaS / PaaS / SaaS / N/A

Intranets will shift from being largely on premises to largely SaaS, and Powell said: "Similarly, if you have access to SharePoint Online as part of a wider Microsoft agreement why wouldn't you build your intranet on it? Our MS agreement didn't provide that a year ago so we opted for HighQ Publisher - it's also SaaS and works really well as an Intranet - but we didn't look at any on-prem solutions at the time due to high costs and slow deployment timeframes."

Intranet

Last Year Skipped: 0 Answered: 64

This Year Skipped: 0 Answered: 64

Next Year Skipped: 0 Answered: 64

On Premise (inc colo) / IaaS / PaaS / SaaS / N/A

You can also expect a dramatic shift towards Saas in the service desk:

Service Desk

Last Year Skipped: 0 Answered: 64

This Year Skipped: 0 Answered: 64

Next Year Skipped: 0 Answered: 64

On Premise (inc colo) / IaaS / PaaS / SaaS / N/A

When it comes to Dev & Test, while the number of on prem installations will drop below 50%, there are very few SaaS instances. Powell said: "This suggests that almost no-one is putting it in Azure or AWS. I would assume that is because to be useful, most dev and test environments are just as complicated as the live systems they are trying to replicate, and contain confidential data. PaaS/IaaS is potentially easier to do as you can replicate a live environment in its entirety on the same infrastructure, with the same infosec regime."
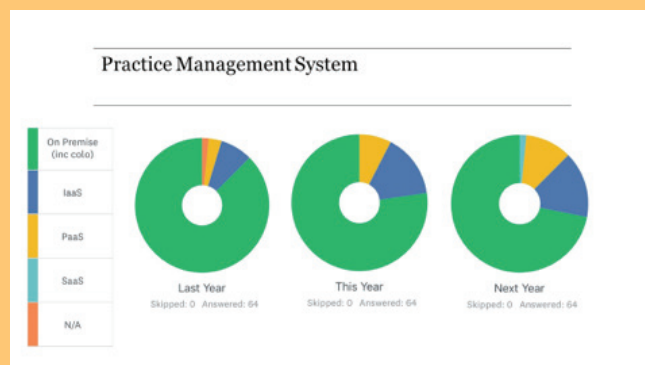
Of course, the last bastion of on premness is the PMS, where just under three quarters of law firms say will still be on premises next year. Powell said: "It appears from this survey that very few firms are putting PMS in SaaS environments right now. There are some notable exceptions to that of course with a growing number of SAP implementations, 3E Cloud in use in the US and the future direction of Dynamics looking SaaS only... but if your starting point is an old PMS with multiple touchpoints, each with decades of iterative customisations, it's difficult. Granted, any PMS replacement is difficult... and when we come to replace ours, we will look at SaaS options with an open mind. But if you have a PMS in place already and are presented with an option to move the same system to the cloud... I can see why that might seem daunting."

Practice Management System

Last Year Skipped: 0 Answered: 64

This Year Skipped: 0 Answered: 64

Next Year Skipped: 0 Answered: 64

On Premise (inc colo) / IaaS / PaaS / SaaS / N/A

▶ Quote/unquote

LITI editor Caroline Hill: "I'm thinking of doing a survey on which is the worst vendor to deal with in the legal tech sector."

LITI commercial director Jeremy Hill: "What an awesome idea. Can I be on holiday in the Arctic when it's published?"

▶ All change at RPC

Craig Hawthorne is going through the process of being officially signed in as both IT and facilities director at RPC, following the departure of Julie Berry, who joined top 20 accountant Saffery Champness in September last year.

The role was formerly split between Berry and Mayur Patel, who also left the UK top 40 firm last year.

With a headcount of 42 in IT and 36 in facilities, Hawthorne now heads a sizeable team, the majority of which are based in London.

Don't miss our forthcoming in-depth interview with Hawthorne on legaltechnology.com in which he talks about his new three-pillar IT strategy.

Make sure you're signed up to receive our regular email news and commentary bulletins using this form: https://www.legaltechnology.com/latest-newsletter/

▶ #GlenLegal19 – IA before AI!

Legal IT Insider's events director Mel Firth tells no tales - or not many - in this recap of a fabulous 48 hours spent in Gleneagles Hotel for our annual CIO conference.

It's easy to forget just how beautifully luxurious the Gleneagles Hotel is, the setting, once again, for our **Legal Leaders IT Forum 2019**, affectionately known to all as **#Glenlegal**. It seems to surprise us every year with its stunning views, elegant décor, delicious food and 5-star service - the only downside was being flummoxed AGAIN by the identical hallways when trying to get back to our rooms every evening!

Both our team and the Gleneagles Hotel had their work cut out this year as #Glenlegal grew in delegate numbers by a staggering 60%, with IT directors, heads of IT, CIO's and innovation leaders joining us from a wide range of firms and countries, including a large contingent from the United States and others closer to home such as Denmark, the Netherlands, Italy and Ireland (the 'B' word was banned by the way!). Their reasons for attending? All similar - the excellent content and a chance to network and share ideas on an equal footing with their peers and technology vendors.

Our sponsors were, of course, delighted with the increase in numbers but also their feedback has shown how pleased they were with the quality of attendees, with Thomson Reuters commenting:

"A supremely well thought-out and planned event allowing ample opportunity for vendors to have access to the senior leaders of customers and prospects."

The conference itself was opened on the Sunday afternoon in the great Henry Hall by our editor in chief, Caroline Hill, who updated everyone on the exciting work that Legal IT Insider is doing behind the scenes to update our platform, before discussing diversity in the Legal IT sector, including a project that Legal IT Insider is working on that will shortly be launched in our bid to use our platform to help improve diversity across the board.

Caroline was followed by opening comments from co-chairs Mike Rebeiro, head of digital and innovation advisory at Macfarlanes; and Rick Howell, CIO at US firm Perkins Coie, who dived straight into our conference theme: 'How does the CIO stay relevant in the changing landscape of the law firm?

The theme sparked much debate and discussion throughout the three days in Scotland.

There were many conference highlights and the feedback, both formal and informal, once again demonstrates that different delegates were able to take different insights from the variety of our speakers, from professor Daniel Katz's keynote speech on the emerging themes of legal innovation; to the extremely popular talk on the challenges of bringing together IT and innovation from Kerry Westland of Addleshaw Goddard; to the shared experience talks from Daniel Pollick and Jonathan Patterson at DWF; Clifford Chance's Bas Boris Visser and Alex Smith of Reed Smith's advice on creating a data strategy - Alex, no-one will forget "IA before AI"! Also Razvan Cretu's take on dealing with shadow IT and an incredibly informative panel offering advice on how to manage the risks in your supply chain - led by the distinguished Martin Smith MBE from The Security Awareness Special Interest Group.

This year we decided to give delegates a change of scenery on Tuesday: our breakout panel sessions The Cloud – What Next?; Making Change Happen; and The Data Needs of Your Firm, were a huge hit, in no small part thanks to the hard work of the facilitators (Andrew Powell of Macfarlanes, Rachel Barnes of Herbert Smith Freehills and Richard Tomlinson of Bryan Cave Leighton Paisner) and their panellists. These thought-provoking discussions continued over lunch in the fabulous Birnam Brasserie, where there was no drilling disruption!

As always, we endeavour to produce an informative, fun, unified event for all attendees, getting away from the "them and us" feel of a trade show or exhibition hall. Discussion between vendors and delegates was welcomed by all parties and helped along by the seriously fun Gleneagles activities (shooting, whisky tasting, off-roading and golf - thank you to Fulcrum GT for sponsoring these). And of course, plenty of time was spent in the Century Bar, which once again hosted our guests until the "wee" hours, including those that discovered that you could get 24-hour "room service" in the lobby after the bar had shut at 3am! #nonames

We can't let the opportunity pass without mentioning Mike Rebeiro's emotive and incredibly personal talk at the Monday night dinner on behalf of the charity Action for Children. The response was a lively auction, which resulted in a huge sum raised:

over £25,000 for the charity! Well done and thank you to everyone who donated a prize and who bid on the night.

It's difficult to sum up #Glenlegal19, so I'll leave it to our guests. See you all next year #GlenLegal20.

"GlenLegal is one of the best IT events of the season encompassing informative and influential speakers coupled with the first-class venue of the Gleneagles Hotel. An ideal chance to network with your peers, share ideas and take away some key new knowledge, definitely one not to miss."

Andrew White – Womble Bond Dickinson
"An amazing two days to benchmark where you are as a firm"

Barry Rodick – Eversheds Sutherland
"Fabulous venue, great opportunities for getting real quality content and networking time."

Steve Sumner – Taylor Vintners
"A great opportunity to discuss relevant topics with peers and learn from others what's working well and what's upcoming."

Diane Bryant – DAC Beachcroft
"A very informative and fabulously fun conference covering a range of relevant topics all excellently hosted in a beautiful location."

Jenny Hotchin – Pinsent Masons
"A fantastic event that had the right mix of topical presentations and debate alongside valuable networking in a beautiful location"

Ruth Ling – Taylor Wessing
"I really enjoyed GlenLegal 2019. A great mix of speakers, content and delegates in a world class setting."

Jonathan Patterson – DWF Ventures
"Different perspectives, challenging topics and insightful content all in a world class venue - packaged together brilliantly by the Legal IT Insider team."

Mike Polson – Ashurst Advance
"A wonderfully broad-ranging UK legal IT event, in a relaxed although not 'laid-back' atmosphere, which I would definitely attend again."

David Thomas – Stevens & Bolton
"The networking is second to none, other events are too big or small, and are too vendor-driven. I have not been to another legal tech event on this level. Great group of people, all open to discussion."

Nikolaj Brandt Clausen – Lundgrens
And last, but by no means least:
"The best technology networking event bar none"
Andrew Black - Muckle

▶ #GlenLegal19 conference coverage!

We have worked with Agnes Intelligence to produce an easily searchable transcript of our #GlenLegal19 conference in order to help us work on some really great editorial over the coming months.

The conference threw up a huge number of discussion points and we are grateful to all our speakers. Their slide decks are available here: https://www.legaltechnology.com/latest-news/glenlegal19-speaker-presentations/

Agnes Intelligence has created a technology that merges NLP (natural language processing) with Agnes Intelligence's proprietary concept clustering search technology, which uses AI to auto-generate, organically from the data, a hierarchical table of contents. Instead of slogging through hundreds of pages of results, it lets you navigate the data by concept.

Co-founder John Snyder says: "We think our tool will ultimately become an indispensable tool for journalists. So much of journalism is the ability to quickly sort through a firehose of data, including spoken word, which nobody has a good answer for."

▶ Litera hits "90% of global 100"

Litera Microsystems says that, due to the record sales of the Litera Desktop, the company now serves more than 90% of the Global 100 market. More than 1,000 firms, including leading global law firms Clifford Chance, K&L Gates, Latham & Watkins and Freshfields, have purchased and use Litera Microsystems solutions.

Avaneesh Marwaha, Litera Microsystems CEO said: "Litera Microsystems has responded to the needs of law firms and CIOs who demand smoother workflows and a better return on investment across their entire drafting technology stack. Because we offer a seamless approach to document drafting, Litera Desktop is now in widespread use in firms around the world. We'll continue refining and expanding our products and services to support lawyers in focusing on what matters."

That doesn't of course mean that 90% of the global 100 only use Litera - while the battle for the desktop is well and truly back many firms still use a mix of middleware including comparison and drafting tools.

▶ Lexis Advance bot

While in New York at the start of the year, LexisNexis unveiled some of the work it is doing to enhance its research capability, including the introduction of what is referred to internally as an "interactive intelligent agent" within Lexis Advance. This update falls into the category of "ones that got away" thanks to the chaos of Legaltech New York, but we recently asked Serena Wellen, the senior director who is leading this project for Lexis, to tell us more. The next couple of paras are an excerpt from her article, which has appeared on the Legal IT Insider website and been well-received on social media: you can read the rest of the article using the link below.

A new tool from LexisNexis slated for release in the next few months provides a tantalizing glimpse into what could be the future of legal research. This new tool is what company spokespeople refer to as an "interactive intelligent agent" that will soon be integrated into the Lexis Advance legal research solution.

Users of Lexis Advance will be able to activate this research assistant, or bot, by clicking on an icon in Lexis Advance. Doing so will open a window on the right-hand side of the screen, which will show the user's recent research activity, with each chat window corresponding to a research thread the user has pursued in the past. Research threads are automatically saved, and the user can re-engage with a thread at any time by clicking on the chat window.

So how will legal researchers use the tool?

Read the rest of the piece here: https://www.legaltechnology.com/latest-news/lexis-advance-bot-will-provide-personalised-conversational-research-guidance-for-users/

▶ New Dawn Legal

Dawn Dutton is leaving iTrain Legal and on 1 April will start her own business - the aptly named New Dawn Legal - delivering IT consultancy, project management and training services to law firms. Brabners is Dutton's first client: she is heading up the UK top 100 firm's implementation of Elite 3E following its decision to swap out from Axxia. That is a project being led internally by CEO Robert White.

Dutton got her business degree last year and is mid-way through a Masters. While she will continue to provide training services, she tells us: "Ideally I want to train the trainers."

If you want to find out more here's New Dawn's LinkedIn page (complete with website URL): https://www.linkedin.com/company/new-dawn-legal/

▶ Pinnacle hires former Xcelerate director

Pinnacle has hired former Xcelerate director and respected Elite specialist Honda Ngo to join its US practice.

Ngo will take the lead on application consulting on select projects, while also working closely with US CEO Bob Beach on client and practice development.

Commenting on Ngo's appointment Beach said: "This is a great hire for us. Honda has spent nearly two decades in the legal finance systems space, working on both the vendor and client side, so he has that dual perspective which characterises so much of the Pinnacle talent. He's highly regarded for both his technical expertise and broader legal business understanding, and he is set to play a key leadership role as we build our US team."

Prior to his director of strategic development role at Xcelerate, Ngo spent a number of years in private practice, initially at Quinn Emanuel and then O'Melveny & Myers. Drawing on 10 years' experience at Thomson Reuters he played a pivotal role in extending and optimising both firms' 3E platforms.

▶ RBRO begins licensing Lift and Shift

RBRO Solutions has, in the past month, begun licensing its Lift and Shift technology to the iManage partner network - the tool is used by law firms to smooth the process of migrating to the iManage Cloud.

Lift and Shift has been used by RBRO for its own migrations, including, most recently, Taft, Stettinius & Hollister.

However, speaking to Legal IT Insider, EMEA regional director Philip Tate said: "Other partners are now using it or saying 'we need it' - not just in the UK but in other jurisdictions, including North America."

Lift and Shift helps to precisely replicate iManage on premises, including all of the security settings and any metadata associated with the environment. Tate says: "This was a manual task that took a considerable amount of time - you had to build an iManage

environment in the cloud. One of the key features of Lift and Shift is that it allows you to do user acceptance testing on the cloud prior to turning it over. Then when you're happy you can roll that back to a good point and start replicating so that anything new on premises gets updates in the cloud and switched over."

▶ Reactions: Microsoft Compliance Center

"Interesting - but why has it taken them so long?" was Vince Neicho's reaction to our story on Microsoft's recent Compliance Center innovations, which we suggest means 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.

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.

Reacting to the story on our website, Vince Neicho, vice president of legal services at Integreon, said: "I suppose it shows something can still be innovative even if it is introduced 10 years too late! Not sure about how lawyers will feel about redaction at source. Surely they will need to see the whole picture to consider context. Their opponents in litigation would certainly want to be sure that any redaction has passed muster with the producing party's lawyers. Sounds like it could be open to abuse by some unscrupulous owners of data."

Vince, who was involved in shaping the Civil Procedure Rules on electronic disclosure, is taking a deeper look for us at the Compliance Center's functionality, so keep an eye out for follow-up comment.

▶ Why is it so hard to implement LegalTech in law firms?

By Dera J Nevin

Despite the increasing prevalence of legal technology solutions available to practitioners, there is sometimes hand-wringing over what is perceived to be low adoption rates by lawyers once this technology is implemented in law firms.

Partly this might relate to what I've called "magic button" thinking: that certain legal technology, once built and implemented, will solve an unlimited number of existing organizational and operational challenges facing professionals and their clients. Lawyers, accustomed to consumer-facing technology in their personal lives, want LegalTech "to just work". And developers want their prospective customers "to just adopt" their tech (even when the technology has undergone limited user experience or concept validation rounds).

It can be a challenge to get any new user to adopt any new technology, from software to toys to rocket-ships, and LegalTech is no exception.

From my perspective, after observing dozens of LegalTech implementations (across a spectrum of adoption success), it seems that many flounder on these twin rocks:

1. A law firm isn't one thing, it's a collection of things. It is a collection of practicing groups with various sub-lines within those groups, and even of small "cells" of lawyers within those practice groups and sub-lines. Many lawyers value autonomy and this shows up in law firm operations as clusters of diffuse working styles. A solution that might be perceived as useful by one lawyer may not be so perceived by a lawyer in the same group in an adjacent office. Even if the solution is designed for both lawyers they might not perceive it that way from each of their vantages. Lawyers are accustomed to zero-Ing in on the micro-difference and will evaluate any LegalTech solution with this lens.

2. People are busy and may not have been given any reason to care about this technology implementation. Particularly where lawyers have thriving, productive practices it can be challenging to get them to see there might be a different, better way of doing things. Where technology is centrally bought for them, the individual lawyer has not gone through the sales journey to achieve buy-in to the solution. Achieving this user buy-in must be done internally, and those competing for that lawyer's time must bear that in mind.

When I have been given the opportunity to lead or participate in a project to implement LegalTech in a law firm, I find the following guidelines helpful:

Implement on storyboards, not features and functions. The temptation is strong to bring users into a room and give them a 60-minute presentation of the software and declare this "training". That's not training, it's show-and-tell, which can be helpful but is usually not sufficient to change how lawyers work. A show-and-tell can constitute an awareness highlight that the technology is now available. But implementation has gone better for me when I learn what lawyers do, and create storyboards of how the lawyers will work with the technology once it is implemented. This may involve re-engineering workflows and training lawyers on both at the same time. Lawyers need help not just learning the software but imagining how it will be used; this also reduces anxiety that may be associated with trying something new. They can see, through storyboarding, what the future holds with this new technology in the mix.

Implementation must follow incentives. Generally, lawyers are not incentivized to learn how to use technology; they are rewarded when they solve legal problems in order to generate revenue. I address that reality head-on and adapt the training accordingly. For every storyboard I create, I then subdivide into mini-

increments so that lawyers can learn only what they need when they need it. When repeatedly exposed to this method, lawyers learn that training will not absorb or compete with time that could otherwise be used to generate revenue. Often, lawyers can continue to generate revenue during the training, particularly if the storyboard training can be used on "live" matters. This method also takes training out of the classroom and onto the desktop: the units are short enough that they can be delivered remotely, and on demand, whether by video or live. I refer to this as "JITJAN" training - Just In Time, Just As Needed. It takes an enormous amount of work to do less training but, overall, it is more effective.

Implement using natural networks. Identify key individuals to target, as well performance metrics for the training, and track success against these benchmarks. Understand what success looks like before you begin and measure the rate of adoption. An implementation that does not factor in the players is less likely to succeed. Who are the key workers in the department and who do they work with? Are there influencers - perhaps some senior associates that work across groups that could be helpful to extend the reach of the technology if they became users? Consider diffusion theory and its curve when developing this plan and benchmarking matrix. I have observed that once 34-37% of a group switches to the new technology, most of the balance follow.

Implement with internal break/fix and enhancement escalation pathways. Give the emerging user base a powerful voice by giving them a person to talk to. Make someone responsible internally for this technology; it's the person that internal users can go to with complaints and enhancement ideas. It's better if that person understands the business the lawyers are in and what workflows are being changed. Users will feel they have someone who understands them on their side. Essentially, this involves creating an internal "customer success team" that supplements and extends the reach of customer success from the technology vendor. It's duplicative but avoids the us vs them thinking that may emerge. Once adoption thresholds are met, the ongoing staffing of this role can be reconsidered.

Implementing any technology requires planning and resources, but there are known techniques that can increase the likelihood of a successful rollout and increased adoption rates. I'll be curious to know how these work for you, and whether anything else has improved adoption rates within your firm.

Dera is a senior associate, IPTech, at Baker McKenzie, and affiliated with its WhiteSpace Legal Collab innovation lab. Opinions expressed in this article are her own.

▶ Zero bolsters its ranks

Email management vendor Zero is bolstering its ranks with some senior hires, including Aimee Spirlin, former managing director at Intapp in North America, who joined Zero in March as vice president of sales.

Zero, which launched just ahead of ILTA last year, applies machine learning to automatically file emails into NetDocuments, iManage and OpenText document management systems, and capture billable interaction with client emails on mobile devices.

Its productivity and compliance tools for lawyers also include wrong recipient detection.

▶ Quote/Unquote

I get messages on LinkedIn most weeks from recruiters saying that I have a great future as a Contract Express automator.

Richard Newton, one of the founders of Contract Express, wishes recruiters would just sometimes do their homework.

▸ Will DWF kickstart a new wave of IPOs?

By Legal IT Insider contributing editor Amy Carroll

After an initial flurry of interest in the public markets following the IPO of uber-acquisitive Slater & Gordon, way back in 2007, law firm listings have been few and far between. A handful – Gately, Keystone, Gordon Dadds and Knights – are trading on AIM. But no firm has taken the plunge on the main market. Until now.

DWF's £95m IPO this month - a deal which values the business at £366m and is not only providing a healthy windfall for its equity partners but is also arming the firm with a £10m war chest, specifically for investment in IT and its managed services programme - marks a watershed moment in the relationship between law and the public markets. But will DWF's move precipitate a new wave of IPO activity or is the window of opportunity already swinging shut?

The appeal of the public markets is clear - creating a capital event for partners who have built equity in the business, creating an opportunity to incentivise and lock in employees through share options, access to funds to drive M&A activity and, of course, to invest in differentiating technology.

"The partnership model that has worked for centuries is starting to look outdated," Dominic Morley, head of corporate advisory and broking at Panmure Gordon, which worked on the Keystone IPO tells Legal IT Insider: "Small and mid-size firms below the Silver Circle may look to or need to consolidate, which will change much of the industry. Going public can help fund growth and acquisitions.

"A public listing gives a law firm access to capital and a quoted currency to participate in consolidation," Morley adds. "If a firm is public, its shares become a currency with a defined - if variable - value. Shares can also help recruit - a firm can offer stock bonuses rather than a far-off promise of possibly becoming a partner."

Conventional wisdom would suggest that firms with low numbers of partners, highly processed services and limited reliance on partner / client relationships will be best suited for flotation. However, according to Pete Dawson, national head of transaction advisory services at Grant Thornton UK, this hasn't been the case.

"If you look at what has actually happened, providing the law firm has a robust business, a strong business plan, clear growth strategy and a sound reason to float, then the opportunity is there," he says.

However, there are also challenges and the public markets won't work for everyone. "Regulation is an issue, especially for those with overseas operations," says Dawson. "Participation in global networks pre- and post-float could potentially be a challenge. The financial reporting requirements of a listed business may not sit well with some law firms. There is also the factor of some loss of control, which won't suit everyone."

In addition, succession can be a challenge if a firm removes the "carrot" of becoming a partner, Morley adds. That can be mitigated by offering bonuses and share options. But there are concerns that some law firms may use an IPO primarily to benefit the current generation of partners, leaving later generations with external investors to service through profit growth, which will only be possible if significant proceeds from the IPO are re-invested. DWF has appeased investor concerns with its commitment to drive value through technology but the markets will be wary of firms looking only to drive wealth.

Furthermore, investor appetite for law firms is not unlimited. As a first mover, DWF has secured one of a finite number of spots on the public market.

"The market has a very large appetite for good investments. It's all about the attractiveness of the opportunity," says Dawson. "Having said that, investors like to have balanced portfolios, so once they have a reasonable exposure to the legal sector they may well become more picky."

"Yes, we think there will be more legal IPOs, but we think this will be measured," adds Morley. "There is more appetite from investors for publicly listed law firms, but the market will look to invest in firms with differentiated business models. We might see one or two new entrants but the market will not have endless appetite for more IPOs of very similar businesses.

"Investors want to back a firm that will use its listing to drive shareholder value," he adds. "If investors think the partners are just cashing out there will be little appetite to buy that firm's shares. Once there are a number of comparable listed law firms investors can be more choosy. They won't want to invest in more of the same."

▸ Getting judgy

Legal IT Insider's editor Caroline Hill is judging the LegalEx Practice Innovation Award, which will take place at 12:45 on the 27th of March.

The companies nominated for the award are Hoxro Limited (stand 650); Me Group (stand 340); Clio (stand 640); ExhibitManager (stand 360); and DPS Software (stand 500).
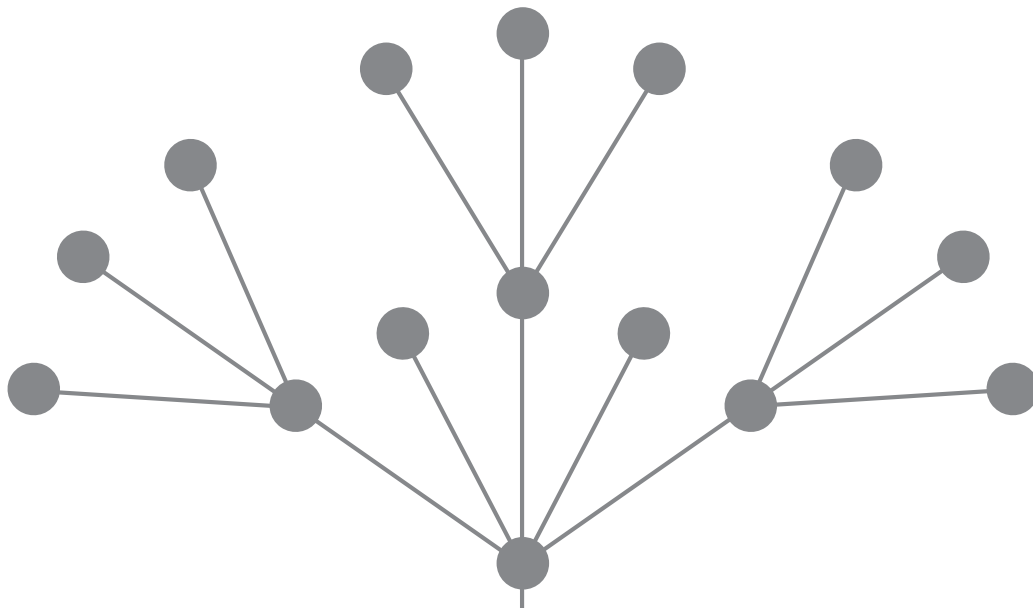
LegalEx takes place at ExCeL, London, on the 27th and the 28th of March and is free to attend.

▶ David Cambria talks legal ops strategy

Speaking to Legal IT Insider editor Caroline Hill, David Cambria discusses his move from Fortune 50 company Archer Daniels Midland Company to become Baker McKenzie's first global director of legal operations; how he is growing the team; and the new technology he is rolling out to help the team work in a joined-up way.

Why did you move to Bakers?

I was in discussion with Baker McKenzie about them creating a new function to help them better align with clients and I was intrigued by the concept but didn't immediately see myself joining the firm. As the conversation progressed, I started hearing more about what they were doing around innovation in legal service delivery and alternative legal services and what the leadership are doing to pull that together. From a career perspective I saw the building out of legal operations in a new space as an interesting challenge and there are a lot of parallels with the maturing of corporate legal operations. I was on that journey already and saw

this as a way to really bring about the discipline that we've all been talking about with a law firms ready and willing to embrace new ways of working.

How will you work together with IT?

The number one benefit of our IT team is that it is centralised across the firm: one IT function serves the entire law firm. If someone brings new collaboration technology to the IT function, they tend to bring me in and talk about how valuable it is to clients or how it will enable us to be more effective and efficient. It's a nice relationship: they are looking at the technology from the perspective of scalability and interoperability and security and then my team can talk about what impact that has on the delivery of legal services and its usefulness to the client, which drives adoption.

We also have a very active innovation committee, which is a place where we can accelerate product ideas or create new ways of using technology that better assist in the practice of law.

We're starting to see the growth of legal operations in private practice, why do firms need to mirror their clients in that way?

What we're doing is building a team around legal operations disciplines, such as cost control and project management, and thinking about client value. We're giving a new language to describe value and what that means. We're partnering with the lawyers to help them better understand client needs and to achieve their strategic goals. We're not setting those goals but saying "how do we help to enable that." It's not about "Well, let's have some common understanding of what KM or LPM is doing" but having one legal operations service team. We don't want to mirror the client - they want efficiency but struggle to put into words the meaning behind that and how to make it happen. A lot of legal teams do try to mirror the client but that doesn't solve the problem.

You've hired some big names: Jae Um and Casey Flaherty joined in January. Is that a deliberate ploy to get the market's attention?

The big names in and of themselves won't help. It's flattering that people are taking notice, and well deserved. But for me, what attracted me to them was a) their reputation is backed by real work that you can point to with measurable results and b) the fact I kept seeing them at different places such as this [Insight Legal] and that they are actively involved in the market. That was very attractive in terms of helping me to be the voice of a different way of thinking about legal services.

Most law firms don't have the resources that Baker McKenzie has, what would you suggest a law firm does to start down this road?

I would build your muscle memory and encourage lawyers to find one or two clients who are ready, willing and able to put the energy in and truly partner toward

driving legal efficiency. You don't need a huge team to augment what the client is already dong. You just need commitment to dedicating some resource and building that capability. Even what we're doing is not going to scale the entire organisation. It's a long journey.

Talk to me about some of the new technology you're using.

We're interacting with clients in an interdisciplinary way and we have to pull all of the information together, which involves rigour and discipline to make sure information gets out of people's heads.

The primary technology we're going to use is Onit, which found its legs doing workflow but also matter management - I've bought from them before and have had input into the product.

The first thing is that it brings work to the people and pushes work to that individual when I need them to do it. The underlying system of record is good at breaking down processes into micro-processes, so the workflow goes to the next person. When I've rolled it out elsewhere often people are interacting but don't know - that's the magic of it. You don't have to change the stack; I want to use it as an overlay. It replaces what they were building out in SharePoint.

Onit is really about enhancing the holistic engagement of different stakeholders. It will satisfy the needs of three personas. One is at the project level, where it will give the financial time-keepers a tool to manage the project tasks. The next is from a management level, where we can see what is happening across the entire portfolio to give me a sense of where are the resources, what types of projects the legal project management team is working on and what is the impact of their involvement on client satisfaction and on pricing and managing the scope. Third is the ability to take that information and present it to our clients so they have a clear understanding by logging in in real time as to where the project is, what are outstanding tasks and staffing mixes.

I'm building it now. Their toolkit understands how to deal with workflow and, as an underlying relational database, it is highly configurable - I'm configuring it to do what I need to do.

They don't have an out-of-the-box product, but our past history convinced them to do it. They are focussed on corporate but may have one law firm client.

The hires you've made are in the US, is the focus of the LPM global or not?

The LPM team is global and we're trying to hire pricing capability in APAC and Europe. I really believe that a pricing strategy, no matter where its created, is only as good as your ability to localise it: you need to connect to the partners. Given the footprint and size of Baker McKenzie the very nature of a lot of the matters are global, so it's important to have resources in the local market to help.

▶ Stickleback and Ledo merge

Stickleback Technologies has merged with Ledo Associates to form Stickleback Group, which is heavily focussed on delivering Intapp Flow and Open projects.

Ledo Associates has operated for over 15 years as a specialist legal and financial services consultancy, largely in the Channel Islands and other off shore jurisdictions.

Richard Ledo will retain his role as head of consulting services and will join the Stickleback board.

▶ CRM article

Having promised a CRM article in the Orange Rag in the wake of Baker McKenzie's selection of DealCloud it turns out that quite a few people want to chat and we're going to hold off publishing until the April issue.

If you want to get involved please email caroline.hill@liti.co.uk - if you have already emailed and not had a reply we will sack the (imaginary) office PA and get back to you asap.

▶ ICYMI

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

Discovery Decisions

The MoD on the disclosure naughty step again: Indemnity costs where disclosure conduct falls outside the norm *https://maas-bong.io/2u6jbNW*
Chris Dale's coverage of this case concludes that "this judgment makes it clear that a defaulting party will be hit with large penalties in costs if its conduct defeats the overriding objective" of the Civil Procedure Rules.

How US courts treat technology-assisted review in discovery *https://maas-bong.io/2VZXpHT*
This article provides an overview of case law and trends that may inform practitioners how Commercial Division courts will apply Rule 11-e(f), which took effect on 1 October, and codifies the Commercial Division's support of the use of TAR during discovery.

Purple rain of sanctions falls on the record company in the "Prince Case" for their intentional destruction of text messages *https://maas-bong.io/2u2slv5*
Ralph Losey tells about this US case in which a US magistrate judge sanctioned a record company defendant and its two top executives in a suit over the posthumous release of Prince's "Deliverance" album. They were sanctioned because the plaintiff proved that the defendant executives intentionally destroyed text messages about the album. They denied bad intent and claim they did what they thought the law required: save the emails and office computer data.

District of South Carolina: Forensic protocol granted where mobile devices returned in three hours *https://maas-bong.io/2GYU2MY*
A US judge orders the defendant to comply with a forensic protocol to allow the plaintiff to capture ESI on the basis that three hours or less was proportionate.

eDiscovery sanctions issued in Jimi Hendrix weed case *https://maas-bong.io/2VRCLJE*
In this copyright infringement case, the plaintiffs motioned for eDiscovery sanctions against the defendant for a variety of misconduct including spoliation and hiding evidence. They were partially successful.

How much privilege review is required under a clawback agreement? *https://maas-bong.io/2HiPl0M*
This is an interesting US dispute, brought to us by Percipient, that highlights the practical and legal implications of clawback agreements. The plaintiff produced privileged documents and requested defendant objected, arguing that the documents were no longer privileged because there was limited effort to prevent disclosure of the information in the first place. Although the court ultimately granted the clawback request, it also suggested that even with a clawback agreement, some level of privilege review is advisable.

Five steps you can take to earn an eDiscovery sanction *https://maas-bong.io/2H3XtlJ*
Exterro and EDRM's 2019 Federal Judges Survey tells us not only what circumstances prompt US judges to impose sanctions, but also how often judges tend to take affirmative action related to eDiscovery problems. This survey, which was by far the largest of their five annual judges surveys, compiles data from over 260 responding federal judges.

Discovery Discovered

What is EDRM? *https://maas-bong.io/2W4TvgJ*
Every now and then it's good to remember that not everyone is steeped in your world's buzzwords and acronyms.

TAR 2.0: Using contextual diversity to find out what you don't know (and a bit about Zipf's Law) *https://maas-bong.io/2Fmqt5r*

In 2014, Grossman and Cormack issued their landmark study comparing different TAR protocols. It showed that random selection was the least efficient way to find relevant documents, including those you didn't know about originally. Catalyst's research, and that of several others, consistently told the same tale.

IT teams, regulatory requests and eDiscovery - a perfect ménage à trois *https://maas-bong.io/2VZgmKS*

Few situations can cause as much stress to IT departments as a regulatory request for information. With little warning, teams are required to trawl through copious amounts of data, in an attempt to extract relevant material. The solution? eDiscovery tools and people.

Five advantages of having an ESI protocol for your matter *https://maas-bong.io/2VY2lwC*

Kelly Twigger argues (rightly) that the exercise of thinking through everything that will be needed for your case in discovery is invaluable.

Threading, duplicates & near-duplicates, ECA fundamentals series Part 4 *https://maas-bong.io/2VVUcJg*

A multi-part series on the fundamentals eDiscovery practitioners need to know about effective early case assessment in the context of electronic discovery.

Disclosure - What information about search methodology must be shared? *https://maas-bong.io/2HkV8Tm*

Edward Spencer and Lizzie Hancock from Taylor Wessing usefully review a recent judgment dealing further with what information around searches for electronic documents needs to be shared during discovery.

Take the risk out of redaction *https://maas-bong.io/2HpBN3k*

Disclosing information requested under the Freedom of Information Act or state public records laws is already a tricky business. The use of improper redaction techniques now makes it incredibly risky, too. Zylab explores this for us. And perhaps for American politicians, too.

"The robots are coming" or "litigation hold script for O365" *https://maas-bong.io/2VJVQgX*

Here's something of a more technical bent from Jonathan McKee, a system administrator at Ferguson Enterprises. Many of us, he says, are in the joyful, big business, world of having an eDiscovery application that applies litigation hold automatically when a case is created, and custodians are entered. From the dark ages of his own past, and for those of you who do not have access to that kind of tool for whatever reason, here is a script to apply litigation hold to the O365 client in PowerShell. The savings come in the ability to load a CSV with custodians, apply litigation hold to them and have reporting on all O365 litigation hold fields added to the original CSV.

Automating eDiscovery: A strategic framework *https://maas-bong.io/2VQcOdG*

The Concise Framework for Discovery Automation takes the overall process of discovery, breaks it down into a data discovery component and a legal discovery component, aligns these components with insight and intelligence, and then highlights four key processes and eight key tasks that appear to be important in the discovery process across the lifecycle of information and litigation. Rob Robinson from ComplexDiscovery takes us through it.

Discovery Discussions

[Video] LegalTech 2019: a chat with Nick Robinson of Microsoft about "in place" eDiscovery analytics *https://maas-bong.io/2FwP5J9*

What makes Microsoft particularly well served is this major trend in eDiscovery: in-place analytics. It is the new shift to keeping your information and content in the systems where it is utilised, and performing your analytics there rather than exporting it

When litigation support manager Dave Hasman was asked what a typical day at Bricker & Eckler was like, he laughed *https://maas-bong.io/2VTS6tv*

As you will know by now, I do like these little insights into other people's lives. Here, Relativity asks the questions.

[Video] From LegalTech 2019 - a chat with Paul Mankoo, CEO Inventus *https://maas-bong.io/2VQxPVr*

Amongst other things eD, Paul discusses two races: one to the bottom for price, and one to the top for talent. No wonder he's so fit!

Discovery Divinations

Actively learning? Predictive coding technologies and protocols survey - Spring 2019 results *https://maas-bong.io/2HjSJsb*

Rob Robinson of ComplexDiscovery's survey is, he says, a non-scientific survey designed to help provide a general understanding of the use of predictive coding technologies, protocols, and workflows by data discovery and legal discovery professionals within the eDiscovery ecosystem. He shares the results with us.

Discovery Diversions

How in-house counsel can utilise eDiscovery platforms for regulatory requests *https://maas-bong.io/2FoCDe5*

Jeffrey Wolff of Zylab observes that a key challenge to managing regulatory requests is finding, retrieving and sorting through the mountains of data now created by even modest businesses in order to extract and present information demanded by regulators. I am noting the welcome trend of lawyers and eD professionals discovering that eD tools and people have many uses outside the eD bubble.

eDiscovery training lagging in most legal departments *https://maas-bong.io/2FjzIDC*

Even large organisations in highly regulated and litigation-heavy industries say they didn't have formal eDiscovery training, according to a survey by Exterro and Duke Law's EDRM.

The mindful data transfer - bringing balance to cross-border discovery and EU data protection obligations *https://maas-bong.io/2Fk3zMi*

This thought-provoking article from Ryan Costello looks at the friction between legal holds and the right to be forgotten and anxiety about the scope of collections amid data minimisation requirements. The considerable financial and operational penalties for failure to comply with the GDPR have created an environment of trepidation about how, and where, to best process, host and review EU data in connection with US-based eDiscovery.

The end of sanctions? New report details dramatic decline in US spoliation penalties *https://maas-bong.io/2Flmu9l*

This would indicate to me that most instances of spoliation were due to incompetence/ignorance rather than deliberate acts.

eDiscovery's new challenge: Not ignoring Internet of Things data *https://maas-bong.io/2Fpc4Wa*

This is the new Wild West of my world: eDiscovery practitioners are challenged by the quantity and variety of Internet of Things device data. But that doesn't mean they can ignore it (I intend to write an article on this subject next month).

If you can tie your shoes, you can "do" in-house eDiscovery *https://maas-bong.io/2VY6fWr*

Casey Sullivan observes that, while discovery challenges still exist, the risks that dominated eDiscovery a decade ago have been significantly reduced.

Drunks, DNA and data transfer risk in eDiscovery *https://maas-bong.io/2u7kMDh*

A beguiling title for the irrepressible Rob Robinson's piece on the disparate tech in play in eDiscovery and the risks inherent in transferring data between them.

Do you have FOMO? You should - if you're not finding and collecting dynamic web evidence *https://maas-bong.io/2VVQgIv*

Fear of missing out? This article explains why collecting evidence from the web should include dynamic and contextual data.

Planning for later in eDiscovery *https://maas-bong.io/2H0kwh3*

Mike McBride discusses what to do with those two eDiscovery elephants: what to do with (1) incoming productions (lots, I hope) and (2) data at the end of the matter (archive, I hope).

To maintain regulatory compliance you need to capture context *https://maas-bong.io/2u0YXFs*

John Grant of Hanzo argues that content and context are BOTH king in the world of compliance.

Compelled-password decision is "death knell" for Fifth Amendment, US state justice argues *https://maas-bong.io/2uc5H3D*

In America a defendant can now be compelled to enter a password to his cell phone as long as prosecutors prove beyond a reasonable doubt that the defendant knows that password. This decision sounds the death knell for a constitutional protection against compelled self-incrimination in the digital age, states an associate justice.

Disclosure difficulties in UK criminal cases - especially mobile phone evidence *https://maas-bong.io/2H9Ioiv*

Chris Dale here draws on criminal matters to highlight the oft-overlooked importance of evidence on mobile devices in both civil and criminal matters.

Discovery Digest

"Own the eDiscovery process": Microsoft unveils compliance center *https://maas-bong.io/2HjVslh*

As this very organ reported earlier in March, Microsoft's 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.

Relativity bags CTO from Amazon Web Services, will add 300 staff *https://maas-bong.io/2Hab36R*

Richard Tromans from Artificial Lawyer brings us this story about Relativity's ambitious growth plans for 2019.

Byte Night

Sign up to sleep out.

Before their home becomes a park bench.

Join the fight against youth homelessness.

Sign up for the UK's biggest corporate sleep out on Friday 4 October 2019.
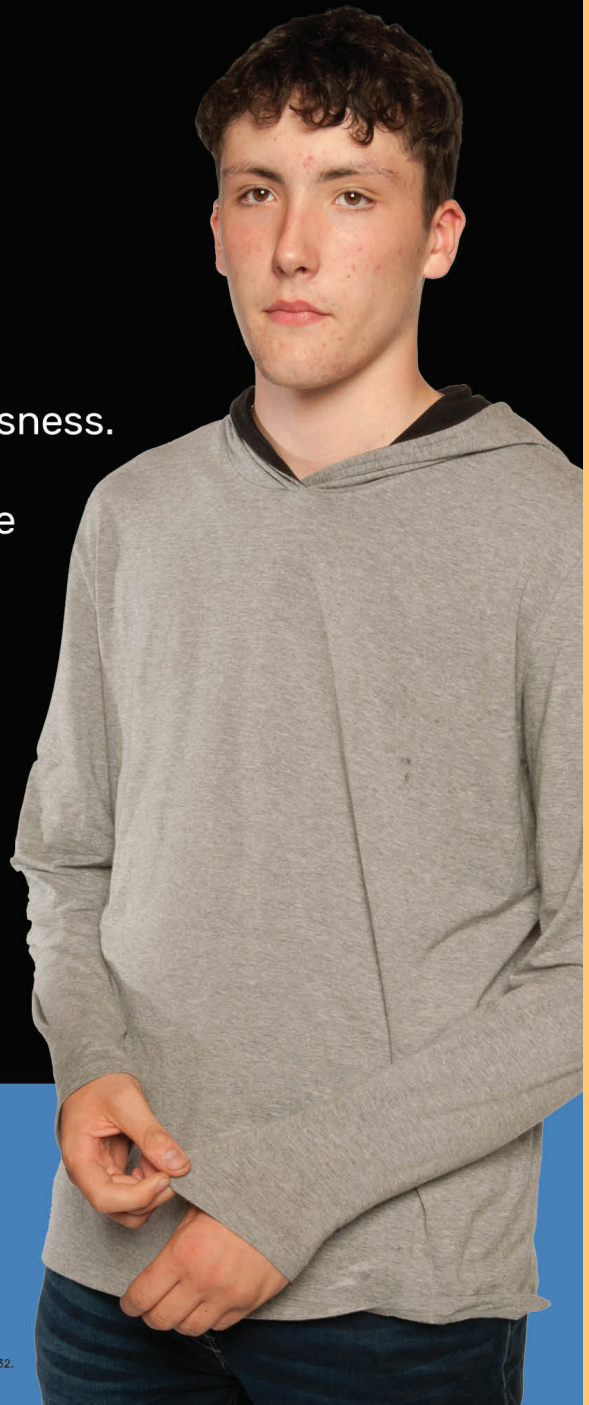
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HOW
ACTION FOR CHILDREN
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What's Hot & What's Not: Wins & Deals

UK & EMEA London headquartered audio conferencing provider **LoopUp** has opened five new offices in Chicago, Dallas, Los Angeles, Atlanta and Madrid - part of a multi-year expansion strategy. The AIM-listed company's plan is to expand its distribution into the legal technology market. **Steve Flavell,** LoopUp's co-founder and co-CEO, commented, "These cities are sensible locations as we increase our US and European footprint as they have a high concentration of professional services firms and multinationals. We're committed to providing services to our global customers by delivering account management and customer support locally wherever we can."

Bech-Bruun, one of Denmark's "Big Four" law firms, has made **DocsCorp's contentCrawler**, an OCR processing solution, a key component of its GDPR compliance strategy. contentCrawler integrates with the firm's iManage document management system to ensure all image-based files are visible to search technology.

CIO **Stefan Winquist** saw a need for contentCrawler at the firm because image-based attachments in emails were not being processed by OCR software: Bech-Bruun's workflow was not capturing documents sent from external sources. "To comply with the GDPR, we needed to ensure that email attachments like scanned copies of identity documents and other image files, could be searched for and deleted when necessary," said Winquist.

DocsCorp, a provider of enterprise productivity solutions, has announced that **Burness Paull LLP**, a top-tier Scottish law firm, has chosen **cleanDocs** to minimise the risk of inadvertent data leaks. cleanDocs removes hidden and potentially damaging metadata from email attachments on send, and prompts users to confirm recipients and attachments as valid. **Sam Moore**, innovation manager at the firm, said: "Burness Paull recognises the potential risk to ourselves and to our clients from hidden metadata. Busy lawyers and secretaries don't always remember to check for metadata, so we needed a tool to make sure we weren't accidentally disclosing hidden information. We chose cleanDocs as our preferred solution to protect against this risk," continued Moore. "cleanDocs is set up at Burness Paull to remove metadata automatically from documents as they leave the firm and we appreciate the built-in email checking functionality as well."

Allen & Overy has made a further investment in **Nivaura** as part of a strategic seed funding round in which the fintech start-up has raised $20m from investors including The London Stock Exchange. Alongside Allen & Overy and The London Stock Exchange Group, investors include Santander InnoVentures and Transamerica Ventures. **Phil Smith**, a partner at Allen & Overy, who was appointed as a director of Nivaura after the first funding round, commented: "We have been working with the team at Nivaura since they first joined Fuse and it is evident they are going from strength to strength. We have incorporated their platform in to the work we do for our clients, resulting in very positive outcomes. Their work is hugely important and we welcome further collaboration with them."

National Law Firm **Davies and Partners Solicitors** has carried out a major upgrade of its IT infrastructure with **DPS Software**. The project has streamlined the firm's systems onto a digital platform and future-proofed its processes to establish a solid foundation to meet its ambitious growth plans. Davies and Partners employs 180 staff across its four offices in Birmingham, Bristol, Gloucester and London's West End. In developing the infrastructure changes, Davies and Partners considered various options and a range of systems available in the market. They required a solution that incorporated their existing case management procedures with an automated reporting system for clients. The firm had been working with DPS for some years, having already had a level of hosting with DPS Cloud for their automated report generation requirements for their construction clients. Their key objective was to introduce a single,

fully integrated and standardised system across their four offices, providing efficiency benefits for clients and the firm. The major systems update is key to Davies and Partners objective of paperless working, which increases its efficiency for clients, provides stronger data security, a better use of space and improvements to the working environment for its employees. Davies and Partners IT manager Dan Smith said: "The Firm's legacy accounting system had a vast amount of information that needed to be successfully migrated and it was a huge challenge to ensure that data transported over fully and successfully, causing the least disruption to employees and clients. The fact that DPS carried out a full pre-conversion test allowed us to see how the changes would work before we went live, which helped settle the nerves and soothed the change in management process." The data migration was a critical task but not as challenging as connecting the case management files to the accounting files from the previously separate and unconnected systems." The project to switch the whole business to the cloud took just over six months to plan and four weeks to implement, including an employee training programme. Once the systems had been migrated to give the business a single software platform the whole firm was moved to the Azure Cloud by DPS.

Eigen Technologies has announced that **LOD** (Lawyers On Demand) is to deploy the London-founded company's natural language processing technology to automate the analysis of its clients' legal documents as part of a new LOD client offering called Designed Solutions. **Nigel Rea**, service development director at LOD, said: "Our Designed Solutions offering is all about solving client problems. To do this we are able to combine great tech, a rigorous focus on process and amazing teams. Moreover, in Eigen we've found a partner that encourages experimentation around client needs, and we look forward to bringing a perfect blend of legal teams, process gurus and machine learning to our clients."

DWF Group plc has announced the successful pricing of its shares, which will see it invest up to £10 million in additional IT systems, including a portion of that to contribute to the development of the group's global platform for managed services. The float will give it a market capitalisation of around £366 million as it becomes the first law firm to list on the Main Market of the stock exchange. Partners of the firm will hold a majority of the shares and shareholders are subject to a lockup, which will see them able to sell 20% of their shares after DWF's results are announced next year, and a further 20% for the following four years. Approximately £19 million will go towards repaying a portion of members'

capital contribution to DWF LLP.

Award-winning Birmingham specialist law firm **Anthony Collins Solicitors** has chosen **Zylpha's** bundling for legal and court documents. The solution will be used in conjunction with the firm's iManage case management software. **Paul Harker**, head of IT at Anthony Collins, said: "We already had a positive experience of Zylpha's product with our previous case management system so we were happy to build on this when we moved to iManage cloud. Bundling is one of those tasks that are critically important but traditionally labour-intensive and complex. With Zylpha, the document management process is now fully automated and the time savings with the iManage integration are significant."

Burges Salmon has joined the **Accord Project,** a non-profit US organisation developing the open source specification and code libraries for a common smart legal contract format. Lawyers from across the firm and members of Burges Salmon's Business Solutions team will be participating in working groups to help establish best practices and legal standards for smart legal contracts. This provides those people with opportunities to both learn and contribute in the collaborative development of smart contracts, with a view to helping Burges Salmon's clients utilise the potential of smart contracts in the future. **Sarah Kenshall,** a director in the firm's Technology and Communications team, said: "As part of our strategy at the firm, we are placing advanced technology at the heart of our legal service delivery model. Smart contracts have a number of potential applications across many sectors and we want to continue to assist our clients in benefiting from such technology developments. **Peter Hunn**, founder of the Accord Project, commented: "Having the leading stakeholders involved in the development of a universal specification is crucial to its success. We are therefore delighted to welcome such a forward-thinking law firm as Burges Salmon to collaborate on the Accord Project."

The European Technology Association (ELTA) has announced a partnership with legal technology provider **HighQ** to enable ELTA and its members to collaborate and share knowledge securely using the HighQ platform. ELTA supports legal tech communities across Europe, including law firms, legal tech companies, in-house lawyers, companies, start-ups and individuals. The organisation plans to use HighQ as a platform for the exchange of ideas and resources as well as to facilitate real-time communication and help create a library of content as a resource for members. "With a growing membership, the circle of our Ambassadors constantly increasing and the formation of first national expert chapters, ELTA has now reached a level of complexity as

an international organisation which requires professional management and collaboration tools," ELTA chair **Tobias Heining** said. "We are very happy to engage in this partnership with HighQ and are looking forward to mutual benefits as we further improve our work with our community of legal innovators." In addition to improving collaboration and knowledge sharing among members, ELTA will leverage the value of the platform to manage projects, securely share files and access powerful integrations with other leading technology partners. "HighQ is excited to have a partnership with an organisation dedicated to the advanced use and application of technology in the legal industry," said **Martin Rohde**, HighQ's strategic partner manager, EMEA & APAC. "We look forward to providing ELTA with technology that will better connect its members and foster meaningful collaboration between legal tech users and developers."

SmartRoom, a global virtual data room provider and the search and discovery platform **Nalytics**, have announced a strategic partnership that will integrate the two technologies, allowing SmartRoom users to utilise Nalytics to undertake challenging information search and discovery tasks with speed, precision and ease, as well as use Nalytics' artificial intelligence technology to automate file review and analysis - significantly reducing the time involved in the due diligence process. "We're excited about this partnership with Nalytics and the value it brings to our customers," said **Jeff Kalina**, executive vice president of SmartRoom. "The integration eliminates the tedious manual work typically involved in due diligence and automates tasks which helps reduce costly risk of human error. As a result, customers will save significant time and money on due diligence. Deal-making will be streamlined and accelerated." **Margaret Warrington**, product manager at Nalytics said: "We are delighted to have the opportunity to partner with SmartRoom. Nalytics will offer an extension to the existing capabilities of SmartRoom. The partnership makes total sense as the two platforms complement each other so well."

North America Email security company **Tessian** has raised $42m in a Series B funding round led by **Sequoia** to accelerate its expansion in the US and other global markets. Tessian has been growing quickly in New York, where it launched in October 2018 led by Ben Freeman, who relocated from the UK. The company, which uses machine-learning tech to prevent spear phishing and misdirected emails, represents an important shift away from rules-based systems that are often inflexible and unwieldy. Announcing the investment, co-founder **Tim Sadler** said: "We've entered the third era of enterprise cybersecurity. In the early days, network security sufficed. Then cloud apps and mobile devices proliferated, and we adopted endpoint protection. But, in spite of these protections, data breaches are at an all-time high. The reason is humans. People are the most important decision-makers in the

enterprise and process extremely sensitive information on a daily basis, yet they're more vulnerable than ever before. Tessian's mission is to help organisations protect people processing data using technology that empowers, rather than restricts, the way they work."

Capensys has won projects to assist **Cole Schotz P.C.**, **Robinson+Cole LLP**, **Rosenberg & Estis P.C**. and **Wildeboer Dellelce LLP** with training materials and resources for their upcoming rollout and training projects.

Iridium Technology has completed the purchase of the legal industry division of **Decision Pace Inc.** Jay Moeller, the former CEO of Decision Pace, has joined Iridium in the position of director - Project Management Office. All Decision Pace clients will now be supported by Iridium staff, and have the option to migrate onto the Iridium BI products. All Iridium BI modules will be made available to the Decision Pace clients: Revenue, Profitability, GL+Expense, and Matter Budgeting/Tracking. Both cloud deployment and on-premise deployment will be fully supported. "This is a win/win scenario for both Iridium and the Decision Pace clients," stated **Tom Jones**, CEO of Iridium Technology. "We welcome the Decision Pace clients into the Iridium family, and we are pleased to make our entire BI suite available to them. We will work closely with these new clients to make sure that their legal BI requirements are fully supported going forward. Additionally, I am incredibly pleased to have Jay Moeller joining the Iridium team. Over the past 30 years Jay and I have been both partners and competitors but, more importantly, we have always been great friends." This is a private transaction, and financial terms have not been disclosed.

Following the announcement that it will extend its integration programme to content providers, **Litera Microsystems** has signed an agreement with **Kira Systems** that will see Kira become available through Litera's Microsoft Word toolbar. The integration is part of a wider move by Litera to give law firms a streamlined approach to document drafting and help them make the most of the technologies available, with Litera's vice president of marketing & partnerships, **Julian Morgan**, observing: "Legal tech is so fragmented and there is so much more that suppliers can be doing to provide these smooth integrations so that CIOs are not left trying to piece everything together - why aren't we saying that we'll take the initiative so that CIOs can spend their time elsewhere? Litera offers a 'cradle to grave' approach to drafting but does not offer a DM solution, and where it has no offering it plans to integrate with content providers to provide users with a single interface.

Baker McKenzie has become the first law firm client of **Intapp**'s newly acquired professional services deal and client relationship management system, **DealCloud**. The DealCloud integration will see the CRM and business development platform auto-populated by the likes of Intake and Open Experience, remedying the perennial CRM issue of getting fee-earners to enter details about their clients into the system. It also integrates with the Microsoft Office stack. Baker's global chief operating

officer **Jason Marty** said: "We have seen a shift among law firms towards enterprise software. I've been sceptical of CRM systems, but we've had a different experience and in DealCloud there is a new approach. **Dan Surowiec**, Bakers' global chief information officer, says: "A key reason for our decision to choose DealCloud is its purpose-built architecture. Traditional CRM platforms are based on the sales department pipeline model, which doesn't align with the way leading law firms like Baker McKenzie operate to develop client relationships. With DealCloud we shall have a solution built specifically for our needs giving a single, all-encompassing view of clients, people networks and prospects."

Law firm enterprise software company **Rippe & Kingston Systems** and **Iridium Technology** have announced a strategic partnership to provide advanced financial insights for firms running the Rippe & Kingston Legal Management System, which includes revenue and expense management, timekeeping, practice management and analytical reporting tools. "By partnering with Iridium Technology, Rippe & Kingston is enabling our existing and future clients to raise the level of their firm's performance," said **Tom Obermaier,** CEO of Rippe & Kingston. "Combining Rippe & Kingston with Iridium BI gives our clients the best of both worlds: an industry-standard finance platform combined with a complete BI stack that includes best-of-breed profitability analysis capabilities."

Adaptive Solutions Inc., a national legal technology partner to law firms and corporate legal teams, and **DocSolid**, a provider of enterprise scanning, workflow and paper reduction solutions for the legal market, have announced that Adaptive Solutions is now a DocSolid Premier Partner. "The Adaptive Solutions team is recognised for their deep expertise across the entire information life cycle within law firms, giving DocSolid an elevated touch point with clients," said **Steve Irons**, CEO of DocSolid. "Together, ASI and DocSolid help firms overcome the biggest obstacle to iManage adoption and ROI – the dependency on paper files."

APAC WongPartnership LLP continues to acquire innovative technology to enhance the delivery of legal services to its clients, with the adoption of document review solutions by **Litera Microsystems**. These solutions include proofreading and document comparison software tools that will improve document review and workflow processes. The solutions allow staff to draft and prepare documents efficiently as well as detect changes across multiple modified versions and file formats to boost productivity. **Wai King Ng**, managing partner, said, "Since our adoption of artificial intelligence technology in 2017 we have continued to explore ways to leverage technology solutions for our document workflow. The Litera solutions will allow us to increase our efficiency further as we focus on more important aspects of legal work and ultimately bring greater value to our clients."

One-stop-shop practice management system provider **PracticeEvolve** has seen five new clients go live on their PMS. The new firms include **Tierney Law** and **Keyworth, Harris & Lowe**. They join a community of more than 200 law firms in the region. **James Parker,** who was brought in from InfoTrack to take over as CEO of PracticeEvolve, said: "We have recently made major investment in expanding our teams globally and locally, adding eight brand new roles to our team here in Australia. These are largely in the client service teams to ensure that we continue to build the excellent service quality and active product development that modern law firms need to maintain their competitiveness."

Payet, Rey, Cauvi, Pérez Abogados, a leading full-service law firm in Peru, has implemented the **NetDocuments** platform as the foundation of its efforts to improve work place mobility and build upon the firm's governance and security initiatives. With more than 110 lawyers working on the go across Peru, the move to the cloud-based NetDocuments has enabled the firm to manage, review, store and share documents and emails from any location on a wide range of browsers and devices. "We chose NetDocuments for its ability to help us meet the mobility demands of today's clients and work force while ensuring we are able to anticipate and address our technology needs of the future," said **Deivi Estrada Saavedra**, IT head. The firm's decision to go with NetDocuments was further validated by the platform's security architecture: NetDocuments offers security by design and default, ensuring both firm and client data is safe from internal and external threats. "The platform's advanced accessibility options and built-in security and governance features allow us to have the peace of mind that, even when lawyers are on the move, all of the sensitive information that we handle is backed up, secure and never in the wrong hands," said Estrada. "Payet, Rey, Cauvi, Pérez Abogados' implementation of NetDocuments is allowing them to adapt and deliver the technology solutions and security their professionals need and clients demand," said **Alvin Tedjamulia**, CTO, NetDocuments. "We look forward to partnering with them for continued innovation and support as they unlock and leverage the unlimited possibilities of the platform."

▶ Movers & Shakers

UK & EMEA Freshfields Bruckhaus Deringer's innovation consultant **Shawn Curran** has joined **Travers Smith** as head of legal technology, re-joining Oliver Bethell, who left Freshfields last year to take over as chief technology officer at the UK top 40 law firm. Curran will be working with new technology and will be focussed on building relationships with internal and external clients to push forward the firm's legal tech strategy. He will be working with head of IT David Cassidy, who has been at the firm for 17 years. Curran says that he is looking forward to the move, commenting: "There are firms that detach the innovation function from core IT and there

are firms that keep it the same. I've worked for firms at different stages that do both and my current view is its best to keep them together. I think it's very important that the technology capability all pulls in the same direction. Any value that comes into the technology team should be shared throughout, whether its server provisioning or client pitches, everyone plays a role."

Allen & Overy capital markets partner **Simon Hill** has been appointed as a director of fintech start-up Nivaura as part of the firm's latest funding injection (see Wins & Deals above).

Wilson Legal Solutions, a provider of software and services to help professional services firms improve business performance, has announced that **Gareth Hodges** has joined the company as an account executive for the EMEA market. Hodges joins from LexisNexis Enterprise Solutions where he was a key account manager. In his new role, Hodges' initial focus will be working with professional services firms to help solve business and operational challenges related to CRM, business development and marketing. He will also help firms identify solutions to improve efficiency, particularly related to billing processes. His long-term objective is to advise firms on all aspects of the client lifecycle and Wilson's software and service portfolio. "Having Gareth join Wilson will be a real boost as he'll be a great asset for both our clients and our business," said **Stu Gooderham**, Wilson's EMEA commercial director. "He has built up excellent relationships and made many connections within the CRM community, particularly in the UK and the rest of the EU, that will help Wilson continue to grow and expand our client base."

Wavelength Law has welcomed Royal Mail legal adviser **Chris Simkins** as its latest recruit as the legal engineering company hits the circa 30-staff mark. Simkins, who joins as a senior commercial lawyer and legal engineer, is being brought in to help boost Wavelength's growing corporate counsel portfolio. In the past financial year Wavelength's revenue was divided almost exactly 50/50 between law firms and corporates but, speaking to Legal IT Insider, founder and CEO **Peter Lee** said: "We've seen our work with in-house teams grow and it is a bigger addressable market. In-house teams are becoming generally more sophisticated and aware of what they can do with data." He adds: "The rise of the legal operations role is helping with that." At Royal Mail Simkins was a senior legal adviser, strategic transactions, advising on large-scale IT programmes. Before that, between 2014-2017, he was a senior legal counsel at Plusnet, having trained and qualified at DLA Piper between 2009 and 2014. Simkins' arrival has been immediately preceded by that of **Barbara Hamilton-Bruce**, who joins as head of client operations. Hamilton-Bruce held that same role at Slater and Gordon until 2017 when she founded legal business change company BHB Consulting. Lee told Legal IT Insider: "Barbara's focus is going to be both on supporting client legal operations projects but also on our data-as-a-service offering, where we design solutions for customers that they run as a

service using our data techniques." That service offering, which is something Wavelength has focussed on over the past year and is a growing limb of its business, sees it enter a proof of concept around analysing legal data that it then builds and runs as a service for the customer.

Insight Legal Software has announced the appointment of former Director, **Brian Welsh**, as Chief Executive Officer following a period of significant growth for the company, averaging 25 new customers per month over the last six months, ranging from single users to over 70 user sites. With over 25 years experience in legal IT and the provision of software solutions, Brian will be responsible for directing the strategic position of Insight Legal, with a focus on bringing the team together to steer the business through a period of internal investment and growth and beyond. Commenting on Insight Legal's growth, Welsh said: "At Insight Legal, we recognise that creating an enjoyable working environment for our dedicated team of industry experts is integral to continuing the development and success we have achieved across the market to date. Our service is built on the core foundations of honesty, independence and unique technology and our recent growth is a testament to the on-going investment in upholding these values in all areas of our business.

North America **ILTA**, the International Legal Technology Association, has announced that **Joy Heath Rush**, previously interim CEO, has been appointed as permanent CEO. "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.

Zero, a mobile-first, artificial intelligence email management technology company, has announced that legal technology veteran **Aimee Spirlin** is their new vice president of sales. Spirlin brings over a decade of expertise in legal technology, most recently in her role as a managing director at Intapp, and a demonstrated strength for developing strategic relationships that accelerate long-term growth. **Ryan Steadman**, CRO at Zero, commented: "We've had a strong start to 2019. As technology adoption in the industry increases, having an experienced and passionate spokesperson like Aimee on our side is an absolute advantage. We are excited about the partnerships Aimee will lead in and the client value she will be able to bring." Spirlin added: "This is truly an exciting time to join Zero. Its powerful and intuitive AI interface addresses some very basic law firm hiccups and offers a simple, effective solution that creates a measurable upswing in billable time. As the legal industry starts embracing technology, Zero is the right tool at the right time and I am thrilled to be a part of their growth story."

▶ The hunt for the missing LOTIES

At #GlenLegal19 earlier this month while waiting for our guests to arrive at Edinburgh airport I was talking to Derek Southall, Peter Owen, and Neil Cameron, who were all judges back in the early "Noughties" when I used to run the LOTIES, e-LOTIES & LEMA awards.

The LOTIES were for the Legal Office Technology Innovation Awards, which were the original Legal IT Awards and were decided on by "FAX VOTING!" The e-LOTIES were legal librarian and knowledge management innovation awards and the LEMAs were the Legal Marketing Awards.

Venues included: Madame Tussaud, Café Royal, The Park Lane Hotel, Intercontinental Park Lane, Royal Courts of Justice, Marriott Grosvenor Square, The Grosvenor House Hotel and Lancaster Gate Hotel. Our awards hosts included Ruby Wax, Boris Johnson, Janet Street Porter, Jimmy Carr (who no showed!), Graham Norton, Phil Jupitus and others I just can't remember!

We had Golden Men on stilts, Bunny Girls, Butlers in the Buff and Tequila Girls, and we rented the Dover Street Wine Bar for the afterparty. We had ice sculptures, champagne & vodka ice luges and chocolate fountains! Wowzah, they would not be deemed acceptable in 2019!

Derek Southall has dug out his LOTIES 2004 - Best Legal Office Technology System (In-House IT Team) winner's trophy.

I want to ask all of you who are old enough to support the "Hunt for the missing LOTIES"!

On 1 April 2019 it will have been a decade since the last one of these awards I hosted, so send me pictures, post me the trophies and watch this space for further announcements. Found a LOTIE; miss the LOTIES; or want a LOTIE, email me, Jeremy Hill, at LOTIES@LITI.CO.UK.

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