

# legal*i* insider

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## ▶ PLMJ hacked

In news that has yet to make it out of Iberia, Portugal's largest law firm, PLMJ, this year became the latest firm to fall victim to a cyberattack after its network was compromised and information relating to the the Benfica football corruption investigation published Wikileaks-style on a football blog.

Lisbon club Sport Lisboa e Benfica has been accused of several counts of corruption, which it strongly denies. Prosecutors allege that Benfica SAD conspired to bribe the judiciary and obtain information about investigations into the club. PLMJ is helping the club to defend itself against the allegations which, if proven, could see it banned from competitive sport for up to three years.

The breach is understood to have taken place towards the end of 2018, with confidential information published on the Mercado de Benfica football blog, according to multiple reports in the Iberian press.

PLMJ issued a statement in January, saying: "Following successive attempts at unlawful intrusion, the security of the PLMJ network was recently compromised. PLMJ is assessing the impact of this unlawful access to information and, together with a team of specialists, it has immediately defined preliminary protection and containment measures."

It added: "The security of our clients' information and the defence of their interests and rights are our priority. We will keep you informed of all and any significant new developments or facts relating to this issue."

According to a report from online Portuguese economic newspaper ECO, some of the measures that PLMJ has already implemented are "the total separation of personal and professional use environments, data

confidentiality and data tracking systems, the definition of computer security protocols and the establishment of diversified access levels according to sensitivity of themes."

Asked for comment on the breach, a spokesperson told us: "As we communicated publicly, once we were made aware of an issue, we launched an investigation with a global incident response company and put additional security measures in place." He added: "The security of our clients' information and the defence of their interests and rights are our priority."

PLMJ is a long-term client of Epona's on-premises Sharepoint-based DMSforLegal, but we understand that the DMS was not breached.

## ▶ Intapp acquires OnePlace

Intapp on 23 May announced that it has acquired Salesforce-based contract lifecycle management rival OnePlace following the acquisition only last year of professional services CLM DealCloud.

We spoke to Intapp's CEO John Hall and OnePlace founder and CEO Tim Smith about the acquisition, which we can reveal will see OnePlace retained as the brand for the legal sector, and DealCloud within financial services.

The ambition is indeed to build a best of breed CLM leveraging the capabilities of the OnePlace team. See the next page for the full interview.



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## ► LTC4 in major overhaul

Legal tech competency company LTC4 has completely overhauled its business model, ditching its annual membership and introducing the ability to pay for learning plans as you go.

Law firms will no longer have to join LTC4 and pay an annual membership or renew their existing membership. Instead, firms who are new to LTC4 can purchase the core competency learning plans individually or in pre-determined packages quickly and easily via an online shop.

They will have to sign LTC4's license agreement (to protect the IP of LTC4) and then they will be able to download whichever learning plans they require. Whether they are delivering training for system upgrades, rollouts, new starters or simply improving skills across the firm the learning plans are designed to provide workflow-based structures which are relevant and application agnostic.

The cost is based on the size of the firm, measured by the number of employees.

The changes come after many firms questioned the need to renew their membership once they have bought all of the learning plans. The changes were voted through by the board, consisting of Bonnie Beuth from FordHarrison; Rachel Baiden from Squire Patton Boggs; Chloe Parfitt from Burges Salmon; Hannah Vendetti from Shearman & Sterling; and Cory Christmas from Baker Donelson.

Existing member firms will retain their membership and benefits until the renewal date and then will be free to purchase the latest versions of the learning plans and apply for certification as and when required. A team of law firm volunteers is currently working on reviewing three of the core competencies ready for release later this year.

LTC4's marketing consultant Joanne Humber tells us that the new pricing structure has already achieved very positive results. Membership for vendors and training providers will continue as before. Many law Schools are also working with the core competencies and aligning their digital skills content with the LTC4 Learning Plans, ensuring that their graduates are prepared for the real world of the modern law firm.

## ► Intapp acquires OnePlace

Intapp on 23 May announced that it has acquired Salesforce-based contract lifecycle management rival OnePlace following the acquisition only last year of professional services CLM DealCloud.

The surprising new acquisition inevitably set the market alight given that Intapp now owns two products that a) compete; b) have very similar objectives; and c) did we mention that OnePlace is built on Salesforce? It doesn't take a genius to conclude that ultimately two products will become one and that it's unlikely long term to be hosted on a third-party platform.

We spoke to Intapp's CEO John Hall and OnePlace founder Tim Smith about the acquisition, which we can reveal will see OnePlace retained as the brand for the legal sector irrespective of platform, and DealCloud within financial services. Lawyers don't just do "deals", after all. Baker McKenzie, which was the first firm to buy DealCloud, will going forward be using OnePlace.

Hall and Smith are reluctant to give away too much about the underlying roadmap before they have spoken personally to clients but we can say that the ambition is to build a best-of-breed CLM leveraging the capabilities of the OnePlace team, which has a long pedigree in this space: many, including Smith, have come from leading CRM vendor LexisNexis InterAction. Intapp has, in effect, bought the IP and expertise of OnePlace, which was beginning to gain some serious traction in the legal market since its foundation in 2012.

Hall says: "Intapp has never been religious about specific technology, we have been pragmatic and taken a business-orientated approach.

"We are going to be consistent and we are going to work with all of OnePlace's clients to help them achieve their client lifecycle vision."

Intapp and OnePlace share the same vision for CLM and it's difficult not to get caught up in their enthusiasm. Much rests on the name OnePlace, and Hall says: "OnePlace is such a great name and the name says it all. The firms recognise that we are trying to create one place for partners, so our two companies completely agree on the vision."

If Intapp gets its way, the vision will mean the ambitious and acquisitive Palo Alto-headquartered company will be one platform for almost all of law firms' technology needs and Hall says: "Over the past 10 to 20 years the legal technology industry has grown up in silos, with different vendors selling different

systems to different budgets. The impact has been to put the burden on the firm - especially IT - as to how they integrate all these different systems to help their partners achieve better insights and deliver work more profitably.

"We believe that firms have been historically underserved by this approach. No-one is looking at the firm leaders and partners - somehow IT was supposed to integrate an ERP and HR into some kind of unified experience and it has placed a huge burden on firms because they are not set up to do this at scale. It's important for us to service each of these business services but the opportunity today is to help firms take a better, more integrated approach, and bring the business service teams together to enable them to serve the partners better."

Note that the ambition is to raise CLM – we're towing the party line by not referring to it as CRM, which has become something of a four letter word (pun intended) – so that it becomes the prevail of the most senior business leaders and partners. "The OnePlace team understands CLM and the marketing and business development community and increasingly has built relationships with the leaders and the partners to help them achieve their strategic goals," Hall says. "There is a tremendous history of this team building the right solution for these firms using the technology that is available to them."

Intapp is used to selling software and to reach partners the language it uses will need to focus very much on the end goal – increasing revenue and profit. But Hall knows that. He says: "Our theme is modernisation and 49% of clients say that their primary law firms' biggest weakness is the lack of collaboration among partners and fee-earners to deliver the right information at the right time. It's the number one critique. So, if you take a step back and say, 'what technology can help that?' you start to understand the Intapp platform. What we're trying to do is to provide for the first time a purpose-built industry cloud for professional services. For the first time to handle the whole client lifecycle from the perspective of the partner. To deliver client insights on revenue and profitability and risk. All on your mobile device.

"The strategy is that these firms need to break out of the history of siloed departmental systems that don't talk to each other if they want to compete."

Smith said: "Our business growth is about identifying the opportunity and capitalising on firms' relationship with clients. We're a growth tool."

Hall adds: "Another core part of the Intapp strategy is a deep investment in AI. Our zero-entry capture is all about passively collecting information from the system the lawyers are using." Intapp not only bought DealCloud but also gwabbit, which includes signature scraping capability. We recently published a report on the CRM market, including an analysis of DealCloud and gwabbit, if you haven't read it yet you can download it for free here: <https://www.legaltechnology.com/top-200/>

In June Intapp will announce a pricing solution that uses AI to look at a firm's work history and help lawyers work out more accurately what price they should quote.

Intapp is undeniably building up a very compelling offering but it has grown extremely fast and has a services issue, with CIOs in the UK particularly reporting their frustrations to us directly. CIOs love a good vision, but if you're not delivering today, the long-term strategy is just noise.

In 2017 Intapp took "significant investment" from Temasek, a Singapore-based investment company, and Hall says: "We have made two or three important steps. We have assembled the financial backing to support us and a strategic team to work with firms at a strategic level. We have a much larger services organisation in London, and there is a big emphasis on cultivating the partner ecosystem - we have brought in hundreds of Intapp trained companies, many of whom know the firms well."

Intapp is also regarded as expensive and as it looks to increase its client base it will be interesting to see if smaller firms are priced out. Hall points out that with 1,400 clients, many of them are mid-market firms. While we have moved on from assuming that cloud = cheaper, Intapp's progressive march towards becoming a cloud vendor means that firms increasingly won't need to pay for infrastructure and will be able to consume its products as online services. DealCloud came with hundreds of mid-market customers.

We have recently obsessed about the impact that the private equity sector is having on the legal market and how it is driving consolidation (see page 4) and Intapp is arguably yet another example of that. We would bet good money that it won't be long before it announces an IPO.

Our assessment of the acquisition of OnePlace? Intapp has taken out a competitor. Its platform strategy is intact. Delivering on all of its promises is going to be a challenge. But it is becoming something of a juggernaut.

## ► Mover and shaker

Congratulations to Stephanie Abbott, who has taken on the role of director of knowledge & learning at Herbert Smith Freehills, heading the function globally. Abbott was previously a director at Janders Dean, which works closely with HSF.



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## ► What private equity wants

*We talk to five investors about what they look for in legaltech opportunities and the value they believe they can bring.*

### **David Sneddon, Scottish Equity Partners**

David is a partner at late-stage venture and growth capital firm Scottish Equity Partners. SEP's investments in the legaltech sector include Peppermint Technology and Workshare.

### **Xavier Woodward, Livingbridge**

Xavier is a partner at Livingbridge, focused on the financial and legal services industries. Livingbridge is invested in law firms and is actively looking at legaltech opportunities.

### **Tom Shelford, Bowmark Capital**

Tom is a partner and member of the investment committee at Bowmark Capital. Bowmark is invested in Lawyers on Demand and is now actively also looking at the legaltech space.

### **Matt Singh, BGF**

Matt is an investor with the Business Growth Fund, which has backed a number of legal services businesses and is invested alongside SEP in Workshare.

### **Greg Coates, Hg**

Greg is an investor with Hg focused on legal and compliance software companies. Hg investments include Iris, Litera Microsystems, Mitratech and German legl software company STP.

**Early-stage investment in legaltech hit new records in 2018. But what makes the sector attractive for later-stage growth and buyout investors?**

**David Sneddon:** I think you need to take a step back and say what makes an attractive investment proposition, full stop. We are looking for growth markets where you are dealing with customers who value technology and who are likely to be good long-term clients. Legal is one of those sectors.

**Xavier Woodward:** The legal sector, in general, is big and fragmented and there are lots of inefficiencies in the way services are delivered. I would suspect legal services businesses don't look massively different in 2019 than they did in 1919, which doesn't describe

most industries. For investors that means two things: there are probably quite a lot of mediocre businesses out there, but equally there is an opportunity for someone to take that sector and make it more efficient and more effective.

**Tom Shelford:** Legal technology has been an interesting space, particularly since changes to regulation allowed alternative business structures in the sector. It has become even more attractive as companies are increasingly forced to focus on procurement. Management of cost is now as material as revenue growth for most corporate's bottom lines and spend on lawyers is no exception. Inhouse legal teams are looking for new ways of procuring legal expertise. Part of that is unbundling the advice they are getting - managing workflows and driving efficiency. Technology has a key role to play in doing that.

**Matt Singh:** I agree that the market really opened up with the 2007 Legal Services Act. Traditional partnerships don't incentivise investment in the business. Partners are incentivised to take money out in their drawings. That has often resulted in under-investment and slow growth. The advent of private equity interest in the sector and a number of legal IPOs, following the regulatory changes, has shown the value to be had in corporatising the legal model and putting capital behind businesses to grow through acquisition, but also to invest in back office systems to drive efficiency. Technology is not the only component of making the sector more efficient but it is a really important component and it makes legaltech a very interesting space for us to look at.

**Greg Coates:** I would say that the obvious attraction is the market potential. Around \$500bn is spent on legal services in the US alone each year and there is a long way to go in improving the efficiency of lawyers in delivering that service. Today, the total IT spend by law firms is only around \$4bn, but, as firms continue to feel client pressure to improve delivery, we'll see more of that spend shift towards software vendors. This is a clearly defined market where the horizontal vendors have consistently failed to deliver products or support that really meets the needs of the way law firms operate.

The second, less obvious, factor is the close community that's developed around law firm purchasers. Communities such as GlenLegal and ILTA mean that if a vendor does a great job at delivering for CIOs, they can very quickly build a quality brand as the 'go to' provider for a segment of the legaltech landscape. Legal CIOs tend to see each other more as peers than competitors, which means that software vendors who



provide compelling products and great support can scale quickly. These two factors mean that we're seeing some really big, interesting software platforms emerge in legal. Beyond Hg's own portfolio, you can see the likes of iManage, NetDocuments, Intapp, Relativity, Clio and many more, all building lasting businesses of meaningful scale.

#### **What's new? How is the sector evolving?**

**Coates:** We see two trends which are interestingly contradictory. On the one hand, there's been this sudden wave of innovation and start-ups in legal trying to bring neat, new tools to attorneys. On the other hand, the complaint we hear most often from CIOs is the proliferation of IT vendors. As a result, there is a CIO push to consolidate their IT stack onto a few strategic platforms. This is going to shape legaltech for the next five to 10 years, with big vendors such as the DMS players expanding their reach, both organically and through acquiring these emerging start-ups.

#### **How does legaltech compare to fintech or other areas of technology as an investment proposition?**

**Coates:** There's probably 50 to 100 times more spend in total on fintech than there is on legaltech, which is perhaps why fintech gets more attention. In addition, legaltech is comparatively hard to scale. This dynamic is mostly driven by the partnership model often used in law firms, which makes IT decision-making more complex, and a general reluctance from attorneys in changing how they work. You can build a fantastically innovative product in legaltech but the highest mountain to climb is convincing CIOs to undergo the change management needed to drive adoption. It requires a lot more thought around sales approach and customer success than any other industry we're investing in and is where a knowledgeable investment partner can add value.

#### **What subsectors do you see as particularly exciting?**

**Singh:** Legal firms are essentially people businesses and ultimately the way in which to make more money out of people businesses without adding more people is to drive efficiency in the way that they operate, so back office technology like robotic process automation or SaaS technology that allows processes to run more smoothly. These are all technologies that can ultimately help drive margin.

**Coates:** We spent a lot of time looking at the legal 'front office' applications before investing in Litera Microsystems. We think we've backed a really special team there who have brought together the Litera Desktop to deliver a single, seamless drafting workflow to attorneys and the benefits of a single vendor to CIOs, which is striking a chord with that drive to consolidate IT vendors, particularly on a cluttered attorney desktop.

There's also a lot of change and opportunity going on in corporate legal, which is often underappreciated.

The rise of legal ops in the US is the root cause of the change in legal services right now and technology is core to what they're doing, which is why we are also invested in Mitrtech. In terms of where next for Hg? We think there are interesting opportunities around law firm 'BizDev' software, better serving small firms or solo practitioners and in changing the way lawyers are delivered relevant legal content.

**Woodward:** We find the workflow management space interesting. Most large firms use workflow management tools, but they are using them in the context of the old-fashioned time and materials model. At the moment, they are not really incentivised to reduce the time spent on a task and, even if they think they are, there is a cultural conditioning towards maximising hours recorded. The other interesting area is how to get technology to perform tasks currently performed by lawyers. There are all sorts of activity around machine learning, AI and digital scanning. Those technologies have not been widely adopted yet but they will be and we want to invest in the ones that are going to win.


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## **Are you looking at AI-driven businesses as viable propositions today, or building relationships for further down the line when the technology is more proven?**

**Sneddon:** We don't look at early-stage propositions around AI, for example. We are following those sectors closely and will be interested in investing once they mature, but we require established revenues in order to invest.

**Coates:** We see a lot of cool AI vendors, but these do tend to be too early stage for us to consider right now and we've not got the conviction quite yet to tackle eDiscovery.

**Woodward:** The challenge for firms like ours is that the most exciting businesses are the ones that grow most quickly. That means the time period between being too small for us to invest in and too big, is shortest. I am always interested in meeting companies even if they are currently too small for us due to the size of the funds that we manage. If they do grow well, we will have put in the hard graft of relationship building so we will be ready when the business is ready for us.

## **What qualities are you looking for in the businesses that you back?**

**Sneddon:** Later-stage growth businesses are our sweet spot. We are typically looking for companies which have disruptive technologies, established customers, recurring revenues and which are looking to grow to the next level. Peppermint is a good example of a company that had brought a disruptive product to market and which had initial customers in place but needed to raise money for further customer acquisition and product development. Then we are also looking at the management team, of course. They are the glue that holds the whole thing together. What we are ultimately backing is the professionalism and skill of that team to execute on a plan.

**Singh:** We are looking for businesses that can articulate a value proposition whereby the client's investment into the software can help drive operational efficiency, in other words where the technology pays for itself. We also look at how integrated the software is. We want new developments to be upsold in a modular fashion.

**Shelford:** The key thing we are looking for is the nature of the client relationships, evidence of recurrence of spend and a large addressable market. We are not early-stage investors and we need confidence around a sustainable track record and business model. Where we believe legaltech has the most scalability is by being extremely focused on a particular proposition and really mining that offering, becoming as innovative and helpful as possible for users before branching out into different product groups or territories. There can be a temptation, given the huge demand for efficiency, to try and be all things to all people.

**Coates:** First, we look for an entrepreneurial team to back. We want managers with a big vision of where they want to take their company, based on a

clear, unsolved customer need and with the capabilities to build a team of engaged employees and processes around that. Second, of equal importance, is a business with healthy customers and healthy product. We want to find businesses that law firms love dealing with and products that lawyers love using. It comes back to the idea of the legal community - if CIOs dread your phone call, or attorneys aren't using your product, someone will quickly take your seat at the table. But if you get it right and build healthy CIO relationships, you have a platform to build from and upsell new innovations. It's all driven by having the right people, processes and level of investment in product and support.

## **What do you make of the quality of management teams that you are seeing in legaltech businesses?**

**Shelford:** I think there are impressive entrepreneurial people heading up legaltech businesses but, as is natural for a sector at this stage, further investment is often required in the broader management team, not only the usual areas such as finance, but also in sales, marketing and operations to help professionalise companies as they scale.

**Singh:** Inevitably in a relatively new area, we tend to see higher risk-taking management teams. They usually know their sector well, or else have parallels to it. They understand that historically this has been a stable, if unexciting industry, and they can see the opportunity to tap into new ways of thinking, new law models and new technologies. It takes management teams with vision, risk appetite and an entrepreneurial mindset to do that, and that's what you see in this sector.

## **What do you look to bring to the table as investors?**

**Woodward:** We don't have a playbook that we roll out. It is very much case by case. But collectively we have seen a lot of businesses, a lot of business models and a lot of business challenges over 25 years. Because there are always challenges. Our job is to share that experience constructively to help management make the right calls on the big decisions, to help avoid missteps and to accelerate growth. We are not saying we can necessarily help the business do something it couldn't do by itself but we might be able to get it there quicker. We have a lot of resource available to support customer acquisition, talent acquisition, data science, research, M&A and we are only too pleased to deploy it as shareholders alongside our management teams. When we win, we win together.

**Coates:** Hg's proposition boils down to four things: our specialist knowledge which comes from an entire portfolio of B2B software and service companies, our expert operational support, our network of talent and, of course, financing. Our primary role is to support our management teams. As businesses scale, entrepreneurs are always going to come up against problems they haven't seen before. The advantage of having a portfolio of 30-plus B2B software companies at any point in time

is that we've probably seen that problem five times before and have, or know, the right person to help. We can also use that network for support in attracting the right talent. Lastly, we can help businesses think about how best to use their balance sheet to drive growth. A good example is M&A, which can be really powerful if you're disciplined in buying high quality businesses which will add value to your customers and focused on getting the integration right. Legaltech is littered with examples of poorly executed M&A, so we think it's useful to have a partner to help avoid the pitfalls.

### What particular challenges do you associate with investment in the sector?

**Sneddon:** I suppose the biggest challenge is that it is an increasingly well-established market and for most product offerings there is a lot of competition. It is about understanding the competitive advantage that you have and ensuring that it is significantly compelling to make clients want to switch.

**Shelford:** I would say there are fewer mid-sized businesses in legaltech than other, more mature, sectors, which is always going to be a challenge for mid-market private equity investors. From an operational perspective, law firms are fairly conservative buyers. That is one of the attractions of the sector but it can also make it difficult to get your foot in the door and scale early stage companies.

**Coates:** Relative to other sectors, it takes a while to come into legaltech and understand the jargon and the way law firms or legal departments really buy software. As well as the experience from previous investments in this sector, it takes a lot of hard yards hanging around the right conferences and talking to CIOs and legal ops directors to build that understanding and network that allows you to make confident investment decisions and add value as an investor.

**Woodward:** The challenge with emerging technology, generally, is predicting adoption, which is partly driven by having the right technology but also by a whole range of factors that are out of your control. There's the classic example of Betamax versus VHS. Everyone found Betamax to be the better platform but it didn't win. The earlier the stage and the younger the business, the more risk there is that while the technology sounds really cool, it just won't sell. That's why we focus on profitable businesses that have reached a certain scale rather than start-ups where, frankly, the job is much harder.

### What do you see as the most likely exit routes for these businesses?


**Sneddon:** There are two primary exit scenarios. Businesses are being sold to larger companies already operating in the space. That's a well-trodden path. We are also increasingly seeing sales to other private equity houses.


**Shelford:** Given the continued scale of growth in the sector as a whole, I think there will be a good

range of exit opportunities. Clearly demand from trade will continue, whether that be from larger consultancy businesses, the big 4 or dedicated BPO companies. I would also expect there to be strong secondary private equity interest and we have seen the good valuations achieved by legal businesses on the listed markets, so I think all three routes will be open. It will be down to the management teams in terms of where they want to take the company and the level of control and investment they want for the next stage of development.

**Coates:** Five years ago, you would have said that the big legal publishers were the obvious acquirer. Whilst they keep making small product acquisitions, it has been a while since we saw any of them make a big move in legal software. I think the larger legaltech platforms being built today have a long runway ahead of them as independent businesses. It would be great to see one or two of these make it onto the public markets as a flag-bearer for legal too.


*By Amy Carroll*


  
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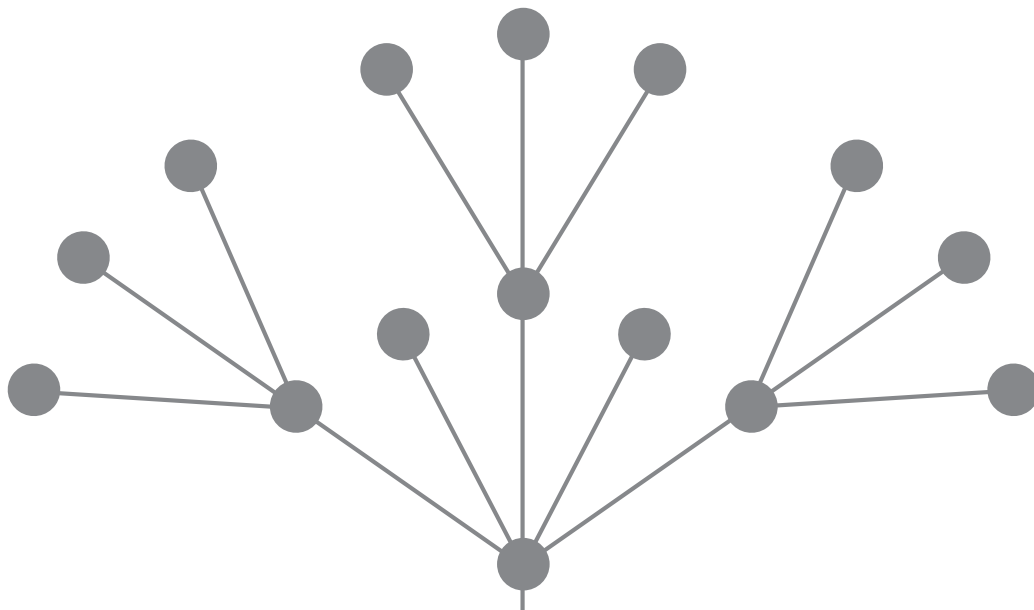


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## ► Legaltech in May

*We bring you all the top news and analysis from the past month with extra commentary from leading players.*

### Private Equity/Consolidation

#### **Litera**

If one trend jumped out in May it was the ever-increasing dominance of private equity in shaping and driving the products on offer in the legal technology sector, as we see much needed consolidation (and in some cases collaboration) between vendors.

On 7 May we revealed that Hg has acquired Litera Microsystems from K1 Investment Management after a three-year period in which Litera is said to have tripled its revenue.

K1 notably built the company through merger in a bid to create an end-to-end document solution for lawyers: in 2016 K1 acquired Microsystems and Xref followed in 2017 by the acquisition and merger of Litera and the Sackett Group. It invested a total of \$100m on the four acquisitions in a deal finalised on 11 August 2017. According to market sources the number K1 is said to have sold for is a fairly eye watering \$400m. No wonder Litera was frustrated at the reference to the \$32.1m paid by HgCapital Trust, which was simply one small part of the transaction.

Speaking to Legal IT Insider, Litera's CEO Avaneesh Marwaha said: "We achieved our targets quickly and it shows that the market is keen to move to a consolidated vendor - the market has received it really well.

"For our customers, they aren't going to see any change as a result of the acquisition by Hg: we are the same company with the same brand and the same values. But, as with any new business, Hg will want to accelerate growth and we will take the vision further and faster, which is exciting."

He added: "When I go out and meet global CIOs it's clear that they are excited and asking us to do more: go wider in our product set and deeper in our functionality and we'll do that either organically where possible but we'll also look out for acquisitions."

The Litera deal is the clearest example yet of how the private equity is leveraging its deep pockets and business acumen to shape play in the legal sector - whether that be owning the desktop or in providing genuine client lifecycle management. As clients increasingly demand a joined-up offering - or even before they do - private equity is obliging. Buckle up for more deals.

Hg, which has focused on the legal sector for 15 years, now has six legal and compliance investments in its current portfolio, including global enterprise legal management provider Mitrtech and German legaltech company STP, which provides insolvency and legal practice software.

How far they will go in rolling up vendors we can

only speculate: will Mitrtech Litera be next?

The success of the combined model, thanks to its ability to cross-sell and provide the client with one environment, is evident: recent wins for Litera include Magic Circle firm Clifford Chance, which in 2018 selected the entire Litera Desktop. That came after Allen & Overy, which has 2,800 lawyers in 40 offices, in October 2018 selected Change-Pro Premier and Metadact for its firm-wide document and comparison and metadata management.

Litera, which already offers Kira through its toolbar, is vying to be the platform with which other vendors must integrate.

Speaking at our #GlenLegal19 CIO conference in Gleneagles Hotel in March, Hector Guinness, a principal at Hg, told a packed room that the opportunity to improve productivity in law firms is "almost limitless" commenting: "There is this huge wave of legal technology to drive that productivity. And it is great to see law firms increasingly embracing that. As investors, that makes legal tech a great place to be."

#### **Onit**

Litera wasn't the only private equity-driven consolidation in May, as Onit, which received \$200m from K1 Investment Management in May (you start to see the ebbs and flows of private equity money after a while) acquired SaaS legal spend and matter management platform SimpleLegal.

Onit provides everything from enterprise legal management to contract management and business process automation. The ambition is to provide legal operation teams with a comprehensive end-to-end solution.

With the investment from K1, Onit has been looking at different ways to scale up, after the company more than tripled its customer base and revenue in two years - sound familiar?

While there appears to be overlap between Onit and SimpleLegal, according to a statement from Onit all product, support and services will continue uninterrupted for all customers.

One of those customers is Baker McKenzie where David Cambria, former global director of operations at Archer Daniels Midland, helped to shape the product and has now become one of the rarer private practice clients.

Neil Malik, managing partner at K1, said at the time of K1's investment: "Onit's platform has raised the bar on what users expect from software that extends across the enterprise. We've seen the company more than triple its customer base and revenue in two years and we have tremendous confidence in the management team's long-term vision."

Los Angeles-based K1 has partnered with over 100 enterprise software companies including Apttus, Buildium, Certify, Checkmarx, ChiroTouch, Chrome River, Clarizen, Granicus, IRONSCALES, Jobvite, Onit, Rave, RFPIO, Smarsh and WorkForce Software.

## Contract review/AI

*It's not so much consolidation but collaboration that you need to look out for within the AI-backed contract review sector, which has, for clients, a fairly overwhelming number of players.*

### **Neota/LawGeex**

In May we were the first to reveal that Neota Logic and LawGeex had paired up to offer an insurance client an automated third party NDA approval process.

While Neota can automate a client's own contract approval process, that falls down if a third party submits their own terms.

Speaking to Legal IT Insider, Neota's director of business development, Mark Surico said: "We often get clients asking what happens in that situation and the answer was that our systems cover the drafting of your documents but not third party paper. What the client decided to do in this situation was to find a company that does do that, and that is LawGeex."

Through the integration with LawGeex, clients can now automatically send their NDA to be reviewed against stipulated terms or standards, with the red-lined agreement returned for review, approval and execution.

Surico says: "Now when a third party says 'I want to upload my own NDA' instead of going to a legal reviewer for manual review, it goes directly to LawGeex

and they provide automatic feedback, providing a whole solution for the NDA review process."

This is likely to be a big time saver so it's no surprise that Surico says: "The feedback has been great" or that LawGeex and Neota are looking at further ways to collaborate.

### **UnitedLex/Seal Software**

The second third party paper collaboration in May saw UnitedLex tie up with Seal Software. UnitedLex's end-to-end contracts lifecycle services platform will route third-party contracts to Seal for comparison and redlining.

Deviations from a client's standard contracting terms will be flagged and a process put in place for further action.

UnitedLex is forecasting that its clients will achieve more than \$250 million in accelerated revenue in 2019 due to faster contracting cycle times. Note that towards the end of last year major private equity house CVC acquired a majority stake in UnitedLex.

We spoke to Seal's founder and CEO Ulf Zetterberg about the saturation in the contract review market and asked if it's ripe for consolidation. He told us: "I see some of the new law companies playing the whole marketing game - they are growing but not investing in how they deliver law service. UnitedLex is well funded and [CEO] Dan Reed has no problem in sticking out his neck and driving change. We are happy to partner with them and we share the view that real transformation will require investment to get there. This is a case of all in or not."

He added: "Many of the private equity firms have seen the transformation in industries like healthcare and manufacturing and they know what will happen: they are prepared to play the long game. But for the long game you need to put in time and energy."

So what do users look for in order to know that they are working with companies here for the long term? "More and more customers are mature, experienced buyers and they want you to show proof of concept and strong references for what you have done for other clients: the proof is in the pudding not just the talk and you have to really show what you have done. We have moved past the hype cycle," Zetterberg says.

Will we see further collaboration or consolidation? "We see more collaboration driven by the customer," he says. "Transformation is about change management more than anything - technology is just one component. Transformation means you change how you solve the problem."

Certainly, clients would welcome more clarity. Stéphanie Hamon, formerly managing director, head of external engagement at Barclays, told us: "Anything that would make reading the market and understanding the offering easier would be welcomed by the client. It's quite challenging at the moment to know all the proposals out there and to assess their respective merits."



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## **Big Four alliances**

### **EY and Thomson Reuters**

Law firms pay attention: collaboration is also the dominant theme when it comes to the Big Four accounting giants' activity over the past month.

Not picked up by the legal press because it looks like a tax alliance - but we argue this may well be just a sign of what's to come - Thomson Reuters and EY in May expanded on the relationship that recently saw EY acquire legal process outsourcing business Pangea3.

The alliance brings together Thomson Reuters ONESOURCE global tax technology with EY Tax Technology and Transformation (TTT) services to help multinational organisations implement seamless tax compliance operations.

The devil is in what Thomson Reuters say about it. Brian Peccarelli, chief operating officer, customer markets, Thomson Reuters, says: "Businesses are responding to technological, social and professional disruption by transforming how they operate and are structured. They now want those they work with to provide transparent, integrated and agile technology with the services that are tailored to meet their needs, not just a one-kind-fits-all offering. This alliance with EY enables us to provide our clients with the very best technology and advisory services for tax, accounting and legal departments."

Peccarelli used to head tax but in addition to the COO role is now head of legal professionals, including law firms, government, academics and the Bar.

### **Deloitte and Relativity**

Also entering a strategic alliance in May were Deloitte and Relativity, which together are offering Relativity Trace, a compliance monitoring application.

Housed on Relativity's cloud-based platform RelativityOne (or elsewhere), Relativity Trace captures structured and unstructured data from more than 40 sources, including email, audio, chat and other file types.

The solution offers near-real-time alerts on high-risk activities like fraud or collusion that necessitate closer analysis.

It follows last year's announcement that Deloitte and Relativity were turning their nine-year relationship into an eDiscovery alliance.

Jordan Domash, general manager of Relativity Trace for Relativity, said: "Increasingly our clients are asking for ways to identify high-risk behaviour occurring in their businesses. To us, a proactive automated approach with integrated machine learning is key to culling massive amounts of data and reducing false-positives. That said, for such automation to work well, it needs to be customised and monitored by seasoned investigative professionals."

## **Document management**

### **NetDocuments**

The shift to the cloud in the document management system sector is really taking off and driving huge volumes of work for the two key players, iManage and NetDocuments.

In May we revealed that Am Law top 50 law firm Wilson Sonsini Goodrich & Rosati had swapped out its iManage document management system for NetDocuments, led by chief information officer Michael Lucas, who led the same move while at Akin Gump.

The NetDocuments selection is said to be a key step in Wilson Sonsini's ongoing strategy to move its entire technology stack to a cloud-based model.

The move was very much driven by Lucas, who told Legal IT Insider: "I've worked at Hogan Lovells, which is moving to NetDocuments, and at Akin Gump, where I signed the deal with NetDocuments. I had a lot of familiarity with both products and a lot of respect for both management teams but where we landed was that we thought the SaaS platform of NetDocuments was very strong and they've been doing it for a long time. It was a platform play and a cloud play and at Wilson we continue to implement cloud solutions. We're doing Office 365 now and my goal is to be pretty much pure cloud by 2020."

One of the key things that swung the dial to NetDocuments was its client file management solution. Lucas said: "Like most firms we have a data sprawl and files in different places. We wanted to have a system that can govern files wherever they are and synchronise with products like Box or corporate Dropbox."

Lucas and the team were also generally attracted by NetDocuments' platform play and he added: "There will be a lot of partners who will join the NetDocuments platform - people once worried how their systems were going to integrate with the document management system but they will all end up there in the cloud."

NetDocuments also won Dickinson Wright - an OpenText AmLaw 200 site - which also selected ndMail for predictive email filing and ndThread for chat-based collaboration.

NetDocuments at the end of April experienced a four-hour major outage - the company recorded it on its support site here: <https://trust-us.netdocuments.com/>

According to the support site, users were able to access the system, but logins were slow from 10am EDT and performance improvements were first logged at 15.39.

One CIO at a leading global firm with knowledge of the outage said: "If that was our document management system and we had a four hour outage it would be a killer for me and the team."

We've scoured social media and can't find a single user complaint. If we're wrong let us know.

## iManage

Baker McKenzie has selected iManage Cloud to replace its on-premises OpenText document management system in a major win for the Chicago-headquartered vendor.

Bakers, which operates in six continents, will deploy iManage Work, Share, Records Manager and Threat Manager in the iManage Cloud for its 13,000+ professionals in 78 offices.

Unusually, the firm said it was unable to speak to us about the selection.

This is the second major win for iManage in three months. In March Clifford Chance selected the iManage Cloud, moving off its SharePoint-based document management system, with security and user interface scoring particularly highly.

CIO Paul Greenwood told Legal IT Insider that iManage came out top for security and user experience.

## CRM

It is all about the CRM this month as Intapp acquires Salesforce-based contract lifecycle management provider OnePlace, and the market is abuzz with what that means. We have some of the answers: see our interview with Intapp CEO John Hall on page 2.

The acquisition came inconveniently moments after we published a report into the CRM market, looking at the key players, trends and developments. If you haven't downloaded that yet you ought to - we just need your contact details.

And as we exclusively revealed towards the beginning of May, Carey Olsen says that it is "on the start of the Peppermint journey", including looking at Peppermint's practice management system and other offerings after a successful business development CRM solution implementation across its nine offices.

The leading offshore firm went live on the CRM solution in June 2018 and, in just the first four months, 6,000 new contacts were added; open rates were up by 55%; click rates up by 26%; while undeliverables went down by 14% and unsubscribes by 70%.

James Prouten, group head of technology at Carey Olsen, said: "We are on the start of the Peppermint journey and are actively looking at Peppermint's online portal, practice management system and other offerings."

## Vendors: The growers

### **Morae Global acquires Phoenix Business Solutions**

It was good news in May for Phoenix Business Solutions, which has been acquired by Morae Global Corporation to form the third limb of the company after eDiscovery and strategic consulting/legal services.

The brand-new document and information management arm, which is headed by Phoenix co-founder Matt Crocker, has clear synergies with the other two divisions. The Phoenix name is retained for this service line.

Fellow co-founder David Boswell has moved into

a senior managing director role, and shareholders and directors Lee Tomlinson and Ray Burch will take on the roles of EMEA new business sales director and director of pre-sales engineering respectively.

Speaking to Legal IT Insider about the acquisition, Morae's co-founder Shahzad Bashir said: "This is a continuation of what we started three and a half years ago and that was 'let's stop the talk and do something that really makes a difference to how corporate law departments work and how they work with law firms and vice versa'.

"We said 'we know we never want to be a law firm and the practice of law is off limits but let's look at the business of law in the broadest and deepest sense: how to make life easy and efficient for law firms and law departments.' Phoenix are culturally aligned with us on a mission to put information management right at the centre."

Phoenix has seen its turnover grow anything between 20% and 30% in recent years, although the bottom line was hit in 2018 by buying out Pickett.

The company has grown to over 120 without contractors and while its biggest office is in London, it has offices in Frankfurt, people spread across Texas, Chicago and New Jersey in the US; an office of around 20 people in Australia; people in the Middle East; and then a newer office in Holland.

## **Ascertus hires**

Hot on the heels of the appointment of Andrew Payne as head of professional services, Ascertus Limited in mid-May announced three further appointments across the organisation as the fast-growing iManage implementation partner tries to keep up with demand in the document management space.

Brendan McMahon and Nickie Ashton have joined as technical consultants and Melissa Jobson as marketing and communications manager.

McMahon and Ashton will closely work with the project management team. McMahon has worked at law firms, including Gowling WLG and Wragge & Co LLP, while Ashton joins Ascertus from BigHand. Prior to that, she was a Technical Deployment Consultant at The ai Corporation. Jobson was previously senior communications manager at HSBC.

Speaking to Legal IT Insider, CEO Roy Russell said: "The good news is that iManage are giving us plenty of new products to upsell to existing clients. The version 10 upgrade and upgrades to the iManage Cloud are keeping us very busy. There is also demand from clients who are unhappy with their existing partner and looking for a change and we provide a viable alternative."

Ascrtus is now up to 36 permanent members of staff, not including contractors. Two years ago it had around 13 to 14.

Russell says: "We've been profitable every year, we've no debt, no loans and we've grown organically."

In the year to March 31 2018 Ascertus grew by 100%.



## Other developments in brief

### **The incubators**

Six early stage companies, ranging from concept through to early revenue-stage, have joined the 10-week MDR LAB programme to work alongside Mishcon de Reya lawyers and other business experts from inside and outside the firm. They are Astroscreen; Index; Donna; Solomonic; Hipla; and Courtsdesk.

### **SA Court Goes Digital**

South Africa is implementing paperless digital courtrooms across the country after selecting London-headquartered digital evidence management provider CaseLines, in a move that is hoped will considerably improve access to justice, including reducing "mislaidd" evidence.

Chosen by the South African Office of the Chief Justice (OCJ), CaseLines is initially to be used in all civil litigation cases across South Africa, eliminating the need for paper in court by introducing an entirely digital platform.

### **Cyber**

Legal and accountancy publishing and software provider Wolters Kluwer in May faced a huge social media backlash over its perceived failure to communicate with customers after suffering a malware incident that took its platform offline for days.

Platforms and applications became unavailable on Monday 6 May, with Wolters Kluwer initially saying it was experiencing network and service interruptions.

### **Tech-celerate**

Litera Microsystems has been chosen as one of Singapore's Tech-celerate for Law pre-approved vendors, with others including Contract Express and NetDocuments. Under the new \$3.68m programme, Singapore law firms can receive funding support of up to 70% of the first-year cost of adopting legal technology solutions.

The companies, other than those named above, are: Hotdocs-Lawcloud and Contract Express for their document assembly software, Relativity, CaseRoom and LegalComet eDiscovery Cloud for ediscovery software and TessaSays for automated client engagement.

Those selected for baseline solutions include CoreMatter, Clio and Tessaract.io for their practice management systems and Dropbox Business, TessaCloud and NetDocuments for document management and INTELLLEX, Westlaw Asia and Lexis Advance for online legal research.

### **Law firm venture**

US employment law specialist Littler Mendelson has launched a new platform to streamline counsel and provide clients with data-driven insights.

"Littler onDemand was developed as a direct response to market demand. Corporate legal

departments often don't have the bandwidth to address the many workplace issues that arise during the course of business and taking all questions to outside counsel can be cost prohibitive," Scott Forman, founder of Littler onDemand, told Legal IT Insider. "Littler onDemand fills that gap and allows us to leverage our scale to act as an extension of our clients' legal teams, providing them with cost savings and an opportunity to direct in-house resources toward higher level services."

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## ► Dispatches from CLOC

***In-house, there is less fear of AI-enabled technology (but not necessarily better access to it)***

*By Dera J Nevin, lawyer and legal technologist*

By all measures, this past CLOC conference in Las Vegas was its largest and most ambitious yet, boasting dozens of education-rich panels. It also showcased a vendor floor of technology and service vendors (including law firms) and made meeting rooms available so that delegates could speak to, learn from and potentially engage these vendors. Part education conference, part trade show, CLOC has become a fixture on the calendar for those interested in technology that impacts legal services delivery.

CLOC has also given voice to and facilitated the rise of the legal operations professional as a key stakeholder in the evaluation and purchase of legal technology. As a result, there has been a rapid increase in technology offerings aimed primarily at in-house legal teams and operations specialists. How does the uptake of this law-department technology compare with legal technology directed at law firm buyers? I went to CLOC to find out and had the opportunity to informally speak with a number of attendees.

***In-house teams are buying, not just sitting on the sidelines***

At least a quarter of the in-house members I spoke to reported they have budget and authority to spend on specific technology categories, mostly related to budget management and external counsel monitoring or process automation. Others had, in addition, an interest in extending the use of alternative legal service providers to supplement or replace law firm activity or were actively exploring labor arbitrage and process automation solutions. Another few reported they were on fact-gathering missions and expected to have budget to spend on similar initiatives in the coming 12 to 24 months. Just under half did not have technology budgets and were there to attend panels to hear what others were doing or to look at technology themselves.

This informal (and unscientific) poll suggests that legal operations are increasingly successful in making the business case to allocate law department funds to technology initiatives aimed at overall cost reduction. I expect this trend will continue for the next few years.

***But in-house buying is focused, and tactical***

The pain-points I heard generally revolved around basic things: formal and process challenges. "All my bills come in different formats, some in paper where I have to use a regional firm. It takes ages to figure out whether we're spending the right amount." "I don't always know when or why [the business] varies a term in a standard contract - and

I don't know how to track that right now." "I am sure we get the same kind of advice from our law firms, but I don't have a way to know this. We might be getting inconsistent advice or paying for the same advice multiple times."

So it is not a surprise that the majority of focus in-house teams were reporting to me was on the tactical side: monitoring and reducing spend, organising individual matters into portfolios, streamlining contract approval processes and times, and making certain information public to the business to reduce time spent answering routine questions. Contract negotiation coordination and contract lifecycle management were the top purchasing and operational priorities of those I spoke to, although the specific motivations for doing so differed vastly.

Only one person I spoke to (admittedly, from a limited set) was exploring advanced solutions for transactional management or automation of specific business needs. This innovation professional, who had been with his organization for some time, had already implemented an external panel- and cost-monitoring mechanisms as well as some process automation software. During a long hallway conversation, he mentioned the need for CLOC to help those on the more advanced end of operations implementation liaise with others and technology in the more custom solutions spectrum.

From these conversations, I learned that those I spoke to remained in a tactical posture even where this was serving a strategy of overall cost-reduction and process streamlining. Few were engaging with the larger question of how to add value to their organisations, including through enhanced data insights about the business, although many had aspirations to do so.

***If it works it doesn't matter if there is AI in it***

Everyone I spoke to was conversant with the kinds of machine learning and natural language processing available in advertised technology, but functionally they cared only if there was AI in a product if its presence helped secure budget. Mostly, they wanted the products they were looking at to work, and to be easier to install and more intuitive to use.

One person I spoke to noted that vendors need to spend less time talking about AI and more time talking about the realities of cleaning data and ensuring it can be imported and exported easily out of the technology. "They don't factor in how hard it is to get data" into analytics tools, he noted and mentioned that the subject of data portability and interoperability was increasingly being asked about within private in-house counsel and legal operations forums.

I learned from this that the significant need for industry interoperability and data format and quality standards - long felt by law firms because of eDiscovery - is now starting to impact the in-house community as well. It will be interesting to see whether CLOC starts to champion data interoperability standards for vendors.

**Many still really need their law firms to help with the heavy, strategic lifting**

The in-house personnel I spoke to here were happy to see eDiscovery and transactional management solutions and vendors at CLOC, as some of them indicated a preference for engaging these services directly; in many cases, where the business case warrants it, in-house teams have already done or will do so to aggregate purchasing and reduce spend.

But other people I spoke to appreciated the opportunity to do some comparison shopping of products and to educate themselves about what the tools do. The legal operations professionals intend to take this knowledge back to their law departments and educate their attorneys about what to instruct their outside counsel to do with these technology categories or might consider adding requirements about process and technology to outside counsel guidelines.

There seemed to be no consensus or trend, but my impression was that law firms are still expected to do much of the work in identifying practice solutions to legal services delivery of substantive work. However, many of the in-house teams wanted to be consulted on solutions being adopted by law firms, or at the very least told about them.

**But some problems remain acutely with in-house teams**

There remain categories of problems that law department face that have yet to be the targets of widespread technology education. Helping to consolidate and aggregate risk associated with business activities, such as by measuring the real at-risk value of cancelled or partially performed contracts, the time-value of money associated with projects or products delayed to market, or the value of compromised IP assets relative to enforcement costs were cited as examples of "bigger problems" that are ongoing. Solutions to these challenges represent material value to the businesses of the law department representatives there, but technology solutions have yet to emerge.

What I learned from this is that, regardless of the substantial progress to date that legal operations personnel have had, there will be a long tail of material challenges for them to resolve. Law firms take note, so that you are positioned to assist once the tactical items are under control.

*Dera J. Nevin formerly practiced information governance and eDiscovery at Baker McKenzie. Opinions expressed in this article are the author's alone. She can be contacted at [dera.nevin@gmail.com](mailto:dera.nevin@gmail.com)*

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## ► Mobile apps: a new age of “self-service” law?

### *Eversheds’ Andrew McManus shares the highs and lows of the firm’s mobile app journey*

When Andrew McManus joined Eversheds Sutherland in 2014, the firm’s IT strategy was focused purely on the delivery of major applications. “It was all about the classic IT projects that took for ever to come to fruition,” he said, speaking at Fliplet’s Apps & Law event earlier this month. “There was no agility and no flexibility. We were in the same position that most law firms were in five years ago but there was a clear sense that there had to be a better way.”

For McManus, that better way began to take shape following a client conversation with a major UK bank a year later. “We thought we were there to pitch law, but they just wanted to talk about technology,” McManus recalled. “They were interested in how our data could be linked to their own data to make decision-making around the management of their high street branches more effective. And they didn’t want that information in an Excel sheet, or a monthly Powerpoint presentation. They wanted to see it live. That was a difficult proposition back in 2015 but it got me thinking about the power of the information we hold and how we should be doing more with our data.”

Since that initial conversation, client demands for “self-service on the fly” have grown at pace and McManus believes that fulfilling these demands has the power to disrupt the legal business model. “I am pretty certain than in five years’ time we will be charging clients on a monthly basis for services involving access to knowledge and data. We have already been up against small specialist law firms doing just that with mobile apps.”

In developing Eversheds’ own mobile app strategy, McManus went against his own best advice. “I always say IT departments shouldn’t run these initiatives. It should come from the business. But we ignored all that and just got on with it. There was no presenting a business case or asking for money to buy an app development platform. A lot of people still don’t really understand apps and the benefits they can bring. If we had gone with a business case we would probably have been told to spend the money on upgrading the email system or sorting out the document management system instead.”

Eversheds’ debut app was an internal knowledge

sharing platform, “Client Conversations”. It enables partners to access information about expertise in other parts of the business immediately. It was launched with a fanfare at the firm’s partner conference last June and now McManus and his team are inundated with ideas for apps from the business.

McManus is conscious, however, that apps are not always the answer. He also believes it is important not to end up with “app overload”. “I am very keen to get down to a small number of powerful apps,” he said. “You just need to get rid of any others. They shouldn’t even be on the app store.” Brand consistency is another priority, and something McManus wishes Eversheds had focused on earlier. It is important to consider app support, he added, particularly if that app is being developed for a client. “Who does that person ring if they have a question? Is it the IT support desk? Is it the person who came up with the idea? It’s a tricky one. You need to have 24/7 support, you need that infrastructure, especially when you are potentially charging for the advice that comes through that app.”

But McManus’s biggest concern rests around the quality of advice the app provides. “When you have a lawyer going into a client conversation you know that lawyer is brilliant at what they do. They work incredibly hard to get their knowledge to where it is. But the moment you start using technology to present advice it is risky. You have to make sure you control the data within it and that that you don’t just input it once and forget about it. We have all seen apps die because the data deteriorates and becomes less relevant.”

Nonetheless, McManus is excited about the speed and agility that mobile apps offer. “They allow you to ‘play’ with an idea, without having to pursue a full launch,” he said. “Lawyers hate waiting. They work in a very agile, iterative way. When a client asks for an opinion they will work overnight and have a next step for that client by the morning. If you can turn something around quickly in a way that matches the way your legal teams operate, it adds to client relationships.”

### **The Fliplet view**

#### ***Fliplet founder and CEO Ian Broom gives his take on the future of apps in the legal industry***

“The number of apps firms have been producing has increased significantly. This is due to firms being comfortable with mobile apps as a medium, additional staff receiving training about how to produce apps and IT teams relaxing control over no-code app creation tools like Fliplet.

The biggest change we have seen in the past six months is that clients are asking firms to produce apps

for them. This is leading to new opportunities and business models for law firms to deliver content. The more sophisticated firms are introducing their clients to the technologies available and inviting the client to be a stakeholder as the firm produces the app. The result are high-value apps that deliver significant value to clients. Successful apps can be quickly cloned, customised to a client's specific needs and delivered in weeks instead of months enabling firms to quickly scale their success.

The days of apps being produced for fun are over. Firms realise that smartphones are a powerful channel for delivering assistance and guidance to clients, but the apps must offer real business benefit and be easy to use. Firms that understand how to use mobile effectively are gaining valuable feedback and data from their clients that can be used to further optimise the delivery of information and services.

The most sophisticated firms have begun to employ dedicated internal teams to produce apps and integrate apps with existing databases and systems. The result is a new in-house rapid app creation competency that can produce high-quality apps that are always up to date with the latest firm information for internal and client needs."

## ► von Briesen & Roper: Simple Innovation

von Briesen & Roper's strapline is "We do things differently" and, according to CIO William Caraher, that statement also applies to their approach to technology - but it's the simplest innovations that have been the most effective.

In the role for 13 years as both CIO and director of operations, Caraher's role extends to office and expense management for the circa 192-attorney law firm.

When Caraher came on board, von Briesen had outsourced most of the technology function but against the wider trend he slowly brought it back in house, only going out for particular areas of expertise. "I put a focus on customer service and useful technology but not the latest, flashy thing," he says.

Half of Caraher's career was spent in investment banking and hedge funds, which he says gives him a different perspective to his legal peers. "I feel we're more of a leader than a follower, so when it comes to new things, we don't just go for what is being marketed to legal," he says.

That became obvious in 2011, when von Briesen was a runner up for ILTA's Emerging Technology Champion Awards for an open source intranet that has a similar functionality to iGoogle, called vBDash.

"Everyone was talking about Microsoft SharePoint and I thought 'there's got to be something better'. SharePoint is expensive and costs a lot of money and the users often hate it. So, I went out and found a really good open source solution. Everyone looked at me as if I had two heads. But I said, 'if we can customise it with no licensing fee, why wouldn't we?'"

In 2013 von Briesen was again up for an ILTA award for Innovative Project of the Year for its Apple-styled inGenious Bar tech training programme, which Caraher helped to develop after the firm's existing training appeared to be wasting everyone's time.

"I took the approach that if they only have a few minutes, let's create a five-minute training programme. At Apple you can make an appointment with a 'genius' and say, 'how do I do X'. So, we take the top help desk calls and put training around that but dial it down to five minutes, such as 'here is how you send a secure email', or 'here is how you redact using this new PDF program.'"

Do you ever look at the ILTA awards (or similar) and wonder if the project was actually a success? Well in this case, Caraher says it's still a big success. "We do it once a week and there's a skill of the week - you can be in and out in five minutes. Then next week we will demonstrate a new skill. We run it for 90 minutes and do the same five-minute training for that time," he says.

"It gets face-time with our staff and IT team so

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when you're calling and upset it's a case of 'Hey Mary, nice to hear your voice again,' not just a scripted 'I'm sorry to hear you are having a problem with X.' We've had great success and one of the things I put out to all my legal IT peers is that when we get people to come for inGenious training, it adds up to four hours of non-CLE IT training per attorney per year - if any firm can beat that, let me know!"

Caraher and his team of seven find that keeping training on the same day and time works best - Friday between 9am and 11am. "Friday is more relaxed, and people grab a coffee before coming to see us. If they have to wait it's just a couple of minutes and people can socialise in that time," he says.

"There's definitely a trend towards outsourcing the help desk function to cut costs, but we hear from attorneys that come to our firm that our IT team is the best and it's great to have firm leadership invested in IT and not just seeing it as a money-saving opportunity - it's a core service to our efficiency and operating model. If you have a problem, you need somewhere you can go and say, 'I need this fixed right now.'"

#### **von Briesen & Roper core systems**

Windows 10 desktop  
iManage 9.5  
Workshare

#### **What you might not know**

von Briesen & Roper was one of the early adopters of ROSS Intelligence

## ► **Aderant forms partner network**

Aderant has begun building up an expert service partner network, appointing IT Finance Services and Andy Stokes Consulting as partners in the UK.

Under the programme partners will benefit from access to Aderant's training resources and partner briefings to ensure that their product knowledge and Aderant roadmap-awareness is continually refreshed and up to date.

David Gallagher, CEO and managing consultant at ITFS, commented: "We've had a very close association with Aderant for a number of years. My personal one dates back to the last century! We're looking forward to taking that relationship to the next level under this agreement and working more closely than ever to deliver our mutual clients projects on time and to budget."

## ► **Is no news good news?**

On 8 May we announced that Allen & Overy has signed an agreement for the use of Eigen Technologies' natural language processing tech. A&O is the second magic circle firm to have confirmed its adoption of Eigen's NLP product after Linklaters became its first client in 2015.

However, the release jumped out for saying absolutely nothing about what A&O is doing with Eigen.

We know that law firms want to retain a competitive edge but this is taking it to the extreme.

What we do know is that Eigen and A&O have completed a pilot and are now exploring a range of ways in which the technology can be deployed.

Eigen also signed LOD (Lawyers On Demand) earlier this year, as part of a new LOD client offering called Designed Solutions. The company is believed to be working with other law firms on a confidential basis. Clients outside the legal space include Goldman Sachs, Hiscox and ING.

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

**UK & EMEA** **Slater and Gordon** has become the first company in the world to deploy **Microsoft Managed Desktop**, as the hedge fund-owned UK firm also ousts dedicated legal technology in favour of the Microsoft stack. MMD was launched in September 2018 and brings together Microsoft 365 Enterprise, device-as-a-service and cloud-based device management. All of Slater and Gordon's circa 1,450 staff now use Surface Pros, and Microsoft automatically manages, updates and protects the devices, including taking care of patching. Access to Surface Pros is through facial recognition, reducing the risk of security breaches. The tech giant uses AI to determine which devices are ready for feature updates or, conversely, whether a specific app is blocking the device's ability to update. It can isolate and shut down a single device where a security risk is established. Approved in October 2018, the new offering is part a raft of changes being led by chief technology and transformation officer Yvonne Ferguson as part of a £30m, three-year technology investment drive by the firm as it aims to transform the way consumers receive legal services.

In a move that gives **Workshare** access to Kofax's PDF creation technology and **Kofax** greater exposure to the legal market, the pair will now offer their comparison and PDF products in a joint solution. Kofax offers a portfolio of solutions for managing documents as part of its Intelligent Automation software platform: Kofax Power PDF is the company's management software that enables workers to create, edit, secure sign and share PDF documents. Combined with Workshare Compare, the solution will provide legal customers with the ability to oversee changes, improving efficiency and accuracy whilst reducing risk of error. "Over the last few months we researched the market and we were consistently referred to Kofax as the leader in the sector with a very long heritage in the creation, editing and manipulation of PDF documents," said **Barrie Hadfield**, CTO at Workshare. "For the last 20 years we have been working on refining our intelligent comparison tool. We recently released our latest application 'Workshare Professional 10' with several unique features, including a superior Word and PDF comparison tool. The integration with Kofax represents an exceptional evolution of our technology as we will be able now to offer customers the industry's most developed comparison tool for PDF documents." "Our solutions are sold globally to a vast range of professionals and industries," said **Kathleen Delaney**, chief marketing officer at Kofax. "We were looking to partner with a legal and professional services specialist that possessed industry-leading knowledge on comparison. Workshare fit that bill. Their experience

spans 20 years and still leads the way. Together we can deliver the best document comparison engine, so customers can seamlessly compare PDF and Word documents with a button directly accessible in the ribbon."

German AI-driven legaltech start-up **rfrnz** has completed a seven-figure funding round, with backers including **High-Tech Gründerfonds** and **UnternehmerTUM Initiative for Industrial Innovators**. Founded in 2017 by chief executive officer Sven von Alemann, CTO Moritz Biersack and chief scientist Adriaan Schakel, rfrnz provides an artificial intelligence platform that uses machine learning and natural language processing algorithms to automate contract review. The technology has already been implemented in DAX-30 corporations, medium-sized companies and law firms. The funds will be used to finance and advance the growth and further development of the product and team.

Leading offshore firm **Carey Olsen** says that it is "on the start of the Peppermint journey", including looking at **Peppermint's** practice management system and other offerings after a successful business development CRM solution implementation across its nine offices last year. **James Prouten**, group head of technology at Carey Olsen, said: "We are on the start of the Peppermint journey and are actively looking at Peppermint's online portal, practice management system and other offerings." The firm's feedback on the CRM system is extremely positive. **Anna Coombs**, brand & marketing communications manager at Carey Olsen, said: "Our last system was little more than an address book, not a CRM and people did not use or trust the data. It is now seen as a business-critical system - a central hub which allows us to be joined up and share intelligent and rich data." Carey Olsen particularly likes Peppermint's dashboard functionality, which provides a centralised view of CRM activity across the whole business. "We are using the dashboard functionality to create 'live' CRM business plans. It allows us to track CRM activity against performance targets," said Prouten.

**Allen & Overy** has signed an agreement for the use of **Eigen Technologies'** natural language processing tech. A&O is the second magic circle firm to have confirmed its adoption of Eigen's NLP product after Linklaters became its first client in 2015. Eigen and A&O have completed a pilot and are now exploring a range of ways in which the technology can be deployed. "A&O is well known for its innovative thinking in the application of legal technology and their team has a wealth of knowledge in this area," **Adam Eastell**, chief legal and strategy officer at Eigen Technologies said. "We are looking forward to working with A&O to explore how our technology can be applied across a range of practice areas."

**DAC Beachcroft** is set to shift its **Thomson Reuters Elite 3E** practice management system into the **Microsoft Azure** cloud, becoming one of the first large law firms to do so. The UK top 20 law firm



stood up its development and test servers for Elite in Azure at Christmas time. Speaking to Legal IT Insider about the move, IT director **David Aird** said: "It's been a lot of hard work but this is the right thing: we'll be more secure and we don't want to be in the business - especially as we get bigger - of having our own data centres all over the place. It's not scalable." DAC has over 2,500 staff in offices across Europe, Latin America, North America and Asia-Pacific. Aird, who joined DAC in October 2013 from leading facilities management company Mitie Group, told Legal IT Insider: "The first thing was explaining to the executive team that this is the right way to go and then working with marketing and our risk teams in formulating the plan and going out to clients. They were very supportive. While we obviously worried, those clients we spoke to were sending out their own case studies about their use of the cloud, so by the time we came to discuss it they had moved on a lot themselves." DAC selected 3E in 2018 after an extensive review. However, Aird says: "I wouldn't underplay the importance of the fact that we had Enterprise and that relationship with Thomson Reuters and we liked the product." While TR is in the early stages of launching a SaaS version of 3E, that move came after DAC had already begun looking at IaaS. Aird says: "It's all quite new so we had lots of conversations with Thomson Reuters about supportability and things are looking good." He adds: "For me and some of my team this is not new but it's newer for Thomson Reuters and law firms generally - but we just need to plan and do it properly."

Leading UK private client, technology, media and entertainment firm **Harbottle & Lewis LLP** has chosen **Aderant Expert** as their new law practice management system, swapping out end of life PMS Lexis Axxia, stating that Aderant Expert was the clear choice, citing user friendliness. "We knew we needed an easy-to-use product that allowed us to continue to grow, yet reflected our uncomplicated business model," says **Derek Godfrey**, Harbottle & Lewis's chief operating officer. "Aderant offered a simple and more user-friendly option, whilst still allowing us to perform all of our required business processes." **Chris Cartrett**, Aderant's executive vice president, said: "The firm had a clear vision for what success would mean for them and found a comprehensive solution in Aderant Expert that fulfils that vision."

Legaltech start-up **Orbital Witness** has secured funding of £1.2 million following a period of significant client wins that include Clifford Chance, Mishcon de Reya, Reed Smith and Macfarlanes. The funding is provided by property technology heavyweights **JLL Spark** and **LiFE Ventures**, alongside Europe's leading seed fund, **Seedcamp**. Orbital Witness, which was part of Mishcon's legaltech incubator MDR LAB in 2017, ran its first pilot only a year ago. It helps property lawyers significantly to reduce the time it takes to build a detailed understanding of the properties or sites they are working on and profile relevant transactional

risks, in order to advise their clients. Over the last few months it has seen its product dramatically change. Co-founders Edmond Boulle and Will Pearce come from the space industry and initially satellite imagery comprised the core of their platform, which was then aggregated with property and legal data from a range of sources, including the Land Registry, Ordnance Survey and local councils. The latter has become the core offering, with all of the analysis that they can provide using that data. Speaking to Legal IT Insider, **Boulle** said: "Thanks to MDR LAB we worked out what was important and what we needed to do to build our product." Mishcon signed up with Orbital Witness in September last year and have rolled the tech out across their entire real estate team. Boulle says: "One of the things that's really good about our technology is that we are used by all the lawyers, not just one technology lawyer. All the lawyers get it and we see 70-80% using it on a weekly basis - it's right at the heart of what they do." Boulle says there is a need to bring transparency and immediacy to property legal assessments: "Real estate is the most valuable asset class there is. Everyone involved in a real estate deal naturally wants visibility of any red flag legal issues with the property ahead of time. The trouble is, if you're weighing up multiple properties or sites, it just isn't possible or practical for your lawyer to go into the detail of each one without incurring significant expense and delay."

**Gowling WLG** has entered a 50:50 joint venture with existing tech partner **Purple Frog Text** to launch real-estate AI start-up **Avail** in order to make a leap "from clever to user-friendly IT". This is the first time the firm has made an investment of this nature, according to real estate partner **Mike Twining**: "A lot of the work I do involves bids on large portfolios, often requiring quick turnarounds. We have trialled many technologies to help us, including a software company called Purple Frog Text. What we found with these businesses is that whilst it is all very clever and the IT is really cool, the output just isn't client- or lawyer-friendly," he added. "We started reversing that and that was the origin that spawned Avail. As well as funding, we can offer legal clarity and nous, alongside their technological excellence." Avail's real estate due diligence Title Register Review App enables instant reporting on official copies, allowing lawyers to identify issues rapidly within a portfolio of properties and advise their client. Its Property Searches App, meanwhile, extracts key information from multiple documents relating to a property to allow the rapid collation of a summary report, increasing the efficiency of legal services for clients. On one case Gowling used the software to review more than 9,000 title documents and, within a matter of hours, condense them down to a list of titles with potential for third party restrictions or. "If you are bidding on a 50 site portfolio, for example, and want to be able to deliver a bit of legal certainty as part of your bid without huge cost, what Avail can offer is high-level title, lease and searches reviews," Twining

explained. "It can quickly tell you that what you are about to do won't be catastrophic, or that out of the 50 sites, perhaps three may be problematic."

**Vuture** has been acquired by **CM Group** - a family of marketing technology companies including Campaign Monitor, Delivra, Emma, Liveclicker and Sailthru. Vuture's platform includes email marketing and automation, offering technology for event management, content management, payments, alumni tracking and surveys. It counts as customers around 65% of the UK's top 100 law firms and more than half of the magic circle. Its customers include Howard Kennedy, Savills and Akin Gump. In conjunction with the acquisition, CM Group completed a \$410 million financing, providing capital for future acquisitions to accelerate growth and provide a technology solution to meet the needs of every marketer.

**Norton Rose Fulbright** and legal technology company **Syke Legal Engineering** have formed **NRF Syke**: a strategic alliance to offer clients combined legal advice and document automation services. Syke helps corporate legal teams and law firms across the world buy and implement legal technology, with a focus on document automation. NRF Syke will offer over 30 document automators, including a high concentration of some of the world's most experienced practitioners. These automators will work closely with lawyers across Norton Rose Fulbright. Partner **Martin McCann**, Norton Rose Fulbright's global head of business and global sponsor of NRF Transform, commented: "Law departments that effectively leverage contract automation are seeing significant benefits. What often begins as an efficiency or cost-saving exercise can lead to improved risk control, business information visibility and internal user experience, and a base to build other legal tech initiatives and tools. Document automation is a rapidly developing market in which there is an acute skills shortage, and in which both Syke and Norton Rose Fulbright are leading providers." **Alistair Maiden**, founder and CEO of Syke Legal Engineering, said: "We began working with Norton Rose Fulbright on an individual mandate when we realised we could do things for the client together which we couldn't do alone. We quickly reached the joint conclusion that if we worked together more closely, we could take something to clients that would be a genuine step-change on what clients could otherwise access."

Dutch independent law firm **Houthoff** has selected **DocsCorp's** desktop productivity suite after a review. The solutions - **pdfDocs** for PDF file editing and bundling, **cleanDocs** for metadata management and **compareDocs** for document comparison, will be used by lawyers, civil law notaries, tax advisers and other legal professionals across five offices. The firm said: "Houthoff chose DocsCorp because the solutions are user friendly, future proof and integrate with their document management system. It's an added advantage that they can get these solutions from one vendor, instead of doing business with several."

**Eversheds Sutherland** has gone live with **Fulcrum Global Technologies'** version of **SAP SuccessFactors**. The firm has rolled out the cloud-based HR platform's **Employee Central module** to around 3,000 employees across the UK, France, Luxembourg, Middle East and Asia as it seeks to streamline operations across its international office network. "When I came into this role 18 months ago, it became very clear that we were operating on a number of different systems across our HR infrastructure and that a lot of those systems didn't talk to one another," **Neridah Jarrett**, Eversheds' international head of transformation told Legal IT Insider. "Our HR information system was approaching end-of-life so the clock was ticking and we needed systems able to cope with our growing, global organisation and all the intricacies and legislative requirements that presents." Eversheds' priority was simplification. "We have celebrated the fact that we have cut between 10 and 15 manual forms out of our toolkit with this process," said Jarrett. "It's about making life easier for our people, particularly our lawyers, so they can give that time back to our clients." Jarrett added that pre-project planning was essential to minimising the need for extensive customisation. "The programme of work itself was around five months but we spent the year before that streamlining our processes behind the scenes. Did we really need five-step approval processes or would one or two suffice?" Eversheds is now focused on delivering mobile enablement through SAP SuccessFactors, "allowing our people to use the product anytime, anywhere," Jarrett explained. "We shall also be looking to roll out further modules as part of a wider strategic initiative designed to offer a superior employee experience." Speaking to Legal IT Insider, **Martin Telfer**, head of EMEA at Fulcrum GT, added: "We feel strongly that law is a people business and that first class HCM is critical to the strategy, management and operations of today's complex global legal practices. Applying our IP solution to a world class foundation like SuccessFactors will help Eversheds Sutherland to transform its management of today's multi-generational global workforce while meeting its complex compliance obligations effectively and efficiently."

Worcestershire-based **QualitySolicitors Parkinson Wright** has selected **Liberate** from **Linetime** as its business-wide legal services software platform. With over 100 staff operating out of four offices nationally the firm recognised that to continue delivering services to its clients it needed to provide online facilities. Today's clients have an increasing expectation to interact with their legal service provider electronically, and to move away from paper-based communications. As part of its investment in Liberate, the firm will be implementing the Client Self-Serve module, providing clients with 24/7 online access to status updates, direct messaging and bill payment functionality. Liberate also provides the ability to sign documents electronically both for convenience and increased efficiency. Liberate will be supporting all the firm's practice and case management

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requirements while also giving lawyers remote access to case data, digital dictation and time recording using mobile technology. **Cyril Arridge**, the firm's managing partner said, "We looked at nine or 10 possible providers and after a detailed investigation process decided on Linetime as the best fit both in terms of what they offered and the people themselves."

**Eclipse Legal Systems** has announced it is implementing its **Proclaim Practice Management** solution at **Cartmell Shepherd**. 200 year-old Cartmell Shepherd is one of the leading law firms in the north, with six offices throughout the region servicing clients across the UK. Proclaim Practice Management system will be rolled out across multiple departments, providing Cartmell Shepherd with a consistent and secure approach to managing cases throughout their lifecycle. The integrated Proclaim legal accounting toolset will enable seamless billing procedures. Cartmell Shepherd will enhance client care with TouchPoint+, the client self-service portal that includes FileView live case tracking and SecureDocs, the online secure document delivery and acceptance tool. **Scott Garson**, practice manager at Cartmell Shepherd commented: "We selected the Proclaim Practice Management System to replace an incumbent solution and see it as a vital part of our future strategy to drive the practice forward. Proclaim's flexibility to integrate with third parties like the LRBG impressed as did the inbuilt GDPR Individual Rights workflow which will aid compliance along with the CRIF ID/AML and Lawyer Checker integrations."

**Deloitte Legal** has begun to collaborate with New York-headquartered robotic process automation provider **UiPath** out of its Bucharest-based Center of Excellence (CoE), which looks set to become a hub for Deloitte's legal technology activity. The CoE supports Deloitte Legal's global network of legal practices in the areas of business development, service delivery and legal technology. Deloitte says that the new collaboration with UiPath - "among the first examples of how the Deloitte Legal CoE is expanding its legal technology capabilities" - will see it design, develop and implement "cutting edge Robotic and Cognitive Automation (RCA) solutions for clients around the world. This Deloitte Legal CoE and the UiPath collaboration aims to help legal professionals leverage technology to increase efficiencies and navigate a rapidly transforming legal industry. Traditionally seen as the enterprise's lawyer-in-chief, general counsel and the teams they oversee are now expected to perform a much broader role as a partner to the rest of the organisation and a trusted adviser to senior management. At the same time the legal function is under pressure to cope with an expanding set of regulations, heightened public

scrutiny, and business models which are adapting to digital and other opportunities, creating an increased and more global need to manage legal risk." "Making better use of advanced technologies will be crucial as increased demands are placed on the legal function," says **Piet Hein Meeter**, global managing director, Deloitte Legal. The first solution co-developed by Deloitte Legal and UiPath will search public records, such as securities registers, which are frequently accessed in due diligence exercises.

**Womble Bond Dickinson** (WBD), a top 40 UK firm, has switched to the **DocsCorp** desktop productivity suite as part of its move to Windows 10. The firm uses iManage and will benefit from integration with the DocsCorp suite. WBD will use **pdfDocs** for PDF file editing, **compareDocs** for document comparison and **cleanDocs** for metadata management and email recipient checking. **Gareth Humberstone**, IT services manager at WBD, said the product benefits were a major incentive to switch during the Windows 10 project. "We were hearing good things about DocsCorp from other people in the industry, and we found the products and the purchase model a compelling reason to switch." "We are excited to add Womble Bond Dickinson to our expanding list of national clients," said **Samantha Jefferies**, DocsCorp VP of sales EMEA. "The firm will benefit immediately from its consolidated approach to application and vendor management and we look forward to working with them."

**Bevan Brittan LLP** has selected **Wilson Proforma Tracker** software to streamline its billing processes and increase invoice accuracy. The software will integrate with Bevan Brittan's Elite 3E practice management system, enabling the creation, review and completion of draft-to-final bills by lawyers and fee earners. The exchange of real-time data helps automate the work-to-bill life cycle, minimising delays in bill production and delivery to improve realisation. Bevan Brittan is now the third UK Top 100 law firm and tenth worldwide to select Wilson Proforma Tracker, highlighting the software's global appeal and fit for purpose. The firm made the decision to invest in billing improvement as part of its general initiative to improve efficiency and productivity since implementing 3E. **Nick Hodgson**, finance director at Bevan Brittan, on why the firm chose Wilson Allen: "After documenting our business requirements and evaluating several options, Wilson Proforma Tracker was the clear winner. Wilson Allen's technical and functional knowledge is second to none. They were exceptionally responsive and collaborative as we discussed the design of a workflow to automate the input of billing data," Hodgson said. "Plus, the software immediately fulfils the majority of our



functional requirements with minimal customisation. It also offers a comprehensive roadmap of features that will be beneficial to our firm in the future.” Bevan Brittan also appreciated Wilson Proforma Tracker’s interface and the increased visibility enabled by the software. “Our users will be able to collaborate from their desktops for quick review and mark-up of proformas in a very intuitive way that requires very little training,” Hodgson explained. “Plus, the software gives our billing team overall visibility of the status of all proformas in progress. These features will help drive uptake within our firm, enabling us to generate bills faster - and therefore get paid quicker.” **Shishir Shetty**, VP of technology services for Wilson Allen sees digital billing as a growing trend in the industry. “All services firms are looking to reduce overhead and accelerate the work-to-bill-to-collections life cycle. Therefore, firms need transparent, efficient and measurable billing processes - which is difficult to achieve with a paper-based analogue process,” he explained. “We’re delighted Bevan Brittan chose our solution to meet this need and deliver improved business services to the firm’s stakeholders and clients.”

**Binder Grösswang**, one of Austria’s largest law firms, is moving to **iManage Cloud** for secure document and email management. iManage offers several data centres within the EU, allowing Binder Grösswang to comply with the GDPR that governs where data must be domiciled. “We operate in a highly regulated market for clients with the highest expectations,” said **Michael Kutschera**, managing partner, Binder Grösswang. Additionally, **Matteo Tassi**, head of IT at the firm, commented: “iManage Cloud not only fulfils our desire to most effectively manage our data with a primary datacentre in Frankfurt and a secondary location in Magdeburg, but it also ensures that, in all instances, client data stays within the EU and our clients know that their data is being properly managed.” The firm had long relied on an on-premises deployment of iManage Work but saw clear advantages to moving to the cloud. iManage Cloud will enable Binder Grösswang to always be on the newest version of iManage Work - which allows the firm to take advantage of product enhancements and innovations as soon as they’re available - in addition to providing enhanced security. “Our clients demand the strictest and most comprehensive security platforms available,” added Tassi. “iManage Cloud is state-of-the-art with highly secure ISO 27001 datacentres. The amount of resources that iManage can dedicate to securing those data centres is greater than what we could achieve in-house.” The firm is working with iManage partner **Phoenix Business Solutions** on its migration to iManage Cloud, which is expected to complete in the summer.

Top 50 UK law firm **Shoosmiths LLP** have moved onto the **iCompli** Records Management and Information Governance platform from **LegalRM**. Commenting on the project, **Dawn Ingle**, head of enterprise applications at Shoosmiths stated: “It’s been one of those successful

projects which has gone so smoothly. The move away from LegalKEY, which we have used for many years, was seamless with practice assistants and records staff commenting on how much more intuitive and user friendly iCompli is for them. This is definitely a step into the modern era of records management as we move toward a more holistic approach to information governance.” **Chris Giles**, CEO & founder of LegalRM, added “We are delighted that Shoosmiths have joined the growing list of firms moving onto our iCompli platform. Astute modern-minded law firms see the potential of the business intelligence from our information governance suite to move beyond compliance to drive client satisfaction. Shoosmiths have been a fantastic implementation thanks to a great project team - they took to iCompli intuitively, even designing and delivering their own training!”

In brief, London-based commercial law firm **REN Legal**, London and Leeds-based **ARC Pensions Law** and Jersey specialist litigation and dispute resolution practice **Baker & Partners** have all chosen **Tiger Eye Consulting** to implement their cloud-based **iManage** document management systems.

**North America** **Phoenix Business Solutions** has been sold to **Morae Global Corporation** in a move that will provide a more joined-up technology and services offering to both the corporate and private practice legal market. The combined entity brings together Phoenix’s document management expertise and Morae’s strength in advisory, managed services and discovery capabilities. “It has always been our mission to help all players in the legal/compliance ecosystem to be efficient, safe and smart, and combining with Morae Global is a giant step in that direction,” says Phoenix CEO, **Mathew Crocker**. “Shahzad Bashir’s team has been the go-to advisors for corporate law departments for many years, and the technology, consulting and legal process services they perform are truly transformational. Together, we are uniquely situated to meet the growing need of law firms and law departments to collaborate through all phases of the information life cycle.”

**Hg** has acquired **Litera Microsystems** from K1 Investment Management after a three-year period in which Litera is said to have tripled its revenue. K1 notably built the company through merger in a bid to create an end-to-end document solution for lawyers: in 2016 K1 acquired Microsystems and Xref followed in 2017 by the acquisition and merger of Litera and the Sackett Group. It invested a total of \$100m in the four acquisitions in a deal finalised on 11 August 2017. Hg, which has focused on the legal sector for 15 years, has six legal and compliance investments in its current portfolio, including global enterprise legal management provider Mitrstech and German legaltech company STP, which provides insolvency and legal practice software (see page 4 for more on why private investors are attracted to legaltech).

Am Law top 50 law firm **Wilson Sonsini Goodrich**



**& Rosati** has swapped out its iManage document management system for **NetDocuments**, led by chief information officer Michael Lucas, who led the same move while at Akin Gump. The NetDocuments selection is said to be a key step in Wilson Sonsini's on-going strategy to move its entire technology stack to a cloud-based model. The Palo Alto-headquartered firm, which has rolled out cloud ERP Workday, conducted a review of both NetDocuments and iManage Cloud, led by Lucas and his team. **Lucas** told Legal IT Insider: "I've worked at Hogan Lovells, which is moving to NetDocuments, and at Akin Gump, where I signed the deal with NetDocuments. I had a lot of familiarity with both products and a lot of respect for both management teams but where we landed was that we thought the SaaS platform of NetDocuments was very strong and they've been doing it for a long time. It was a platform play and a cloud play and at Wilson we continue to implement cloud solutions. We're doing Office 365 now and my goal is to be pretty much pure cloud by 2020."

**Neota Logic** and **LawGeex** have paired up to offer clients an automated third party NDA approval process in a move that is expected to be widened to cover a number of different contractual scenarios. The integration developed out of work that Neota is doing for one of the top five property and casualty insurance corporations in the US, helping them to automate the NDA creation process using standard templates and DocuSign for e-signatures. When it came to third parties that insisted on using their own NDAs, the process would again become manual and laborious, with the third party uploading their NDA to be emailed for manual review. Speaking to Legal IT Insider, Neota's director of business development, **Mark Surico**, said: "This is a pretty common situation. We often get clients asking what happens in that situation and the answer was that our system covers the drafting of your documents but not third party paper. What the client decided to do in this situation was to find a company that does do that, and that is LawGeex." Through the integration with LawGeex, clients can now automatically send their NDA to be reviewed against stipulated terms or standards, with the red-lined agreement returned for review, approval and execution. Surico says: "Now when a third party says 'I want to upload my own NDA', instead of going to a legal reviewer for manual review it goes directly to LawGeex and they provide automatic feedback, providing a whole solution for the NDA review process."

**Onit** has acquired **SimpleLegal**, a 2013-founded SaaS provider of legal spend, matter and vendor management tools, to bolster its end-to-end business process automation platform. While there appear to be clear overlaps between Onit and SimpleLegal, according to a statement from Onit all product, support and services will continue uninterrupted for all customers. Management teams from both organisations will remain intact. Eric Elfman, who was

previously CEO of Onit, will serve as the CEO of the merged organisation, and Nathan Wenzel, previously the CEO and co-founder of SimpleLegal, will serve as the general manager of SimpleLegal, which helps corporate legal departments to process more than \$1 billion annually and manages nearly 500,000 legal matters globally. Onit, whose previous financial backers included Level Equity Management and Austin Ventures, has a platform that supports a wide range of corporate counsel needs, including enterprise legal management, legal spend management, e-billing, contract management, onboarding and budgeting. Its customers include Fortune 50 global food processing corporation Archer Daniels Midland, where former global director of operations, David Cambria, helped to shape the product. Cambria is now at Baker McKenzie, which is to be one of the first ever private practice law firms to use Onit to streamline its workflows.

**Baker McKenzie** has selected **iManage Cloud** to replace its on-premises OpenText document management system, in a major win for the Chicago-headquartered vendor. The global firm, which operates in six continents, will deploy **iManage Work, Share, Records Manager** and **Threat Manager** in the iManage Cloud for its 13,000+ professionals in 78 offices. Speaking to Legal IT Insider, global chief information officer **Dan Surowiec** said: "We have a small number of pockets where we have an obligation to maintain data within country and need a hybrid approach and the only tool that met that is iManage." He adds in a statement: "To support our lawyers in delivering the best possible legal services to our clients, we needed a secure, world-class, cloud-based system that our attorneys can access on any device, anytime, anywhere around the world - and iManage fits the bill perfectly. "iManage's modern cloud architecture, intuitive interface, powerful search and robust security will help us transform our work practices and enable our attorneys to work smarter, safer and more efficiently." The addition of iManage Threat Manager will protect the firm from insider threats in real time. In terms of collaboration, using iManage Work and Share, Baker McKenzie's attorneys will be able to collaborate on work product with their colleagues as well as clients, partner firms and outside consultants without sacrificing security and governance of their clients' critical data.

**Hogan Lovells'** IP practice has selected **Anaqua** in a big private practice win for the intellectual asset management software provider. The top 10 global law firm has an IP practice of close to 400 dedicated professionals spanning the Americas, Europe and Asia. The firm also boasts a client base which includes over 50% of the world's largest brand owners. Anaqua will provide the trademark team with a unified platform to drive process standardisation and automation across their offices worldwide. The platform's multi-language functionality will support the firm's international operations and diverse client base. **Constanze Schulte**, trademark partner leading the transition to Anaqua,

said: "Partnering with Anaqua makes a lot of sense for our global practice, which relies on close and efficient collaboration on a daily basis."

**Intapp Inc.** has acquired **OnePlace**, a leading provider of cloud-based solutions for marketing and business development teams. Intapp and OnePlace are joining forces to address the growing need for a unified front office solution spanning the client life-cycle that helps firms cultivate key relationships, drive growth and better compete in their modern marketplace. OnePlace, founded in 2012, was an early pioneer in cloud-based marketing solutions, helping more than 60 professional services customers replace their legacy CRM. The combination brings together OnePlace's deep domain knowledge and team of experts in marketing and business development technology, with Intapp's market-leading Industry Cloud for Professional Services. With this acquisition, Intapp says that the market will now have an integrated client life-cycle solution for the front office that enables seamless collaboration across the firm and its partners and business services teams, from strategy to origination and execution. "Coupled with our other recent acquisitions of DealCloud and gwabbit, adding OnePlace to our portfolio further demonstrates Intapp's commitment to assembling the industry's best team to deliver on the full vision of a modern, unified front office solution for our customers," said **Dan Tacone**, Intapp's president. "Together, we will help our customers execute marketing and business development growth strategies more efficiently and effectively." "My team and I are excited to join with Intapp to make the industry's leading client life-cycle experience even more complete and powerful," said Tim Smith, OnePlace's CEO. "At its core, this acquisition will deliver a single, reliable source of truth for client and prospect knowledge to our combined customer roster. Like Intapp, we believe in the 'everything in one place' ethos. Our combined team has the unique capability to execute this vision."

**BCF Business Law**, a Montreal law firm, have selected **cosine Matter Planning** from **cosine solutions** to enhance visibility of key metrics in the front office and improve operational efficiency by driving down administrative overheads. "With a range of both complex and high transaction practices, we were looking for a tool that would not only provide comprehensive matter planning capabilities, but also drive the automation necessary in the back office to address the increasingly burdensome administrative overheads for the business," noted **Marie-Claire Garneau**, chief technology officer at the firm. "The intuitive interface in cosine Matter Planning will make it easy for our partners and lawyers to track and manage their engagements and, because the tool is embedded within 3E, the efforts involved to set up and maintain complex billing arrangements will be substantially lower than the other tools we reviewed. The combination of native 3E functionality and cosine's 'app like' user experience made our decision an easy one." "We're delighted to be working with the team at

BCF," commented **Lucas Garlepp**, managing director at cosine solutions. "The strong management group at the firm partnered with our 3E-powered tools will deliver value for the firm quickly and efficiently and we're excited to get their project underway."

**NetDocuments**, a cloud-based content services platform for law firms, corporate legal teams and compliance departments, has announced that **Gray Reed & McGraw LLP**, a full-service, 150 lawyer firm with offices in Dallas, Houston and Waco, has selected NetDocuments as its secure cloud-based content services platform. The firm, which had been using iManage for nearly a decade, selected NetDocuments in order to fully embrace a native and secure cloud document management platform. According to **Jason Rodriguez**, Gray Reed's director of information technology, the existing on-premise solution had cumbersome back-end infrastructure and server maintenance. "We are a small IT shop so spending considerable time maintaining the technology to run our DMS was no longer an option. We were also challenged in leveraging the existing system to meet rapid firm growth, especially as it related to maintaining the infrastructure moving forward. It just felt like we could never keep up." A concern with the existing system's cloud offering was its immaturity and the fact that it was unproven as a true native cloud solution. "We needed to be in the cloud and be able to outsource the IT burden to someone else so we could focus our attention on strategic IT issues," said Rodriguez. "The firm spent considerable time networking with peers at other firms, speaking with existing NetDocuments customers and participating in available product and strategy workshops and presentations. We felt very good about our decision based on NetDocuments' maturity and dominance in the native legal cloud space as well the company's overall reputation and track record," added Rodriguez. For Gray Reed, the most important aspects of the NetDocuments DMS is the ease of use afforded through a familiar user interface and accessibility and mobility, which have driven user adoption. "Considering the firm had been using the same system for almost 10 years, initial user satisfaction and adoption has been extremely positive," shared Rodriguez.

**Bryan Cave Leighton Paisner** (BCLP) announced today that it is making a strategic commitment to embed the use of **Kira Systems'** artificial intelligence tool within its high-volume workstreams globally. Kira's machine learning software identifies, extracts and analyses text in contracts and other documents. It automatically highlights important provisions and organises the data for analysis. This enables significant time-saving and reduces the risk of errors and omissions, as well as freeing up legal teams to focus on providing high-value analysis and advice. BCLP already has made progress in embedding the software into its corporate and real estate workflows across its Manchester and St Louis legal service delivery hubs.

It now will begin extending the deployment across all relevant parts of the business, wherever Kira can provide value for clients. The announcement of the strategic commitment to Kira is being driven by the firm's new global Innovation Group, which is led by global chief innovation officer Kathryn DeBord. **DeBord** said: "BCLP has been at the forefront of innovation in the legal sector on both sides of the Atlantic, having been named the world's most innovative law firm numerous times. We have used a huge number of different tools to meet specific project requirements for many years. As we standardise workflows across BCLP globally, AI due diligence is now at a point where our ability to leverage the technology can deliver substantial benefits for our clients worldwide. Therefore, we have carefully evaluated the market and believe Kira's platform provides the best solution for our clients. This follows recent enhancements made to its lease abstraction capabilities. Making this commitment will enable us to develop our processes to make best use of the platform and deliver a better solution for clients."

**Dickinson Wright**, an Am Law 200 firm with 500 attorneys across 19 offices has selected **NetDocuments** as its secure cloud-based content services platform. The firm, which had been using OpenText's on-premise eDocs DMS, selected NetDocuments in order to provide secure centralised, cloud-based document access within a user-friendly and easy to use DMS platform. In addition, the firm selected **ndMail** for predictive email filing as well as **ndThread** for chat-based collaboration. **Anthony Garza**, senior director of IT, first started looking at DMS alternatives in 2017: "We wanted more flexibility from a new system, mobile access from any device and, overall, a new approach to software design and the user interface. What really changed the game for us was NetDocuments' commitment to security and their willingness to help the firm navigate our cloud-based security challenges. Before choosing NetDocuments all our systems and applications were on-premise so we needed to feel good about what the cloud would provide." According to Garza, the existing DMS provided technology challenges without delivering needed benefits: "With the current de-centralised DMS environment, the firm was always playing catch-up with software updates and server upgrades. With NetDocuments there will be one central document location, all managed by NetDocuments, providing unprecedented data access flexibility." "It is always impressive to see large, full-service firms like Dickinson Wright make the jump to the cloud and fully embrace what the NetDocuments platform has to offer," said **Alvin Tedjamulia**, CTO, NetDocuments.

**Wolters Kluwer's ELM Solutions** has extended its portfolio of products and services by acquiring **CLM Matrix**, a leading provider of contract lifecycle management software. This acquisition enables Wolters Kluwer to offer a more comprehensive suite of technology solutions to address the growing need

of corporate legal operations departments to increase responsibility for, and oversight of, the contracting process. "As corporations continue to increase demands on their legal operations, our clients require a contract lifecycle management solution that aligns with our current offerings," said **Jonah Paransky**, executive vice president and general manager for Wolters Kluwer's ELM Solutions. "We are thrilled to respond to our customers by delivering CLM Matrix' solutions that provide deep contract management expertise, a strong global presence and intuitive technology to the customer experience that will improve the legal operations workflow." CLM Matrix helps companies streamline the contract process. The acquisition adds technology that transforms the way companies manage their contract lifecycle to ELM Solutions' market-leading portfolio of enterprise legal spend and matter management and legal analytics solutions. CLM Matrix offers a highly customisable, easily implemented, SaaS-based solution that works seamlessly with Microsoft Office to automate contract initiation, creation and negotiation from execution through to expiration. CLM Matrix gives companies insight into key performance metrics that can drive organisational efficiencies and decrease contract cycle times.

**Casepoint** has been selected by **Vandeventer Black LLP**, a long-established US-based law firm and MSI Global Alliance member, to provide a standard platform for eDiscovery. Casepoint's advanced, cloud-based eDiscovery platform will provide comprehensive software and services across all of the firm's offices. "We chose Casepoint for its features, superior pricing and intuitive interface, and for the quality of the entire Casepoint staff who support the platform," said **Robert Stinnette**, legal technology manager at the firm. Casepoint was selected based on its exemplary track record of service delivery with the firm but other drivers included Casepoint's state-of-the-art data security protocols, cost predictability and system scalability, which will accommodate the firm's future growth without the limitations imposed by in-house infrastructure. Vandeventer Black, which previously utilised a variety of eDiscovery platforms, including Relativity and Ipro Eclipse, has standardised on one internal eDiscovery solution in order to bring predictability and consistency in cost to the firm and its clients. "Our firm has partnered with Casepoint for the last four years. We chose to adopt Casepoint's new platform and eDiscovery application because of its simple and competitive pricing, comprehensive capabilities and features, and ease of use," said Patrick Genzler, partner. "We have been consistently impressed by their commitment to customer support and timely responses to our clients' needs. We look forward to achieving even greater productivity and efficiency with the new Casepoint Platform." "We are excited to continue our long-standing relationship with Vandeventer Black," said **Karin Magness**, vice president of account management at Casepoint. "The firm's



selection of Casepoint as the exclusive, unified, end-to-end eDiscovery platform of choice is a validation of our product's intuitiveness and ease-of-use. We look forward to creating new efficiencies in their eDiscovery workflows."

**APAC Lawyers on Demand (LOD)** has acquired Australasian legal services business **lexvoco**. Launched in 2014, **lexvoco** supports in-house counsel through the delivery of innovative legal operations and legaltech solutions as well as providing law firm services. "lexvoco is an important force in the Australian market and we have always admired the way they have pushed the legaltech and legal ops consulting business harder than we have," LOD managing director **Tom Hartley** told Legal IT Insider. "They do what we do now and what we want to do in the future," he added. "In addition to legaltech, they have a big secondment business which is at the heart of what we are doing in that market. So they give us scale in our core business and a leg-up in an area where we are looking to grow." LOD will have the **lexvoco** teams join them in their combined offices of Sydney, Melbourne, Brisbane and Perth whilst adding Adelaide, Geelong, Auckland, Wellington and Christchurch to the LOD network. In APAC the legal operations and legal technology function of **lexvoco** will form a new offering called LOD Innovate, which will be headed up by **lexvoco** founder and CEO Anthony Wright. LOD's acquisition of **lexvoco** was supported by private equity firm **Bowmark Capital**, which acquired a majority stake in the business last year.

In its first win in Southeast Asia, **ContractPodAi** has entered into a commercial relationship with **Rajah & Tann**, which is one of the largest firms in Singapore with a legal network spread out over 10 countries across Southeast Asia and China. While **ContractPodAi**'s clients are almost invariably in-house legal teams, **Rajah & Tann Asia** is the London-headquartered vendor's second private practice client. It plans to help its clients transform how they work via **ContractPodAi**'s technology, which includes third party document review and contract lifecycle management. **ContractPodAi**'s platform, which is underpinned by IBM Watson, takes care of the entire contracting process, from contract generation to negotiation and signature. **Rajesh Sreenivasan**, a director at **Rajah & Tann Technologies** who also serves as **Rajah & Tann Asia**'s technology advisor & partner, said: "Our clients are operating in an increasingly regulated environment and are under pressure to control costs at the same time. As they innovate and use new technologies to fuel their businesses, it's critical for us, as service providers, to be equipped with 'best in class' tech to achieve their business goals. We see the **ContractPodAi** platform as being the most suitable contract lifecycle management platform at this point in time." He added: "Our clients don't need technology for technology's sake but the right tool for the job, which is easy to implement, particularly in these times of enhanced

scrutiny and regulatory pressure." "We appreciate the growing strategic role for legal departments in taking the helm of the organisation. They need to add value to the business, and innovative legal networks like **Rajah & Tann Asia** recognise this," said **Sarvarth Misra**, founder and co-CEO of **ContractPodAi**.

Melbourne-based legal tech start-up **Josef** has closed a \$1m funding round. The seed investment was made by venture capital firm **Jelix** and angel investors including **Kara Frederick**, managing director of **Tiger Financial Group** and **Ben Armstrong**, previously a principal at **Telstra Ventures**. "These funds will enable us to continue building up the power and sophistication of our legal automation platform," said co-founder and CEO **Tom Dreyfus**. Launched by **Dreyfus** and **Sam Flynn**, former lawyers at **Arnold Bloch Leibler**, and **Kirill Kliavan**, a machine learning expert, **Josef** is a platform that enables lawyers to build bots that can automate lawyer-client conversations, legal advice and the drafting of legal documents. With the support of Australian tech accelerator **Startmate**, 600 bots have already been built, able to handle employment law, environmental law, start-up law, health law, commercial law, bankruptcy, consumer law and more. These bots have dealt with over 30,000 legal problems in just 12 months. And while **Josef** was originally built to help community legal centres overcome capacity constraints, the company is now working with a number of in-house legal teams to help in-house lawyers interface more efficiently and seamlessly with other parts of the business, including FAQ bots and document automation bots. Larger law firms, meanwhile, are also using **Josef** to build bots that handle frequent issues for particular clients or categories of client. These bots can be embedded in the client organisation to provide a smoother client experience, a new line of revenue and to create a stickier product. **Josef**'s law firm customers include **Herbert Smith Freehills**. "I believe that **Josef** are onto something big," said **Herbert Smith** partner **Michael Gonski**. "My view on the future of law is that lawyers need to work out how to turn what they do every day into processes. **Josef** is the first software I have seen where the lawyer is empowered to turn their process into a chatbot or an app rather than needing to pay a developer to do it for them. "That is game changing as it has never been worth the cost of paying the developer when right now it is cheaper to just do it the old-fashioned way and keep the process on a piece of paper or an Excel spreadsheet."

**Motta, Fernandes Rocha Advogados**, a full-service law firm in Brazil and member of the **Latin Lawyer 250**, has chosen **NetDocuments** as its cloud-based document and email management platform. Servicing domestic and international clients as a part of the trusted **TerraLex** network and **International Bar Association**, the firm's switch to **NetDocuments** is said to have been the key piece of its cloud technology and security strategy. The new strategy was put in place to ensure data protection, information governance and continued exceptional



service for their clients. "NetDocuments' platform is integral to ensuring our professionals have the tools they need, our clients receive excellent service and our data is secure, compliant and available anywhere on any device," said **John Shaw**, administrative and finance director at Motta Fernandes. "The platform will help us deliver on our goals to improve the client experience, properly protect our data and ensure our people have the most modern technology available in the market today."

## ► Movers & Shakers

**UK & EMEA** **Ascertus Limited** has appointed former NetDocuments senior director for EMEA, **Andrew Payne**, as its head of professional services to lead the company's project management and consulting teams, as well as drive technical engagement across Ascertus' product portfolio. Payne has over 18 years of technical, project management and commercial experience in the legal sector. Prior to his five-year stint at NetDocuments he was a senior project manager and business analyst at top 30 UK law firm, Nabarro (which merged with CMS alongside Olswang in 2017). "We are at an exciting phase in our growth, where there's a need for expansion of the management team, to support continued business advancement across EMEA," **Roy Russell**, CEO of Ascertus, said. "Andrew's experience is rich and his philosophy of 'customer success' matches ours. He brings the right mix of technical and commercial perspective to the role, and we are delighted that he has joined Ascertus. Our customers will greatly benefit from his contribution." Meanwhile **Brendan McMahon** and **Nickie Ashton** have also joined as technical consultants and **Melissa Jobson** as marketing and communications manager. Russell commented: "These appointments will enable us to significantly reduce lead times on projects, allowing us to deliver solutions faster without compromising on the quality of service and support."

Clifford Chance litigation support manager **Clare Chalkley** has joined **Integreon** as a senior director - legal services, focusing on litigation support services and document review for law firms and corporate legal department clients. Based in Integreon's London office and reporting directly to Joe Mischler, Integreon chief sales officer, Chalkley will work with clients to design and implement efficient and cost-effective litigation processes. She can be expected to advise on issues and disciplines such as data collection and preservation approaches and early data assessment and review strategies, with an emphasis on predictive coding and advanced analytics. "Clare has a wealth of experience and hands-on knowledge of the processes and technology needed to help clients navigate their complex, data-intensive litigation projects," said **Mischler**. "We couldn't have found a better fit and professional profile than Clare to join our team."

Legal technology provider, **F-LEX** has strengthened its management team with the appointment of well-

known LexisNexis leader **Sophie Gould** as its new head of learning and development. Gould has over 25 years' experience within the legal sector, having worked as a lawyer for a decade before changing paths to build and develop solutions for the industry. At LexisNexis UK she has long-led the in-house team offering. The hire signals a strong quarter for F-LEX, which connects pre-approved law students to firms and general counsel via its online platform. **Mary Bonsor**, CEO and co-founder of F-LEX said: "The legal market is changing radically as firms realise the value in harnessing technology to improve service and efficiency. Sophie has seen the sector evolve and brings with her a wealth of unique knowledge and skill. She will help ensure that our paralegals and junior lawyers are getting access to good training opportunities."

**HFW's** new managing partner Jeremy Shebson has appointed London litigation lawyer **Brian Perrott** as its first ever innovation partner. The firm has also formed an innovation committee, which is tasked with identifying potential business and service improvements to be submitted to the management board. Business development, IT, knowledge management, marketing and risk and compliance, in addition to client-facing lawyers, will all be represented on the committee. "We have always been a very creative and entrepreneurial firm, with lots of exciting ideas," **Shebson** told Legal IT Insider. "This is simply about creating a structure to harness that creativity from across the entire firm and help put the best ideas into practice." Shebson added that Perrott was selected because he is extremely entrepreneurial and because his energy and enthusiasm are infectious. "Brian is also very connected to our clients, which we see as being vital to this process. We aren't interested in meaningless buzzwords or shiny new technology that looks great on paper but doesn't actually do much for clients. For us, innovation has to make a meaningful difference to the service that we can provide to our clients and to us as a business." HFW's innovation committee is currently in the process of collecting and reviewing ideas. The intention is for the group to submit at least three projects to the management board for consideration within the next six months.

**Exterro**, a provider of software specifically designed for in-house legal and IT teams at Global 2000 organisations, has formed a new UK-based European team with **James Thompson** leading the team in London as regional director. "Exterro has a long history of working with large corporations with a major presence in Europe, including HSBC, Barclays and Siemens. With the opening of the new UK office and addition of James and his team, we look forward to rapidly accelerating our success in Europe," said **Bobby Balachandran**, president and CEO at Exterro. "I'm extremely excited to be a part of the team to help to formalise Exterro's presence in the UK and to grow Exterro's relationships with both international and local organisations," said Thompson. "Exterro already has an impressive list of European clients who have helped the company address and build European privacy and other region-specific workflows as

part of their orchestrated eDiscovery solution. I look forward to helping other European clients leverage the power of the Exterro platform."

**Tikit** is launching an independent product advisory board headed by legal IT veteran Janet Day to help inform its IT strategy. Day, who was IT director at Allen & Overy until 1992, then director of technology and infrastructure services for 18 years at Berwin Leighton Paisner (now Bryan Cave Leighton Paisner), will be looking for other legal IT influencers from EMEA and North America to join her on Tikit's new board. Day says: "I want to convene a group with a breadth of knowledge, understanding and market experience. They will have the weight to know their ideas are being listened to, and the confidence to make recommendations that won't necessarily match Tikit's own road map." She adds: "We'll be entirely independent and looking to ensure that the products Tikit develops reflect the changing way firms do business in the modern legal world." Speaking to Legal IT Insider, Tikit's chief technology officer **Mark Garnish** said: "Janet is going to create an independent advisory board with her peers and others who have a voice and an understanding of the industry to help inform us of what our IT strategy should be and what we need to develop or don't need to develop. The key thing for us is that it's Janet's decision: although Janet is working with us, she gets to decide who is on the board and its direction. It's for the greater benefit of our clients to make sure that we do the right thing going forward with regard to development and partnerships."

**OnePlace** has appointed **Daniel Ibrahim**, legal technology specialist, as sales director, EMEA. Ibrahim joins the team to help drive further growth and adoption within the region. With time spent at Thomson Reuters, Kroll, Copitrack and, most recently, NetDocuments as director of strategic accounts, Ibrahim brings a wealth of expertise and understanding of the legal industry to the role. He has extensive experience advising large law firms on embracing technology to solve complex business challenges and a deep understanding of how firms can drive operational efficiency and overall effectiveness when competing for business. His experience stands him in good stead to help ensure real, meaningful change within the organisations with which he works. Commenting on his appointment, Ibrahim said: "I am thrilled to be joining the incredible team at OnePlace. My experience working with the majority of the top law firms in EMEA, understanding their requirements and legal technology, means I am well placed to advise new and existing clients on the power of the OnePlace solution to facilitate firm growth. My top priority will be to strengthen my relationships with these firms and ensure that those that are considering new or alternative client lifecycle management solutions are fully aware of the capabilities and functionality offered by OnePlace. I'm excited to be joining at a time of considerable growth and look forward to working with my colleagues around the globe to help our clients

achieve success with their CLM projects." **Tim Smith**, CEO at OnePlace, added: "It's an honour to have Daniel join the OnePlace family. His deep knowledge and expertise in the legal sector, and his grasp of the ever-changing legaltech space, make him a great fit for us and our clients. We're delighted to have attracted such top talent to our growing team."

**North America** **Iridium Technology** has bolstered its North American consulting team with the hire of **Brian Taaffe**, who joins from Prosperoware. As a member of the Iridium team, Taaffe will be involved with business information (BI) implementations for leading law firms in all regions. He brings deep experience in SQL Server, Analysis Server, PowerBI and other BI technologies. As with all Iridium team members, Brian will wear multiple hats in his new role: BI Consultant/Developer, BI strategist, PowerBI specialist, dashboard designer and contributor to new Iridium BI product designs and features. Tom Jones, CEO and president of Iridium Technology told Legal IT Insider: "Brian has a deep understanding of the business of law and, more specifically, legal BI. He has spent the last 13 years focused on helping legal and professional services firms improve their profitability and processes. Brian is a consummate professional and has excellent technical expertise. We are proud to welcome him to the Iridium team!" "Iridium has a great product line built on leading-edge technologies," says Taaffe. "Their products are recognised for their elegance, performance and ability to customise based on customer preference. I am excited to join an organisation that is experiencing exceptional growth and is recognised as a market leader in BI for law firms. I bring a unique set of skills to the firm, and we are already deep in discussions about working some of my ideas into the Iridium BI product. I appreciate the firm's culture of respect for both employees and clients, and I look forward to playing a part in the firm's continuing growth." Iridium has also promoted **Ash Ladouceur** from controller to director – marketing and data analysis. Ladouceur will be leading the expansion efforts for Iridium's marketing initiatives while continuing her involvement in business operations.

**Catherine Casey**, an established thought-leader in eDiscovery and data analytics, has joined legal Software-as-a-Service company **DISCO** as its first chief innovation officer. Casey will lead industry conversations around how legal professionals can embrace technology to deliver better legal outcomes, while serving as a key evangelist for DISCO as the company continues its aggressive product and services innovation and international growth. She brings more than a decade of experience working with organisations around the complex eDiscovery and forensic needs that arise from litigation, expansive regulation and contractual relationships, and will work closely with DISCO clients as they modernise the practice of law. Casey joins DISCO from Gibson Dunn

& Crutcher LLP, where she led the AmLaw 200 firm's global eDiscovery and practice technology team. She specialised in eDiscovery, data analytics, cyber security and information governance. "The legal technology industry is at a major inflection point, where innovative organisations leveraging machine learning and AI to reduce time to insight are changing the practice of law. DISCO stands head and shoulders above the competition," said Casey. "DISCO has a vision that expands beyond eDiscovery, to fundamentally change how legal practitioners utilise technology across all aspects of law, supercharging human decision-making. I am beyond excited to align myself with the clear leader in advanced cloud-based discovery and to work with the innovative technical experts that drive this industry-leading organisation." "Cat embodies the inventor's spirit that is core to DISCO's culture. Her unique combination of technical and legal expertise will allow DISCO to further challenge the status quo while bringing transformative new legaltech solutions to the market," said **Neil Etheridge**, DISCO chief marketing officer.

**Bellefield Systems**, a provider of time entry solutions, has hired **Tara Quinn** as a senior account manager to support its rapidly expanding client base. Quinn will oversee client relations at Bellefield, working closely with the Client Services Department and vice president of sales, Matt Yezovich. "Tara brings a considerable amount of value to the organisation through her role as account manager, and we are thrilled to have her on board to deepen our relationship with our customer base," stated **Gabriela Isturiz**, president and founder. "Service to our customer base is not only one of our core values, but also something in which we take great pride and in which we shall continue to invest as we pursue rapid expansion," Isturiz continued. "I am truly honoured for the opportunity to work with the team at Bellefield during this period of growth and look forward to helping our customers remove barriers to time entry and billing compliance," added Quinn.

## ► ICYMI

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

### Discovery Decisions

#### **29 cases of shocking and strange spoliation**

<https://maas-bong.io/2VP8YBb>

"In the world of eDiscovery, spoliation is serious business. For destroying evidence intentionally (or in some cases, negligently) litigants and attorneys can face stiff sanctions, ranging from monetary fees to default judgment to jail time. But, like a ridiculous lawsuit, alleged spoliation can also be incredibly fun to read about - and produce some pretty outrageous (and strangely insightful) opinions."

#### **Further clarity provided on the application of the Disclosure Pilot** <https://maas-bong.io/2V9MmuJ>

"In this second blog article concerning the application of the Disclosure Pilot, we consider two recent High Court decisions which have provided further guidance as to its interpretation."

#### **US court grants motion to compel production of telephone records from individual plaintiff** <https://maas-bong.io/2UPqAfu>

"They are not subject to a privilege claim just because plaintiff's counsel's telephone number may appear in the records, and privacy issues are minimal to non-existent (since the at-issue records do not contain the substance of communications)."

#### **Florida appeals court upholds ruling that non-party had no duty to preserve evidence** <https://maas-bong.io/2V9mTS3>

A self-explanatory affirmation of common sense.

#### **Sanctions issued against US government in case where litigation hold notices were issued three months after filing** <https://maas-bong.io/2W5iEM3>

"The decision recognised that a court can impose sanctions either on the basis of its inherent authority or pursuant to Rule 37 of the Rules of the United States Court of Federal Claims. Rule 37(e) requires that an intent be found to deprive another party of the use of electronically stored information in order for the most severe sanctions to be imposed."

#### **Text messages must be preserved** <https://maas-bong.io/2USjAPm>

"When it is time to issue a litigation hold notice, you must include an instruction to preserve text messages as well as the devices from which they are sent/received."

**Six cases to know from the past year in US electronic records case law** <https://maas-bong.io/2VGgA8U>

"At the 2019 MER conference in Chicago Ken Withers and Ron Hedges ran through some of the most important electronic records management cases of the past year and what should be learnt from them."

## **Discovery Demystified**

**What's in a key word? Early case assessment or early data assessment?** <https://maas-bong.io/2LHAQHL>

This is a constant bugbear of mine and well worth repeating: ECA or EDA? In the world of eD, EDA all the way, baby.

**Electronic storage in a nutshell** <https://maas-bong.io/2VagYMP>

Craig Ball has "just finished the eDiscovery Workbook for the 2019 Georgetown eDiscovery Training Academy. The readings and exercises in the Workbook plot the path that evidence follows from the familiar information items called 'documents' that lawyers use in court back to the featureless stream of binary electrical impulses common to all information stored electronically."

**eDiscovery tech training in 12 modules** <https://maas-bong.io/2UX1iwn>

"Jared Coseglia breaks down a broad eDiscovery technology professional certificate that has hit the market from Cleveland-Marshall College of Law."

**TAR v Keyword Search Challenge, Round 6 (Instant Feedback)** <https://maas-bong.io/2Vh77ES>

Rob Robinson comments on an article by Bill Dimm (linked): "Even with a large pool of participants, ample time and the ability to hone search queries based on instant feedback, nobody was able to generate a better production than technology-assisted review when the same amount of review effort was expended."

**Computer forensics: What lawyers need to know** <https://maas-bong.io/2LNqZQE>

"The key that unlocks many legal matters is electronic data - it can help you determine whether private customer data was compromised, prove that a former employee stole valuable trade secrets or assess a potential spoliation claim ... Below are 10 simple tips that every lawyer who collects or utilises electronic evidence should understand." If this is news to you, PRINT IT OUT AND STICK IT ON THE WALL BY YOUR DESK!

**Reinventing eDiscovery: Process innovation takeaways from the ACEDS Chicago chapter meeting** <https://maas-bong.io/2LKgPQJ>

"The problems are well known: ever-increasing

data volumes; emerging data sources; under-utilised eDiscovery technology tools; and insufficient documentation. Process innovation is a key part of the solution. Workflows, technology and people are integral to reinventing and improving your eDiscovery processes."

**Q&A with emoji law expert Eric Goldman from Santa Clara Law** <https://maas-bong.io/2LP2jar>

"While some might scoff at the notion that a grinning, yellow-faced icon or a 'thumbs up' might constitute admissible evidence, lawyers are increasingly confronting the reality that they need to know how to preserve, analyse and present emojis as evidence in court."

**How to master slack eDiscovery and information governance in three easy steps** <https://maas-bong.io/2VIX5Nb>

"Unlike the data within familiar eDiscovery formats such as email, the data in Slack is unstructured. This makes it hard to figure out who data custodians are, difficult to set limits on scope and basically impossible to handle with traditional eDiscovery tools."

**Web's most asked questions: What is a custodian (in eDiscovery)?** <https://maas-bong.io/2LYwdci>

"In eDiscovery, we refer to custodian as the individual who is in 'possession, custody or control' of evidence." Is it really that simple nowadays, asks Martin Nikel?

**Investigate, don't just review documents** <https://maas-bong.io/2LRXkFL>

"The approach to managing electronic information in ... regulatory compliance investigations differs significantly from the approach to document review in the litigation context."

**Finding the evidence hidden in slack data** <https://maas-bong.io/2UMth1G>

"Logikcull's new case study on Slack discovery details how litigators are able to turn Slack data into an opportunity and uncover evidence essential to their cases."

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

Updated: "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."



**Turn your mind to discovery early** <https://maas-bong.io/2VEyyIR>

"Far too often parties turn their minds to the practical requirements of discovery far too late in the process. If we are to reduce the time and cost of the discovery process, then it is essential that how to tackle discovery is considered at an early stage." A constant refrain, here echoed in New Zealand.

**Emojis & eDiscovery: What lawyers need to know** <https://maas-bong.io/2VGpxPM>

Another interesting piece on what are, and what does a lawyer do with, emojis: "Lawyers must understand the nuances of collecting, processing and reviewing data that includes emojis - just like they must now understand plain-text emails and other more established electronic forms of communication."

### Discovery Distractions

**Seeing through the data fog: Investigative tech comes of age** <https://maas-bong.io/2LKw2kS>

The data challenge: "Alongside emails, board minutes and phone records, there are now texts, instant messages, social media communications and publicly sourced intelligence. On the transactional side, you could now be trawling through millions of rows and columns of accounting, trading and market data."

**What are the eDiscovery issues related to the Internet of Things?** <https://maas-bong.io/2UPfl1o>

"An Englishman's home may still be his castle, but thanks to Fitbits, Nest thermostats, Amazon's Alexa and Apple's Siri, modern living involves letting Big Tech across the drawbridge."

**eDiscovery evolution** <https://maas-bong.io/2USmbsB>

"Tools to analyse digital data have become more sophisticated and cheaper, allowing even small firms to reap the benefits."

**The 2019 Buyer's Guide to UK eDisclosure Systems is available now** <https://maas-bong.io/2UNwA8F>

As Andrew Haslam says: "The latest edition features 101 suppliers and 76 products, including 10 new suppliers - although this is balanced out by the 10 vendors who have left/been acquired, as well as three name changes." Of course, it includes my BONG as a valuable resource (my adjective).

**Internet evidence is the next big thing in eDiscovery** <https://maas-bong.io/2UV6917>

"While not all online information is relevant to litigation, much of it could be if lawyers can find it, understand its meaning through context and capture it. Forward-thinking attorneys have already started looking to the internet for evidence."

**90 per cent of law firms managed social media evidence collections in 2018** <https://maas-bong.io/2UQTWuc>

ILTA's "very informative and comprehensive law firm eDiscovery practice survey [see below] received responses from 181 different law firms - small, medium and large - on a variety of subjects, including eDiscovery practice trends and software tool usage. It reveals three key takeaways regarding social media and website discovery."

**eDiscovery in South Africa - Herbert Smith Freehills follow the sun** <https://maas-bong.io/2ZYNOM>

All of HSF's 11 technology support hubs around the world "use the same technology; have the same training in processes and solutions; and recruit with the same ideals, so that they can and do truly work 24 hours a day matter by matter."

**Inside eDiscovery & Beyond: Navigating legal digital disruption** <https://maas-bong.io/2V8JPB3>

"In this evolving digital risk landscape, the fifth annual Inside eDiscovery & Beyond survey by BDO examines the opinions and insights of 100 senior in-house counsel about changes in their approaches to eDiscovery, information governance, compliance, data privacy and cybersecurity."

**Exterro and Duke/EDRM Judges Survey 2019 Series: Part 3, the judge's role in the e-discovery process** <https://maas-bong.io/2VeSq5c>

"This is the third in a series of posts evaluating the results of Exterro and Duke/EDRM's 2019 survey of Federal district court and magistrate judges. With information from over 250 judges, the survey data offers a rich trove to mine ... This article examines what role the judges think they should play in the eDiscovery process."

**How to build a business around eDiscovery: The Troutman Sanders story** <https://maas-bong.io/2V9T9Vb>

"To provide the level of service clients expect, many firms are working toward breaking even for costs related to technology. Other firms see the glass as half full, taking this challenge as an opportunity to build a business around and generate revenue from eDiscovery. This model isn't just about a price tag on litigation support costs - it's about the value-added services firms are able to provide to their clients."

**eDiscovery technology is not just for the bigger firms** <https://maas-bong.io/2Vi2Xgd>

"Smaller firm lawyers consider the costs of eDiscovery technology to be higher than they can afford or their clients want to pay. But the concept that eDiscovery is a luxury accessible only to big law firms that have the resources to invest in considerable infrastructure is obsolete."

## **South African courts to go digital with CaseLines** <https://maas-bong.io/30irgOv>

"It's expected that the new online system will help to alleviate some of the current logistical problems presented by judges being called to review documents across different courts, particularly given the distances involved and the challenging infrastructure."

## **In-house targets external spend in push for eDiscovery efficiency** <https://maas-bong.io/2W2bgRI>

"The 3rd annual [Blickstein and Exterro] Study of Effective Legal Spend Management found that legal departments are looking to bring more eDiscovery processes in-house and are eyeing document review and data collection as prime areas from which to elicit savings."

## **Why eDiscovery savings is about department value for corporate legal** <https://maas-bong.io/2LUXZ9v>

"CLOC's 'A Tale of Two eDiscovery Operating Models' panel examined some of the opportunities that come from streamlining eDiscovery and information governance inside corporate legal departments."

## **GDPR: Brave new world or business as usual for eDiscovery?** <https://maas-bong.io/2VCLS0s>

"In reality, the GDPR is focused on protecting individuals and safeguarding data from data processing giants like Facebook and Google, not on restricting the flow of information or legitimate uses of data."

## **Weaponising security? The emerging role of the CISO in eDiscovery** <https://maas-bong.io/2VSnMPC>

"The role of the Chief Information Security Officer is becoming the norm in eDiscovery companies as these companies grow their client base and venture into compliance and data breach prevention services."

## **A lawyer's path to increased competitiveness** <https://maas-bong.io/2VSxAco>

"Adopting eDiscovery technology for in-house use empowers attorneys to understand their clients' businesses and needs more thoroughly. It gives them direct access to the knowledge and insight they need to formulate strategy more effectively."

## **GDPR for litigators** <https://maas-bong.io/2VQ3oOM>

"Virtually all evidence, whether in litigation or arbitration or relating to investigations carried out by regulators or enforcement authorities, will contain some personal data."

### **Discovery Diversions**

## **Video: Disclosure Pilot Scheme** <https://maas-bong.io/2VMxIK7>

Lawyers Dan Wyatt and Matthew Evans of RPC discuss how the UK's Disclosure Pilot, started at the beginning of 2019, encourages the use of technology.

## **Video: Five takeaways from BDO's eDiscovery & Beyond Survey** <https://maas-bong.io/2VN8ECP>

"In our fifth annual eDiscovery & Beyond Survey, we asked 100 senior in-house counsel about changes in their approaches to eDiscovery, information governance, compliance, data privacy and cybersecurity."

## **Podcast: Xact Data Discovery CEO Bob Polus on industry evolution** <https://maas-bong.io/2LOWXfi>

"In less than two decades, the eDiscovery industry has gone from birth to a market in excess of \$10 billion. In our inaugural episode of the First Chair Podcast, Bob Polus, the original founder and current President and CEO of Xact Data Discovery, joins us to offer a wide-angle view of the discovery services industry's evolution, from birth to today."

### **Discovery Divinations**

## **It's time to follow a next-generation eDiscovery playbook** <https://maas-bong.io/2VMdhNJ>

"A next-gen eDiscovery playbook calls for the use of modern review technologies that are focused on understanding the data - not just how to improve the review rates of documents."

## **ILTA's 2018 Litigation and Practice Support Technology Survey results** <https://maas-bong.io/2UVIaPh>

"It's clear that the role of the eDiscovery professional is changing, as evidenced by the articles in this white paper which shed light on the additional knowledge and skills required to remain current."

## **From big law to legal tech, DISCO's new CINO sees eDiscovery renaissance** <https://maas-bong.io/2V7caYp>

"DISCO's first chief innovation officer, Cat Casey, says eager investors in legal tech, ballooning data created by lawyers' clients and a greater need for advanced analytics are fuelling eDiscovery's renaissance."

## **How eDiscovery requirements are changing: Five questions with Relativity CTO Keith Carlson** <https://maas-bong.io/2UJB7sV>

"Earlier this year Relativity, a Chicago-based provider of legal software, announced plans to hire 300 people. As part of the expansion, the company named Keith Carlson as its new CTO. Carlson recently shared his views on the value of unstructured data, changing requirements for data privacy and how the eDiscovery space is evolving."

*Incidentally, and for those outside the UK (or in the UK but without televisions), BONG! is a reference to the main evening TV news in the UK, on which headlines are read out between strikes (bongs) of the now-silent Big Ben, the bell in the Elizabeth Tower (renamed from the Clock Tower in honour of the Queen's Diamond Jubilee) at the Palace of Westminster.*

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## ► Is CRM finally the answer?

Law firms have always been terrible at cross-selling and making relationships sticky so, with the advent of improved client relationship management technology, particularly signature scraping (which enters data automatically into the CRM), will law firms become better at institutionalising their clients?

As usual, technology isn't the answer, at least not on its own. The bottom line is that those who use technology to augment and further develop their relationships - to be proactive rather than reactive and to understand their clients' needs - may well find the new and improved legal CRM augments that.

Used as a substitute for real relationship building, it will fail.

The term "cross-selling" is an interesting one - arguably law firms that try to "sell" anything are destined to fail. Speaking to Legal IT Insider over a lunch with Intapp, board member and former chairman and CEO

of Orrick, Ralph Baxter, observed: "Those who use a CRM system to sell are mistaken in what the client wants. They don't want to be sold to. But if you know the client well and understand their business then you can grow that relationship. Recommendations come from trust and what lawyers need to focus on tirelessly is relationship management - technology can augment, but never replace, that."

Intapp has not only bought professional services CRM DealCloud but also OnePlace, which, combined with another recent acquisition, contract management solution gwabbit, will go a long way towards achieving "zero entry" CRM.

Zero entry will in turn go a long way towards overcoming the traditional barriers to CRM, including culture (lawyers not wanting to share) and lack of time.

Whether lawyers like sharing or not is going to become almost immaterial. Clients are increasingly expecting their law firms to have a deep understanding of their needs across the business. Those that can't or don't will start to look amateurish: clients don't have time to waste on educating their advisers.

# legali<sup>i</sup> insider

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