

legal*i* insider

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▶ You're hired!

In this month's newsletter we reveal more big names, and, in some cases, surprise moves and hires than probably ever before as Andy Sparkes takes over as director of legal markets and Matt O'Callaghan joins Peppermint Technology from Microsoft. Legal engineering firm Wavelength.law is bringing on board as head of strategy and policy Sophia Adams Bhatti, who was previously director of legal and regulatory policy at the Law Society of England and Wales. And Syke Legal Engineering is hiring Adrian Stafford from LexisNexis.

Oh yes, and if you haven't heard, Chris Bull is joining Deloitte Legal as legal operations architect.

You can read more detail on all of those in this issue. You're welcome.

▶ Chris Bull joins Deloitte Legal as legal ops architect

Leading legal IT adviser Chris Bull has joined Deloitte Legal as legal operations architect, working with the team leading the development of the next phase of the Big Four giant's legal services offering, as Deloitte also, we can reveal, looks for a chief technology officer.

Bull, who is director and founder of Kingsmead Square consultancy, will be focussed on the design and delivery of a legal operations infrastructure for Deloitte Legal.

A spokesperson told us: "This will place smart

working and new operating models at the heart of Deloitte Legal's offering and empower our lawyers to deliver the future of law, today."

"The future of law, today" is a Deloitte tagline, and Bull says on LinkedIn: "My role is to design and implement a state-of-the-art lawyer infrastructure; bringing together process, technology, tools, knowledge and project/matter management models. Over the next year we will be upgrading this internal infrastructure to support Deloitte Legal's delivery of 'the future of law, today.'"

Bull has more than 20 years' experience in the legal sector, working at a senior level both as a COO at law firm Osborne Clarke and global legal managed service provider Integreon, and as an advisor to many leading UK and international legal services businesses.

He has extensive experience working across the Big Four, specifically in audit, tax and consulting roles.

He joins as Deloitte Legal's managing partner Michael Castle looks for a CTO, who we understand will have a more client-facing role.

Castle joined Deloitte Legal from Allen & Overy in February 2019. A banking partner by profession, Castle was also involved in the innovative delivery of legal solutions to clients.

Castle's remit is to develop new ways to take legal solutions to the market. "This will combine legal advice with legal managed services, technology and consultancy to provide solutions to clients looking to optimise the management of their legal operations," Deloitte said in a statement at the time his hire was announced.

Deloitte Legal has 60+ client-facing practicing lawyers in the UK and 125+ other fee-earners, many of whom are delivering regulated legal activities.

Globally, Deloitte Legal currently has around 2,500 professionals operating in over 80 countries.



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► Exclusive: Microsoft's Matt O'Callaghan moves to Peppermint

Legal cloud software provider Peppermint Technology has hired Matt O'Callaghan as director of business development. O'Callaghan - who will report to chief sales officer Tony Cox - joins from Microsoft where he has been leading enterprise engagement within the UK legal sector. He will now take day-to-day responsibility of the Peppermint sales team.

"Having worked for Microsoft for 14 years and, for the past two years, leading our legal services sales team, I'm now ready for my next challenge. I've led the team at Microsoft from when it was first created in 2017 and my mission from the outset was to learn from our customers and shape the team around how they wanted to work with us," O'Callaghan told Legal IT Insider.

"I think we have achieved that. We have the right structure in place, we have a great team and they have many more years of success ahead of them."

O'Callaghan will nonetheless be sorely missed at Microsoft by many in the legal sector, given that he has tirelessly built up a solid London-based team with unusually in-depth knowledge of the sector and law firms' priorities.

So why move to Peppermint? "Well, quite simply, they have developed a brilliant product in Dynamics 365 and they have some brilliant people," said O'Callaghan. "There are a number of new faces in their leadership team, all of whom I worked with when I started working in the IT industry. They know how to create success within a business and have some ambitious plans. I cannot wait to join them and get started. Of course, I'm sad to be leaving Microsoft as they have been a huge part of my career and I will miss all my colleagues whom I now regard as my friends but, ultimately, it was too much of an exciting opportunity to turn down. Plus, I still get to work in the legal industry."

Based on Microsoft Dynamics CRM, Peppermint provides a full suite of legal apps delivered as a SaaS product. Last year the company launched a Dynamics 365 public cloud customer relationship management system, which O'Callaghan told Legal IT Insider at the time, propelled Peppermint into the big leagues.

Peppermint has been through some challenging times, but the online CRM solution is perceived to be transitioning the company from a predominantly mid-market client base into the eyeline of Biglaw firms. This transition follows the appointment of a whole new C-suite, including Cox, CFO Nicki Grundy and CEO Gary Young. It also follows the injection of further capital by existing investor Scottish Equity Partners and new investor Accel-KKR.

"Transforming the client experience sits front and centre of our legal customers' digital strategy and Peppermint is uniquely placed to help them deliver that. For me, it's the most exciting conversation you can have with a law firm and if you get it right then you've played a part in helping increase the bottom line by providing them with the platform to win more clients and achieve better client retention," O'Callaghan said.

"The problem most law firms face is the disparate systems that their employees must navigate to get the insights they need to build strong client relationships. They are overwhelmed with too much information and not enough insight. But, for organisations that can harness the data to gain relationship insights, the results can be truly transformative. Our approach at Peppermint is to unify the experience by leveraging Microsoft tools they are already familiar with and integrate them for a seamless experience that enables an end-to-end view of their client.

"However, one of Peppermint's other key USPs, and another reason I decided to join, is the investment they have made in their own customer success team," O'Callaghan added. "They understand that customer success is the key to Peppermint's success, and this is so important. Don't get me wrong, first and foremost you need to have a great product, but I would argue that it's even more vital working for a company that is committed to ensuring its customers start realising the benefits of the technology as quickly as possible. This is all down to helping our customers every step of the way through their own cultural transformation and, in almost every case, this is the biggest challenge of all. Peppermint has invested in a team that's sole purpose is working with customers to make their investment a success. Taking all of this into account, I think our prospects are very good."

► **Exclusive:** **Wavelength hires** **Sophia Adams Bhatti**

In a very significant hire for Wavelength.law, the legal engineering firm, has hired the Law Society of England and Wales' director of legal and regulatory policy, Sophia Adams Bhatti, who in September will take on the new role of head of strategy and policy at Wavelength.

Adams Bhatti is a respected figure in the regulatory world: before the Law Society, she was deputy director of strategy for the UK Competition and Markets Authority and the Office of Fair Trading and acting head of strategy for the UK Financial Conduct Authority.

At the Law Society, Adams Bhatti has led the legal and regulatory policy team with oversight for policy development across the full breadth of law reform, engaging with policy makers in government, and partner agencies, both domestically and internationally. Specifically, she spearheaded the Law Society's programme of work on the impact of technology on the law and the justice system and practice of law, leading the Public Policy Commission on the use of algorithms in the justice system.

Speaking about the hire to Legal IT Insider – and more specifically replying to our question as to why Wavelength needs Adams Bhatti - CEO Peter Lee said: "Sophia is going to be our head of policy and strategy. We've realised that quite a lot of the work we do needs a lot of strategic thinking from organisations about their use of data, especially in the financial services and pharmaceutical sectors, where their regulators are starting to include data requirements.

"We need to be able to advise on and assist with the strategic planning of some of these implementations. Strategically organisations need to consider how the use of machine learning and artificial intelligence and the different ways of working with data is going to affect them and Sophia is doing a lot of work in those areas."

Have regulatory barriers been a hindrance so far? "No," says Lee, "but it's definitely having those skills that is needed and we can't see anyone else that can offer an end to end solution. So, if we're doing a solution design and legal operations piece of work, that might involve elements of data science and service design and technology and there is a strategic wrapper around that."

So, is the ambition that Adams Bhatti will also work with the regulators? "Possibly," says Lee. "We've had discussions with the regulators around supporting them, especially around better data structures in their handbooks and the way they execute on the regulation, so her skills will really help in those areas.

And also we've had discussions with court services - so national and international courts - who want to engage in technology more in the way they deliver legal services."

Wavelength employs around 30 people. This time last year that number was 12. Around two thirds of its staff are based in Cambridge and the rest in its London office. Adams Bhatti will divide her time between the two offices.

Her hire follows that of Erika Concetta Pagano, formerly both a lecturer in law at the University of Miami School of Law and director of LawWithoutWalls, who in June took on the new role of head of legal innovation and design at Wavelength. Pagano will lead the development, growth and management of the legal design and innovation aspects of Wavelength's business.

Lee said: "It's all part of the vision. Struan Britland [who joined in May from Arm] is heading the legal operations work we do. Erika is heading legal innovation and design. And Sophia is heading policy and regulation. All of our projects involve elements of all of those things."

► **Andy Sparkes takes** **over Lexis UK legal** **markets**

Andy Sparkes has taken over from Simon Collin as director of legal markets for UK and Ireland, we can reveal.

Already in the role, Sparkes will be responsible for all LexisNexis' legal products, including driving the publishing giant's commercial and product development strategy.

Lexis has divested enterprise resource planning solution LexisOne but continues to focus on LexisLibrary, PSL practical guidance and LexisDraft as well as key brands such as Halsbury's Laws of England. Sparkes will also head the learning function of LexisNexis, which goes to market as LexisLearning.

Sparkes was previously general manager of Lexis Enterprise Solutions for UK and Ireland.

We've not yet been able to catch up with him about the new role.



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► Adrian Stafford to join Syke

LexisNexis' head of legal knowledge engineering, Adrian Stafford, is to join leading legal tech engineering business Syke, we can reveal, in the latest of a number of big name hires in this growing sector of the market.

With almost 30 years' experience in document automation and previous roles at Linklaters, A&O and Business Integrity (creators of Contract Express, now part of Thomson Reuters) Stafford will bring a wealth of expertise in implementing automation projects. He joins Syke in August.

Syke, which was founded by Alistair Maiden in 2016, helps corporate legal teams and law firms to buy and implement legal technology. This includes document automation, contract lifecycle management, legal AI, expert systems and legal bots. It now employs 30 people, of which the majority are based in Yorkshire. Stafford will be based in London, taking the number of people in that region to seven - although Syke doesn't have a London office and employees work from home or from clients' offices.

Syke's customers include the AA Group and DWF, where it has helped with the growth of DWF Draft.

In May it announced a strategic alliance with Norton Rose Fulbright to offer NRF's clients combined legal advice and document automation services, responding to a demand among clients for law firms to collaborate more with other legal service providers.

Stafford has been brought in to help drive the partnership with NRF, and Maiden said: "He's an expert in this field with a lot of experience in managing document automation projects with major organisations working with in-house and external lawyers to do that."

Syke has seen significant growth in the past year and other big hires include Vicky Lockie, formerly at Pearson. Anna Lolua, formerly deputy director of M&A at Polyplastic Group, joined Syke in October 2018 and is now on secondment to HSBC as innovation and legal technology manager.

Asked how he explained the high growth and demand for legal engineering work, Maiden told Legal IT Insider: "In terms of firms and corporate legal teams using us, it's because we have expertise which is quite narrow in a subject which is quite complicated. We're not generalist: we focus on contract lifecycle management and document automation, AI and legal bots, and that's all we do. All those things require

specialist skills and we get the best experts together in one group.

"Getting those experts together means they share their expertise internally and we've seen our capability increase massively."

The growth comes as in-house teams this year stopped growing for the first time, according to recent research by The Buying Legal Council. Companies like Syke represent an alternative to appointing a legal operations head, and Maiden said: "In a lot of what we do there is a cross-over with legal operations and what we're talking about - the digitisation of the corporate legal team - is quite difficult to do as an in-house counsel or legal ops director. In the procurement of a contract lifecycle management system, for example, we've got a really good idea of the actual capability of the system beyond the sales patter and we know what the price should be - we don't have to do the thinking over again."

► The French ban: The Law Society comments

News that France has banned the publication of statistical information about judges' decisions shocked the legal industry this month. Punishable by a maximum five-year prison sentence, the French legislature is cracking down on litigation analytics in the first ban of its type anywhere in the world.

The new law, known as Article 33 of the Justice Reform Act, is aimed squarely at legaltech companies focused on revealing the pattern of judges' behaviour in relation to court decisions. "The identity data of magistrates and members of the judiciary cannot be reused with the purpose or effect of evaluating, analysing, comparing or predicting their actual or alleged professional practices," the law states.

It is understood that the law has been introduced as a middle ground amidst growing demands, in France, for judges' names to be removed from the online publication of decisions altogether. A compromise it may be, but it is nonetheless a startling reminder of regulatory risk for the burgeoning data analytics sector.

The litigation analytics companies we spoke to, however, appear remarkably sanguine about the implications of the new French law. "It is only

one market and only one component of litigation analytics," said Edward Bird, chief revenue officer at Solomonic. "We have seen no sign that this will be enacted in other markets. We are therefore doubtful of it occurring elsewhere at this time. Furthermore, currently we have no data on the French judiciary and have had no plans to include it."

Christina Blacklaws, president of the Law Society of England & Wales, meanwhile, is under no illusion as to the importance of maintaining judicial transparency. "Transparency is key to dispensing justice effectively," she told Legal IT Insider. "Judgments should always be publicly available and easily accessible. The use of technology to analyse case law and scrutinise decisions has become widespread in both academia and private practice. In England and Wales it contributes to the development of a jurisprudence which is deeply rooted in real life and can take context into account."

Blacklaws added that any regulation of litigation analytics would, in any case, be difficult to put into practice. "The use of predictive analytics in litigation has become more common in the past few years. Its regulation is a matter of domestic law. However, policing data analytics and patterns will be challenging to enforce."

► Bloomberg Ending UK Court Coverage

And news comes from America that Bloomberg Law will be, err, ending its coverage of UK Court Dockets.

Thanks to Jean O'Grady from Dewey B Strategic for sharing this news. Jean says:

"A Bloomberg Law executive explained to me that use of the UK materials had declined and that there were legal limitations which prevented the company from automating or 'crowdsourcing' UK documents as has been done with Pacer."

Here is a message that was sent to customers:

"Effective August 1, Bloomberg Law will no longer offer coverage of UK Court Dockets. We have decided to discontinue this service because usage of UK Dockets on Bloomberg Law has steadily declined over the last few years. We believe this is the result of the modernization of UK Court system websites.

"To minimize client impact, we have chosen August 1 as this date coincides with UK Courts' recess. After August 1, we will continue to offer historical coverage on Bloomberg Law. New coverage and updates to existing UK dockets, however, will be discontinued from the following dockets sources: UK Court Dockets; UK Court Hearings; UK Corporate Insolvency."

► Minster's 9% tech investment

If you missed our profile in June of the IT capability of UK top 60 law firm Minster Law, take a look [here](#).

Minster Law's director of IT and change, Mazella Heaton, talked to Legal IT Insider about the IT team's remit, strategy, and challenges but it was the investment - estimated at 9% of income in the current year - that really jumped out. The average spend across the top 100 is closer to 3%.

While investment fluctuates, the 9% figure is due to Minster's systems consolidation and infrastructure refresh. Its key priorities include consolidating its case management and financial systems onto Proclaim. It is using QlikView for management information.

Minster's top line business strategy breaks down into consolidating existing business, growth and sustainability. The IT strategy mirrors that. "My key objectives are around ensuring the stability and performance of IT through our infrastructure; delivering digital solutions that increase customer satisfaction; reducing the overall cost of our IT; giving colleagues the tools that they need to do their job; and delivering against an MI strategy that improves our ability to do data analytics," Heaton said.

"The main projects that drive out of that are the consolidation of our business process applications into a single platform. Currently we have two case management applications and a separate finance system. This year we are working towards consolidating everything onto one platform.

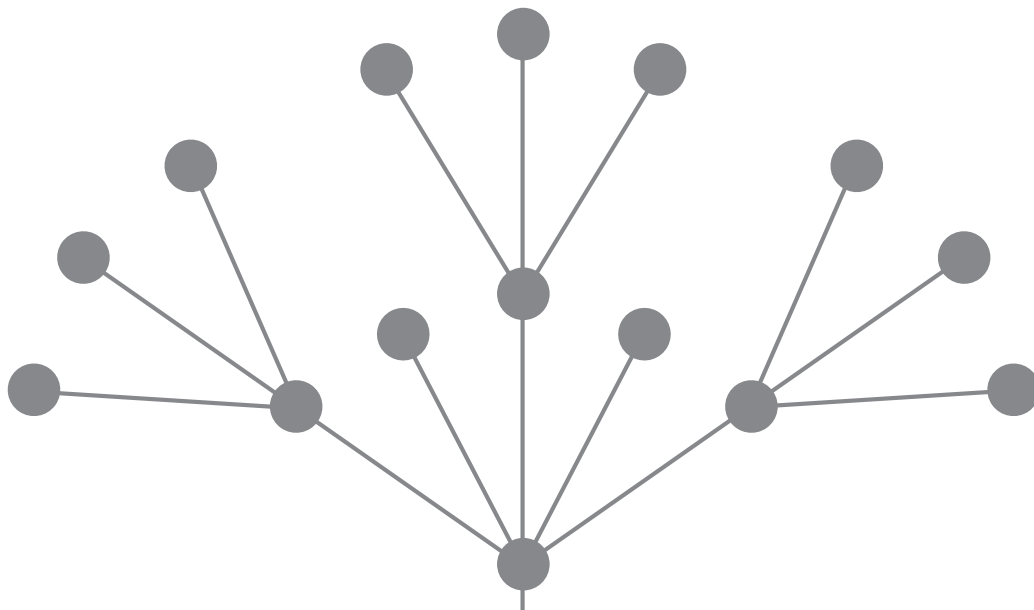
"We are building the second phase of an online digital portal for customers and we have got an AI system in pilot. Those are our digital solutions for improving customer satisfaction. In terms of providing the business with the tools that it needs, we have recently upgraded to Microsoft 365. We shall be rolling out aspects of that, such as Microsoft Teams, throughout the year. We are also currently building out our data store into Microsoft Azure from an on-premises data warehouse which will support our analytics."

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► Greenberg's Recurve-ball

June saw the launch of US law firm Greenberg Traurig shared services subsidiary Recurve, which will be a launchpad for its innovations in technology, project management, alternative staffing and solutions for lawyers and clients that don't involve the practice of law.

While many international law firms are looking at launching this kind of entirely separate venture - beating the alternative legal service providers at their own game, if you will - it's still in its relative infancy, and one area where the United States leads the UK.

As far back as 2011 the ABA Journal began a series of reports looking at how the legal profession is responding to its "Kodak moment": Seyfarth Shaw, Baker Donelson, Dentons and Akerman have all launched separate ventures in which to collaborate with clients outside of the constraints of the partnership, particularly around technology.

We speak to a lot of people behind the scenes and you should not underestimate what an achievement it is to get partner buy-in for the launch of a separate venture of this nature, with all of the cultural and financial ramifications that has.

In the UK, Magic Circle firm Allen & Overy's subsidiary aosphere has long stood out and won awards for offering subscription-based online derivatives services but is has been something of a lone island. More recently, Clifford Chance launched Applied Solutions, out of which it will sell white-labelled document automation services, client apps and more.

A separate subsidiary is a no-brainer if you want to sell subscription-based, tech-underpinned services. Lawyers struggle to sell their own services at times, let alone products they don't understand. CC, which launched Applied Solutions in 2018, is finding that it is easy to attract good people to work within that type of organisation.

But Recurve is far wider in its ambitions than either of those two ventures and almost certainly than the pre-existing ventures in the US. Speaking at the time of Recurve's launch, Greenberg's executive chairman Richard Rosenbaum said that the firm's wholly-owned subsidiary will be "utilising investments by strategic partners involved in its core disciplines and other equity investors experienced in the space to fund its capital requirements and operational needs," adding, "Recurve is intended to become the first law firm-founded, third-party financed global collaboration platform solely focused on creative innovation in the support of the delivery of legal services."

He added: "Recurve will work outside the traditional legal model to provide previously unavailable tools and efficiencies in the legal ecosystem, bringing together diverse talents and resources across the globe in a collaborative platform aimed at industry-wide innovation

to help attorneys and clients adapt to the rapidly changing legal landscape."

Working outside of the traditional legal model - particularly for US firms, where a lack of deregulation means less flexibility in how you structure your own alternative legal offering - means that it won't be burdened with the costs of the partnership and can be more flexible (aka attractive) in its fee structure.

Recurve will establish headquarters in Warsaw, Tel Aviv and Denver, with operations in strategically selected locations, including Austin, Berlin and South Florida.

It will, Greenberg says, be staffed by a lean and experienced team of innovation "architects", well versed in client needs, the advantages of the traditional law firm model and the wide array of growing resources in the legal innovation marketplace.

In addition to Rosenbaum the initiative is being led by Denver-based lateral hire Tom Romer, head of innovative client strategies at Greenberg, and Jaroslaw Grzesiak, managing shareholder of the law firm's Warsaw office.

The ambition is to help clients use advanced technology solutions, value-based budgeting and pricing and process innovation without themselves making significant investments in people, process and technology.

You could easily argue that Greenberg might be better off creating an integrated shared services offering such as Herbert Smith Freehills and Baker McKenzie have, led by their shared services centres in Belfast and internationally. Clients benefit from a cost-competitive, tech-led approach to higher volume work that is fully integrated with its mainstream legal practice.

The advantage that law firms can offer over established ALSPs is a natural, integrated workflow that means all of a client's work from low to high end is taken care of at the right price point.

There is a but: if Greenberg pulls this off, they could be in a much better position when the next recession bites and corporate legal teams downsize, and general counsel look to where to send the lower value work that is currently being handled in-house. Spoiler alert: it's unlikely to be law firms, although firms with built in alternative legal services will be at the front of the queue.

There are a few big questions about Recurve that we can't yet answer that will help to decide success or failure.

1) Is it really, truly separate or is there a blurring of responsibility that mean senior personnel are selling Greenberg and Recurve. As one legal tech vendor said to us, "If that's the case, good luck with that." It must also not suffer from the early Seyfarth effect, where partners gave away services to their clients.

2) What is the workflow for clients between Recurve and Greenberg?

3) Are Greenberg lawyers being incentivised to refer work to Recurve? Recurve may be a greenfield site, but it has the huge advantage of Greenberg's thousands of clients.

We await with interest news of any third party/VC funding, as well as a few answers.

► What the innovation head said

Four legal innovation heads compare remits, challenges and priorities

Around the table:

Isabel Parker, chief legal innovation officer, **Freshfields Bruckhaus Deringer**

Shilpa Bhandarkar, head of innovation, **Linklaters**

Wendy Butler Curtis, chief innovation officer, **Orrick**

Kerry Westland, head of innovation and legal technology, **Addleshaw Goddard**

Innovation roles can differ widely in terms of day-to-day responsibilities. What, exactly, is your remit?

Parker: It's complicated, as I wear a number of different hats. I am joint chief legal innovation officer. That is a global role and, broadly, my remit is to look at how our lawyers currently deliver legal services to clients and how that delivery can be improved - via process improvements, delivery from our Freshfields Hub or use of technology. I am also accountable, with Adam Ryan, our other joint CLIO and Sonia Awan, our global head of innovation architecture, for the "transform" layer of our digital transformation strategy, which involves the development of differentiating client-facing digital solutions. I also co-lead the Freshfields Lab in Berlin with two of my colleagues, Gerrit Beckhaus and Felix Netzer. Finally, I am global head of knowledge.

Bhandarkar: Very simply put, my role, and the role of my team, is to catalyse change. Our motto is "unleashing the imagination of our people, to challenge the present and shape the future". But it's more than a marketing strap-line - it's the underlying philosophy of how we approach the space. There is a technology aspect to that, of course, but primarily I see my role as a change role. How do we get people to change the way they have done things for years and try something new? How do we get lawyers, who tend to be perfectionists, to get comfortable with the concept of a minimum viable product, a concept familiar to everyone in the start-up and innovation world?

Butler Curtis: As chief innovation officer, I help shepherd our firm and our clients through digital transformation. This includes redesigning legal services into legal solutions that allow the business customers to have on-demand and often self-service legal advice. Our goal is to add value, not delay. We want legal expertise to be an asset to the business in solving problems, reducing risk but also, equally

importantly, identifying opportunities. The data in the law firm and the data in the legal department is an asset to decision-making and we are working to better harvest, monitor and report this data to help inform decision-making. Too often there is a misperception that this transformation is all about technology. I also work within the firm and with clients to identify new roles and skills for lawyers and legal professionals.

Westland: I'm head of innovation and legal technology. From the first of May this year, I am also a partner. I run a team of 26 which works across the firm, with our practice areas and clients, looking at new ways of working. Obviously, the introduction of technology is a part of that. We get involved with the really large projects that our clients will always need outside counsel for. And then we also talk to them about how they are using technology internally.

How does the innovation function fit with IT, and within the broader firm?

Bhandarkar: I wouldn't describe us as a function. We are a small central team. We sit entirely separately from IT, although we are, of course, very closely aligned. Bruna Pellicci, our CTO, sits on the innovation steering group. We are both members of the cross functional Legaltech Working Group. But we are separate teams and for us that is the right model. The IT function has responsibilities around our tech infrastructure - emails, document management and so forth. My team looks more to finding and testing, as well as building, new products. My role, in part, is to challenge IT to make space for these new and emerging technologies in their road map - to be a bit more flexible in their way of working. And Bruna's role is to challenge me to ensure that we only bring in what is actually necessary, and what integrates effectively with our technology stack. That equilibrium between our worlds is what makes it work well.

Westland: We are also a separate team, although we talk all the time. I report to the COO and so does our IT director. At Addleshaw Goddard, we have an area called Intelligent Delivery, which is where my team sits. IT is a business service, although I do have some IT developers ringfenced. I think that degree of separation is important because I see us as a conduit between the business and the technology piece. A lot of my team are legal professionals. That means we understand what is needed - what our clients are looking for - and can translate that into new ways of working. We also sometimes have to respond really rapidly to a client request. IT processes tend to be a bit slower. IT can help bring in the technology, and then I look at how we use that technology to deliver legal services.

Butler Curtis: We collaborate with our IT department but also have dedicated innovation resources. Within Orrick Analytics we have developers, project managers and a statistician. Outside of IT we have data scientists and Orrick Labs, our skunkworks.

Within the innovation group we have innovation advisers who monitor functionality of legal tech, and also business applications commonly used by our clients, to help determine whether the firm or the client should build or buy a solution and, if build, whether existing tools can be leveraged for the build. The best models ensure a heavy focus on customer service, a mechanism for direct lines of communication with the firm and client customers, and a culture supportive of trying new things regardless of the outcome.

Parker: When I started my innovation role three years ago, the innovation function was separate from the IT department. This was a conscious decision, as our IT department had a lot of operational work to deliver and could not at that time focus on innovation. Since the arrival of Charlotte Baldwin, our chief digital and technology officer 18 months ago, innovation has become part of what we used to call "IT", and we are now one team: Global Technology and Innovation. The model has to follow the maturity of the organisation and I think we were right to start out as a separate unit to build credibility within the firm and with our clients. Once Charlotte arrived, with her wealth of experience in digital transformation and started to build up capabilities in global technology, it was clear that innovation should be part of one function, aligning to our CDO. We are now moving much faster, and have professionalised our innovation delivery. We are very happy to be one team.

What are your key priorities in terms of innovation?

Butler Curtis: A Gartner study reports that digital transformation is the number one priority for 80 percent of Fortune 500 CEOs. We are certainly seeing this amongst our clients and our priority is to help our clients with this transformation.

Parker: We have just introduced a product delivery lifecycle which we are applying to the development of all client-facing digital products. This is a process by which we assess and prioritise ideas for client-facing tech products that come from the lawyers, looking at a number of factors, including strategic alignment with the firm's priorities and relative business value. My priority is to get this embedded and humming, so that we can speed up delivery and make sure we are even faster to respond to client need. We cannot hang around as clients are increasingly asking for digital solutions and we have to be quick to respond to that.

Westland: We are prioritising workstreams that cover wide areas of the firm and which can therefore be re-engineered and offer the greatest value. We are also prioritising making sure we are using the best tools. There is a focus on research and development around what is in the market, whether we are using what we have in the right way, and if there are new capabilities we need to bring in. Finally, developing the right culture in the firm is also a priority. We need to make sure we are bringing everyone along on the

journey.

Bhandarkar: We launched our Ideas Pathway, a tech ideation platform, earlier this year. The sheer number of really interesting ideas coming through that, and the potential to link up those ideas so we can offer more scalable solutions, is one big area of focus. We also launched Matter Explorer, which links together various databases in the firm and provides our lawyers with an almost Google-esque search function that allows them to find deal-related information across more than 750,000 deal bibles. Previously, this would have been a much more laborious process. Ideas like that, which bring data and technology together to improve the user experience for either our lawyers or our clients, are always exciting.

What would you say have been your biggest successes?

Bhandarkar: In addition to the Ideas Pathway and Matter Explorer, we recently also launched a virtual internship with Inside Sherpa. I really like this one because it highlights innovation and the use of technology, but not just on transactional work. This was about increasing diversity in and access to our profession, giving students that wouldn't otherwise



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have considered a career in law the opportunity to see what working at a magic circle law firm might be like. We had over 1,500 students register from close to 200 universities in less than a week of launch.

Parker: Three years ago innovation was a team of two people with no substantive plan other than a strong belief that we could deliver more value for our clients. We are now a real leadership team with a diverse mix of skills - lawyers and technologists - and we have the capabilities, processes and foundations we need to drive transformation for clients. Watching the exponential growth in client interest has been really rewarding and seeing digital transformation firmly at the core of the firm's strategy is similarly a great success for the team.

Butler Curtis: Orrick has a culture of innovation for all. Through our actions we empower everyone to innovate as part of their job. We offer innovation prizes and include all personnel in design thinking sessions and innovation reports. Our associates receive credit towards their bonuses for time devoted to innovation and, in the first 12 months of this programme, have devoted 4,000 hours or the equivalent of 500 days to innovation. We also work with our clients to help drive their innovation. In the past six months we have held innovation sessions with more than 400 client

personnel.

Westland: We have won some really important pieces of work because we have been able to offer a technological solution. We have also retained clients because we have been able to show what we do, and how important it is. The growth of my team, and the development of those people, also blows me away every day. I had my first trainee qualify this month. Those sorts of personal successes are really exciting as well.

What challenges do you face in your innovation role?

Westland: I have been doing this for five and a half years now, and I find expectations have risen exponentially. Those expectations often exceed what is possible right now. Managing the expectations of clients and internal stake-holders around what can be done with today's solutions is a challenge.


Parker: For me, it's speed. We want to move faster and deliver more. We have come a long way, but we can always do better.

Bhandarkar: The upside of working in a firm the size and calibre of Linklaters is the volume of great ideas that our people generate. The challenge is pulling that together without making it a centralised function. We want innovation to stay within the practice, with the people closest to the problems we are trying to solve, but we also want scale. It can be difficult to keep track of everything and to connect all those dots. We haven't found a tech solution for that yet - much of it is just down to good old-fashioned conversations and collaboration.


Butler Curtis: The Orrick innovation team has been a bit of a victim of our own success. At the end of last year, we were overwhelmed by the amount of ideas and energy across the firm. To solve this problem we built a platform available to the entire firm that crowd-sources information on all innovation projects ongoing at the firm as well as information on approximately 600 legal technologies either built by Orrick or available in the market. By making this information available to all, we can better prioritise resources, share knowledge and enable collaboration. This transparency also reduces concern over hype and gives everyone at the firm tangible examples of what is possible.

Do you think your role is properly understood by management, by IT and by the wider firm?

Parker: Having Charlotte join us has helped with this enormously. We now have a clearer vision and strategy for digital transformation that has been communicated across the firm. Our team objectives align to this strategy and we continually refer back to the strategy to make sure we are delivering. The firm as a whole is starting to speak the language of digital transformation - we recently put on "digital week" - a global internal programme of activities, talks, demos, webcasts and external speakers to reinforce the




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importance of digital transformation for us and for our clients. It was a great success.

Bhandarkar: As I mentioned before, we work very closely with our tech team and I'm therefore confident that they definitely understand what it is that we do. I think management at Linklaters has a clear understanding as well. A lot of thought went into creating the innovation steering group prior to the creation of the innovation team. That group, which comprises partners and senior members of our business teams, set the strategy and had a clear vision for what they wanted from the Linklaters innovation team. That is reflected in how we have designed our team and recruited for roles, mine included. I think the confusion is sometimes with the wider market because each firm has structured their innovation offering slightly differently. At some firms, innovation sits within tech, at others within knowledge. That is why it is sometimes difficult to gauge what an innovation head's remit actually is and what you can expect them to be involved in. I think that is only natural in an emerging area. Each firm is figuring out what works for them and there is no right and wrong answer. I think it is exciting, because it means there is an opportunity to shape the role.

Butler Curtis: I agree. We need to do more to tell our clients about all the innovation that is happening on their matters. We are working to not just report on the outcome but also report on what new solutions, analytics, roles and technology were used to achieve the outcome and how these new solutions increased speed, accuracy and strategy.

Westland: I think the wider team does understand what clients are asking for and why a team such as mine is needed. I do think that IT sometimes wonders why it's not them, but I don't think innovation is something you can do on the side, whether you are a lawyer or in IT, which is why you need this dedicated resource.

All four innovation leads involved in this discussion are women. That wasn't a conscious decision. Do you think the rise of innovation roles is helping drive gender diversity in the sector?

Bhandarkar: At Linklaters, our head of legaltech is a woman - Jas Mundae, our CTO is a woman, as am I, as the head of innovation. It's quite remarkable really. As a general observation, I think it is true that women have risen to prominence in the innovation space, although I don't really have a scientific explanation as to why. I've heard explanations along the lines of women are more creative and more collaborative - I'm honestly not sure I buy either - I work with some incredibly creative and collaborative men, too. The simpler, slightly more pragmatic, explanation might be that most of the innovation roles we are seeing in the market are filled by ex-lawyers. And there are just more women who have opted out of the profession than have men.

Parker: Over time, innovation will open up the

profession to more diversity of all kinds - and true cognitive diversity is what drives innovation. In terms of gender diversity, I can only speak from our own experience. Our CDTO is a woman, our joint CLIO is a woman and our global innovation architect is a woman. In fact, of our GT&I leadership team over 50 percent are female - so our balance at Freshfields is very strong.

Butler Curtis: This is one of the aspects of my field that I find most rewarding. We are creating new roles, and bringing together people with different backgrounds and perspectives. We challenge assumptions. We work to find common language amongst team members each accustomed to speaking in their own vernacular. Then we create innovations that improve the satisfaction of clients and our colleagues. These efforts prove the incredible value of working with people who are more different than the same. It also gives people confidence and comfort in working with people who think differently than they do. We are supporting gender diversity but, more than that, we achieving success through inclusion in the broadest sense.

Westland: I run an associate secondees programme within innovation. Every associate that has come forward has been a woman. You could argue that what we do lends itself to stereotypical female skills around creativity and relationship building. Both those things are such generalisations. What I do know is that there does appear to be a wealth of women coming through at the moment, particularly in the magic circle firms. That's a big change. It certainly wasn't always the case.

What would you consider to be a mark of your success in the role?

Westland: For clients to see us as a trusted firm which offers modern, legal services and for those clients to be out in the market saying that they need to use Addleshaw Goddard for this type of work because we really get it, and because we deliver the best outputs. I would also like to see some of the technologies and processes we are implementing now become the norm - and maybe for my team to be double the size!

Bhandarkar: I think success would simply be getting people to be braver and more comfortable with trying new things, doing things differently to how they are done today to add value in how we deliver our service. If, in three years' time, I have people coming up to me saying "do you remember when...?" - referring to a way of doing things that has since fundamentally changed - I think that will be a mark of success.

Butler Curtis: Our goal is constant improvement. I will have done my job in three years if we maintain the current level of commitment and pace of change we enjoy today.

Parker: Success, for me, will be if my job no longer exists and innovation is embedded in every member of the firm.

► UK Top 50 tech profile: DAC Beachcroft

As part of the hugely popular series of law firm legal IT profiles that we are collating from the UK top 100/200, here DAC Beachcroft's COO Andrew Keith talks to Legal IT Insider about the IT team function; where innovation lives; and what the key objectives and targets are for 2019.

At a glance: DAC Beachcroft

Team size: 110

Leadership:

Andrew Keith, COO

David Aird, IT Director (Reports to Andrew Keith)

Investment in IT: Circa 6.5% of revenue

Innovation: No separate division - focus on driving innovation throughout the firm

Key objectives: World class basics; strategic data; security; infrastructure simplification; embracing technological change; buy not build

Immediate priorities: Major office move; digital refresh, including Windows 10 and Skype for Business; 3E implementation

Andrew Keith, COO, DAC Beachcroft

What is your remit as COO when it comes to IT within the firm?

My remit is to coordinate and lead the business services within the firm (excluding finance). I represent business services on the executive board, I influence strategy at board level and execute strategy across all our locations.

How does that affect IT?

Well, the IT Director, David Aird, reports to me and we have accountability and responsibility for the delivery of our IT capability across the business. On a day-to-day basis it is David who leads the IT department and sees to execution of the strategy.

How big is the IT department and what functions exist within it?

We have around 110 people in the department. We have an enterprise architecture team; business solutions team; projects team; operations team, which includes site support, applications support and a service desk; and then we have a management

information team. So, you start off with design, then you move into development with our business solutions team, delivery through our projects team, we operate in operations and then report through management information.

And where does innovation sit in relation to the IT team?

Innovation is something that we as a firm want to embed across all our operations - not just in business services but across our legal teams as well. We don't have a specific innovation piece because in our view everyone is responsible for innovating.

What we do have is a methodology for capturing those ideas, and then turning that into a design, with finance wrapped around it. So, we make sure we know what we are doing, what the RoI is, and then we deliver on that. Those ideas could come from anywhere. Part of my job is then coordinating all that, bringing together IT, data scientists, the business process teams, HR, practice management, whatever is required, to deliver the solution to the business.

Do you have any plans to change the shape or size of the team?

We continually assess whether our current structure is delivering what we want to deliver. Certainly, the board is very keen to understand the most effective ways of driving innovation and the delivery of our projects, and those are really interesting conversations that ensure we are always seeking to strengthen our teams and the way we work.

What are the key objectives for the IT function at DAC Beachcroft?

Focus on world class basics; mine our data strategically; be secure; simplify our infrastructure; be resilient; embrace technology change across the business and buy not build as appropriate.

What about specific projects or priorities for 2019?

We have a number of major projects under way on a firm-wide basis. We are moving to significant new premises in London. That will be a big project for the IT team. We recently opened a new office in Paris, as well, which has been an interesting challenge due to the speed we needed to complete that. That required a lot of resources but we managed it in time.

We are also coming off the back of a significant investment in a complete refresh of our some of our core systems, including Windows 10, Skype for Business and Intapp Time. We are in the midst of a 3E implementation. All these strategic projects are going to run through 2019.

What level of investment does IT receive within the firm?

We are benchmarking at around about 6.5

per cent, or perhaps a little more than that. It is really important that our business, as a whole, is technologically advanced, therefore investment will grow in line with the growth of our firm. Last year we saw a lot of investment with a number of those big projects being put in place. The next part of the cycle will involve consolidation, doing what we are doing really well.

Can you elaborate on why you have made the decision to buy and not build?

Historically, we have taken a developmental approach and I think that has created a more complex IT ecosystem. The market for legaltech products is much more sophisticated than it was even five or six years ago. Many of those products can deliver what we need through vanilla implementation. A vanilla approach means our upgrade pathways are simpler, our maintenance is simpler, our usage is simpler, our integrations are simpler. The challenge, therefore, is to bring our procurement and vendor management to world class levels..

What is your approach to shadow IT?

I think we are pretty good at not having too much shadow IT. We are pretty good at hunting that down and embracing it where it's right and managing it where it's not a priority. It may make me a hostage to fortune, but I don't think we have too much shadow IT.

What is your biggest challenge or frustration when it comes to your IT responsibilities?

From an IT perspective, and I don't think we are particularly unique in this, I think our biggest challenge is managing the level of change that IT strategy is going to bring. The challenge is to make it easy for people to take up and learn new technology and then reap the benefits.

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

All the systems that we are putting in place would be well used, and used well. That is all about adoption and change acceptance. It's about understanding the new technology that is there to make our clients' lives easier, and the lives of our lawyers easier as they deliver the sophisticated services we provide for those clients.

► Zero hires marketing manager

Zero Cognitive Systems in June continued its growth trajectory with the hire of Bernie Toledano from real estate investment firm Hunt Companies as marketing manager.

Zero is a mobile first email management tool that includes automatic email filing into iManage and NetDocuments.

Other recent hires for Zero include Lisa O'Callaghan, senior product manager at Zero, who joined in April from LexisNexis UK, where she was responsible for the development of LexisLibrary.

The word on the street is that Zero has signed a number of big name firms including Neal Gerber & Eisenberg and Holland & Knight.

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► CMS UK's Obelisk partnership

We recently caught up with CMS' head of innovation and legal operations, John Craske, to find out more about the UK top 10 law firm's strategic partnership with Obelisk. CMS is using the flexible legal talent provider to support the delivery of CMS Mix, which focuses on the deployment of the right people, processes and tech for the right job.

Mix draws on the firm's growing pool of legal project managers, designers, product managers, legal tech tools and 90+ paralegals across its legal service units. The new partnership with Obelisk will allow the firm to resource client and business projects more flexibly.

CMS has, in our humble opinion, a slightly confusing number of different brands running consecutively, and Mix is part of CMS by Design.

CMS' head of innovation and legal operations, John Craske, who leads CMS by Design, told Legal IT Insider: "CMS by Design is a client-facing proposition - the idea is that we talk to clients about their challenges and design a solution that helps them. The innovation process means getting your hands around the problem and working with the client to understand what they want using all the resources available to us to solve it."

There are a number of services in CMS by Design and one of those is Mix, of which Craske says: "The arrangement with Obelisk is another tool in our toolbox when we're thinking about the solutions that we can offer to clients. Sometimes that might be a flexible lawyer. That's not anything new, but it's something that clients ask for and something we wanted to do. Rather than building up our own flexible lawyer offering, we've been having discussions with various providers."

Obelisk's flexible talent pool is made up largely of female lawyers who are returning to work after having children and, in many cases, want to work part time.

"One of the things I like about Obelisk is that they don't just pay lip service to diversity," Craske tells us. "It feels like a properly inclusive culture and we try to live in that way. I'm not saying we're perfect but it's something we really try to do. For us it's about like-minded organisations working together."

► JDHorizons rocks

We feel like kindred spirits with the Janders Dean crew, who sure know how to throw a conference. Mojitos, ice creams and bubbles punctuated the day, with one speaker commenting that the JD crew had ruined other conferences for her.

We turn to Ben Hunt, legal technology manager at DLA Piper, for the key themes of the day:

- spending the time to identify and define the "right" problem before diving into solutions (don't just chuck hashtag #legaltech at it) - it's all about the design;
- the best legal solutions are built by multi-disciplinary teams and are co-developed by law firms and clients working together;
- this is a people business - people that like each other get stuff done together;
- you can only play at serious tweeting when compared to the pros Kerry Westland and Helen Burness - Hunt mentions this because he is sore that didn't win the bottles of Dom Perignon.

One of the biggest highlights for us was an all-female panel who were asked questions by a bunch of eight-year-old children (including Hugo North, son of JD founder Justin North) via a pre-recorded video. Questions included, "what is innovation" and "do you believe in innovation dust?"

These are a couple of responses.

What is innovation?

Shilpa Bhandarkar, head of innovation at Linklaters: "Being brave and trying something new."

Do you believe in innovation dust?

Jane Stewart, head of innovation at Slaughter and May: "The balance has tipped so that there is way too much talk and not enough action."

What bedtime reading do you suggest?

Isabel Parker, chief legal innovation officer at Freshfields Bruckhaus Deringer: "Invisible Women. It's all about data and data bias. Many data points are derived from male data, such as the temperature in the office is too cold; the shelves are too high, and more women die in car crashes because the safety measures are based on men." That is definitely next on the reading list.

► Tech investment and the partnership model

It's pretty obvious that if you were to invent a professional services model from scratch today, the law firm partnership model would probably not be it.

But how much is it impeding investment in technology as firms look to become far more efficient, agile and responsive to their clients' needs?

We have already had conversations with some of the biggest names in tech.

To get involved, whether you are on the tech or management side, email editor caroline.hill@liti.co.uk.

► ICYMI

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

Discovery Decisions

Paying the price for partial production: eDisclosure sanctions hit lawyers in the US

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

"You may pay a price if you fail to locate and produce all the electronic data requested during discovery. A now-dissolved law firm in the US state of New Jersey recently learned that the hard way when a bankruptcy judge ordered them to pay almost \$60,000 in sanctions as a result of their failure to do so."

US case law alert: What constitutes spoliation of a .pst file?

<https://maas-bong.io/2QTp8bT>

"This case helps establish that the criteria are exactly the same as for any other electronically stored information."

Recent US cases spotlight the challenges of cross-border data protection laws in eDiscovery

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

"To meet the challenges of foreign data protection laws, organisations will need to be prepared. As two recent cases make clear, this includes more effective information governance programmes and litigation-readiness measures, along with better advocacy on the issues in court."

Has the US Supreme Court eviscerated recovery of eDiscovery costs?

<https://maas-bong.io/2Zwyn4O>

"Back in March when we were all checking our brackets [?], the Supreme Court quietly issued an opinion that, at least on the surface, appears to bring an end to prevailing parties recovering costs related to eDiscovery."

Discovery Demystified

It's all Belgian fries to me: The art of multilingual eDisclosure (Part I)

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

"The rise in global commerce has seen an increase in cross-border litigation, arbitration and compliance investigations, which has, in turn, meant that the industry has had to develop or tweak existing technical and human solutions to deal with the processing, keyword searching, the review and potential translation of documents for these types of legal matters."

It's all Belgian fries to me: The art of multilingual eDisclosure (Part II)


<https://maas-bong.io/2R4iz6I>

"The evolution of multilingual document processing and review by cleverly balancing the use of emerging technologies and human resources."

What litigators and in-house counsel should know about foreign language document review (Part I)



<https://maas-bong.io/2KpC2Nz>

"Companies promise that for merely a few cents per page, at the push of a button, documents will be 'translated' into English at an 'acceptable' accuracy to make a determination as to their importance. However, when considering the use of machine translation (and there are many varieties utilised in the eDiscovery industry) it is important that attorneys understand the risks and benefits to this technology - as well as its limitations."



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What exactly is machine learning?

<https://maas-bong.io/2W1alg0>

"Machine learning is a very exciting field with unlimited applications, and we have just scratched the surface of what it can help us accomplish."

What is metadata?

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

"Different types of metadata are available depending on the type of file. For example, a Word document will have different metadata fields than a photo taken with an iPhone. You can expect a Word document to have metadata about the author of the document, when it was last saved, where it was copied from and any comments or tracked changes. By contrast, the metadata in an iPhone photo will typically include the date the photo was taken and GPS coordinates of where it was taken."

Cracking single slide from a 2016 webinar entitled "A Practical Guide to Cross-border eDiscovery"

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

A very useful map showing country-by-country eDiscovery laws and rules at a glance. Note, though, that it's from 2016.

The four essential phases of selecting a legal vendor

<https://maas-bong.io/2R0OsN2>

"The selection process consisted of four phases: determining the current state, establishing a security baseline, conducting a lean RFP process and meeting with the most qualified potential partners."

Considering eDiscovery data processing? Task, spend and cost data points

<https://maas-bong.io/2Zr9gAk>

"While many individual elements contribute to the cost of data processing, results from the semi-annual eDiscovery Pricing Survey may provide insight into six key costs and cost trends related to the eDiscovery task of processing data."

Considering eDiscovery document review? Task, spend and cost data points

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

"Spending on document review-related software and services is estimated to constitute approximately 69% (\$7.87B) of worldwide eDiscovery software and services spending in 2019."

Considering eDiscovery providers? Competencies, attributes and distribution frameworks

<https://maas-bong.io/2W1pYE9>

"Understanding that a provider's organisational character is made up of more than capabilities, it seems reasonable that a common set of descriptive elements for competency, attributes and distribution frameworks might be beneficial for the provider-comparison process."

Ten tips for successful eDiscovery planning

<https://maas-bong.io/2ZHlg0X>

"May these top 10 tips help you in navigating your discovery, so your focus can be on the merits of the case as opposed to the technical issues."

eDiscovery Checklist Manifesto

<https://maas-bong.io/2ZxB85Q>

"Introducing the eDiscovery Checklist Manifesto, your complete reference for everything a legal professional should consider as they conduct litigation and eDiscovery."

Discovery Distractions

Podcast: Office 365 eDiscovery search Part 2

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

"This session covers some of the deeper filtering functionality that can be performed in a review set along with advanced search techniques and basic EDA functionality."

Video: a chat with Craig Ball

<https://maas-bong.io/2QSy3KI>

"For the newbies, Craig Ball is a trial lawyer, computer forensic examiner, law professor and noted authority on electronic evidence ... and the pen behind the award-winning 'Ball in Your Court' column on electronic discovery. He is one of the most respected brainiacs in the industry."

Podcast: Office 365 eDiscovery analytics discussion

<https://maas-bong.io/2QObp64>

"Once you are done with your searches and add your search results to a review set, O365 extracts files from containers as well as text and metadata. When this process is complete, the system builds a new index."

Discovery Diversions

This edition of The Legal 500 includes the guide's first-ever ranking of American firms' electronic discovery capabilities

<https://maas-bong.io/2W7RSid>

"This year, we have added eDiscovery to the US guide. A relative new-comer to the field of law, it has steadily developed from the early 2000s into a sophisticated area of practice, crossing the boundary between technology and advocacy."

EDRM's spring 2019 workshop/forum examines challenging issues of eDiscovery and technology

<https://maas-bong.io/2WbJL3Q>

"The workshop's objective is to generate practical guidelines and advice to help legal professionals and judges navigate complex challenges related to technology and the law."

eDiscovery standard 27050 updated

<https://maas-bong.io/2KpAF1n> (£)

"The fundamental purpose of the ISO27k digital forensics standards is to promote good practice methods and processes for forensic capture and investigation of digital evidence," ... "On behalf of the editorial team for the International eDiscovery Standard, I [Kelly Friedman: BLG] am proud to say that three of the four parts are now published and available for purchase."

US and EU begin negotiations for e-Evidence agreement

<https://maas-bong.io/2R2uVMt>

"If the negotiations are successful, European authorities would be able to access evidence needed for criminal cases more quickly than they can now and US-based service providers would not have to worry about violating EU data protection rules when providing evidence related to European nationals."

Summer 2019 eDiscovery Pricing Survey results

<https://maas-bong.io/2R0Yu0z>

"The eDiscovery Pricing Survey is a non-scientific and non-comprehensive survey designed to provide general insight into eDiscovery pricing as shared by individuals working in the eDiscovery ecosystem."

Protocol considerations for cell phone examinations

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

"Imagine we have a case where we would like to see what information is in the opposition's phone. The judge has issued an order to examine the phone, but now we need to establish the protocol agreed upon by the opposition, or at least the judge, on how the examination is to be performed."

The Sedona Conference Commentary and Principles on Jurisdictional Conflicts over Transfers of Personal Data Across Borders

<https://maas-bong.io/2R2aa3a>

"The goal of this Commentary is to provide: (1) a practical guide to corporations and others who must make day-to-day operational decisions regarding the transfer of data across borders; and (2) to provide a framework for the analysis of questions regarding the laws applicable to cross-border transfers of personal data." Now available for public comment.

Discovery Divinations

What will the eDiscovery team of the future look like?

<https://maas-bong.io/2Zr3yhQ>

"It's fair to say that eDiscovery is at an inflection point. As an industry, it has seen an influx of cash. 2018 saw an almost doubling of mergers, acquisitions and infusions of capital from investors. Big players like Microsoft are making inroads on the basis of their substantial footprint inside enterprises."

Current trends: Discovery of electronically stored information on mobile devices and social media

<https://maas-bong.io/2QNc0F0>

"This White Paper provides an overview of recommendations for identifying and preserving ESI, and examines how US discovery rules apply to mobile devices and social media. Particular attention is given to preservation requirements and the possible sanctions imposed for data loss."

The state of eDiscovery 2019

<https://maas-bong.io/2R6bbr8>

"This year's State of eDiscovery report pulls from the latest economic, case law, and professional eDiscovery and legal industries to paint a picture of an industry at an inflection point."

What blockchain means for digital evidence sharing, security and verification

<https://maas-bong.io/2Ret1bH>

"The underlying blockchain distributed ledger technology could prove to be the missing solution for managing digital assets, including digital evidence shared and validated between case stakeholders and agencies around the globe."

Time to embrace technology? The 2019 State of eDiscovery Report

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

"The Report pulls information from 18 different industry-leading studies, reports and articles covering eDiscovery, information governance, privacy and other issues facing legal teams, providing a comprehensive look at the trends, practices and challenges facing the eDiscovery industry today."

Discovery Discussions

If you want to save money on eDiscovery, you can

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

"We believe that, for many organisations, insourcing eDiscovery operations and implementing an eDiscovery platform make good sense. The benefits are clear-cut and real."

The new disclosure rules

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

"How the new disclosure rules impact approaches to preservation and collection."

Biggest eDiscovery challenges facing plaintiff's attorneys, Part Five

<https://maas-bong.io/2W4GZxg>

Tom O'Connor's conclusions after a five part series looking at eD from a plaintiff's perspective, with input from various well-known US eD specialists. Contains links to the preceding four parts.

Have we lost the war on eDiscovery?

<https://maas-bong.io/2W36Bef>

"Conferences spend about four times as much time talking about review than preservation or collection. I [Craig Ball] challenge anyone to show me topics at major conferences that teach lawyers practical ESI search skills."

Collaboration finds a way, but can eDiscovery keep up?

<https://maas-bong.io/2W6Ra4E>

"New collaboration apps are too easy not to engage with. Here are five critical problems that eDiscovery professionals encounter with collaboration apps - and five best practices to counteract them."

Bringing eDiscovery in-house: Can we "geekify" law firms?

<https://maas-bong.io/2Wb9WHZ>

"Whether and how to make lawyers more geeky and what chance there is for those ways to become established and successful."

Aligning AI technology with your eDiscovery process

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

"It seems like the artificial intelligence freight train of the past couple years is finally slowing down, at least in the eDiscovery space. For as long as I've [Tim Rollins, Exterro] been blogging in this space (about 18 months now), there has been a pretty steady drumbeat of articles taking one of two diametrically opposed perspectives on AI."

Small firms keep ignoring eDiscovery to their peril

<https://maas-bong.io/2QR6PnE>

"Small firms are still lagging behind in eDiscovery investment. A Thomson Reuters survey found that only 19 percent of smaller firms are investing in eDiscovery tech. Only 2 percent responded that they plan to join the tech club in the next year. That's an abysmal figure."

No Bates, no problem for native files

<https://maas-bong.io/2R0CKCd>

"We [CloudNine] revisit some of the eDiscovery best practice posts we have covered over the years and discuss whether any of those recommended best practices have changed since we originally covered them."

Managing New Zealand's increasing discovery volumes

<https://maas-bong.io/2R8WnrB>

"Globally the data volumes experienced in the discovery process are increasing rapidly and this is no different in New Zealand."

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Five everyday things eDiscovery is (and isn't) like

<https://maas-bong.io/2Rb9WXz>

"As it turns out, eDiscovery is not so far off from the things you encounter each and every day ... sort of. Let's take a deeper look at the eDiscovery process and see where it fits in to the familiar trappings of your life."

This article will self-destruct: Behind ephemeral messaging's in-house rise

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

"Ephemeral messaging apps, which automatically delete data after a set timeframe, can present significant roadblocks to in-house compliance and eDiscovery operations. So why is their enterprise use growing?"

How mature is your legal department when it comes to eDiscovery?

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

"Although eDiscovery has become an important tool for many in-house counsel, many companies still struggle with new sources like social media and instant messaging, a survey by Duke University and Exterro found. Exterro's Tim Rollins gives three key takeaways from the survey, including how companies fared in training and by industry and size."

Who says you can't Bates number native productions?

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

"For items produced in discovery, the unitisation that makes most sense is the native unitisation, files. Word-processed documents, presentations, spreadsheets, photos, videos and sound recordings all manifest as files in the ordinary course. We store them as files, collect them as files, process and enumerate them as files and hash them as files for deduplication and authentication. It only stands to reason that we produce and Bates number items as files."

Retention of ephemeral messages

<https://maas-bong.io/2Zyx8Sy>

"An oft-heard argument is that one form of a recorded communication channel (e.g. Instant Messaging) is more akin to an unrecorded telephone call than another (e.g. email), and the former should thus not be subject to any regulatory or legal retention obligation."

Connecting the dots between eDiscovery, information governance and cybersecurity

<https://maas-bong.io/2x5kUVg>

"Our eDiscovery expertise, workflows and technologies are incorporated into our cyber, forensics and information governance offerings."

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Examining eDiscovery statistics: Where in the EDRM can you save the most money?

<https://maas-bong.io/2ZEu07P>

"There are plenty of reasons why an enterprise should conduct as much of its own eDiscovery as possible. It lets you ensure that your practices are defensible. It gives you visibility into the process, so you understand where you are at any give time. You can define the process and identify areas where you can create further efficiencies. For many (and probably most) organisations, the decision to in-source eDiscovery operations usually comes down to one big factor: saving money."

US plaintiff's top complaints regarding ESI production

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

"What we see in eDiscovery practice is a heavy focus in the eDiscovery world on defence strategy, both in actual practice and educational conferences. Often left out of the discussion is any concept of a strategy for the plaintiff's bar."

Discovery Digest

ACEDS welcomes Rachi Messing to its Global Advisory Board

<https://maas-bong.io/2QMLCv0>

"Messing is a Senior Programme Manager at Microsoft, currently working within the Corporate, External and Legal Affairs group. He focuses his time on the usage of advanced technology solutions to help Microsoft's legal team be efficient and effective in meeting their discovery obligations involving complex technical matters."

Reveal Data acquires Mindseye Solutions

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

"Reveal Data Corporation, a Chicago-based provider of cloud-based eDiscovery software solutions and services, announced today that it has acquired Mindseye Solutions, a complementary software solution." (And see page 27)

A new tool for data and legal discovery? AWS announces general availability of Amazon Textract

<https://maas-bong.io/2W4yYZh>

"Existing OCR technologies are unable to recognise common layouts like forms and tables, and only generate a lengthy and often inaccurate text dump. What organisations want instead is the ability to accurately identify and extract text and data from forms and tables in documents of any format and from a variety of file types and templates. Amazon Textract analyses virtually any type of document, automatically generating highly accurate text, form, and table data."

The convergence of eDiscovery and privacy: The next stage of growth for Exterro

<https://maas-bong.io/2R8kzdP>

From the horse's mouth, Bobby Balachandran,

president and CEO of Exterro: "Jordan Lawrence's expertise and leadership solidifies our position as the leading solution to organisations' eDiscovery, data privacy and information governance challenges."

New AI eDiscovery tool "reduces legal review hours by 99 percent"

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

"Veritone has launched a new eDiscovery tool, Veritone Illuminate, which searches, analyses, culls and explores audio and video as well as text evidence."

Forensics firm claims it can break into every iPhone

<https://maas-bong.io/2ZuyQ7A>

"A company staffed with white-hat hackers apparently made a breakthrough in unlocking iPhones and iPads. Cellebrite says it is offering law enforcement agencies access to every bit of data on any iOS device."

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

UK & EMEA TLT LLP has extended its existing relationship with **Clarilis**, which, on top of helping TLT to automate its own contracts internally, will now form the basis of a white-labelled document automation service for clients. Clarilis enables in-house lawyers to improve the speed, quality and value of their document and contract process with a questionnaire-based solution that produces documents in line with the company's precedents and rules, supported by a managed service. Clarilis will deploy its intelligent document automation platform and managed service to TLT clients, helping to automate and streamline contract creation, review and negotiation to storage and analytics. The move means that TLT now offers an end-to-end contract-as-a-service platform, combining solutions from TLT's technology partners with its own legal services. The TLT platform includes TLT LegalSifter, a software-as-a-service solution that combines artificial intelligence from LegalSifter Inc. with in-built legal advice from TLT to review and advise on contracts. **James Touzel**, partner and head of the firm's digital group, said: "We have always believed that we should share with our clients the solutions we deploy within our own business that increase efficiency and consistency and manage risk."

TIQ, a provider of legal time-recording software, has announced that **Claeys & Engels**, a leading Belgium law firm, has selected **TIQ Time** as its new time tracking software. After an extensive review period, the firm is currently rolling out TIQ Time to all its fee-earners and assistants. "The goal is to streamline our time-to-bill process and make it less time-consuming" explains **Tim Van Caeyzeele**, IT and procurement manager at Claeys & Engels. "The complete process will be reviewed and optimised." The firm will use a range of time recording features, from fully automated time capture to TIQ's **Time Narrative Builder**, which helps to construct a clear and accurate narrative compliant with the firm's billing guidelines. TIQ's software will be deployed as an extension to Aderant Expert and iManage Worksite. "It's great to be a part of Claeys & Engels' goal to reduce the workload for fee-earners and assistants. TIQ's technology reduces the amount of time and effort spent on the administrative task of time tracking, making sure that time can be spent where it matters most" says **Nick Schils**, founder of TIQ.

Ashurst's Glasgow-based legal services centre, **Ashurst Advance**, has teamed up with legal service outsourcing provider **Cognia Law** to bolster its capability and enable it to scale its offering. The partnership will see Cognia provide a broad range of legal managed services, working in collaboration with the firm's existing delivery teams. The move comes as

clients increasingly look for collaboration between their providers - often blending process and technology - and **Janet Taylor-Hall**, CEO of Cognia Law, commented: "Increasingly clients are looking to leverage aggregated solutions - our experience has shown that the power of collaboration between the in-house team, law firm, law company and tech providers, ensures clients receive the best outcomes at the right price. We are delighted to join with Ashurst Advance to provide a sophisticated solution adapted to ensure the best service standards for clients." **Chris Georgiou**, partner and head of Ashurst Advance, said: "We strongly believe that collaborations between leading service providers will increasingly define the future of the legal services market. By combining the best of Ashurst's capabilities with the best available resourcing, process, technology, data and consultancy services in the market, we can continually offer our clients the most powerful and cost-effective solutions for their business challenges. Entering into this partnership with Cognia, one of the highest quality next-generation legal service providers, alongside our launch last month of our new digital products business Ashurst Digital Ventures, is a further demonstration of our commitment to ensuring that we adapt our delivery model to ensure the best service standards for clients."

Automated electronic bundling company **Zylpha** has collaborated with law firm **Kingsley Napley** to develop a new document bundling toolset. Amongst the all-new functionality is a **Bundle Import Tool**, which uniquely allows the firm to partition incoming bundles according to specific documents or sections when adding files to their own bundles. The toolset, originally designed for use with the practice's MatterSphere case management system, drives process efficiency for both the firm and its clients and represents a step forward in bundling technology. As the import functionality can be easily used with other case management integrations, Zylpha now includes the new system in its main bundling project for the benefit of all users. The project team created by Kingsley Napley, led by **Rowena Rix** and partner **Sarah Harris**, included key staff from the practice's IT team. Together, they worked closely with Zylpha in leveraging the technology to partition and import key elements of bundles received at the practice. **Harris** said: "Kingsley Napley is renowned for the quality of the services it provides. Underpinning this are the excellent systems that we operate. Bundling is a key element of this and we have chosen to collaborate with Zylpha on developing this new functionality. They understand what our practice needs to achieve because of their ongoing commitment to making lawyers' lives easier through the smarter use of technology." **Tim Long** MD of Zylpha added: "Some practices have particular needs where they go the extra mile for their clients and staff alike. Kingsley Napley saw an exciting opportunity to add extra, highly innovative functionality to our bundling software."

Zylpha has also partnered with cloud case management provider **LEAP Legal Software** to launch the

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legal profession's first integrated pay as you go (PAYG) document bundling system. This new Zylpha service is helping to drive efficiency across law firms using the cloud-based platform. Priced per "bundle project", the partnership ensures that firms are only paying for what they use. Zylpha provides everything needed to create bundles via a user-friendly dashboard. This unique approach streamlines and simplifies even the largest, most complex bundles. By using Zylpha's digital document bundling in conjunction with LEAP software users can produce even the most complex bundles in minutes. Additionally, Zylpha's bundling system eliminates costs such as stationery, photocopying, paper file storage, maintenance and courier charges. **John Espley**, CEO of LEAP UK, commented: "Partnering with innovative and market-leading solutions such as Zylpha allows us to offer this exclusive PAYG service and provide an optimum solution for our clients. We help them to save time, reduce overheads and, thanks to the unique pricing model, benefit from the same bundling technology afforded to larger practices." Zylpha MD **Tim Long** said: "LEAP is the go-to practice management solution for small to medium-sized legal practices and is widely acclaimed for its innovative product, rich content and quality of service. Through our new integration, we can now enhance their offering by delivering a fully professional document bundling solution on a pay as you go basis, ensuring practices only pay for what they use. It's the first of its kind and, as such, represents a real game-changer for legal practices."

COBALT, one of the largest law firms in the Baltic, with offices in Estonia, Latvia, Lithuania and Belarus, has selected **Sysero's** know-your-client and document automation solutions to streamline client inception and drive greater productivity for its lawyers. COBALT is implementing Sysero's cloud-based document automation technology to ease the workload of the firm's lawyers by turning frequently-used documents into reusable templates that can be shared across the firm. Lawyers can automate documents and manage templates directly from within Word, bringing enhanced efficiency to day-to-day transactional work. While the firm was evaluating Sysero's document automation solution it realised an opportunity to employ the same technology to transform its client intake process. Compliance with anti-money laundering regulations, know-your-client and sanctions requirements continues to be a key focus for the modern law firm, and firms must ensure they are following appropriate compliance procedures. COBALT will use Sysero to automate their current know-your-client processes to standardise the firm's business inception process and subsequently reduce associated risk. The new intake workflow will

include pre-defined metrics to evaluate new business opportunities based on a pre-defined set of rules determined by the firm's priorities, including local and EU AML regulations. A risk profile will be created for each new client, allowing the firm to escalate high-risk clients for further review. "We're pleased to recognise COBALT as the latest firm to benefit from Sysero's fully integrated automation tools," explained **Phillip Ayton**, director at Sysero. "We're seeing an increasing number of firms looking to streamline their internal processes, and our solutions have been able to fulfil their requirements and more."

DocsCorp this month announced that German firm **Graf von Westphalen** selected **contentCrawler** to ensure that all documents in their iManage document management system are 10 per cent searchable. Swedish firm **Føyen Torkildsen AS** has chosen the complete DocsCorp desktop suite: **cleanDocs** for metadata cleaning and recipient checking, **compareDocs** for document comparison and **pdfDocs** for PDF creation and editing.

ayfie, a provider of legal tech software solutions, has signed a customer agreement with Norwegian law firm **SANDS**, a full-service law firm with leading expertise across all areas of business law. **ayfie Locator** for knowledge discovery will accelerate SANDS projects by making internal and external information easy to find and instantly accessible for teams through a natural approach to searching and viewing knowledge distributed throughout the firm. ayfie Locator for knowledge discovery provides fast and intelligent views into SANDS' most relevant information by automatically identifying meaning across multiple data sources. It normalises and structures disparate data across data silos and quickly connects users to the knowledge they need most. ayfie Locator is based on unique and advanced language processing technology, backed by more than 30 years of research and experience in computational linguistics. **Ernst Ravnaas**, managing partner at SANDS, said: "We are very happy to enter into this partnership with ayfie. SANDS has one of the leading dispute resolution departments in the Nordic. Being able to launch ayfie in dispute resolution as the first law firm in Norway really excites me. It assures that our excellent team of lawyers are given state-of-the-art technology to further improve their performance when handling complex disputes - to the benefit of our clients." **Truls Baklid**, general manager Nordics at ayfie Group added: "Leveraging ayfie Locator for dispute resolution is a tremendous opportunity as it will create a competitive edge for SANDS. We are proud that SANDS chose ayfie to accelerate their internal knowledge discovery with our solutions."

Following a multi-million-dollar seed investment (see page 26), **Infinnium**, a software company that develops solutions to improve information governance and business decision-making through effective use of the latest artificial intelligence technology, has announced the opening of a new office in the UK. The Infinnium UK team will help organisations meet the enormous challenges of information governance and compliance under the GDPR and other EU data privacy regulations. Infinnium will deliver technology solutions to allow clients to take control of data and processes to confidently comply with the GDPR, data privacy and security regulations and discovery. The new operation will be headed by **Harsh Sutaria**, co-founder and chief success officer, and **Britt Endemann**, senior vice president of advisory services, disputes and investigations who recently joined Infinnium to direct the company's global advisory services. Endemann and Sutaria both have many years of experience in delivering solutions and services in cross-border litigation and investigations involving the EU, US and Asia, making the UK presence a natural progression for the company. "We have ambitious plans for Europe. Our partners and clients resoundingly agree there is an urgent need for reliable GDPR solutions," says **Sutaria**. "With a year of experience under the GDPR, many still face huge challenges in managing data, identifying PII and assuring compliance with the GDPR. Our technology affords users an unprecedented level of visibility and control over their data, enhancing their ability to identify, protect and secure it. Augmenting this control is our AI platform that categorises data into meaningfully defined relationships - people, places, ideas, communication, sensitive information - enabling the analysis of data at a mass scale."

Some wins in brief for **Tikit** this month: Greek law firm **Jure Law** has selected **Carpe Diem** as its time recording application whilst **The North of England Protecting & Indemnity Association** (NEPIA) has selected Carpe Diem Cloud. In addition, three UK firms have switched to **Tikit P4W**: East Midlands firm **Flint Bishop LLP**, Essex-based **Thompson Smith and Puxon** and northeast firm **Ben Hoare Bell LLP**. Finally, house-building company **Persimmon plc** also this month joined the P4W community.

North America **Akin Gump Strauss Hauer & Feld** has adopted **FileTrail GPS** to help manage the way it retains, stores and ultimately destroys its data. The move - notably underpinned by a significant cultural change piece - is being led by assistant general counsel for information governance, **Christopher Egan**, who joined Akin Gump from the US Department of Justice in November 2017. The Am Law 100 firm will store its information governance policies and outside counsel guidelines in FileTrail and apply them to control the way information is managed across the firm's data repositories, including its NetDocuments document management system. In addition, Akin Gump - an Aderant client

- is integrating FileTrail with other business systems to enforce client-specific retention and disposition requirements - from the inception of a new matter to the appropriate period of time after it closes. Speaking to Legal IT Insider, FileTrail's president **Darrell Mervau** said: "Chris was brought in to develop and extend Akin Gump's information governance programme and the heads of the board support his efforts. His remit was to look at cultural change and then find a product to fit and manage that: that's when we started talking to him and he said that FileTrail was the only tool fitting the firm's needs. Firms need to gather all these different data feeds from across the firm's internal policies and it's all feeding into FileTrail GPS." Akin Gump formally selected FileTrail in December and a data migration is currently underway. It has created a group of around five or six lawyers who are working with FileTrail to look at Akin Gump's information governance surrounding matter mobility and outbound and inbound lateral attorney moves.

Elite, part of the Legal Professionals division of Thomson Reuters, has announced that New York law firm **Mendes & Mount LLP** has chosen to transition from Enterprise to the **3E** enterprise business management solution. A long-time Enterprise customer, the firm selected 3E following a competitive review process. 3E came out on top in the firm's selection process due to the solution's market-leading technology, and it will serve as a powerful foundation to help the firm improve efficiency and drive innovation. In addition, the choice of 3E was based on the firm's experience with the TR Elite services and support teams over the years. Mendes & Mount will also be adopting TR's **3E Budgeting and Forecasting**, which plugs into human resources and payroll systems and provides a standard process that helps eliminate errors, instantly corrects issues and reduces implementation and training time.

Aurora North, providers of specialist intellectual property prosecution software, services and consulting for law firms, has announced that **BakerHostetler**, an Am Law 100 firm, has selected their **PracticeLink Suite** for its top-ranked IP practice. BakerHostetler was an early adopter of Aurora North software, advising the development team on key requirements for streamlining patent and trademark prosecution. With an IP practice of more than 170 lawyers nationwide, the firm is now upgrading to the latest version of PracticeLink, which centralises, integrates and automates key aspects of the IP prosecution process. "Aurora North has been an invaluable partner in innovation, working with our team over the years to develop our internal portal for the IP prosecution team and automate workflows that enable our team to respond quickly to both our clients and to the USPTO," said **Matthew Collins**, director of IP services at BakerHostetler. "By adopting Aurora North PracticeLink we'll be enhancing the user experience for IP lawyers and staff, making it even easier for them to collaborate with clients, international associates and the patent and trademark office - and to deliver client

service in the most efficient way possible." The Aurora North PracticeLink Suite provides IP practitioners and staff with a "one stop" work portal, integrating information across the applications they use, including docketing, document management, email, financials, invoicing, notes and more. Role-specific dashboards provide visibility across matters, including a clear view of upcoming tasks and deadlines. PracticeLink also enables firms to automate downloading documents from the USPTO, uploading them to the firm's document management system and notifying firm and client stakeholders. "BakerHostetler is widely recognised for its commitment to excellence in client service and for using transformative technologies to help achieve its business goals," said **Christopher Kave**, principal at Aurora North Software. "We're very excited to work with their team in implementing PracticeLink and in sharing best practices in how to get the most out of our IP prosecution management suite."

Onna Technologies, a New York- and Barcelona-based start-up dedicated to centralising proprietary information, has closed an \$11 million series A equity funding round to grow its central information access product. The round was led by **Dawn Capital LLP** with participation from **Dropbox Inc.**, **The Slack Fund** and existing early investor, **Nauta Capital**. **Norman Fiore**, general partner at Dawn Capital, will join Onna's Board. Fiore has invested in several of Europe's leading SaaS businesses including Mimecast, Collibra and Showpad. Onna's mission is to make proprietary information accessible, useful and private. Currently Onna's customers, like Facebook, Electronic Arts, Dropbox and Fitbit, use the platform for discovery, compliance, knowledge management and enterprise search. **Fiore** said: "Helping employees find, organise and protect crucial business information when it sits across all these apps is a big challenge. Onna's solution has already seen great traction in eDiscovery with a legal use case, with annual recurring revenue having more than tripled over the past year. But Salim [Elkhou] and the team at Onna rightly recognise the opportunity is much bigger. By building an internal search engine for enterprise and giving all employees fast access to their own information, Onna can be an industry game-changer." **Lev Finkelstein**, VP of corporate finance and strategy at Dropbox, said: "Information and tools people use at work are increasingly fragmented and it's often difficult to search, locate and secure documents spread across the many tools we use. Like Dropbox, Onna is on a mission to help fix that. We've gotten to know Onna over time, as both a partner and a customer, and have been impressed with their thought leadership, technology and use of AI to improve information search across multiple platforms. We're excited to be one of their Series A investors and look forward to seeing Onna grow." Founder and CEO, Salim Elkhou, had previously founded eDiscovery company eStet that collected, searched and organised millions of files in a very short time. Elkhou realised that the new wave of productivity

applications created a data disparity problem that weighed heavily on the enterprise and its employees. eStet was acquired by EY and Elkhou moved on to start Onna. This funding will allow Onna to take the next step in its development and expand its solution to meet the needs of a far larger and growing audience.

Exterro Inc., a provider of eDiscovery and information governance software specifically designed for corporate legal and IT teams, has acquired Jordan Lawrence, a provider of data privacy and information management software. **Jordan Lawrence** provides comprehensive privacy and information governance solutions that enable customers to manage their information compliantly, defensibly and cost-effectively. With this acquisition Exterro is poised to provide clients with the first fully integrated software platform for eDiscovery, data privacy, security and compliance. "The convergence of privacy, information governance, and eDiscovery provides an opportunity for organisations to manage the many new and evolving data privacy and security regulations, such as CCPA and GDPR, more effectively whilst also addressing eDiscovery needs under the FRCP. The combination of Jordan Lawrence and Exterro will deliver the only integrated software platform that provides organisations with the ability to address all of these challenges simultaneously, resulting in higher productivity, lower costs and unprecedented risk mitigation," said **Bobby Balachandran**, president and CEO at Exterro. **Alice Lawrence**, principal at Jordan Lawrence, said: "By combining our respective strengths we will provide a solution that enables clients easily to know and act upon their data inventory, practice defensible information governance processes and perform end-to-end eDiscovery activities."

Litify, a software platform that empowers law firms to better service their clients and grow their businesses, has announced a Series A investment of \$50 million by **Tiger Global Management LLC**, a New York investment firm. The financing will be used to fund Litify's continued growth and general operations, with a focus on expanding its offerings to a broader customer base, including in-house counsel, a corporate law offering for mid-to-large size firms and an off-the-shelf solution for smaller-sized law firms. Litify's founder, **Reuven Moskowitz**, said: "Tiger Global's investment will allow us to continue growing and to partner with more law firms across the globe and further enhance the client experience. We're thrilled to have the backing and confidence of a premier tech investment firm with such a proven track record. The additional capital will allow us to accelerate our growth and put more resources toward our products and our customers' success in support of our ultimate goal of transforming the legal industry." Litify's software is designed to bring greater structure, automation and transparency to law firms' day-to-day operations. It improves efficiency by providing an intuitive and extensible platform for client relationship management, document and case management, internal and external communication and

more all in one integrated platform. Built on top of the Salesforce.com platform, Litify brings the power, trust, security and stability of Salesforce to law firms with custom applications tailored specifically for the legal profession. "Litify is helping law firms transform the way they operate and materially improve their productivity. We are excited to partner with them as they continue to innovate and grow," said **Scott Shleifer**, a partner at Tiger Global Management.

Cuesta Campos Abogados, a top-ranked full-service law firm with offices and affiliate firms across Mexico, has chosen **NetDocuments** as its native cloud-based document and email management platform. "We view modern technology as a critical piece of our business strategy to not only protect our digital assets with the most stringent security, encryption and compliance available, but to also provide our people with the tools and flexibility they need to work anywhere and on any device, including Apple Macs," commented **Fernando Cuesta**, a partner at the firm. "The NetDocuments cloud is the most mature and trusted legal cloud platform and is the type of technology and partner that will take our firm into the future." Primarily an "Apple shop", the firm will take advantage of the NetDocuments' system flexibility afforded Mac users, including **ndClick**, a Windows and Mac app that enhances the NetDocuments experience of everyday activities, including creating, sharing and opening a document or email, and other tasks.

Meanwhile, Central American full-service law firm **Aguilar Castillo Love** has also selected **NetDocuments**. The firm, highly rated for its advice to both global multinationals and key domestic companies, is looking to future-proof its technology by centralising access via the NetDocuments cloud. Platform security, mobility, anytime/anywhere access and the ability for the firm, across its network of offices, to collaborate seamlessly drove the decision. "The decisions we make as a firm have direct impact on our clients' future. Our mentality of future-proofing client service delivery is why we chose to deploy a native cloud technology platform like NetDocuments," said **Juan Carlos Castillo**, senior partner at the firm. "Knowing that NetDocuments has delivered cloud technology innovation to thousands of law firms and hundreds of thousands of users spanning the globe gives us peace of mind and confidence as we look to deliver for our international clients." **Marriott Murdock**, regional director Latin America at NetDocuments, said: "We are thrilled to welcome Aguilar Castillo Love, a truly vital firm across Central America, to our global customer community."

Thomson Reuters has announced that Texas-based law firm **Scott Douglass & McConnico LLP** has selected electronic billing solution **eBillingHub** to transform their billing process. The firm, which has more than 75 lawyers in Austin, chose eBillingHub after a thorough review of possible solutions. The technology will move them from a manual to an automated eBilling process, enhancing efficiencies and significantly improving profitability. Specifically, they chose the tool for having

a centralised unit for tracking eBilled invoices to their clients. The firm - a long-time user of Elite Enterprise to manage its business - has also selected Enterprise Extend, which helps enhance efficiency through a robust event notification management system. Fully integrated with notifications from eBillingHub, Extend will benefit SDM with expedited critical decision-making and improved margins through actionable, management-by-exception reporting.

Intapp is to launch a pricing tool called, quite simply, **Intapp Pricing** to help law firms maximise their profitability with smart scoping, pricing and monitoring. According to Intapp, firms will be able to use the tool to efficiently scope, price, resource, budget and monitor engagements with increased flexibility and accuracy. Pricing will become another limb to Intapp's client services firms - especially in the legal realm - to provide more value and clarity in their engagements," said **Jose Lazares**, vice president product and business management at Intapp. "To meet this challenge forward-looking firms are embracing a modern, technology-based approach that leverages artificial intelligence to mine and analyse their existing data to derive accurate pricing strategies. The result is greater value to clients, firm partners and lawyers." **Wilson Allen** will be one of Intapp's first partners to work on the implementation and roll out of Intapp Pricing. "Firms are placing greater emphasis on ensuring that they scope and accept profitable engagements while continuously delivering a superb client experience on budget," said **Norm Mullock**, vice president of strategy at Wilson Allen. "Further deepening our long-standing partnership with Intapp, we're pleased to contribute our unique business intelligence skillset coupled with our analytics and billing process expertise to enable firms to successfully adopt and improve Rol with Intapp Pricing."

Infinnium, a start-up company headquartered in Virginia that is developing solutions to improve law firm information management and business decision-making through AI, has raised a multi-million-dollar seed investment. The company was founded in 2018 to provide software solutions for law firms and corporations. Its 4iG Suite brings together elements of machine learning and AI to gain visibility across data repositories, providing insights into both structured and unstructured data to help organisations organise, analyse and categorise large volumes of data. It promises to protect access to sensitive information such as PII, achieve compliance with HIPAA and GDPR and reduce the volume of redundant content. Their **ObscurePI** product aims to automatically find and redact PII within structured or unstructured data; automatically encrypt files in preparation for transmittal; secure sensitive information for internal uses on a need-to-know basis; perform redactions of privileged information in advance of production for litigation discovery; and provide audit reporting on progress toward compliance. The investment was made by Indian-headquartered tech conglomerate the **Sahajanand Group**, which focuses

on developing pioneering smart technologies. The investment in Inffinium recognises the potential for AI and other data technologies to address growing challenges in data privacy, data protection and regulatory compliance. "Globally organisations are facing exponential data growth, combined with increasing complexity in security and data privacy. Organisations are not well equipped to derive the financial benefits available from effective information governance, and they continue to face expensive penalties and loss of financial value as long as the IG technology gap exists," says **Bhargav Kotadia**, managing director, Sahajanand Group. "We have invested in Inffinium with a long-term outlook. We believe that Inffinium has the strategic vision and ground-breaking AI solutions to lead the coming transformation in information governance and data privacy."

Am Law 100 law firm **Crowell & Moring LLP** has selected **3E** following an extensive and competitive review process. This is a great win for Thomson Reuters: the Washington-headquartered law firm selected 3E "for its market-leading technological capabilities and its established track record of value delivery in the legal enterprise marketplace." The firm is said to have been attracted to 3E's ability to deliver significant improvements to e-billing efficiencies, which will streamline the day-to-day work of the firm's 550 lawyers. The firm was also said to have been impressed by the level of support offered by the Thomson Reuters Elite team, both during the review process and going forward.

Elevate has secured a \$25m minority investment from Los Angeles-based private equity firm **Kayne Partners** in order to scale operations and enhance its Cael enterprise legal management software. "Kayne takes us to \$60m of capital invested in Elevate," Elevate president and co-founder **John Croft** told Legal IT Insider. "This is a vote of confidence from mature investors - not just in Elevate, but in the law company market as a whole. The money will support Elevate's future growth plans, continuing the momentum generated by our recent acquisitions." Croft continued: "We also added operations in Poland last year as part of our organic growth. Our growth rate has been around 65 per cent per year for the last five years." Elevate has completed five bolt-ons since the middle of 2018: AI specialist LexPredict; contract lifecycle management provider Sumati Group; UK NewLaw resourcing firm Halebury; law company Yerra Solutions; and Hong Kong-based flexible legal resourcing business Cognatio Law. The acquisitions were funded in part by a \$25m financing from a credit fund managed by Morgan Stanley Expansion Capital, the growth-focused private investment platform within Morgan Stanley Investment Management, an Elevate client. According to Croft the business is now considering the acquisition of a UK law firm. "By then we think we will have all the elements of a global law company covered and thereafter we see mainly organic growth as our path." Elevate now provides services to over one hundred Global

1000 corporations and over 20 global law firms. The company's 2019 sales are forecasted to exceed \$75m and it is planning to IPO in 2021. "As that year gets closer and closer, we remain focused on that outcome and we see this first slug of outside equity from Kayne as a key step in that direction."

K&L Gates LLP, a global top 50 law firm, is using Litera Desktop to simplify their lawyers' document drafting workflow. **Litera Desktop**, a single toolbar customised to include everything a lawyer needs to draft documents, means they can spend significantly less time reviewing the work produced by their teams and be confident it is of the highest quality. **Melissa Speidel**, director of business transformation at K&L Gates, said: "We believe Litera Desktop will be the differentiator by giving us the competitive edge to increase efficiency and to better deliver on client needs. The move from five separate vendors with a wide array of tools to just one will not only reduce the time it takes to produce our documents in the first place, but also increase adoption of the existing toolset across all our offices. They can now go live where all our people work, and changes are introduced to every machine across the globe simultaneously." Litera Desktop delivers efficiencies throughout the firm, giving K&L Gates' lawyers more autonomy over their work day and the ability to focus more on their clients. This was identified as a key to the firm's next phase of growth.

Reveal Data Corporation, a Chicago-based provider of cloud-based eDiscovery software solutions and services, has acquired **Mindseye Solutions**, a complementary software solution. The combination of Mindseye and Reveal creates a comprehensive eDiscovery SaaS solution, including data processing, early case assessment, storage, review and artificial intelligence. Reveal received investment from **Gallant Capital Partners**, a Los Angeles-based investment firm. "We are excited about the opportunity to partner with the Mindseye team in order to continue to deliver cutting-edge solutions to our customers worldwide," said **Wendell Jisa**, founder and CEO of Reveal. "The ability to leverage Mindseye's advanced processing capabilities and ECA tools within the Reveal platform will provide our customers with the most complete and cost-efficient solution in the market. In addition, we could not be happier to have Gallant as our partner and look forward to leveraging their operational capabilities to help us accelerate our growth. In partnership with Gallant we will continue to search for opportunities to acquire or integrate with leading or emerging eDiscovery solutions to provide our customers with the best possible software tools and services." "The combination of Reveal and Mindseye is a perfect fit," said **Bob Krantz**, CEO and co-founder of Mindseye. "We see an enormous opportunity to leverage our combined software platform to deliver a seamless, comprehensive and best-in-class eDiscovery software solution to our customers. Our employees, customers and partners will all benefit from the capital, resources and experience that Reveal and Gallant bring

to the table."

Hanzo Archives and **Vestige Digital Investigations** have entered into a strategic partnership, combining Hanzo's dynamic web archiving and AI-powered online investigations technology with Vestige's digital forensics, eDiscovery and cybersecurity expertise to deliver expanded services to their respective customers around the globe. "The web is a vital yet often under-used resource for cases largely because it's been historically too arduous and expensive to identify the subject profile and capture the relevant data before it changes," said **Dan Spaide**, partner manager at Hanzo. "This partnership pairs Hanzo investigations, continuous monitoring and preservation technology with expert digital forensic services to give customers more options to uncover and recover potentially mission-critical evidence." **Anthony Merlino**, MD at Vestige Digital Investigations added: "In many cases, the deleted data is the only remaining location for recovering evidence that can then be used for internal investigations or court cases to settle disputes and litigate claims. The Hanzo-Vestige partnership joins the technology and services of industry trailblazers to deliver best-in-class investigative solutions to clients."

Some brief **DocsCorp** wins this month: **Lewis, Bess, Williams & Weese P.C.** in Colorado and **Dannis Woliver Kelley** in California both selected **cleanDocs** for metadata cleaning and recipient checking. Meanwhile, Tennessee firm **Grant Konvalinka & Harrison, P.C.** chose **cleanDocs** based on recommendations from their partner, **LOGICFORCE**, as did Tennessee-based **Manier & Herod** who, in addition to **cleanDocs**, selected **compareDocs** for document comparison.

APAC In a major expansion into the United States for cloud case management provider **LEAP Legal Software**, the Sydney-headquartered company has entered a joint venture with **LexisNexis** to offer a migration pathway to the 15,000 law firm customers of **PCLaw** and **Time Matters** in the United States, Canada and Australasia. **Chris Stock**, formerly CEO of LEAP Verticals in the US, is the newly-appointed CEO of PCLaw | Time Matters. The JV is jointly operated by LEAP and LexisNexis at board and executive levels. There are around 130,000 users of PCLaw and Time Matters involved as paying clients in the JV and **Mariska Lloyd**, global transitions manager at LEAP, says: "We have the capability of moving firms from PC Law and Time Matters to LEAP and the track record of doing so." LEAP will start by improving the customer support experience for PC Law and Time Matters users with the introduction of its online support experience built on the Salesforce technology stack that LEAP has used for more than a decade. Executive chairman of LEAP and now also PCLaw and Time Matters, **Richard Hugo-Hamman** said: "We are also very aware that the crucially important Certified Independent Consultant (CIC) network is ready for a more focussed and active programme to help them better serve their clients. They play a crucially important advisory role to many law firms, and we will make sure that they have all the information they need to provide

good informed advice and to help them build their businesses. We think that a strong CIC network, well supported by the JV, will be good for our thousands of customers." While both parties in the JV were at pains to stress that clients are not being forced to migrate to LEAP, this is an absolute coup for LEAP, which currently has a global customer base of 8,000 firms. In the UK, where it formally launched in 2015 with the acquisition of Peapod Legal Software, LEAP already has 2,000 law firm clients and 12,000 users.

Leading Australian law firm **Lander & Rogers** has swapped out its Thomson Reuters Elite Enterprise practice management system in favour of **Aderant Expert** software in order to improve its mobility, streamline workflow processes and strengthen innovation. The firm wanted a solution to "advance and simplify" its internal processes. The choice was said to be clear after Aderant demonstrated the ability to solve the firm's pain points with Aderant Expert. "This investment is a key component in our innovation and transformation strategy at Lander & Rogers," said **Michelle Grossmann**, head of innovation & transformation at the firm. "We hope that it will give us the ability to drive improvements through our business by providing our people with the right tools and support needed to provide quality legal advice and services to existing and future clients."

Brisbane-based law firm **Mullins**, a long-standing client of BigHand, has extended its relationship with the adoption of financial business intelligence tools **BigHand Quantum** and **BigHand Evaluate**. The commercial firm, which back in 2015 was the first in the southern hemisphere to sign up to the BigHand SmartNote system (which combines speech recognition with iManage integration) was looking for a way to capture, collate and present matter-related financial data with the ultimate goal of increasing their quality of service to clients. "BigHand was the logical solution for us because we were already familiar with their technology having implemented BigHand Voice, BigHand Hyperstyles and BigHand Smart Note in 2017. In reviewing Quantum and Evaluate it was clear these two programs could not only help us analyse matter- and client-related data but also display that data in a way that was easily understood by the partners and management staff," said the firm's chief financial and operating officer **Stephen van Dorp**. BigHand Quantum is a business intelligence and reporting program that translates key financial and matter-related data into dashboards and reports. The program allows users to identify gaps in time-recording, get real time updates on work in progress and review debtors and write-offs, amongst other key business data.

DocsCorp have announced that Australian national firm **Piper Alderman**, Sydney's **McCabe Curwood** and New Zealand lawyers **Duncan Cotterill** have all selected **pdfDocs** for creating and managing their PDF documents.

► Movers & Shakers

UK & EMEA **Ben Weinberger** has joined Dentons' growing in-house consultancy arm **Nextlaw In-House Solutions** as legal operations director. Part of Nextlaw In-house Solutions' remit is to help in-house counsel improve their processes and bring in the right technology and it is here that Weinberger will focus on delivering solutions across all dimensions of managing a legal department as well as supporting clients to lay out a roadmap for organisational digital literacy. **Chris Pinnington**, Canada chair of Nextlaw In-House Solutions, said: "A common challenge we hear from our in-house clients is striking a balance between supporting the day-to-day needs of the business while pushing innovation and providing more for less. Ben's experience in both traditional law firms and legal software companies gives him a unique vantage point that will be invaluable to clients seeking greater value from their in-house legal departments." Many in-house teams are appointing their own legal operations directors but with budget issues and headcount freezes this will provide an alternative to having a legal ops head on staff. **Weinberger** said: "This presents a great opportunity for me to assist clients as they navigate the challenges of running a modern-day in-house legal department."

In a big international hire for **Wavelength.law**, **Erika Concetta Pagano** has left her role as both lecturer in law at the University of Miami School of Law and director of LawWithoutWalls to take on the new role of head of legal innovation and design at the UK-headquartered legal engineering firm. **Pagano** will lead "the development, growth and management of the legal design and innovation aspects" of Wavelength's business. **Pagano**, who will continue to teach a course on "innovation, technology and the law" at IE University in Madrid, Spain, said, "I'm delighted to join Wavelength, home of a talented team of lawyers, data scientists, designers and legal engineers committed to bringing a fresh perspective and positive change to a wide variety of clients through the collaborative application of a wealth of diverse talent, experience and tools." **Drew Winlaw**, Wavelength co-founder, COO and chief legal engineer, said: "Erika will help drive forward our thought leadership in legal innovation and design. She will support our development, engagement with education, as well as leading on the practical delivery of innovation and design client projects with wider Wavelength legal data teams that are working on legal engineering solutions for clients." Wavelength CEO, **Peter Lee**, added: "Erika has a deep understanding of the international practice of law, applying design principles to legal services and has a strong network in the sector. I'm excited about her helping us continue to build a global service line for Legal Innovation and Design."

BigHand's co-founder and legal tech veteran **Gordon McAlpine** has joined resource management

consultancy **Mason & Cook** as a non-executive director to oversee the growth strategy of its technology product - **Vantage**. He will be responsible for the global launch and continued growth of the software arm of the business. **Mason & Cook** have been supporting law firms for over six years in adopting best practice resource management processes and structures. They have been developing Vantage over the past 18 months to allow the processes they introduce to scale globally. Vantage tracks and monitors teams' activities and helps partners to achieve better (and arguably fairer) utilisation of fee-earners' time, plus make sure work is going to the right place from a client perspective. **McAlpine**, who until last month was a mentor within Allen & Overy's innovation hub Fuse, said: "I am always extremely selective about businesses I become involved with as I only like to get involved if I passionately believe I can add a lot of value and make a real difference. When Dave Cook approached me to discuss this opportunity, I was extremely impressed with his clear vision and ambitious plans to expand the Mason & Cook business with the introduction of the impressive Vantage software. Mason & Cook's philosophy ties in very closely with my core values and they operate in a specialist area which allows firms to be more productive, their lawyers more engaged and is a key enabler for shifting the needle in diversity and inclusion in the legal profession." Founder and CEO **Cook** said: "To attract an individual of Gordon's calibre and standing within the legal industry is a huge compliment for us and the impact our work has had across the legal sector."

Craig Matthews, CEO of Pracctice Ltd, was appointed chair of the **Legal Software Suppliers Association** at the association's 2019 AGM. **Matthews** takes over from Julian Bryan of Quill who has served as Chair for the past three years. The LSSA is the UK's industry body for legal systems developers and vendors. **Matthews** said: "I am proud to be appointed as chair of the LSSA and look forward to building on the excellent work achieved by Julian Bryan. We aim to deepen our relationships with The Law Society, the Solicitors Regulation Authority and government bodies such as HMRC to facilitate the acceptance of new technologies in the legal market, bringing efficiencies and cost savings to law firms. The LSSA will continue to be a major force in shaping the future of legal technology in the UK." **Tim Smith**, founder and director of Insight Legal Software assumes the role of vice chair and **Phil Snee**, development director at Linetime, will continue as treasurer.

Herbert Smith Freehills partner and alternative legal services (ALT) head **Libby Jackson** has been appointed a **Member of the Order of the British Empire** (MBE) in the Queen's Birthday 2019 Honours List. Jackson (cited as Elizabeth Jane Bewick Jackson in the Honours List) has been recognised for her services to the Northern Ireland economy and innovation in Law. Jackson's achievements include establishing and leading HSF's Belfast office, which was launched in 2011 and

was the firm's first dedicated ALT hub as well as the first near-shore operation to be launched by an international law firm. The ALT business has grown from 19 fee-earners to a multidisciplinary, global team of more than 350 lawyers, legal analysts and legal technologists in 11 locations around the world. Commenting on her appointment, **Jackson** said: "I am honoured and humbled to be appointed an MBE. So many amazing and talented people at Herbert Smith Freehills have been part of our shared success building ALT. Together we have turned the firm's first-mover innovation in Belfast into a global, technology-enabled service for our clients, driven by technical legal excellence."

North America eDiscovery education and certification provider the **Association of Certified E-Discovery Specialists** (ACEDS) has brought in **Rachi Messing** from Microsoft to its global advisory board. Messing is a senior program manager at Microsoft, currently working within the corporate, external and legal affairs group. He was part of the Equivio management team and joined Microsoft through that acquisition in January 2015. At Equivio he was vice president of customer solutions and before that he was VP of technology services at DiscoverReady, helping to build the company up from a start-up to generating \$30m in revenue prior to its acquisition in 2008. His career has focused on compliance and eDiscovery for the past 20 years with experience in the provider, software and corporate environments. "We are thrilled to have Rachi Messing join our ACEDS Global Advisory Board," said ACEDS executive director **Mary Mack**. "Rachi brings years of expertise in legal technology, process and fantastic educational opportunities to our global community. All of us will be enriched through his desire to help further eDiscovery education."

Epiq, a worldwide provider of legal services, has announced that **Stephen Cole**, a noted expert in legal services consulting, has joined as senior vice president of sales in the global business transformation solutions practice. Cole brings to Epiq nearly 25 years of experience in legal sales, operations, solutions and product management. Epiq currently provides law firms with on-site management and technology solutions. Last month Epiq announced plans to broaden the range of solutions offered to clients by launching technology-enabled business process outsourcing and transformation solutions to corporate legal departments in the finance, banking, oil and gas, pharmaceutical and technology verticals. "Stephen has demonstrated a great vision for innovation in the legal services market," said **Michelle Deichmeister**, president and general manager of global business transformation solutions at Epiq. "I am thrilled to see that same energy and leadership applied to the expansion of our services and solutions at Epiq." **Cole** said: "Epiq is poised to transform the legal services industry. Joining during this time of growth into new markets is exciting. From middle office management to eDiscovery, Epiq offers compelling solutions to clients

and uses technology-enabled services as a way to solve complex client challenges." Cole most recently served as the director of strategy and legal technology at Mattern & Associates where he led legal business process consulting and cost recovery solutions.

DocsCorp, a provider of enterprise productivity solutions, has announced that **Dennis McCarthy** has joined its North American team as sales engineer. McCarthy has over 20 years' experience in the legal technology industry, having previously held positions at iManage and Hewlett Packard. With service and support being a DocsCorp strength and a key to future growth, McCarthy will be responsible for ensuring all DocsCorp customers in the Americas get maximum value from their software. He will also ensure the smooth onboarding of new clients, assisting with pilots and advising on deployments. DocsCorp VP global commercial operations, **Ben Mitchell**, said: "The North American division of DocsCorp is glad to welcome Dennis as its newest member. The knowledge he gained at industry-leading technology vendors and his experience in executive positions in major law firms will massively benefit the legal clients we serve. He is in an ideal position to advise them on the right solutions for their business." **McCarthy** added: "I am extremely excited about the position with DocsCorp. I look forward to advising our current and future clients, helping them to achieve their business goals with DocsCorp's suite of innovative solutions." DocsCorp has also announced that **Bob Moore** will return to the company as vice president, Americas. Matthew Stalder, the former vice president, is retiring to focus on his philanthropic work. Moore will oversee the sales, marketing, customer support and operations teams in the region. He will continue to be based in Portland, Oregon. Commenting on the appointment, **Moore** said: "I'm very glad to be back at DocsCorp and part of its American team once again. The company is experiencing a period of huge growth in the region - with revenues increasing by 20% year-on-year. I'm looking forward to building on that momentum with the support of our dedicated sales force." "We're delighted to welcome Bob back to the company and into the senior leadership team," said **Mitchell**. "Bob has held a variety of high-profile executive positions with proven success in business development roles over the years. He is the right person to lead DocsCorp in the Americas as we continue to build on our success and grow our client base there. We are excited about this next chapter and the new opportunities ahead."

Wolters Kluwer Legal & Regulatory have announced the promotion of **Dean Sonderegger** to senior vice president and general manager of Wolters Kluwer Legal & Regulatory US. Wolters Kluwer Legal & Regulatory US (LRUS) is a provider of information and expert solutions for legal and business compliance professionals and is part of the Wolters Kluwer Legal & Regulatory division. The LRUS business includes legal markets, legal education, healthcare compliance

and reimbursement, corporate compliance and international offerings. Sonderegger will report to Stacey Caywood, CEO, Wolters Kluwer Legal & Regulatory Division. An experienced information and software solutions industry leader, Sonderegger joined Wolters Kluwer Legal & Regulatory US in 2015 as the head of legal markets & innovation. He spearheaded customer-focused innovation with a strong focus on the rapid development of advanced digital products and services to enhance legal professionals' efficiency and workflows. Prior to joining Wolters Kluwer Sonderegger was executive director of product management and marketing at Bloomberg BNA. "Professionals rely on Wolters Kluwer to help them have impact in the moments that matter," said **Caywood**. "With Dean's strong technology and business expertise and customer-first focus, LRUS will build on our great momentum as we accelerate the development and delivery of expert solutions for our customers." **Sonderegger** commented: "It's a true honour to lead LRUS across all five business lines and to continue to serve our customers in exciting new ways during this time of transformation in the legal and compliance professions."

Morae Global Corporation, a supplier of full-service, technology-enabled, integrated solutions to corporate legal departments, law firms and compliance functions, has appointed **Marcia Goldenberg** and **Ryan Murphy** as managing directors and **Shawn Christen** as senior director. "Morae Global's success is directly tied to expanding our team of the industry's most experienced professionals, all of whom have a proven record of keeping the client front and centre," says **Shahzad Bashir**, founder, president and CEO of Morae Global. Primarily focusing on managed services for contract life cycle management and legal operations, Goldenberg brings with her more than 25 years of experience in legal outsourcing in operations management, strategic account management and business development. Murphy has over 25 years experience as a senior executive in law firms, corporate legal departments, eDiscovery providers and consulting firms, most recently as director of global legal business operations at LyondellBasell. With more than 30 years of consulting and professional services experience in the legal, financial services, health care, pharmaceutical and technology industries, Christen has worked on-site for extended periods of time internationally in Munich, Tokyo, Bermuda and India. His experience has ranged from serving as a strategic advisor, business operations manager, subject matter expert and implementer of technology, day-to-day operations and case management to serving as an expert providing declarations and affidavits when requested by counsel. The new hires come on the heels of last month's acquisition of professional services information management specialist Phoenix Business Solutions. That deal strengthened Morae Global's strategic direction and capabilities around artificial intelligence and cloud-based technology in order to help its clients better collaborate through the use of technology, data and

information management. "Our growth will continue to come from helping law departments and law firms serve their clients faster, more efficiently and effectively," said **Bashir**. "Ryan, Marcia and Shawn are integral parts of these efforts to redefine the business of law," he added.

APAC **Stephanie Abbott** has taken on the role of director of knowledge and learning at **Herbert Smith Freehills**, heading the function globally. Abbott, who is based in Australia, was previously a director at Janders Dean, which works closely with HSF. HSF's current global head of knowledge management, Mark Collins, is moving on from the UK top 10 global firm. Prior to joining Janders Dean in 2015, Abbott consulted through Kitsune Consulting but she has a long law firm pedigree. From 2011 to December 2014 she was director of knowledge management, learning and development at Mayer Brown, and before that she was learning and development manager at Gilbert + Tobin. She began her career as a commissioning editor at LexisNexis.

Integreon Inc. has announced the addition of **Joanne Shields** as director of its Data Breach Analysis (DBA) teams in India. Joanne joins Integreon's growing DBA practice which provides rapid deployment of on- and off-shore resources to identify and extract sensitive personal data in order to prepare within prescribed timeframes the requisite breach notifications to affected individuals, as well as state attorneys general, consumer protection authorities and/or national credit bureaux as required. In addition to extensive experience managing traditional document review projects, Shields has been overseeing DBA projects for over three years both in the US and India. She has worked to develop best practices and training programmes for Indian lawyers regarding American form and formatting of private information. "Speed and accuracy are the two essential elements in the work we do for our clients," said **Jamie Berry**, managing director, legal services. "Joanne's depth of expertise handling these types of data-driven projects, along with her experience overseeing, managing and training resources in India, ensure those two elements are consistently and expertly delivered. We are delighted to have her leadership in India." Shields has been a California-admitted lawyer for over 20 years and began her legal career as a solo practitioner. After 10 years managing her own practice, Shields worked as a team leader and project manager responsible for teams of over 200 reviewers handling complex document review projects. Most recently, she worked as a senior review manager training Indian lawyers on conducting US discovery projects and sensitive data projects. "Integreon's reputation in the market for quality delivery and expert review of data was fully realised when I met the team," commented **Shields**. "With exceptional resources and Six Sigma processes, India seamlessly and expertly works with its US counterparts to give clients much needed peace of mind following a breach."

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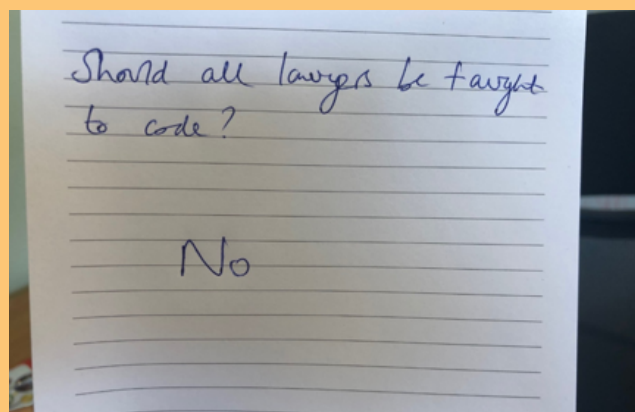
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► Lawyers and coding

Thank you to Legal Week Strategic Technology Forum for inviting us to Marbella, where guests from across the globe enjoyed great content and networking. Legal IT Insider editor Caroline Hill chaired two panels, the second of which was a head-to-head debate on the topic "Should all lawyers learn to code?". We thought you'd appreciate the preparation note to the right.

The debate was between Tony McKenna, director of information technology at Gowling WLG (for) and Andrew Dunkley, head of analytics at BLM (against), who said: "Thank you for the impartial and unbiased facilitation of the debate."



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