legal it insider

▸ July Scoops!

So, July was a fairly monumental month for breaking news and in this last Orange Rag before we break for a month for the summer, we're handing the front page over to a recap of two of our biggest and consecutive exclusives this month: Litera Microsystems acquires Workshare, and Thomson Reuters acquires HighQ.

The first acquisition, which we broke on 9 July, sees Litera buy its UK-headquartered document comparison rival and market leader Workshare, in a move that will enable firms that currently use both suppliers to consolidate their relationships and simplify the drafting process in line with other recent best-of-breed acquisitions.

The acquisition is understood to be driven in large part by Litera's private equity owner HG (formerly HG Capital), continuing the work of former owner K1 Investment Management, which in 2016 began piecing together leading companies from across the drafting experience to provide users with a single desktop experience. Those acquisitions include Microsystems, XRef, Litera, The Sacker Group and now Workshare.

Workshare's chief technology officer and founder Barrie Hadfield will be joining the newly merged company to help evolve the merged comparison technology. Workshare's CEO Michael Garrett, who joined in October 2018, will be assisting Litera's CEO Avaneesh Marwaha and HG with the integration, although his long-term role is as yet unclear.

Workshare's tech stack includes Compare, Secure and Transact. There are overlaps between the first two and Litera's existing products Metadact and Change Pro Premier. Transact, Workshare's software to help deal teams run closings, is unique to Workshare. It has been gaining traction in the UK (clients include Fieldfisher and Clifford Chance) and Australia (Gilbert + Tobin) and it seems likely that Litera will now drive adoption of Transact in the US.

Speaking to Legal IT Insider about the acquisition, Marwaha said: "This combination will give the end users a simplified way of working and adds huge value - the more we can bring together the best of the breeds, the more we feel our customers will benefit."

The acquisition has been welcomed by Linklaters, a client of both vendors, where global chief operating officer Matt Peers said: "As far as I'm concerned, the more consolidation of top suppliers we see, the better."

However, on our website "a customer" said: "Private Equity has been applauded in legaltech but the down side is that it sucks all the innovation from the most innovative companies in the market."

Elsewhere in the market the reaction was one of sheer surprise as Jane Hastings, EMEA account director at Kutana Ltd, said on LinkedIn: "Well knock me down with a feather!!" and Eliza Hedegaard, account director in legal and accountancy at Mimecast, replied, "My thoughts exactly Jane!"

Both acquisitions are symptomatic of the race towards consolidation in legal and, in the case of Thomson Reuters, its acquisition of HighQ on 18 July followed a period of intense multi-party bidding that one person with knowledge of the situation described as "aggressive."

Almost certainly (and annoyingly for Litera) our deal of the year for 2019, the HighQ acquisition goes some way to answering what TR will spend the money it made from divesting its 55% stake in its finance and risk business for around $17bn.

We spoke to TR managing director Lucinda Case and global head of drafting and automation Andy Wishart about the acquisition, which we have heard on the grapevine was well over $300m - TR would not

comment on that figure.

HighQ has done well to reinvent itself over the years from a fairly one trick collaboration portal pony to a platform, and speaking to Legal IT Insider, Case said: "Our customers are faced with an explosion of legaltech, regtech, taxtech, proptech and fintech and their challenge is how to work with multiple products and different integrators. HighQ has solved a lot of those challenges as it has built the platform and for us this acquisition provides an opportunity to expand our own productivity offering."

She adds: "We already integrate with HighQ and Contract Express and, by creating this open platform, we can integrate Thomson Reuters solutions and third-party solutions and deliver that all up to the legal profession with a single unified experience. So, from a customer perspective it helps them to simplify the way they are making the most of legaltech and regtech solutions."

The reactions to the deal on social media have been positive but on the Legal IT Insider website, where most comments are anonymous, the reaction has typically been super critical, with one of the more polite commentators saying:

"Hmmm, HighQ is a great product. All credit to Stuart Barr and the team. My concern is that Thomson Reuters will destroy it like they have a number of other products. I would like TR to issue a statement as to how they will operate differently so this doesn't happen again."

See here for our in-depth analysis, which tracks TR's successes, failures and recent internal restructuring in terms of how that might impact the acquisition of HighQ.

Commenting on LinkedIn, Jason Moyse, founder of Law Made, who is on the advisory board of MDR LABS and a fellow of CodeX, said: "Outstanding analysis...haters gonna hate (and they are vocal in closed rooms, I can tell you that! and there are many merits to the complaints) but who can deny that Practical Law Company is a success and there are significant winds of change at TR in terms of their strategy? It's real and I learned a ton at their Internal Leadership Conference earlier this year and when I chat with folks at the company."

He hits the nail on the head with this observation: "TR is looking to be a true platform company which, really, is best played by those that have brand and resources. These products are terrific integrations in theory.

"The key will be P R I C I N G as there is a serious moat around many lines of business at TR as it is, and value is always a tough sell among exhausted resource-strapped CIOs and CKOs."

▶ NIS Regs drive law firms in Europe to the cloud

The EU NIS Directive on security of Network and Information Systems is driving law firms in Europe towards adopting cloud systems and solutions in order to comply with its onerous certification, security and reporting requirements.

The NIS Directive was implemented by Belgium on 3 May 2019, and while there has been much focus on GDPR, speaking to Legal IT Insider, Stibbe's head of ICT and facilities for Belgium and Luxembourg, Olivier Van Eesbeecq, said: "In Belgium, the week the NIS came into effect we were required to be compliant, including having all sorts of certification such as ISO certification, an internal yearly audit, an extensive audit every three years as well as 24/7 contact. It goes much further than GDPR regulations in protecting data and we've already had two pitches asking how we comply.

"We need to think if our ambition is to keep everything internally or whether we are going to outsource, for example, our document management system to iManage by moving to the cloud. They have that coverage."

In Amsterdam, Stibbe has just adopted Infrastructure as a Service with PeopleWare and is working with iManage on a roadmap to a cloud DMS. See page 7 for the full story.

▶ Is Microsoft too cloud aggressive?

While putting your data in the cloud is the obvious direction of travel, this year we're hearing that Microsoft is effectively driving the cloud agenda with its aggressive approach to licensing.

The tech giant has unequivocally set out its stall as a cloud vendor, with cloud licensees beginning to see real advantages in terms of the solutions available to them.

The bigger question is whether Microsoft's sales team is being honest with its law firm customers about all the options still on the table, with one US law firm IT director, who asked not to be named, saying: "We upgrade every three to four years but you can also downgrade - so if you have an active license for Office 2019 you have the downgrade rights to 2016 and below.

Microsoft doesn't make that clear and some firms are under the impression they have to upgrade now."

So while you can buy cloud licenses (why wouldn't you?) without immediately moving off premises, that same IT director told us: "The conversation around licensing is an area that needs exposure: Microsoft are misleading firms and pushing them down a different path for their own benefit."

Another criticism surrounds SAM (Software Asset Management) audits and the IT director said: "Microsoft will also say that you're required to get a SAM licensing review and everyone freaks out but a SAM is not required and, if you don't have one done, it doesn't mean you're guilty or hiding something. A licensing reseller review can be a less stressful option. They can pull your Microsoft volume license purchase history, review against user and hardware counts and then work with you on an end of year 'true up' license purchase plan for any gaps. Mechanically, it is similar to a SAM, but there is no cost for the review and it gets done on your own timeline and terms."

We spoke to Matt O'Callaghan while he was still enterprise sales manager at Microsoft (he has now moved to Peppermint Technology, see page 30 for the detail), and he told us: "It's true that there is no incentive for Microsoft to sell perpetual licenses and that's not where we're going.

"But there are a number of firms that are on Office 365 licensing but still deploying on premises and you can move to the cloud at your own pace. Commercially we're not penalised if customers buy on premises and they should be aware of the options."

One of the big benefits of Microsoft driving the cloud agenda is that the inevitability is giving law firms a sense of safety in numbers, particularly when it comes to how they speak to clients.

Nick Martin, head of iomart's cloud consultancy SystemsUp told us: "Pretty soon you're not going to have an option but to move to the cloud."

▶ #GlenLegal: Word from the chair

We've saved some of the best for last when it comes to covering the content from #GlenLegal19. Here our two co-chairs give their thoughts on the latest trends, and warn: scrutinise, don't just get sucked in by technology.

How to stay relevant as a CIO
Rick Howell, CIO, Perkins Coie

The challenge for CIOs is how to serve clients' needs today, while also making the right choices to remain competitive tomorrow, Rick Howell told assembled delegates. CIOs are being asked not only to solve more problems than ever before with technology but also to drive new ways of working through innovation.

These are two related, but distinct, challenges. "Solving problems typically comes down to a tech solution. You might not be the first person to do it and change management may be relatively simple. It's a productivity play. It's about using a piece of technology to do existing work faster and cheaper."

In order to do this effectively, it is important to start by focusing on the benefits of technology, Howell said. "Why? Because IT has no inherent value. The benefits of IT are only realised by enabling people to do things differently. Just as a carpenter's tools have no value until his customer has a need that allows him to create something that the customer will pay for, only business managers and users can create value from technology. Not the IT team."

But while solving problems with technology is about doing existing tasks more effectively, innovation can be about opening new markets, new skills, new roles and potentially even new service lines, Howell explained.

"When you are talking about smart contracts or blockchain, for example, you are talking about a new way of doing business. There is a lot less certainty of outcome. There will be a lot of people telling you they have the unicorn you are seeking, and you have to get good at filtering the information you are presented with."

Howell explained that it is vital that CIOs are able to cut through the deluge of available data to make decisions - and investments - that work for their firm. "If we can't apply that lens, then technology could kill us," he said. He went on to reference a number of statistical correlations that highlight how important it is that data presented as fact is thoroughly scrutinised.

Could technology actually be killing us? Check out these stats...
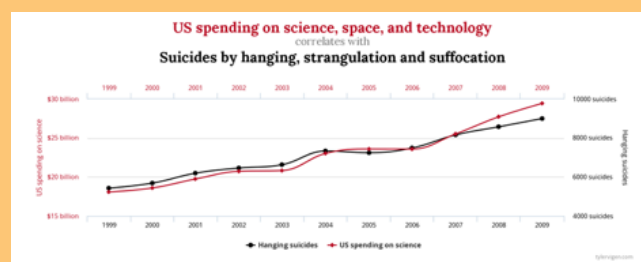
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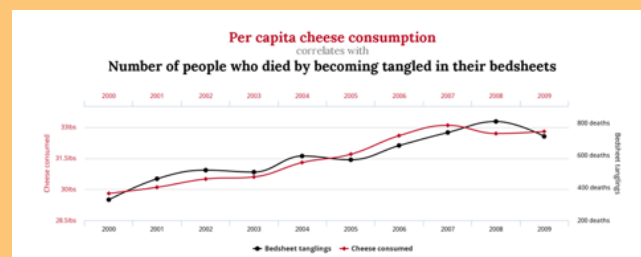
"That we even have a stat that shows people are dying in their bed sheets is strange, while the fact it is correlated to cheese consumption is frankly disturbing,"

Howell joked. "But it does show that while data is a great way to tell a story, if you are not checking the veracity of that data it might not be the best basis for making decisions."

Indeed, when making decisions about innovation, Howell believes the challenge becomes less about the objectives that play such an important role in solving problems with technology, and instead more about how that change can be managed. "The most important piece of innovation transformation is ensuring that this new way of working is sustainable. That is why, as CIOs, we need to be deeply engaged in these conversations. If people, processes and culture are not changing to support the technology we are trying to initiate, it won't be sustainable and the business won't realise the benefits."

"For me, that is what the role of the CIO is," Howell continued. "Our role is to sustain and extend the strategic capabilities of our firms and to do that you have got to be at the table. You don't have to be driving the innovation but you need to be part of the conversation to make sure the organisation is not just doing the right thing, but that it is doing it the right way."

Clients' five worries, and how we respond
Mike Rebeiro, Macfarlanes

There are five things worrying today's general counsel, Mike Rebeiro, senior adviser and head of digital and innovation at Macfarlanes told delegates at the 2019 Legal Leaders IT Forum. Those worries are globalisation, liberalisation, cost pressures, digitalisation and business model disruption.

"In terms of globalisation, all of our clients are being affected by increased regulation on a national and international level," Rebeiro said. "In the UK, of course, the situation is particularly challenging because of all the uncertainty surrounding Brexit. Our clients are having to look at new markets. That creates a different regulatory landscape and new and worrying risk for general counsel."

GCs are also acutely aware of the wave of liberalisation that is happening in law, Rebeiro added. "It is no longer just about the traditional law firm relationships, which many GCs have been defending to their management teams for a long time. Liberalisation is leading to an unbundling of legal services which means the GC is having to develop project management skills and there is a complete supply chain of legal vendors for any one piece of work."

At the same time, GCs are facing immense cost pressures. "CFOs are demanding they reduce spend on external legal services. That's bad news for them and it is certainly bad news for us," said Rebeiro. "Furthermore, many of the tasks that used to be regarded as high value, are now seen through the lens of the fourth industrial revolution and there is pressure on GCs to commoditise."

Rebeiro pointed, in particular, to the role that technologies such as blockchain, smart contracts and AI will play in the industry. "The result is GCs' positions are becoming worryingly disrupted because the business - their internal client - can, in many cases, go to a platform for legal advice. In the past, the GC was considered to be the font of all knowledge. The business would ask them a question and they, in turn, would come to our partners. In the future, the business will increasingly go direct to independent platforms to get that advice, without the requirement for either the GC or us."

Businesses themselves are also being disrupted. New technology from AI, to big data, predictive analytics, smart city infrastructure, wearable devices and virtual reality, are all shaking up traditional industries. That creates challenges for GCs who need to navigate the legal and ethical implications. Finally, there is business model disruption. Clients tend to fall into one of three groups, according to Rebeiro. There are those who feel immune to change. "Those businesses will not be around too much longer, I suspect," Rebeiro commented. Then there are those businesses which see disruption as an opportunity, and which have a clear strategy for disrupting their own market. "Finally, there are the vast majority of businesses, which see this tsunami of disruption coming but just don't know what to do about it."

Rebeiro pointed to Clayton Christensen's innovator's dilemma to highlight the challenge that businesses face. Christensen argues that disruptive technology is generally developed within big companies. Those companies seek the reaction of their clients, who often tell them that while the technology has potential, it is of no immediate use. However, someone else then sees the value in the technology and continues to invest and build new markets. The clients that originally turned that technology down come running, and the company that walked away from the opportunity is left with nothing.

"There is no doubt that there were people within Blockbuster that were thinking about streaming technology, but they decided to stick with what they know," Rebeiro said. "Our clients don't want to join the ranks of C&A, MFI, Woolworths and Toys 'R' Us. They don't want to be disrupted."

The challenge for the GC, therefore, is one of relevance, Rebeiro claimed. "They have to be able to add value to the business and move into the digital delivery of services which are real time and interactive.

As CIOs, your challenge is to help them with their challenge. If the GC is no longer relevant, they will no longer be there. If they are no longer there, they will no longer be paying our fees."

So, how has the legal profession responded to this dilemma? With business as usual, according to Rebeiro. "Ownership models are still defined by equity in the hands of a few white, middle-aged men. Billing is by the hour, infrastructure involves multiple offices around the relevant geographies and delivery of service is still word and paper-based, albeit delivered digitally. Frankly, it isn't good enough."

Rebeiro believes that over the next 15 years the competitive threat facing law firms will soar. "We will still see one or two niche advisory firms. In-house teams will be more tech-enabled as CFOs invest in order to save costs. There will be global law firm platforms and full-service consultancies, but full-service law firms will struggle. At the top end there is the possibility of investment and listening to clients, if they get it right. But at the bottom end, where margins are tighter, it will become a lot more difficult."

Keep your eyes out for a #GlenLegal19 e-book of all the main sessions, which will be published shortly.

▶ # Why Wavelength sold to Simmons

Up there with the biggest stories in July is the acquisition of Wavelength by Simmons & Simmons, which sparked a good few questions, mostly as to why Wavelength would sell at a time when every law firm and their dog needs and doesn't have legal engineers and data scientists.

At the time of the acquisition, we interviewed Simmons' managing partner Jeremy Hoyland on the "hows, whys and wheres" of the acquisition and if you haven't read it yet you can do that here: https://www.legaltechnology.com/latest-news/wavelength-law-simmons-managing-partner-jeremy-hoyland-discusses-the-hows-whats-and-whys-of-the-acquisition/

We've since had a chance to speak to Wavelength co-founder Peter Lee about the acquisition, and he had this to say.

Peter, what led you to sell Wavelength to Simmons at a time when you're in big law firm demand?

"We can still work with other law firms and we intend to do that. But joining Simmons give us a really good opportunity to scale massively into the space.

"When we started in 2016, legal engineering was a white space and we believe we were the first people to do what we call legal engineering. We were fortunate that we were the first movers and we scaled without investment to 30 people in Cambridge and London. But I always knew from the day we started that this was a hot

area and we've observed over the past few years that other players like the Big Four and other ALSPs have realised the data approach to law is popular and valuable. I just thought the window would be five to seven years. We always knew we'd have to scale in some form or other, either by taking private equity funding or joining forces with a bigger platform. Obviously, there are pros and cons of both but our preference of those two naturally was to join a bigger platform and the reason for that is that it allows us to keep true to our culture and the way we are structured.

"The rapid growth of the corporate counsel market means that the time frame has been reduced. What you find is that the big legal departments tend to have bigger problems to solve - the scale is bigger, like GDPR or LIBOR. In order to service the market, we need to grow our numbers and international reach. What we do isn't bound by jurisdiction and one of the reasons we were so keen on Simmons is they have a really good international footprint.

"We're not just being absorbed and spread through the business, we are a separate legal entity."

Did new hires such as Sophia Adam Bhatti and Erika Concetta Pagano know you were being acquired?

"Sometimes when we're hiring people it takes months. We started talking to Simmons not that long ago - it was a fast process because we've been working with them for some time so it just feels really natural. It was more like an evolution. We've been doing a lot of work around Libor remediation and in November we went to their partnership conference to help educate them on legal technology, which was great.

"Because of the way we're structured as a separate entity where Drew [Winlaw] and I still lead and manage in a lot of ways, it's not that big a change. But the deal gives us more opportunity for those guys to do the sorts of deals they want to do leveraging Simmons' big network."

How will you work for other law firms?

"The law firm market is big and there are some firms that won't want to work with us anymore and some that will. We are a law firm ourselves and have been since we started.

"But the likely increase in corporate work aligns with how we see our sales pipeline evolving, because of organisations like CLOC and people in corporate teams becoming empowered."

Why has Ben Gardner left and is the rumour true that there was a fallout?

"No! Ben left simply because his passion has always been in pharma and he got an amazing opportunity to work for AstraZeneca. His PHD was in biochemistry and he worked at Pfizer for many years before Linklaters. This opportunity to work with really large data sets in the pharma sector came up. He left on very good terms with Wavelength and was out celebrating with us last week."
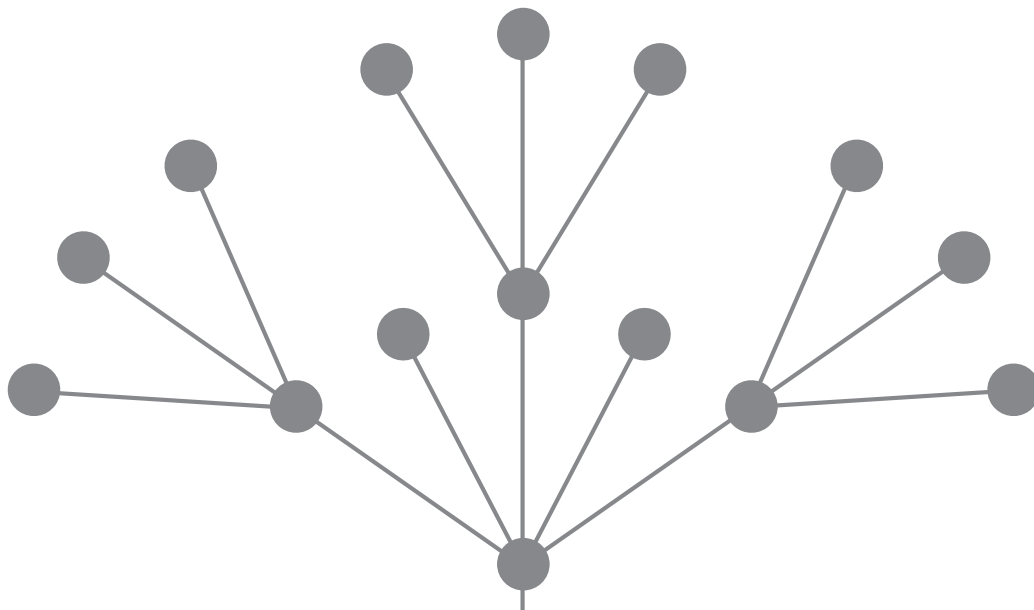
▶ Bruce Braude breaks the internet

It's no wonder that Bruce Braude says that he is "overwhelmed" by the good wishes he has received on LinkedIn following our announcement at the start of July that he is moving to Deloitte Legal as chief technology officer. The post has received 26,030 views, 249 likes and 91 comments - all congratulating him and some questioning whether this means that the true technologists are eschewing law firms for accountants.

This is the first move of its kind and one senior in-houser tells us: "It's caused such a big reaction because it's a first but it's an area we all expect the Big Four to be better placed and funded to exploit."

So far, we'd say the Big Four hires have been heavyweight but pretty conventional. Deloitte Legal is run by Michael Castle, a former banking partner at Allen & Overy. July saw the announcement that Andrew Lilley, former managing partner of Travers Smith, and Liz Pierson, formerly a partner at Squire Patton Boggs, will respectively join Deloitte Legal as UK head of employment and head of Deloitte's reward practice.

People like Stephen Allen at Hogan Lovells are very much intact and being given a fairly free hand to make changes.
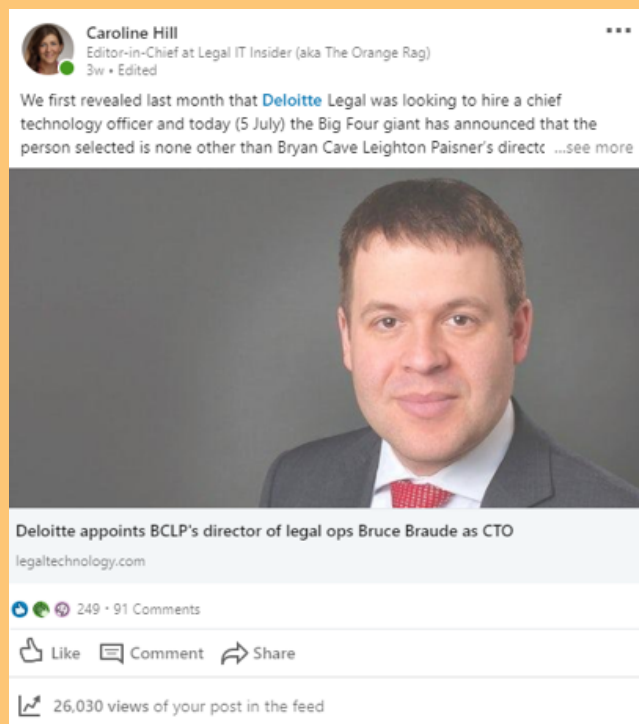
However, we asked an only recently ex-law firm legal technologist for his view. Alex Smith, formerly innovation manager at Reed Smith and now at iManage, had this to say:

"As the industry brings in new non-legal talent, that talent's ambitions are not derived by the prestige of the employer but whether the job adds to career paths that probably don't end in a law firm or a management consultancy.

"Organisations will need to build new pipelines of talent and new ways to incentivise them: that incentive will not be the old 'partnership' carrot that both firms and the Big Four dangle.

"I agree that what you'll see is a more fluid market where talent follows opportunity. I'd not consider Big Four culture the end point, and agree that the jobs I've seen from the Big Four and recruitment consultancies have shown me are, at present, a step back from where the likes of Stephen Allen and Bryon Bratcher at Reed Smith are in law firms. Those are fix the basics, automation and process roles.

"They all, including the Big Four, need to get over the 'I used to be a lawyer' qualification and work out how to hire true innovation, UX, product professionals (clue … they have more skills and cost less than 'ex-lawyers')."

Caroline Hill
Editor-in-Chief at Legal IT Insider (aka The Orange Rag)
3w • Edited

We first revealed last month that Deloitte Legal was looking to hire a chief technology officer and today (5 July) the Big Four giant has announced that the person selected is none other than Bryan Cave Leighton Paisner's directo ...see more

Deloitte appoints BCLP's director of legal ops Bruce Braude as CTO
legaltechnology.com

249 • 91 Comments

👍 Like   💬 Comment   ➡ Share

📈 26,030 views of your post in the feed

▶ Continental Europe IT Profile

Stibbe in Focus

While we have profiled many of the IT teams in the UK Top 100 law firms, we're excited to say this profile of Stibbe is the first from Continental Europe.

IT Team Structure
Olivier Van Eesbeecq - head of ICT and facilities in Brussels and Luxembourg.
Jochem Roelofs – head of ICT in Amsterdam.
Amsterdam has just adopted Infrastructure as a Service with PeopleWare (see below for more detail).

Olivier, what is on top of your to do list at the moment?
We're rolling out brand new laptops in Brussels and a new digital workspace, which is meant to be the virtual complement to our physical office. It should also help to accelerate innovation from our lawyers.

The laptops are state of the art HP Elitebook X360s that you can convert to a tablet and they will help us to be more secure and complement our Always on VPN. We can track the devices across the globe and can neutralise them remotely. They have built-in privacy: if you're working on the train no worries, your neighbour can't see. Thanks to the new version of iManage Work 10 we have also improved internal collaboration in parallel with the new laptops.

We are also providing new ways of working and are investing in a full-time barista because we believe it's not only technology that will drive innovation, but you need a parallel strategy in facilities. We are rethinking our office space now that we have the laptops. We have a pop-up bar with the barista and healthy sandwiches as well as nice coffee. We're replacing the furniture and investing in good Wi-Fi. It's great to see people sitting working together.

With the new laptops we are promoting functionality like the reduction of printing from Word and Excel. You can review documents with the inking function in Excel or Word and use your finger to highlight things to be rewritten, which means we can be more paperless.

We rolled out more than 200 laptops in three weeks across Luxembourg and Brussels, and Amsterdam is in the process of doing the same thing.

In Amsterdam, they are mapping out the roadmap to move to the cloud with iManage Work 10.

What is the biggest challenge you are having to meet?

New regulation, in particular the NIS. In Belgium, the week the NIS came into effect we were required to be compliant, including having all sorts of certification such as ISO certification, an internal yearly audit, an extensive audit every three years and 24/7 contact. It goes much further than the GDPR regulations in protecting data and we've already had two pitches asking how we comply.

We need to think if our ambition is to keep everything internally or whether we are we going to outsource, for example, our document management system to iManage by moving to the cloud. They have that coverage.

Is NIS a factor in the laptop rollout?

In my head it was part of the strategy. With the Always on VPN you can't use a PC without being noticed by our firewalls. It's not possible to visit websites that aren't allowed. That creates a more secure network. With the old laptops there was a risk of viruses. So we always had our current strategy but the new regulations have helped us to get it over the line now with no push-back.

What is your ambition for the firm?

To accelerate the creativity of our lawyers and to organise training to help unlock their creativity.

We have found over the last two to three years working with our innovation committee that it's not about technology. You first have to make sure that people are thinking and becoming more creative than before.

What is your firm's approach to "innovation"?

Well, our new managing partner Wouter Ghijsels has technology at the top of his agenda.

We have an innovation board, which I lead, which includes Dries Hommez, a corporate/M&A partner; and Erik Valgaeren, a technology, media and telecoms partner.

The committee also includes PSLs and some technology lawyers who are involved in testing new products.

What is your investment in IT?

IT investment is around 4% but if you take the investment the firm is willing to make each year including facilities and knowledge management, it's closer to 7-8%.

This year is a bit higher not just in IT investment but in training; and of course we're investing in the office environment. We renegotiated our extended lease and received an incentive to stay, which we have reinvested.

What are your strategic priorities for the next 18 months?

Technology is not a driver. It's the people, and in order to make sure that people feel comfortable in their work and their work area, you need to invest in a lot of things and one of those is wellbeing. We also have a big diversity programme running. We try to drive innovation by training; investment in wellbeing; diversity; and the work environment.

Tell us a bit more about plans to outsource your infrastructure?

The regulation is driving our decision - it's no longer part of our core strategy to host our own servers. It's become so complex and the number of upgrades is high. If you want enough resources to work with tools such as iManage Work 10, all those projects have new functionality, but you need time to explore them.

And you have a big agenda against waste?

The clients are driving our agenda - we have to be more sustainable than ever before. In Belgium we have a lot of pitch requests and more than 70% of them ask about sustainability, security, compliance and diversity.

It's not all about tech but tell us about some of tech you're playing with?

We're looking at BRYTER [a no-code platform to turn knowledge into apps]. It helps you with your thinking based on a yes/no decision tree. It's a nice easy-to-use platform but you need a lot of volume if you want real benefit and we are full service and handling complex legal matters, so we don't have a lot of repetitive work.

We are also using an artificial intelligence enterprise search tool called Sinequa.

We have trained the system how to recognise an engagement letter - we have 26 million documents and emails all indexed. Internally all of our sources have been indexed by that search engine, including PDFs.

We have had it for four to five years but now they have machine learning capability. We were one of their first ever clients - not just in legal – to use the ML module. We teach the system how to recognise an engagement letter, whether in English, French or Dutch, whether it be in the mail box of the managing partner or in our DMS, FileSite, the system will look through the entire source and flag all the engagement letters with an error rate of 0.1%.

Why is that important? The business development department and our pricing team need the latest engagement letter. If you have a pitch you need to make

sure there is no engagement letter that it is still relevant to that client. It's a human thing: a partner has to send over the latest, signed engagement letter to the risk team but it's often not done in time. We have an official engagement letter database but it doesn't contain them all.

Sinequa is also capable of recognising price negotiation discussions through email - we didn't train it to do that! If a partner and a client are sending emails comparable to an engagement letter the system can recognise those discussions and they are flagged as "contractual information" because not every email turns into an engagement letter.

Our intention is to use it to identify NDAs and other types of contracts.

Do you have any plans to change any of your tech?
When I go to ILTA I would like to know if there is a good alternative to HighQ Publisher. We've had a meeting with the BD department in Belgium and Amsterdam and decided that we'll stop using Publisher, which is now a lot of money and not HighQ's core business. Two years ago the dashboards were free but now it costs a lot of money. You can get a better dashboard in Collaborate but under the premium module it's no longer free.

However, with HighQ we have created the first link between Collaborate and our data warehouse. We get requests in real time for WiP and will build a client portal.

What is your approach to shadow IT?
It's under control because we have a very good overview of what is going on within our infrastructure and if we see anything shady we make sure it becomes under the control of IT.

On the new laptops, we encourage the online presence of lawyers on apps likes LinkedIn and Twitter. The most popular parts of our website are where people are involved in social media and we see a peak in the number of visitors when someone launches an article in the press.

What is your biggest challenge or frustration as head of IT?
Not having enough time! Things are moving so fast.

When we're toasting your success in five years to what will it be?
The business is still growing. People are asking for alternative billing so it would be good to see that the new way of working is successful.

If you see two or three lawyers sitting together outside of their office proposing creative solutions to clients, it's been a success. The world is changing so fast, and our need to be creative has nothing to do with technology. If you're going to help with a blockchain financing, it's new and you have to be creative with law that's not adapted yet.

We are investing in training and culture and different angles on top of that because we see the impact of the environment on the day-to-day things we decide in the office.

One advantage is that I have a double role and we can shift faster than others who have someone for facilities and someone for IT because everyone has their own agenda and challenges.

Stibbe's core tech stack
DMS: iManage Work 10
Comparing documents/metadata cleaning: DocsCorp (the entire suite). Van Eesbeecq says: "We swapped out Workshare a couple of years ago. We tested it and the send and clean took much longer with Workshare at that time and DocsCorp's PDF suite is also nice."
Practice management: Aderant
CRM: Interaction IQ
Pitch creation: Enable Business Solutions

Prosperoware CAM now integrates with Kira, HighQ and Microsoft Office 365

In a huge development for Prosperoware's cloud legal content management system CAM, July saw it announce integrations with Kira Systems, HighQ and Microsoft Teams and SharePoint Online, which are all now supported for matter provisioning and tracking.

CAM orchestrates, manages and governs legal content systems. The impact for clients is to reduce the cost of using multiple cloud services, enabling consistent information governance across the full matter lifecycle management from provisioning through to disposition.

With the addition of Kira, HighQ, SharePoint Online and Microsoft Teams support, CAM now goes beyond document management systems to support a variety of legal and non-legal content systems.

As a centralised platform CAM provides its users with the ability to provision and track across disparate systems. Steve Obenski, chief product officer at Kira, said: "Our partnership with Prosperoware CAM enables our customers to more easily manage matter details across Kira and other supported platforms".

Exigent launches evergreen fund

Legal outsourcing provider Exigent in July launched an evergreen fund to help early stage start-ups in legal and data technology, which it says is in the business of leveraging real skills and experience rather than "throwing money up against a wall and hoping for the best".

BrightMinds Capital Partners ("BMCP") will focus on start-ups in the AI, blockchain and big data management applications space and says it will provide not just capital but also leadership and sector expertise to start-ups specialising in legal technology and services, data extraction, corporate data management and optimisation.

It has a subscriber base that can opt into investments that BMCP recommends to them. Exigent, which CEO David Holme tells us has a surplus of cash from a successful few years, will cornerstone each investment.

One of the first investments in the fund's portfolio is Lexchain, an immigration compliance automation tool using the latest distributed blockchain ledger technology.

"If you look at the VC industry today there is too much money being thrown at the wall and hoping for the best and that feels like the 1980s. This is not the right way forward. When you consider the legal services tech space I fear too much money is being burned on the wrong things. The multiples of some of these investments are completely unsustainable," Holme said.

Libby Jackson MBE

If you missed our conversation at the start of July with Herbert Smith Freehills partner and head of Alternative Legal Services (ALT), Libby Jackson, who received an MBE in the 2019 Queen's Birthday Honour's List for her services to the Northern Ireland economy and for innovation in law, you can read it here: https://www.legaltechnology.com/latest-news/the-future-of-alternative-legal-services-libby-jackson-mbe-gives-her-take/

ALT, an integrated service catering for volume and document-intensive work, was launched in Belfast in 2011 and is now global. Jackson shares her take on the evolution of the alternative legal services space and the changes she anticipates in the years ahead.

▶ Farrer & Co: Lessons learned from shift to IaaS in Azure

Just over 18 months ago, Farrer & Co began a project to move its entire infrastructure into Azure - becoming one of the first UK law firms to do so.

Having broken that news first-time round, we recently caught up with IT director Neil Davison and head of IT systems Andy Beech, as well as Nick Martin, managing director of cloud consultancy SystemsUp, to find out how the project is panning out. Has each of the stages gone as expected? What have been the unexpected challenges? We expected there would be a few bumps in the road and, of course, there have been. But have they been overcome, and if so how?

The plan

As a quick recap, in around November 2017 we spoke to Davison and Martin about shifting Farrer's infrastructure to the cloud. The plan was move to a secure Microsoft Azure hybrid cloud platform and a desktop environment based on Office 365 and Windows 10, broadly following these three phases:

- Phase 1 - Instruct system integrator, SystemsUp.
- Phase 2 - Move to Azure after completing due diligence and information-gathering within the firm. Under this phase the firm was to move to Exchange online. Davison told us: "We have a hard deadline in that our disaster recovery site shuts down in March and we want all our core systems replicated by then, including getting Active Directory into Azure and putting Exchange online." SystemsUp was working on putting the new desktop build in by the first quarter of 2018.
- Phase 3 - This is the desktop piece and Davison told us back in 2017: "That's where we transform how they work. We're already looking at new build Windows 10 Office 2016 desktop next year and we're looking at new hardware". That includes Surface Pros among "other options". The firm will be using Skype for Business as part of Office 365. Farrer already was already using SIP telephone in the cloud so can readily transfer those numbers to Microsoft.

Migration

Speaking to Legal IT Insider, Beech said that migration to Azure took "lots of planning". He says: "SystemsUp have been engaged from the start, so we did a lot of thinking about what we're trying to achieve from the off and it became evident fairly quickly that it would have to be 'lift and shift' of everything in one hit. We looked at a staged migration over time but many of our applications and services are integrated. There was too much of a risk of moving some services here and some there".

SystemsUp mapped out which systems talk to what using Azure Migrate (there are lots of tools available to help you get onto the platform) and while they would normally stagger a migration, Davison told us: "We're the first law firm to do this and the complexity was so great that the map was too big to print out so they couldn't use a normal approach".

Martin adds: "From a sector point of view, there isn't another that has as tightly integrated applications as law firms. A law firm is underpinned by a set of interconnected applications whether that is finance and CRM and workflow or whatever it may be, it is more tightly integrated than any other sector. So, take local government where they have all sorts of streams for social care and highways and finance and none of it is connected but in legal it's all tied in."

The reasons are many, but Davison said: "Lots of law firms have through merger different software and systems. They have a system they don't want to stop using to knit it together with others".

In any event, Beech concludes: "A decision was reached early on that, rather than starting small, we'd have to go full fat from day one. We spent a lot of time and lot of effort with the guys from SystemsUp to understand our estate and where the challenges would be".

Key was ensuring that data was encrypted and secure and Beech says: "The solution we have in place is an express route connectivity to connect us to Azure - a private connection between us and Microsoft's data centre encrypting data across channels using Silver Peak Unity EdgeConnect SD-WAN" which, Beech says, was "another thing that fell into place after we started testing".

He says: "We had some performance issues with legacy applications and having done testing we were satisfied that it was do with our application architecture. We needed to make sure services were at least as good as on-premises and Silver Peak ticked the box".

Davison adds: "Certain legal applications are not designed with this in mind and struggle over an external link. We spent thousands of hours testing performance and functionality to make sure the applications did what they should. What came through early was performance issues with certain systems that weren't up to it. We spoke to the suppliers and they didn't have a solution. We had to go and look at what we could solve ourselves".

Eight weeks before go-live, panic began to set in. Davison continues: "We spoke to SystemsUp about WAN optimisation and the big player making inroads with their AI build is Silver Peak. They look at apps and are constantly optimising. Eight weeks before go-live, I knew we couldn't go live. Silver Peak is plug-and-play and, in a matter of days, some of our systems were working quicker than on-premises".

Martin said: "Any system will run in Azure but key is

the user experience: Farrer & Co focussed on that heavily. The backend is still clunky but modern technology has been applied to build an excellent UX - it's like a gold-plated band aid. The team focussed on what the UX needed to be rather than the underlying tech".

Of the last few weeks before go-live, Beech recalls: "God there was so much happening! We spent the last few weeks testing the heck out of everything. By then we were reasonably comfortable that we had done everything we needed to do". In an unprompted vendor plug he added: "SystemsUp is a really good resource, they really know the platform and understand us, how we work and operate and how our systems hold together technically so they helped with the final stages of the migration".

During that phase SystemsUp also provided training to the IT team and Davison says: "Even the service desk people needed training, so they had enough information to know what we were doing and to answer those questions".

Martin says: "Farrer saw very early on that training across all roles would cement the chance of success. There is a distinct difference between the stance this team takes and other firms. It makes a significant difference".

Prior to migration, SystemsUp had helped Farrer & Co to build a test environment and Beech says: "It was a replica of our production environment in Azure so we could do a lot of testing in there and get comfortable that it was going to be okay".

For the actual migration Farrer had dedicated onsite resource from SystemsUp and used a lot of comms internally to communicate the fact that the system would be offline over the weekend.

Beech says: "We started on Friday evening by taking the system offline and completing the replication in Azure and executing the changeover. Honestly, we had some of our core systems back up and running by 7am on Saturday morning.

"Obviously we did more testing and had engagement not just from IT but from key stakeholders across the firm. Stakeholders for the practice management system and client relationship management system came in to measure that they were happy with the systems operationally and that they were doing what they should be doing. We did have a line in the sand and if there were any issues we would need to think about reversal - we had a contingency plan but everything went really well. The execution was amazing".

Lessons learned
So, what were the lessons learned from the shift to Azure?

Davison says: "It was more resource intensive than we thought it would be". You can tell when he says it, that this was a big deal.

Beech adds: "We knew it was going to be a monster project, but we have spent hours and hours whiteboarding and talking tech".

Both are on balance positive and Davison says: "We now have a pure OpEx model and it gives us improved security, agility, compliance, disaster recovery. While we have increased our spend in some areas, in others it has decreased: third party products come as part of the Azure suite. Our disaster recovery costs have gone and become part of the Azure tenancy".

Farrer didn't expect the move to Azure to be a cost-saving but the RoI will come, they say, over the year, adding: "If we'd had to rebuild our datacentre we would be looking at £2m".

Yes, it was a big project and Davison says: "We didn't realise how big it was", but the result is good.

Davison says: "Our journey started with NetDocuments and looking at cloud services and once you're comfortable with your documents being in the cloud it becomes a natural progression. It's about getting the partners to understand the reasons, not just in terms of cost but also security".

He adds: "In terms of staff, there's a lot of information they need to learn and it's going to be busier than ever to make use of what is in Azure. There are a lot of other projects we can now hopefully deliver more quickly now we're focusing less on our infrastructure".

▶ Diligen launches ML-based self-training system

Diligen on 29 July announced the availability of Diligen Prodigy, a new self-training system that will enable law firms and legal departments to more rapidly train Diligen to recognise new clause types in contracts.

The system learns to recognise new concepts in minutes. If, for example, you want to teach the system to look for recital "now, therefore", you can start with a keyword search and a simple "yes" or "no" to the data points presented. In the demo we were given, it was fairly effortless.

Rather than having to dig painstakingly through documents and highlight the relevant text, Diligen Prodigy volunteers the data for the user to classify. Affirmed clauses appear under "yes" on the left of the screen and discarded "no" clauses on the right, complete with who worked on them. The clauses can be dragged and dropped from one pile to the other.

"As a South African Legal Services Provider, Inlexso (Innovative Legal Solutions) has been faced with 'teaching' machine learning-based contract review systems with bespoke clauses unique to the South African legal landscape," said Cliff MacGregor, managing executive at Inlexso. "Having used multiple machine learning contract analysis systems, we found that the Diligen training model and process are user-friendly and efficient. We believe that this enhanced efficiency will improve project execution time and accuracy, ultimately resulting in time and cost savings".

▶ ContractPodAi secures $55m

ContractPodAi in July secured a whopping $55 million Series B investment led by US venture capital firm Insight Venture Partners with participation from the company's Series A backer, Eagle Proprietary Investments.

The $55m investment represents Europe's largest legaltech Series B fundraise (and, apparently, the largest Series B round for any CLM provider globally.)

Here are a few things you might want to know about the company:

- ContractPodAi has built what it calls a contract lifecycle management ecosystem to help drive in-house legal transformation;
- Its clients include Bosch Siemens, Total and EDF Energy;
- The company, which just closed its financial year, again saw revenue growth of an astonishing 300%;
- According to Owler, ContractPodAi has a revenue of $4m and 60 employees, although this has not been verified by our own sources.

Co-founder and CEO Sarvarth Misra told us: "We have everything together within one CLM ecosystem and we have built a toolkit that the in-house lawyer needs to drive in-house transformation. There are multiple use cases from assembly to repository to discovery to third party review. We're building our ecosystems with partners such as IBM and Workshare to save them having to buy multiple apps for contract management."

Founded in 2012, ContractPodAi now serves customers across every continent, with offices in London, New York, San Francisco, Glasgow and Mumbai.

▶ Leverton restructuring

Leverton has dismissed around 50 of its employees and closed its Berlin office, according to German digital industry publication Grunderszene.

In a report that we have used Google Translate to read, Grunderszene claims that the Berlin workforce was told of the imminent office closure on 28 June, according to "current and former employees of the Legaltech start-up, who do not want to be named."

One person with knowledge of the situation told us: "What has been written presents only one side of the coin. More will be made public at the end of the week."

That was last week and, at the time of going to press, there was still no update. It is understood that there may be news of further fundraising.

Leverton, which is Germany's leading AI-backed data extraction and management provider, raised $11m in Series A funding in July 2017, having raised $5.6m in seed funding in 2015, according to Crunchbase. The more recent funding came from DAH Beteiligungs and Anyon Holding.

▶ Quote/Unquote

"Competing on the savings you make by using technology in eDiscovery is a tough sell - 'Hey client, this case cost you $600,000 but if I were worse at my job it would have cost you $1m."

The head of eDiscovery at a big US law firm responds derisively to the suggestion that use of tech gives you a competitive edge in winning work.

TORONTO PART ONE

▶ The Incubator Scene

Toronto has one of the most vibrant technology scenes in the world and in legal technology has given birth to the likes of Clio, Kira Systems and Diligen as well as one of the first, if not the first, global master of laws in innovation, law and technology at the University of Toronto Faculty of Laws.

Toronto was said recently by a BMO Capital Markets report to be the fourth largest tech market in North America with around 214,000 workers in the sector. Other names you might know that have come out of Toronto include Cisco and Oracle - in 2018 the third largest software producer by revenue behind Microsoft and Alphabet.

While I was there for an OpenText conference (FYI, OpenText's global headquarters are in Canada), I had time to catch up with a handful of key people – thanks in no small part to the introductions of Toronto born former Baker McKenzie senior associate and legal technologist and, of course, Legal IT Insider contributor Dera Nevin.

One of the major themes that emerged during this trip was the role that government-funded incubators have played and continue to play in supporting the growth of legal technology. This means that the A2J movement is thriving in Toronto. T here is also a strong connection with the education sector, in particular Ryerson University.

The scene is in fairly sharp contrast to the UK, where most of the incubators or accelerators are typically run by law firms or the Big Four (PwC).

These incubators are by their nature biased but one of the advantages they have is easy access to the lawyers that shape the products emerging from the incubator. And connections (potentially even funding) that may help smooth start-ups' paths as they go to market.

The Legal Innovation Zone

The Legal Innovation Zone, commonly referred to as LIZ, was the first incubator in Canada - and possibly anywhere - dedicated to legal tech.

LIZ was founded around four years ago by managing director, former attorney general and Ontario MPP Chris Bentley, who before entering politics was a criminal defence and employment lawyer. He also founded the Law Practice Program, an alternative path to qualification, and both that and LIZ are housed at Ryerson University.

LIZ supports start-ups, R&D for law firms and businesses and practical reform initiatives. It grew from a conversation that Bentley had with the executive director of Ryerson about the university's Digital Media Zone incubator. "I said how many are doing something in law? And the reply was 'none'. So, I immediately emailed the president and said, 'you need a legal incubator'".

LIZ can house 15-20 start-ups at any one time. It is free to them, funded by the university and also paid for by projects underway at the incubator. Bentley says: "It allows them to meet entrepreneurs and advisors". LIZ doesn't take any equity or interest in the start-ups.

"We are trying to create change and help to build better solutions," Bentley says. "We want to give consumers better access to justice".

Bentley has an interesting concept of what access to justice means. "It's about law in the way you need it, at the time you need it, without a thousand caveats. That's access to justice."

The least able to access justice are often middle-income families who aren't eligible for support and, for Bentley, it's about "being able to access justice at the end of the day, after your day job."

He is launching a family portal that will connect people who are separating or getting divorced with a lawyer who can help to triage their case. "I've just announced that it will be up and running in January," Bentley says with a smile, because he's not sure how they will hit that deadline. "We've been talking about access to justice for decades and it has to happen, so we've set a deadline."

For more information and to get involved click this link: https://www.ryerson.ca/news-events/news/2019/07/ryerson-legal-innovation-zone-launches-family-law-portal/

LegalX and Law Made

In 2015, entrepreneurs and former lawyers Jason Moyse and Aron Solomon launched LegalX, an industry cluster in the MaRS Discovery District innovation hub designed to connect technologists, designers, coders, engineers and lawyers.

They went on to launch Law Made, an advisory firm focused on the legal space with a particular emphasis on supporting entrepreneurship and intrapreneurship across the globe.

Solomon, who is no longer working with Law Made, won the prestigious Fastcase 50 in 2015, which highlights people who have charted a new course for the delivery of legal services. He is now CEO of Aron Brand, a Berlin-based global innovation studio. See below for his thoughts on the dangers of government funded incubators.

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111 innovation hub: Blue J Legal

Founded in 2015, Blue J Legal provides users with AI-powered research and planning tools, helping them to work out how a court would rule in their tax and, more recently, employment cases. At the end of 2018 Blue J raised US$7m in seed funding.

Co-founded by Ben Alarie, there is a big A2J side of Blue J, which at its heart has an ambition to democratise the law.

The company is based in tech hub OneEleven (written as 111), which houses around 30 diverse high performing tech scale-ups within 250,000 square feet of real estate.

111, which Ryerson University is a co-founder of, is in the heart of Toronto's business district and a short walk to the companies and law firms it does business with.

According to VP of marketing Michelle Kwong Rutherford, who has been with Blue J since April and has equity in the company, being part of an incubator is a hugely positive factor. FYI the reason we mention equity is because Kwong Rutherford has a successful marketing background, including a senior role at American Express but was attracted to legal start-up Blue J in large part because of its utopian ambitions.

While it's hard to articulate any specific influence 111 has on product development, the energy and exchange of ideas with other like-minded techies – who currently focus on anything from using AI-based predictive analytics for industrial IoT to an online test for admissions teams to assess applicants' people skills - is a huge plus.

It's become a bit of a cliché, but table tennis tables provide great decompression and while Kwong Rutherford gave me a tour of the building, one of the team's data scientists was absorbed in a game. See online for photos and video links on Friday 2 August.

Note: Blue J has received support from The Creative Destruction Lab, which has helped nurture start-ups worth over £2bn in value and is coming to the UK beginning in September 2019, delivered by the Saïd Business School, University of Oxford

Saïd Business School is partnering with the Rotman School of Management at the University of Toronto to deliver CDL in Europe for the first time.

Currently CDL operates at five universities across Canada and at New York University's Stern School of Business.

The Toronto incubator scene – the drawbacks of government funding

A LinkedIn chat with Aron Solomon, JD, CEO of Aron Brand, a Berlin-based global innovation studio.

Caroline Hill: Aron, my take is that independent incubators are a huge factor in the growth of the Toronto tech scene, is that right?
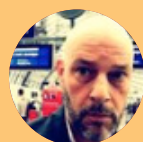
Aron Solomon: Defining "independent" is tough in the Toronto innovation scene. So many of the incubators/accelerators remain far too dependent upon government money. This means two things. 1/ That that haven't felt the urgency to create their own revenue streams; 2/ That when governments change and funding follows, they can be in extremely precarious positions.

This just happened in Toronto. The provincial government made massive funding cuts and what followed was many accelerators and programs, such as OCE (Ontario Centers of 'Excellence"), almost closing down.

OCE has funded many LegalTech start-ups this decade through several of their programs.

I honestly don't know of any truly independent incubators. MaRS, DMZ (where LIZ is), 111 (they just had huge senior personnel changes, including this weekend their CEO), Creative Destruction Lab. None are self-sufficient.

What has made the Toronto tech scene grow is necessity. Take away tech, take away start-ups and the innovation scene, and it's a very different economic position for Toronto and for Canada.

I'd also add two more dangers. The first is that some of the better known LegalTech companies in Toronto really can't be seen as start-ups any longer (Kira, BlueJ, ROSS).

Those who are true start-ups are either facing or are about to face runway issues. Toronto is notoriously bad at getting companies bridge funding. While government dollars help start-ups in many verticals get seed money and stay alive probably a lot longer than they should, the transition to less government dollars and more private

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dollars for your start-up is not a smooth one in Toronto or Canada.

Caroline Hill: What we have in the UK are incubators run by, e.g. Allen & Overy, Mishcon, PwC etc. While they offer access to lawyers (great to shape product) they are very much not independent like e.g. LIZ. Toronto seems further ahead in that sense. But I guess the benefit of law firm/big four incubators is that they aren't a drain on government, they shape product and they can perhaps help start-ups transition to private dollars...

Aron Solomon: You raise a great point here. And I like Chris and LIZ. But they're not independent. Without government money (Ryerson University and the DMZ, where LIZ is located) are public, government funded. Yes. If the goal is getting actually good LegalTech products faster to market, I don't think that independence is the most expeditious path.

Amy ter Haar, blockchain consultant, Creative Destruction Lab associate and entrepreneur

"What makes Toronto a natural home for the legal tech sector is the high density of lawyers. There are also some close links between the academic and business communities. For example, through the Creative Destruction Lab (CDL), founded at the Rotman School of Management at the University of Toronto, as well as the Legal Innovation Zone (LIZ). Certain commercial in-house incubators are also effective. For example, SecureKey just released a new legal tech product called Verified.Me. We have an impressive and rapidly mushrooming community of legal hackers, are the host city for the World Legal Summit this week and are also home to a number of world-class legal tech start-ups.

"The growth of innovative, vibrant and successful value creation by legal tech hubs, incubators or accelerators depends on a large number of interrelated factors, such as technology vendors and enthusiasts, the proximity of customers and beneficiaries of legal services, access to investors, regulatory initiatives to foster new approaches, especially in a conservative profession like the law, and local law schools and legal education'.

"Most incubators/accelerators have a specific objective or approach. In Toronto, for example, LIZ focuses on building better legal solutions for the consumers of legal services. On the other hand, the CDL focuses on providing the strategic insights needed to turn research innovations into high-growth ventures (not focused on legal tech but does have legal tech).

"One of CDL's best functions is its role as a crucible of business acumen and technical expertise, bringing together a highly effective combination of entrepreneurs, investors, scholars, inventors and risk-takers. This works extremely well. CDL has focused on building a community of entrepreneurs, angel investors and thought leaders that commit to spending time with the companies. It is the time, more than the money, that is what's really scarce. It is through providing the strategic insights that helps turn research innovations into high-growth ventures.

"Legal tech innovation is going to be driven in the future by trends that favour Toronto's specific strengths. Primarily, in Toronto this is the convergence of identity solutions, artificial intelligence and distributed ledger (blockchain) technologies. It is our collaborative interdisciplinarity that will be the hallmark of tomorrow's innovation breakthroughs. All of a sudden smart legal agreements meet identity solutions and peer-to-peer payments meet communications - this is exactly where Toronto has a bench strength that punches well above its weight.

"This past spring, the Royal Canadian Navy (RCN) and the Canadian Special Operations Forces Command (CANSOFCOM) partnered with CDL. This is an example of the Canadian government understanding that new technology is accelerating at a rapid rate and, in order to understand the network, you have to be part of it. These types of initiatives provide a collaborative environment in which the government can directly engage start-ups and business leaders in the development of technology use-cases. While this example isn't focused on legal technology, it does provide an excellent approach to follow in order to realize the benefits of a collaborative approach. A rising tide lifts all boats. Success begets success and working together in this way seems like the best way to go about it. Singapore is another good example of a government-backed initiative to drive innovation and to position the tiny nation state as a regional and global legal hub.

"It isn't always easy to overcome institutional stasis (or bias) within a legal organization, regulatory body, law firm, corporate legal department or law school. However, a public/private collaborative approach can best provide the strategic insights that helps turn research innovations into high-growth ventures."

Law firm IT profiles: Clyde & Co

In one of our largest law firm profiles to date, Clyde & Co's global CIO DiAnna Thimjon tells us how the firm's IT team is structured, what its strategy is, what the biggest challenges are and what changes are being made to the core tech stack.

The interview will be published in full on Monday, 5 August on the Legal IT Insider website so don't miss it. Here are some of the headline stats and a few highlights.

Clyde & Co IT Team size: "Several hundred"
Leadership: DiAnna Thimjon, Global CIO (took over role in 2018)
Investment in IT: In excess of 6% industry standard and highest in firm's history
Innovation: Moved back "under one umbrella" under DiAnna Thimjon

Remit
"The role comprises all of the core foundations of IT - applications, infrastructure, project management and delivery capabilities. But it also includes the legaltech teams, which range from something as practical as litigation and dispute services to the innovation board, data lab and the really forward-thinking elements.

"Both I and the board recognised that there was a gap between this legaltech function and the core IT teams. A lot of law firms find there is this tension between the two groups. They don't always collaborate or integrate well. Bringing them together under one umbrella enables us to make faster progress."

Top priorities
"We need anytime, anywhere access, which means a highly responsive and agile tech foundation. I also believe data should be a strategic asset and am focused on leveraging thoughtful data governance that can help us standardise and streamline that data so that we can use it to help our clients and to drive more cost-effective solutions.

"The third piece is really, I think, the reason that we in IT all exist. I want to connect more fully with what our lawyers need and to create a set of tools which enable lawyers to spend less time on the mundane, in order to spend more time adding value for clients."

Log on to the Legal IT Insider website on 5 August to find out what Clyde & Co is investing in and how it plans to grow the team, plus what changes Thimjon plans to make in terms of core systems.

Thimjon says: "I can tell you that the level of investment in technology over the next three years will exceed anything that the firm has done in the past and is higher than the typical industry benchmark of around six per cent. That reflects a recognition than technology is no longer just a back-office function but a globally available service that changes the way lawyers can provide value to clients."

Inflated job titles

If you have yet to work out what your inflated Silicon Valley job title is try this generator: https://siliconvalleyjobtitlegenerator.tumblr.com.

Orange Rag editor Caroline Hill is an In-house Tech Sultan. Or, after a second go, Tech-Svengali in Residence.

Thanks to Alex Smith at iManage for flagging the generator in a LinkedIn discussion over the worst job title you've seen lately.

We think EY's "pursuit strategist, EMEIA deal activation" is a fairly strong contender (no offence to the person in that role!).

Tom Bangay, director of content at Juro, suggested that start-ups wanting to be taken seriously could do better than "chief troublemaker".

And Christian Gordon-Pullar, managing director, head of EMEA at Aon Intellectual Property Solutions, identified "chief inspiration officer", commenting: "Apparently such a 'CIO' is a company representative whose role is essentially to encourage 'belief in the company' and 'internal evangelism of its values' - and it's not a role in a church."

That post is here if you want to contribute to this highbrow discussion: https://www.linkedin.com/feed/update/urn:li:activity:6561193792265822208

The False Promise of Lawyer Timekeeping Analytics Technologies?

By Dera J Nevin

What does the rising number of legal technology applications that are focusing on lawyer timekeeping analytics tell us? Will the emergence of this technology finally bring about a challenge to the billable hour and help to reduce the cost of legal services?

It's no secret that for many lawyers and law firms compensation and performance reviews continue to be structured around the billable hour. Despite the notional rise of flat and alternative fee arrangements most bills sent to clients consist of narratives, time units and hourly rate entries. The billable hour has been held responsible for inflated bills and incentives for lawyer inefficiency.

Legal project management and pricing professionals are emerging in law firms as a result of client attention to these criticisms.

An emerging category of legal technology focuses on supporting improvements to lawyer billing and the adoption of alternative pricing and project management. Increasingly this technology is getting more sophisticated and incorporates machine learning and natural language processing. The technology is variously marketed both to law firms and law departments, but generally approaches the problem of understanding lawyer billing in one of two ways.

The first problem associated with lawyer billing, usually targeted to law firms, consists of automating capture and improving narratives. Underlying this technology is the recognition that most time capture is manual and error-prone; the software integrates with mobile devices and calendars to automatically "read emails" and note activity like phone calls made or emails sent. In some cases, the technology will not only create time-capture activity stubs with hourly units, but may also pre-write narratives and assign them to client matter numbers. The objective here is to increase the amount of time being captured and improve the accuracy rate of total entry.

Capturing more and better-quality narratives at the point of time entry is an important initiative for law firms seeking to maximise revenue. But this technology alone is insufficient to accomplish that objective. The entry of time will not ensure it is billed, and billed time may not necessarily be collected. To understand whether this technology actually has an impact on the top line (and therefore RoI for its purchase), firms would need to analyse how much of this additionally captured time is collected. The two challenges to doing so are that most time is written off "from the top" of the invoice and also that, generally, law firm finance systems are unable to reconcile write-offs to individual line-items on bills. One also needs to question the long-term health of a revenue capture system that is subject to so much leakage.

The second problem associated with lawyer billing is that time entry results in large amounts of unstructured data that resists analysis in aggregate. The prevalent mechanism to add structure to the content, UTBMS codes, is manual and often results in subjective and conflicting data classification. An increasing number of applications, usually marketed to law departments, will ingest time entry data in the form of bills, apply sophisticated algorithms to analyse the narratives, ignore the manually entered UTBMS billing codes, and restructure the data to approximate the phases of the work to which the narrative entries correspond. Some will even analyse this against billing guidelines to flag unusual or impermissible entries! The promise of this technology is that consumers can better understand how legal costs are being generated and work with their firms to control these. This technology is increasingly being purchased by law firms to support legal project management efforts.

Structuring billing narratives and classifying the narratives into "buckets" of work permits analytics, and many of these tools can be used to generate visually compelling reports showing costs against budget, or how time is being spent across a portfolio of matters. Others permit comparison of how different law firms accomplish similar work. For this reason, these technologies have become important to many legal operations professionals because they help them get insight by reverse engineering how the work is being billed. The solutions rely on the belief that "what gets measured gets managed."

However, such solutions may obscure the more subtle but insidious challenges associated with managing service delivery costs by the sole lever of law firm billing. Billing narratives, even when structured, do not tell the full story about how lawyers and the law firm put together their work and where the real obstacles to efficiency might be. As such, they offer an incomplete picture and may be insufficient to achieve novel or more profitable pricing outcomes.

For example, billing narratives will not capture whether a high-quality precedent was used, saving time, or whether the lawyers were confounded by poor precedents or noise from a search that contained out of date materials due to a lack of investment in information

governance and knowledge management. Nor will it capture the presence of non-billing allied professionals who supported on the matter but who added direct (rather than indirect) overhead. In other words, a focus on classifying narratives does not enable law firms to unpack the true cost of delivering the services within any given matter, or in the aggregate. Indeed, many law firms are unable, within the finance systems or even within a practice, to understand the cost of supporting any individual client or matter.

Overall, the industry-wide inability to capture, understand and analyse revenues and the specific and tied costs of generating that revenue are the far greater obstacle to the acceleration of fixed and alterative pricing arrangements, not the billable hour. While these billing point-solutions have their place, they are unlikely to yield systemic changes. It's possible that it will take consolidation of these standalone applications into finance and time entry solutions, and enhancements to FP&A functions in law firms, before more significant understanding of underlying economics will result in changes to legal service delivery pricing.

Dera J Nevin is a lawyer and legal technologist based in New York City. Views are her own.

Moore Stephens Aus breaks into legal

Inspired by the Big Four accounting giants, Melbourne-headquartered mid-tier accounting firm Moore Stephens Victoria has rolled out a new legal services division with the hire of former Dentons partner Alexander Nielsen, a circa 10 years PQE lawyer with experience in corporate, tax, real estate and asset management matters.

"The big four financial services firms have proven there is a desire from clients for a more holistic model and, like all good ideas, this eventually trickles down," said Nielsen, who left Dentons' Melbourne office to lead the new division. "It's an exciting opportunity to be one of the first in the mid-market space to evolve into this area, and it's a chance to not only show Moore Stephens' leadership but also create real value for our clients.

"Our accounting and business advisors have many high-quality relationships and, as a lawyer, it's a rare privilege to become part of a client's core team rather than being consulted on one-off matters. This is a chance for clients to streamline the process while engaging multiple advisors to deepen our relationships with clients. It's a single team, with a single client's best interest in mind."

▶ ICYMI

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

eDiscovery mergers, acquisitions and investments in Q2 2019 *https://maas-bong.io/2ZJr6yQ*

"Findings, data points and tracking information that may be useful for understanding M&A+I activity patterns in the eDiscovery ecosystem from April 1, 2019, through June 23, 2019."

Four trends shaping eDiscovery today *https://maas-bong.io/2ZJ9GSL*

"eDiscovery, as an industry, is once again at an inflection point. For an industry that is only about 15 years old, it certainly has had a turbulent ride. While throughout the 1990s, more and more relevant information was being produced and maintained in electronic format, it wasn't until 2003 that the obligation for organisations to preserve (and produce) relevant ESI was announced [in the US] with a thunderclap in the form of the Zubulake rulings."

eDiscovery unfiltered in 2019: A survey of current trends and candid perspectives *https://maas-bong.io/2ZMY6WN*

"Ari Kaplan Advisors' annual eDiscovery Unfiltered Survey is an informative report that this year provides actionable intelligence and insight for defensible decisions by legal, business and information technology professionals on data and legal discovery analytics, pricing preferences, document review trends and international eDiscovery."

A warning to law firms and litigants: Unlawful disclosure of PHI in litigation can lead to trouble *https://maas-bong.io/2ZP9scG*

"Unless stated otherwise by statute, the context of litigation does not effect a person's legal duties when handling sensitive data."

Privileged and confidential: cross-border differences in the protection of confidential information *https://maas-bong.io/2KCU67G*

"The increased focus on data privacy poses a significant challenge to the bounds of cross-border transfers in US litigation and in other jurisdictions."

A party can't dump documents on their opponent the night before a hearing: Judge refuses permission to rely on evidence served very late *https://maas-bong.io/2Neg4Qt*

"The fresh evidence was not both filed and served at least three clear days before the summary judgment hearing. Indeed, the bulk of the new material was provided after-hours the night before the hearing and

was not exhibited to a statement. It is, in my judgment, important that applicants seeking summary judgment should not be permitted to ambush respondents." Rats!

Legal Professional Privilege global guide, 5th edition *https://maas-bong.io/2NlZwpL*

"This global guide is a dynamic resource containing up-to-date details of the varying concepts and scope of legal professional privilege across dozens of jurisdictions globally. New jurisdictions are regularly being added to the guide, so if you cannot find the jurisdiction you are seeking, please let us know." DLA are good at these guides.

Legal wants more certainty, flexibility from outsourced eDiscovery providers *https://maas-bong.io/2NnZVrZ*

"The 'eDiscovery Unfiltered: A Survey of Current Trends and Candid Perspectives' report found that both legal departments and law firms are open to subscription pricing for eDiscovery and value trust and responsiveness in their eDiscovery providers."

Eight myths about eDiscovery, and the truth behind them *https://maas-bong.io/2Nms3eP*

"Some lawyers have misconceptions about eDiscovery workflows and technology, leaving them susceptible to large unexpected costs, wasted resources and, potentially, embarrassment in court. Here are some common myths that are leaving lawyers vulnerable to costly mistakes."

CCPA … The most significant impact on US litigation since the FRCP *https://maas-bong.io/2NBLU9Y*

"I have a simple question for all the GCs, CPOs, and CISOs out there: Are you ready for the California Consumer Privacy Act? Because it's coming, whether you're ready or not, on January 1, 2020. (And 10 other states will soon follow suit with similar, but different, regulations.)"

XDD acquires QDiscovery to further expand services in Midwest and East Coast *https://maas-bong.io/2Nvl2Zx*

"Xact Data Discovery, a leading international provider of eDiscovery, data management and managed review services for law firms and corporations, announces the acquisition of QDiscovery, a mid-tier eDiscovery and digital forensic services provider based in New London, CT."

The most popular providers? A running eDiscovery aggregation from ALM reader ranking surveys *https://maas-bong.io/2NOqQNZ*

Updated: "Each survey has multiple categories of products and services presented for consideration, with a subset of survey questions from each survey that directly or indirectly pertain to the eDiscovery ecosystem."

Winning the game of vendor roulette: Uncovering the secret sauce for a great technology provider Part II *https://maas-bong.io/30oLnKc*

"For those that remained, we were laser focused on a few key factors: support of weird data, innovation around AI/TAR/managed review, transparency, collaboration with my team and willingness to adapt to our firm's way of conducting discovery."

OpenText launches dedicated legaltech division and unveils major tech expansion *https://maas-bong.io/2YMaHJO*

"The team will look after the development of eDOCS and OpenText's eDiscovery business."

eDiscovery for defendants in practice *https://maas-bong.io/2YPUSlf*

"We've repeatedly advocated that defendants try turn the eDiscovery tables on plaintiffs whenever possible - particularly in MDLs where discovery is flagrantly one-sided - by going after plaintiffs' social media information."

Thinking like a millennial: How millennials are changing discovery, Part Two *https://maas-bong.io/2YVwZZI*

"What does this mean in terms of technical usage trends? The millennial segment may not be 'digital natives' to the degree of the Gen Z population but they have grown up during the digital revolution. They're tech savvy and saw firsthand the explosion in the use of mobile phones, social media and Internet-based information at your fingertips."

Invitation to a new eDiscovery manifesto *https://maas-bong.io/2YTuIy9*

"eDiscovery requires the careful coordination of the substantive law firm, the client's IT resources and the necessary outside service providers that provide technology and staffing support. To make eDiscovery 'better' requires the close coordination of these participants, much the same as a construction project requires careful planning and excellent execution."

Alexa, can you be used against me in court? *https://maas-bong.io/2YSzlbJ*

"It's going to be challenging for any business that has to include such a device in their legal proceedings or regulatory compliance programmes. But that won't stop opposing parties from demanding its inclusion."

Market guide for eDiscovery solutions *https://maas-bong.io/30CQyGx (£)*

"Controlling risk and cost remain the primary business drivers for seeking comprehensive and more effective eDiscovery solutions. I&O leaders can use this guide to help choose a solution for their needs."

Emojis are increasingly coming up in US court cases *https://maas-bong.io/30HATGa*

"Attorneys are having to argue for different interpretations of the small illustrated characters that are used to express emotions, activities or objects. And courts are struggling to handle the nuances of emojis as evidence."

Discovery back on the menu as Irish Supreme Court delivers major judgment *https://maas-bong.io/30B4YXE*

"Hogan J. described discovery as having caused a 'crisis' by contributing significantly to costs and delays and held parties should use particulars, admissions and interrogatories so that discovery was the last, not the first, resort. Leave to appeal was granted by the Supreme Court essentially on the question of whether traditional discovery is appropriate in modern conditions."

On collaboration for lawyers. Why it's not what you think *https://maas-bong.io/30I46kc*

"As lawyers, we're taught the value of strategic thinking in every aspect of what we do; almost as if every new matter is a new game of chess against a new

opponent. We are taught that our opposing counsel is really our adversary and we argue motions and, as such, we up the gamesmanship and perhaps hide some of our pawns. The idea of cooperation between lawyers, therefore, tends to naturally get lost by the wayside."

An unusually warm summer? eDiscovery Business Confidence Survey results - summer 2019 *https://maas-bong.io/2JJckmf*

"The eDiscovery Business Confidence Survey is a non-scientific quarterly survey designed to provide insight into the business confidence level of individuals working in the eDiscovery ecosystem."

Litigation Support 2019 guide to providers e-Edition *https://maas-bong.io/2JZE8BV*

"Featuring in-depth coverage of 10 categories of support services in the US, UK, Asia-Pacific and Global-wide regions, it is an invaluable resource for lawyers, GCs and private clients tackling complex disputes."

Mobile device security: Corporate-owned personally-enabled practice guide *https://maas-bong.io/2JWiD4Y*

"The rapid pace at which mobile technologies evolve requires regular reevaluation of a mobility programme to ensure it is accomplishing its security, privacy and workplace functionality."

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.

▶ Pace of change top Gartner risk in Q219

Phew, it's not just you. In a survey published in July by Gartner, "pace of change" emerged as the top emerging risk in Q2 of 2019.

Organisations are concerned about their ability to keep up with a rapidly changing business landscape, driven in part by concerns about their own organisations' lagging and misconceived "digitalisation" strategies, according to Gartner's latest Emerging Risks Monitor Report.

Gartner surveyed 133 senior executives across industries and geographies and the results showed that pace of change had emerged as the top emerging risk in

their 2Q19 Emerging Risk Monitor survey. Last quarter's top emerging risk, accelerating privacy regulation, has now become an established risk after ranking on four previous emerging risks reports.

Closely linked to the concern around pace of change are two operational risks, including "lagging digitalisation" and "digitalisation misconceptions", which Gartner experts said may be partly driving the top concern around pace of change and related threats from business model disruption.

"Among the top five emerging risks in the quarter's survey, the linkages are clear", said Matt Shinkman, managing vice president and risk management practice leader in the Gartner audit and risk practice.

"Organisations are concerned with the pace of business change and vulnerability to disruption. Part of the reason they may feel this risk so acutely is related to concerns around their own operations, including digitalisation strategies and an inadequate talent pipeline".

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

UK & EMEA National full-service law firm **Blake Morgan** has successfully consolidated all of its practice management systems into **Peppermint CX**, creating a single view of the client and removing the need for multiple records in multiple systems. "This is the first time we have been on a single system within Blake Morgan," said managing partner **Mike Wilson**. "Moving everyone onto a single practice management system is the foundation that drives consolidation and enables our legal teams to work in a consistent manner across the firm." The move onto Peppermint has also provided the opportunity for Blake Morgan to review its working practices and create further efficiencies, for example through the removal of online transaction requisitions. "When we took a closer look at finance workflows we were able to drive significant efficiencies through automation of steps that were previously manual. We've really started to challenge ourselves around the touch-points and focus efforts on actions that are truly value-add," said finance director **Matthew Clarke**.

Legal outsourcing provider **Exigent** is leading the launch of an evergreen fund to help early-stage start-ups in legal and data technology, which it says is in the business of leveraging real skills and experience rather than just providing capital. **BrightMinds Capital Partners** ("BMCP") will focus on start-ups in the AI,

blockchain and big data management applications space and says it will provide not just capital but also leadership and sector expertise to start-ups specialising in legal technology and services, data extraction, corporate data management and optimisation. It has a subscriber base that can opt into investments that BMCP recommends to them. Exigent, which CEO and founder **David Holme** tells us has a surplus of cash from a successful few years, will cornerstone each investment. One of the first investments in the fund's portfolio is **LexChain**, an immigration compliance automation tool using the latest distributed blockchain ledger technology. The fund's founders include Holme, who says in an eight-minute video on YouTube: "There's a massive gap between having a great idea and having the technology available to you and making it into a business the people want to buy or work with. That involves some old fashioned skills like selling and marketing. The idea can be as brilliant as you like but the execution is where BrightMinds helps you. We take those ideas once they get beyond a certain stage and turn them into real cash with real profit instead of them just staying as clever ideas. When you consider the legal services tech space I fear too much money is being burned on the wrong things. The multiples of some of these investments are completely unsustainable. We're the guys that do it ourselves and are prepared to apply our skills to help management teams get past hurdles two, three and four, and I would say the hurdles keep coming. We're appealing to ambitious managers who want to leverage our skillset, as well as our money. There are very few funds out there with the level of maturity that we have and the level of experience in building these businesses that we have hands-on, day in day out."

Nexa Law has chosen online document bundling software from **Zylpha** for use with its **LEAP** case management software. Nexa Law is one of the first practices to sign with Zylpha following the company's recent announcement of a formal partnership with LEAP UK. Zylpha's pay-as-you-go electronic bundling software for LEAP contains everything needed to create document bundles. It can be accessed from a single-view dashboard-like screen, which makes it clear and easy to use because the system's unique single-view digital approach streamlines and simplifies the arrangement and pagination of documents. The system is also acclaimed for its advanced security. Commenting on the news, Nexa Law solicitor and HR director **Victoria Hibbert** said, "Nexa Law is one of the first law firms to utilise the Zylpha for LEAP online bundling tool. It is easy and straightforward to use and will make a significant difference for our consultants. At Nexa Law we are always looking for new ways to improve and help our consultants in the best way possible. Zylpha will help us make great inroads here and we have already had positive feedback internally. Overall then, we are really impressed with LEAP and Zylpha combined."

In what is by far its biggest acquisition to date, **Litera Microsystems** has acquired UK-headquartered document comparison rival and market leader **Workshare**, in a move that will enable firms that currently use both suppliers to consolidate their relationships and simplify the drafting process in line with other recent "best of breed" acquisitions. The acquisition is understood to be driven in large part by Litera's private equity owner **HG** (formerly HG Capital), continuing the work of former owner K1 Investment Management which, in 2016, began piecing together leading companies from across the drafting experience to provide users with a single desktop experience. Those acquisitions include Microsystems, XRef, Litera, The Sackett Group and now Workshare. While many of the details are still being finalised we can tell you that Workshare's chief technology officer **Barrie Hadfield** will be joining the new company to help evolve the merged comparison technology. Workshare's CEO **Michael Garrett**, who joined in October 2018, will be assisting Litera's CEO **Avaneesh Marwaha** and HG with the integration, although his long-term role is as yet unclear. Speaking to Legal IT Insider about the acquisition, Marwaha said: "This combination will give the end users a simplified way of working and adds huge value: the more we can bring together the best of the breeds, the more we feel our customers will benefit.

Global law firm **Hogan Lovells** has become the latest to announce a formal partnership agreement with "next generation" legal services outsourcing pro-vider **Cognia Law** to enhance its alternative delivery solution capabilities. The Cognia team serves as an extension of Hogan Lovells' legal delivery centre in Birmingham, providing further flexible resource capabilities. The new model of delivery has already been successfully rolled out on real estate due diligence for the firm's Munich office as well as on a number of litigious document reviews. Further joint services will be launched later in the year. The partnership, which follows Cognia's ad hoc consultancy and legal project management services over the past four years, is being led by the firm's global head of legal operations, **Stephen Allen**, and head of alternative delivery solutions, **Rachel Dabydoyal**. Dabydoyal said: "We are delighted to have joined forces with Cognia Law, not least because of our alignment in processes and quality but also because we are able to share best practices with each other to further enhance our alternative delivery offering - a true collaboration to drive efficiencies for our clients."

Clifford Chance has selected open source contract analytics platform **ContraxSuite** to underpin its new data science lab and help it build document analysis solutions for its clients. This is a tech/services play as the firm will also be supported by specialists in AI and data science at **Elevate**, which acquired ContraxSuite as part of its acquisition of LexPredict in November 2018. **Clifford Chance Labs** was formally launched in

July 2018 - designed to foster internal idea generation and interdisciplinary solution development. While ContraxSuite can be hosted on a firm's own servers or hosted by LexPredict/Elevate in the cloud, Clifford Chance was clear at the time of its launch that Labs is a cloud platform. "Our clients will benefit from the efficiency, power, and flexibility of a legal AI toolset that is already configured to solve many known problems," said **Paul Greenwood**, chief information officer at Clifford Chance. "ContraxSuite's flexibility, coupled with ready access to experts in legal AI and data science at Elevate, will enable us to build a wide range of AI-powered solutions, many of which haven't even been contemplated yet." "We designed ContraxSuite as a set of modules that can work with each other in many different ways," said **Daniel Katz**, VP of innovation and data science at Elevate. "For example, the system has a customisable UI, a module for natural language processing (LexNLP), a module for analysing the SEC's public database (OpenEDGAR) and several other tools, all of which can be used in different combinations. This architecture enables faster, more nimble solutions than many typical standalone products." According to Greenwood, Clifford Chance reviewed "other leading products" and chose this technology platform in part because of its advanced data security architecture. The pilot project for the firm's banking client is said to have demonstrated that ContraxSuite's data security meets the most stringent client data security requirements, including for one of the world's largest banks.

ContractPodAi has secured a $55 million Series B investment round led by US venture capital firm **Insight Venture Partners** with participation from the company's Series A backer, **Eagle Proprietary Investments**. The $55m investment represents Europe's largest legaltech Series B fundraise (and, apparently, the largest Series B round for any CLM provider globally). ContractPodAi, which as a small business is still exempt from filing its full accounts in Companies House, is an end-to-end contract lifecycle management solution for all three aspects of contract management: contract generation, contract repository, and third-party review. Its clients include Bosch Siemens, Total and EDF Energy, whose in-house teams are using its technology to help transform their contractual processes. ContractPodAi's growth comes as in-house clients such as Bosch look to transform their working practices. **Sarvarth Misra**, CEO, says: "What you typically see are larger businesses, even the biggest legal teams, in need of transformation. They are all having the same key issues around how do we become more efficient around the contract management process. We have everything together within one CLM ecosystem and we have built a toolkit that the in-house lawyer needs to drive in-house transformation. There are multiple use cases from assembly to repository to discovery to third party review. We're building our ecosystems with partners

such as IBM and Workshare to save them having to buy multiple apps for contract management."

Law society-endorsed legal software provider **Eclipse Legal Systems** has announced integration with conveyancing search supplier **Legal Bricks**. Legal Bricks is an online service that provides conveyancing searches, anti-money laundering ID checks and company reports. The firm has experience in partnering with conveyancing law firms throughout the UK. **Proclaim**, Eclipse's case management solution, will embed Legal Bricks functionality - which is itself fully integrated with the Land Registry - to provide faster and more efficient conveyancing searches. Unique to this innovative integration is the ability for users to be able to access the full suite of Legal Bricks conveyancing searches directly from within Proclaim, removing the requirement to be redirected through an external website. Users simply select the required number of single or bundled searches from the onscreen menu. Searches are automatically billed to the conveyancing firm reducing administration time even further.

Eclipse has also announced that new start-up law firm **Forever Legal** is implementing their **Proclaim** practice management system. Established in 2019, the Altrincham-based firm specialises in equity release, residential conveyancing and probate law. As a new legal practice, Forever Legal required a scaleable PMS that would facilitate growth and provide an in-built accounting toolset for efficient billing procedures. The firm is rolling Proclaim out firm-wide. The in-built visual dashboards within the KPIs reporting suite will provide the firm with key financial performance information at glance for individual fee earners, departments and the firm as a. **Steve Dicks**, managing director at Forever Legal commented: "Proclaim has an excellent reputation in the marketplace, I see it as the system of choice for new start-ups like us. Proclaim will provide an excellent platform for Forever Legal's continued growth and success. It will enhance the service we deliver to clients whilst boosting our internal efficiencies and allow us to meet our goals as a business. We're very excited to start working with Proclaim."

Following a period of intense multi-party bidding that one person with knowledge of the situation described as "aggressive", **HighQ** has been acquired by **Thomson Reuters** in what looks likely to become our deal of the year for 2019. Questions have long hung over Thomson Reuters as to on what it will spend the money it has made from divesting its 55% stake in its finance and risk business for around $17bn. HighQ provides secure project and client collaboration and over the past few years has heavily focussed on the automation and workflow space, leveraging iSheets, a data collaboration module in HighQ Collaborate. Addleshaw Goddard is one law firm leading the charge on this and in 2018 Dentons, the world's largest law firm, announced that it was adopting

HighQ's intelligent work platform. The platform can be used for extranets and client portals, transaction management, legal project management and litigation management. HighQ is also notably among the vendors positioning itself to become the leading AI platform or hub, and already has an integration with Kira Systems. Within Thomson Reuters itself, HighQ already integrates well with Contract Express: if you use HighQ for client collaboration, you can import iSheet data into Contract Express Version 8 to generate documents and export documents back to HighQ as part of your drafting workflow. The acquisition comes as Thomson Reuters groups heavily around legal tech products not services, having this year divested its legal managed services business (that is still best known as Pangea3) to EY.

DocsCorp, a provider of enterprise productivity solutions, has announced that **Kvale**, a Norwegian commercial law firm recognised by the Legal 500 and Europe Chambers and Partners 2018 awards, has bought the DocsCorp Productivity Suite: **pdfDocs** for PDF file editing and bundling, **cleanDocs** for sending secure email and **compareDocs** for document comparison. **Christopher Vogt**, head of IT at Kvale, explained the decision to purchase: "We really needed a solution like cleanDocs for both general email security and GDPR compliance. Then we learned that DocsCorp had several other solutions that would benefit the firm, giving us a way to consolidate the number of vendors we do business with." **Samantha Jefferies**, VP EMEA at DocsCorp said: "We are pleased that Kvale saw value in the DocsCorp suite of desktop solutions. These solutions help firms be more productive while consolidating the number of vendors they work with. All three solutions have the same look and feel and require minimal training, which increases user adoption. Having a set of tools that increases productivity, reduces the risk of data leaks and integrates seamlessly with existing systems is something every firm could benefit from."

Other **DocsCorp** news in brief: International Law firm **Withers LLP** and Northern Ireland firm **Carson McDowell LLP** have both selected **pdfDocs** for their PDF creation and editing needs. Spanish firm **Roca Junyent** has chosen **cleanDocs** as its metadata cleaning and email recipient-checking solution.

Neota Logic and content management solution provider **Repstor** have announced integration between their two products that will automate the client onboarding and matter creation process in a solution delivered by partner **Transform Data International** (TDI). When registering a new client within the practice management system, an email will be sent to the responsible lawyer to conduct a risk assessment using Neota's decision tree technology, which will take the lawyer through a process to decide if the client is low, medium or high risk (depending on the parameters set by the firm). Low risk means that Neota will automatically refer the matter back

to the PMS, at which point Neota will, through an integration with Repstor, trigger the creation of a new client matter in Repstor's legal matter management solution, **Custodian for Legal**. More complex matters will initiate a process for additional approval.

Dovaston Law, a family law practice based in Southend, has chosen **Zylpha**'s document bundling to work with its LEAP case management software. The deal represents the first fruits of a recent partnership between Zylpha and LEAP based on Zylpha's all-new software integration. The software, which contains everything needed to create document bundles, is accessed from a single-view dashboard-like screen, making it clear, concise and easy to use. Zylpha's unique single-view digital approach streamlines and simplifies even the largest, most complex bundles. It is also acclaimed for its security. Commenting on the news, owner and principle solicitor **Karen Dovaston** said: "Zylpha's document bundling is a really valuable toolset and given the smoothness of integration with our LEAP case management system it works really well. It's now so simple to create even the most complex bundles, taking only a fraction of the time it took previously."

Following a wave of hires and fairly rapid growth at **Wavelength**, the legal engineering firm has been acquired by **Simmons & Simmons**, in what is one of the latest, albeit one of the more dramatic, developments as law firms focus on building or buying their own alternative delivery capability. As part of Simmons & Simmons, Wavelength says it will introduce new services and solutions for clients around the globe, by utilising its diverse blend of legal, data, design and engineering skills drawn from in and outside the legal profession. The acquisition of Wavelength by Simmons will act as a significant springboard for a firm that is perceived to be behind in terms of its alternative delivery capability - no reflection on highly rated innovation and business change director Ben McGuire. **Jeremy Hoyland**, managing partner at Simmons & Simmons, said: 'This is an exciting opportunity for the firm and one that will give our clients a clear advantage. It demonstrates that we are serious about delivering smarter solutions for our clients and that we are driving change for the better in the legal market. I look forward to working with the Wavelength team and to introducing them to our clients".

Hempsons, an award-winning health and social care law firm, has chosen **Aderant Expert** as its practice management platform. The firm needed increased support for the 120 lawyers across its national offices: Aderant was selected to boost profitability, streamline workflows and manage transactions. "Given our existing practice management system is due to reach its end of life in January 2020, we needed to move to a new solution that would be easy for the fee earners to engage with and would enable us to manage our financial operation in a more efficient manner", said

Anna Lawton, director of IT. "We explored a number of options, but Aderant was a clear choice for us", Lawton added. "Hempsons' investment with Aderant Expert will advance our innovation and deliver a modern solution", said Aderant executive vice president, **Chris Cartrett**.

Global disputes law firm **HFW** has announced a development partnership with litigation analytics start-up **Solomonic**. Under the partnership HFW lawyers will be able to access the Solomonic system, which uses detailed court data to enhance predictions, optimise case research and improve outcomes. In return, HFW says that Solomonic will be able to call on HFW's deep commercial litigation expertise to help develop its platform and data analysis, and to expand its system into new modules and jurisdictions. **Noel Campbell**, head of HFW fraud & insolvency group, said: "Combining Solomonic's data with our experience and expertise as litigators will allow us to be more efficient and effective as lawyers, and ultimately enable our clients to make more informed, commercial decisions about resolving their disputes." **Gideon Cohen**, barrister and co-founder of Solomonic, said: "HFW is the ideal firm to help us develop Solomonic. It is not just HFW's enviable litigation volume and record of success; the firm's significant global reach, with leading practices in key dispute jurisdictions around the world, will also be invaluable in helping us expand our offering internationally".

NetDocuments, the secure cloud-based content services platform for law firms, corporate legal teams and compliance departments, has announced that **Forsters LLP**, a London law firm and the largest in London's Mayfair, has selected NetDocuments as its secure cloud-based content services platform. Forsters will implement the NetDocuments' cloud DMS platform, **ndMail** for predictive email filing, **NetDocuments OCR** and **ndSync** for file synchronisation. The firm evaluated a variety of competitive technologies.

UK top 100 law firm **Royds Withy King** has selected **Phoenix Business Solutions** (now part of **Morae Global**) to implement **iManage Work 10**. According to our UK top 200, Royds was previously on Worldox. As part of a technology refresh, and after an extensive evaluation of the market, Royds is said to have selected iManage Work 10 due to the single, intuitive interface which gives professionals access to their critical files regardless of location. Phoenix Business Solutions was chosen as the digital transformation partner due to their legal sector knowledge, consultative approach and proven methodology to complete projects from design through to go-live, and ongoing support. **Dave Eagle**, head of client solutions and innovation at Royds, said: "With the business growth we are experiencing we needed a forward-thinking partner to help us through this journey, which we found in Phoenix Business Solutions. Today's professionals in the legal sector are more demanding so, from both a lateral hiring and client perspective, it is becoming an

expectation for law firms to have iManage in place. With Phoenix by our side, we are excited to begin delivering the first-class service, client value and client interaction expected in today's legal market."

In a huge development for **Prosperoware**'s cloud legal content management system **CAM**, **Kira Systems**, **HighQ**, **Microsoft Teams** and **SharePoint Online** are all now supported for matter provisioning and tracking. CAM orchestrates, manages and governs legal content systems. The impact for clients is to reduce the cost of using multiple cloud services, enabling consistent information governance across the full matter lifecycle management, from provisioning through to disposition. With the addition of Kira, HighQ, SharePoint Online and Microsoft Teams support, CAM now goes beyond document management systems to support a variety of legal and non-legal content systems. **Steve Obenski**, chief product officer at Kira, said: "Our partnership with Prosperoware CAM enables our customers to more easily manage matter details across Kira and other supported platforms." "As firms continue their journey to an enterprise-wide digital transformation, they are embracing more and more cloud applications," said **Keith Lipman**, CEO and co-founder of Prosperoware. "CAM provides a unified approach to track where matter content is stored and a unified audit around administrative actions and reporting, enabling firms to satisfy their clients' security and privacy requirements. Firms ultimately benefit from reduced IT costs and improved service through CAM's orchestration capabilities."

adhemar.law - a boutique Belgian law firm that provides services to public authorities and companies - has recently chosen to implement **Clause Companion** from **Litera Microsystems**. adhemar.law will roll out the solution to its lawyers, complementing their drafting workflow and enabling them to access their preferred content faster, saving time. **Jan Roggen**, a partner at the firm, said: "At adhemar.law we create value through change. We leverage technology to increase the quality of our services while decreasing the costs. We are excited to partner with Litera Microsystems to provide further value to our clients." **Abhijat Saraswat**, Litera Microsystems' director of international business, said: "We're delighted that adhemar.law is leveraging Clause Companion to quickly reproduce their best drafting. Their investment in our solution enhances the firm's comprehensive range of client services. We're excited to work with their lawyers as they provide an exceptional quality of service, essential for their client-oriented approach".

CPA Global has announced a new partnership with **Brügmann Software**, Germany's leading IP management software specialist, which will optimise and connect law firms and in-house IP teams to the world's most trusted patent renewals management service through a joint technical interface and secure data transfer. Through its flagship product, **PatOrg**, Brügmann works with more than 350 law

firms, corporates and research institutions across the DACH region to intelligently manage IP rights across the innovation lifecycle. The partnership will see a complete integration between the coming version of PatOrg and CPA Global's global patent renewals service, delivering clients a seamless digital interface and a single point of access. This both mitigates the risk associated with manually transplanting and inputting data across multiple channels and enables a dramatic reduction in time expended on the patent management and renewals process. **Peter Thelen**, head of EMEA partnerships at CPA Global, commented: "The DACH region is one of the most dynamic IP markets in the world, particularly in the Mittelstand where high-growth, innovative businesses are generating an estimated 80% of IP assets in the region. There is an imperative for these businesses, and the law firms who support them, to have a strategic approach to IP with a focus on agility, efficiency and risk management. This partnership between CPA Global and Brügmann is a game-changer in terms of smart data transfer and patent automation, and will help legal teams digitise their IP functions, remove risk, minimise admin and deliver real strategic value to clients. Extensive data verification by CPA Global, ensures that customers always have up-to-date and reliable data." **Sören Brügmann**, CEO, Brügmann, added: "We have been collaborating with CPA Global for many years and are pleased to be bringing to market this innovative joint interface which offers full integration between our IP management software and CPA Global's technology infrastructure and services for patent renewals. Together, CPA Global and Brügmann, through PatOrg, already service separately a great number of firms in the German-speaking marketplace and this partnership will fundamentally connect the dots for our clients - enhancing speed, security and convenience."

Sysero has announced a partnership with **Eficio**, a legal IT solutions consultancy, to provide technical support, integration services, consulting and training to legal clients across Europe and North America. Eficio, which is based in Paris, offers expert-level legal IT consulting services, technical expertise and industry software solutions to law firms and legal departments in France, Belgium, Canada, Luxembourg, Russia and Switzerland. The firm specialises in optimising workflows and integrating solutions to drive efficiency and fluidity across legal work processes. Under the strategic partnership Eficio will become a reseller for all Sysero document automation, database and workflow solutions. Eficio also will provide strategic consulting, implementation and integration services for Sysero solutions. "Eficio's values align very closely with ours," said **Phil Ayton**, director of Sysero. "We're both very much focussed on helping legal clients find improved ways of working through innovative technology solutions." Sysero will join Eficio's suite of efficiency-driving legal solutions, which currently include iManage, Workshare, HighQ and Mimecast.

"Automated workflow technology is becoming increasingly crucial to the modern law firm," said **Emmanuel Potvin**, general manager at Eficio. "Sysero's powerful features, combined with its ease of use and accessibility from Microsoft Word, offer a truly unique solution to effectively managing document-based processes. We're delighted to now be able to offer this technology to help law firms drive greater efficiency, quality and service across their firms."

Finally, **Tikit** has announced the sale of 80 **P4W** and **Carpe Diem** licences to specialist real estate law firm **Davitt Jones Bould**.

North America **OpenText** has launched a dedicated legal technology function led by **Serge Savchenko** who rejoins (he left as vice president sales in early 2017) from Survalent Technology, where he was the chief revenue officer. The legal tech division becomes the only dedicated industry vertical in the Nasdaq-listed, 12,200-employee company, which has just announced its largest technology update to date, including significant advances in the security of its document management system, **eDOCS**. Savchenko will head a team that includes Simon Price, VP of sales, who was formerly managing director of Recommind. The team will look after the development of eDOCS and OpenText's eDiscovery business (including EnCase, Axcelerate and OpenText Insight Predict, which stems from its acquisition of Catalyst).

Calgary-based 50 lawyer firm, **McLeod Law** has selected NetDocuments to be its document and email management platform. To address stringent document location requirements, the firm will use the NetDocuments **ndFlexStore** to physically store documents and emails in the cloud, in Microsoft Azure data centres, in local on-premises stores or in any combination while simultaneously leveraging NetDocuments' global cloud platform. The firm is said to have completed a thorough evaluation of several document management systems and preferred NetDocuments for its user-friendly UI. "Beyond being a DMS, NetDocuments will make our lawyers more mobile, allowing them to access a clients' entire file history at their fingertips," says managing partner **Robin Lokhorst**. "This will give us a strategic advantage when it comes to court and being out-of-office. It will also help reduce time spent searching for precedents or clauses and will make us much more effective and efficient."

Xact Data Discovery (XDD), an international provider of eDiscovery, data management and managed review services for law firms and corporations, has acquired **QDiscovery**. **Bob Polus**, XDD founder and CEO stated: "As we continue to explore, expand and scale business operations within key markets nationwide, merging forces with QDiscovery further strengthens our presence in the Midwest and on the east coast. Congruent with XDD's culture, the QDiscovery team thrives on providing exemplary client service, making

it a natural fit for our company as we continue to scale our eDiscovery, forensics and managed review services. We look forward to enhancing our company together." **David Barrett**, QDiscovery CEO, added: "Joining forces with XDD further empowers our joint vision to provide exemplary service to clients. Similar to QDiscovery's culture, XDD's people, strategy and grit are laser-focused on doing whatever it takes to exceed customer expectations. Joining the XDD family is a natural fit for our company as we strive to expand market share together nationwide. We look forward to integrating our people and clients into the XDD ecosystem."

Litera Microsystems has announced that **Neal Gerber Eisenberg**, a law firm headquartered in Chicago, has recently selected Litera Desktop firm-wide. Litera Desktop is a single toolbar that includes everything a lawyer needs to draft high quality documents. **Clint Kehoe**, NGE director of IT, said: "We evaluated multiple options for all of our Word plugins for drafting workflow. After looking at the field we decided to choose Litera Desktop to ensure that we improve the firm's efficiency for now and the future." **Avaneesh Marwaha**, Litera Microsystems CEO said: "We're proud to announce that Neal Gerber Eisenberg has chosen Litera Desktop to simplify their lawyers' document drafting workflow. Their reputation for high-touch and high-quality legal service is supported by Litera Desktop, which will help their lawyers spend more time attending to their clients and maximising the quality of their legal work."

IP technology software provider **CPA Global** has announced a new strategic partnership with **Aurora North**, a provider of IP prosecution software, services and consulting for law firms. The new collaboration brings together CPA Global and Aurora North's offerings to enable law firms to combine technology and practice management to better serve their clients. Aurora North consultants specialise in IP practice management assessment and advisory services which help align business processes, policies and technology infrastructure with staffing and resourcing models designed to boost productivity, mitigate risk and enhance client service. In addition, Aurora North software solutions enable law firms to centralise, integrate and automate patent and trademark prosecution. As a result of this new partnership, law firms have seamless access to a combined set of offerings representing a broader range of products and IP expertise to help them successfully manage their clients. More specifically, the combination of CPA Global's IPMS products and IP Support Services alongside Aurora North's consulting services will accelerate process alignment and adoption within law firms. Further, Aurora North's **PracticeLink** software integrates seamlessly with CPA Global's software products providing law firms with increased visibility over their activity through centralised dashboards. "This partnership with Aurora North promises to bring added value to our customers

through their complementary capabilities, offering a unique mix of purpose-built software and consulting expertise," said **Alex Cregan**, president, North America at CPA Global.

Wilson Allen, a software, strategic consulting and technical services provider for professional services firms, and **ClearlyRated**, a provider of client satisfaction surveys and service quality research for professional service providers, have announced a strategic partnership. With a shared goal of helping law firms leverage data for actionable process improvement and revenue growth, Wilson Allen and ClearlyRated have formalised a partnership that will incorporate real-time client feedback into business analytics and data-driven decision making across their shared clientele. "The client experience is important to all professional services businesses, but it is also a prime opportunity for law firms to differentiate from the competition," said ClearlyRated's CEO and founder, **Eric Gregg**. "Our partnership with Wilson Allen will ensure that the law firms we serve have access to measurable insight on the client experience in a way that supplements business intelligence and informs strategies for growth." The two companies announced the partnership after a successful launch of their API integration which pairs ClearlyRated's client survey program with a series of business intelligence tools utilised by law firms, drawing client experience data directly into the analytics that inform business planning. "After experiencing the ClearlyRated client survey program first-hand, it became clear that real-time insight into client experience would be a pivotal improvement for the firms that we work with," added **Norm Mullock**, vice president of strategy at Wilson Allen. "We're thrilled to offer an integration that helps clients bring this key element of the full client life cycle to their business intelligence efforts."

APAC Sydney-based law firm **Gilbert + Tobin** has selected **Workshare for Transact** as part of their transformational drive towards adopting best practice legaltech solutions for customer success. "Transact enhances our legal project management offering and has given us the capability to offer a more collaborative and transparent approach to working on transactions with clients and opposing counsel. Transact has helped to streamline our conditions precedent process and facilitate quick and seamless transaction closings for all stakeholders. For example, the online transaction checklist allows parties to review the most up-to-date progress of deal closing items at any time, meaning deal closing calls can be more focussed and productive. Inbuilt document comparison and transaction bible creation functionality are also great timesavers for us", said **Daniel Yim**, a senior lawyer at the firm. "Workshare is a great fit for us as they are a proven long-term legal technology provider with over 20 years' service to the industry. It is also very important for us to receive great local support; we were very impressed with how responsive Workshare personnel have been throughout

the years and during this pilot process. Another key reason for us to proceed with Workshare is that we could clearly see the significant investment they have made to improve Transact, with the updated interface recently released and future pipeline of development emerging", added **Caryn Sandler**, partner and chief knowledge and innovation officer.

▶ Movers & Shakers

UK & EMEA   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. As for Peppermint, 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."

Richard Punt, the former head of Allen & Overy's contract lawyer business Peerpoint, has joined **Thomson Reuters** as chief strategy officer. Punt joined Peerpoint as its first standalone chief executive in 2014, a year after the business was launched. Under his stewardship, Peerpoint expanded internationally, opening in Amsterdam in 2017. Further expansion into Germany and the US is now mooted. He also saw Peerpoint expand the roster of non-Allen & Overy lawyers on its books, including former Marks & Spencer general counsel Robert Ivens.

Wavelength.law, the legal engineering firm that was acquired by Simmons & Simmons earlier this month (see above), 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."

Andy Sparkes has taken over from Simon Collin as director of legal markets for UK and Ireland. 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 the UK and Ireland.

ObjectiveManager's chief operating officer **Guy Adams** has joined **Intapp** as practice group lead, professional service firm leaders and partners, engaging with the UK and EMEA legal market's most senior leaders on how Intapp can help them further their strategic objectives via its platform approach. Having expanded its offering to cover everything from client onboarding, workflow, ethical walls, time recording, client development, CRM and now pricing, Intapp is already engaging law firm managing partners

and CEOs on the benefits of having their data in one place, with one vendor. Adams' role is similar to that of Darryl Cross in Washington, with whom he will be working, as well as VP of the leaders and partners practice, Patrick Archbold, who is based in Minnesota. Cross, a former high-performance coach, joined Intapp in February of this year to help evangelise for Intapp and pull together a community of managing partners, practice leaders, and senior partners. **Adams** told Legal IT Insider: "Darryl, Patrick and me will be working closely together and, in fact, my role is the mirror image of Darryl's for everything outside of the US. The idea is that we work together as a cohesive practice and it's a reflection of how important the UK market is to Intapp: while it's a Silicon Valley-based company, the UK is a big market for us. You've seen all the things that Intapp is acquiring and they have bought a lot of good software but we are moving to a space where leaders of law firms will want to talk about our holistic platform and how they can bring their data together. My role is to have those conversations and understand the challenges and the strategies and how we can help."

Deloitte has appointed BCLP's director of legal ops **Bruce Braude** as CTO. Based in the London office, Braude will report directly into UK managing partner, Michael Castle. His role will be to oversee all aspects of legal technology for the Deloitte Legal business. This includes: the use of technology internally to enable the firm's lawyers to operate as efficiently and effectively as possible; the use of technology to develop new legal solutions for clients; delivering legal services via new "tech-enabled" offerings; and the way in which Deloitte Legal advises its clients on the use of legal technology to optimise their own operations. Braude will also be involved in the continued roll-out of proprietary technology such as dTrax, an AI-enabled contract management tool, and myInsight, a secure client portal that enables clients to track and monitor their legal compliance services. Braude joins Deloitte after eight years at BCLP where, prior to his legal ops role, he spent four years as head of strategic client technology. Previously he held senior operational and technology roles at Investec.

In further hefty hires for Deloitte Legal, the legal arm of the Big Four giant has today announced the appointment of two new partners: **Andrew Lilley**, former managing partner of Travers Smith, and **Liz Pierson**, formerly a partner at Squire Patton Boggs, who will respectively join as UK head of employment and head of Deloitte's reward practice. Lilley began his legal career at Freshfields Bruckhaus Deringer LLP in 1985 before moving to Travers Smith LLP in 1995. He became head of the firm's employment law practice and was appointed the firm's managing partner in 2010. He will be focused on providing businesses with advice on informed decisions about their workforce and all aspects of employment law and employee relations, as well as supporting

Deloitte's wider business services. Pierson will lead a team of approximately 20 lawyers offering legal advice around executive remuneration, equity and incentives for both private and public clients. She joins from Squire Patton Boggs, where she has been partner since September 2017. Prior to this Pierson worked as a senior counsel at Clifford Chance for four years. She has also worked as an in-house reward and governance lawyer for Virgin Media and held various roles at Freshfields Bruckhaus Deringer after qualifying at Bowman Gilfillan in South Africa. Commenting on the two appointments, **Michael Castle**, UK managing partner for Deloitte Legal, said: "Andrew and Liz both have fantastic track records in their respective fields. As we continue to build Deloitte Legal's presence in the UK, we are determined to hire the very best talent in order to provide our clients with best-in-class service."

Norton Rose Fulbright is launching a legal operations consulting practice that will be led by **Stéphanie Hamon**, who joins the firm from Barclays. The practice will provide management and operational advice to in-house legal teams at major financial institutions and corporates. The legal operations consulting practice will officially be launched in August and will form part of NRF Transform, the firm's global change and innovation programme. Hamon was previously managing director and head of external engagement, legal, at Barclays, where she was responsible for launching an internal survey tool to assess the bank's external lawyers' performance. She believes that in-house legal teams' ability to help drive commercial value - and articulate the legal department's own value to business stakeholders - is becoming increasingly important, driven by advances in legal technology; the new disciplines and organisational approaches being brought by legal operations teams and by an increased focus on extracting maximum return for legal spend. The new legal operations consulting practice will support clients as they grapple with these changes, helping to provide a practical vision for in-house legal teams' involvement in wider business objectives; advising on legal operations functions; and assisting in the delivery of specific projects. "For me, the most exciting part of Stéphanie's new practice is that it will get us closer to clients," said **Martin McCann**, Norton Rose Fulbright's global head of business and global sponsor of NRF Transform. "The better we understand our clients' complete needs, the better we are able to service each aspect of the work we do for them. This will give us maximum insight into clients' most pressing concerns, and the opportunities to really add value across all of the work we do."

Phoenix Business Solutions, which in April was acquired by **Morae Global** Corporation, has appointed Mitratech's EMEA managing director **Jason Heyman** as global sales director. Heyman will initially be responsible for sales activity and reporting across EMEA and APAC, with further plans to increase this reach to the US in the coming months. Heyman in effect takes on the role that Phoenix's co-founder Mat Crocker filled before becoming CEO of Phoenix in 2018. While Lee Tomlinson has the title of Phoenix EMEA sales director, he focuses exclusively on winning new business. Heyman brings a wealth of knowledge from both corporate legal and outside counsel. His experience in the legal sector began at Winscribe (formerly SRC) in 2000, where he championed the introduction of technology to increase productivity in the legal sector. Following this, Heyman was appointed as managing director, EMEA, of Mitratech, a provider of enterprise legal management solutions. He since spent four years accelerating the company's presence in EMEA - growing from a team of one to around 90 - by developing new opportunities and partnerships in the region. Heyman says: "My experience within both corporate legal and outside counsel means that I am in a good position to accelerate the growth of Phoenix in the coming months, especially as we begin aligning ourselves and our offering with Morae Global. I am also keen to introduce further collaboration and transparency, not just within the sales team, but across the whole business; I believe this will create the foundation for success as we become more strategic." Heyman, alongside Phoenix's EMEA commercial director, Bart Vervoort, will also be leading the development of the organisation's latest division to open in Maastricht, Netherlands, expanding Phoenix's global footprint to seven cities. **Mat Crocker**, now president of the Phoenix Division of Morae Global, said: "We are thrilled to have Jason on board, and we're really looking forward to the direction that his knowledge and experience will take us.

North America   Hanzo, the company known for its technology that proactively identifies the legal and compliance risk within unstructured enterprise data, today announced that its Board of Directors has appointed **Keith Laska** as chief executive officer, effective immediately. He succeeds Kevin Gibson, who remains as Executive Chairman. "During this time of industry transformation, there is no better person to lead the next stage of Hanzo's growth than Keith Laska," said **Kevin Gibson**, executive chairman of Hanzo. "Keith is a proven CEO with outstanding leadership skills, global business competency, and the natural ability to bring people together. His vision for how technology can empower corporate legal and compliance teams as they leverage data for proactive decision-making and risk mitigation is what Hanzo needs as the company enters its next phase of product innovation and growth." Previously CEO of the SDL Language Technologies Division of SDL plc and CEO and co-founder of EUXmedia, Laska has been an active member of the Hanzo board since 2016. During this time, Hanzo has spearheaded major strategy and technology shifts across the company's portfolio of

products and services, most notably the company's move towards a unified cloud platform of end-to-end data intelligence and risk management for unstructured data. Hanzo has innovated its work with dynamic web data and solutions to customer challenges associated with the identification and defensible capture of this information. "Up to one-third of a company's operating profit is spent on litigation. As the amount of unstructured data in the enterprise has exploded, so have the legal and compliance risks," said Laska. "Our mission at Hanzo is to eliminate billions of dollars in unnecessary litigation. Being able to identify, analyse, and act on enterprise information proactively is a key part of realising that mission for our customers and the wider market".

Relativity has announced the move of **Mike Gamson** from advisory board member, which position has held for two years, to CEO whilst founder and ex-CEO **Andrew Sieja** takes on the role of executive chairman. Gamson previously spent 12 years at LinkedIn, latterly as SVP global solutions. Sieja explained to Legal IT Insider: "In my new role I will remain closely involved in the company, advising Mike and the leadership team, engaging with our customers and partners, and - what I am most excited about - having the opportunity to once again get deep with the product and technology and help accelerate the evolution of Relativity."

Seal Software, the contract analytics company, has announced key changes in its executive leadership, including the selection of a new chief executive officer, a new president and the introduction of a significant board-level position focused on accelerating strategic growth initiatives. These appointments are made as Seal experiences record revenues for the first two quarters of 2019. **Ulf Zetterberg** has been elevated to executive vice-chairman by the board of directors, on which he continues to serve as a member. He is succeeded by **John O'Melia**, who has been promoted to lead the company as its CEO, while **Jim Wagner** has been made president. The appointment of a new CEO and president will allow Zetterberg, who has served as CEO since he co-founded Seal Software in 2010 with chief technology officer, **Kevin Gidney**, to focus on key customer relationships and to support strategic board and company initiatives. Zetterberg commented: "John has demonstrated unyielding integrity and a ceaseless dedication to our customers, partners, employees and stakeholders. There is no doubt that he will bring the same tireless energy and bold ideas to his new role as we continue to change the game for businesses and legal users looking to better understand and more effectively manage their contracts." Wagner has served as chief strategy officer for Seal since joining the company in July of 2018 as part of the company's acquisition of Apogee Legal, an organisation that Wagner co-founded. In addition to continuing his role leading the overall strategy for the company, Wagner will take on responsibility for the

company's strategic alliances and marketing.

Women in eDiscovery, a non-profit organisation that brings together women interested in technology related to the legal profession, has appointed two new American regional directors. Sheppard Mullin's **Lauren Doucette** has been named director of the southwest region. **Cheryl Moretti** from Gibson, Dunn & Crutcher will be responsible for management of the northeast region. "I am dedicated to Women in eDiscovery and its mission to empower women to develop careers in legal technology and seek out leadership roles," said Doucette. "I look forward to continuing to support the collaborative efforts across Women in eDiscovery chapters through this new role." "I am thrilled to continue to be part of WiE as its newly appointed northeast regional director," stated Moretti. "In a world where developments in technology are rapidly changing the way we communicate, work and think, I strongly believe that WiE continues to empower women in the legal industry by consistently providing opportunities for their growth and mentoring with an interesting and inspiring range of networking, educational and charitable events, now even more so by the leveraging of an ever-growing worldwide group of women with eDiscovery leadership experience and support."

Alex Su leaves eDiscovery automation company Logikcull for AI provider **Evisort**, where he will be director of business development. Earlier in his career, Su managed numerous discovery workflows as an associate at Sullivan & Cromwell. After joining Logikcull as one of its earliest sales hires, Su witnessed how cloud-based automation streamlined processes and changed how cases were being litigated. "Artificial intelligence is among the fastest-growing areas in the space," said Su. "Evisort has designed its AI-powered contract management technology thoughtfully, and in a way that delivers immediate and significant value to law firms and corporate legal departments." As the director of business development, a newly-created position, Su will serve as an evangelist for Evisort, and lead industry conversations about how AI can empower legal teams. **Jerry Ting**, founder and CEO of Evisort, said: "We are thrilled to have Alex Su join the Evisort team at the helm of our business development efforts. Alex's combined experience as a lawyer and a sales leader at Logikcull provides tremendous value for our clients."

FTI Consulting has announced the appointment of eDiscovery, information governance and legal operations expert **Rena Verma** as a senior managing director in their Information Governance, Privacy & Security practice ("IGP&S") within the technology segment. Before joining FTI, Verma served in leadership positions with the Huron Consulting Group and Consilio.

Rich Rifkin has joined **Reynen Court** to launch its sales team as the company we first dubbed "the App Store for legal" moves into the next stage of its

development. Rifkin has worked in the legal sector for over 20 years and was previously at Thomson Reuters selling Business Development Premier, which was sunsetted at the start of this year. He has also worked at Hummingbird and Wang. He starts in the role of director of global sales, having been introduced to Reynen Court by White & Case's chief information officer Tony Cordeiro. White & Case is a member of the heavyweight consortium that Reynen Court has been building up to develop momentum behind the platform, which will offer law firms access to a services automation platform that will allow firms to deploy computing applications without exposing them to third-party cloud environments. Access to that consortium is now closed. Rifkin told Legal IT Insider: "My appeal to Reynen Court is my network. I've been working in the sector for 20 plus years and know so many people in the space, and my responsibility is primarily evangelising to the law firms. We have a team of folks focusing on vendors and people building the platform but, until now, there has not been much need to close business with the law firms. The timing is good and we're going to start having those conversations. My responsibility is primarily the law firm IT and corporate legal teams. We will be fostering and managing those relationships."

Bill Burch this week once again entered the legal technology fray as co-founder and chief revenue officer of electronic court filing start-up **ECFX**. Burch, who will be based in Washington D.C., rejoins former Thomson Reuters colleague and ECFX co-founder **Dan O'Day**, who was previously VP of sales and client services at court docketing provider American LegalNet. Founded in January, ECFX will provide law firms with an electronic interface to the courts' systems. It has already signed one major global law firm and one US firm, despite the fact that it's not fully built yet and the company will be running in earnest only from October. O'Day, who will be based in Venice Beach, Los Angeles, said: "Bill will help with our go-to-market strategy and in securing key accounts as well as having responsibility for all areas of revenue."

Kira Systems has appointed former Thomson Reuters vice president for corporate sales, **Joanna Trimble**, as the company's chief revenue officer, completing the Kira executive team (which has undergone a strategic transformation over the past year). Trimble joins Kira Systems with over 25 years in the legal industry including spearheading sales transformation at online directory LexisNexis Martindale-Hubbell (now owned by Internet Brands) and scaling Practical Law (acquired by Thomson Reuters in 2014). At TR, Trimble oversaw the teams working with in-house lawyers and led five years of double-digit growth while executing on major sales force transformation projects. At Kira, Trimble will primarily focus on driving new revenue opportunities, implementing strategic initiatives and ensuring customer success. "Joanna has a stellar track record

leading sales teams in legal and corporate markets; a horde of people we respect told us superlatively great things about her," said **Noah Waisberg**, CEO and co-founder of Kira Systems. "I look forward to learning so much from Joanna and our other highly experienced leaders as we accelerate Kira into its next era of our growth." Trimble added: "After first meeting Noah and Alex [Hudek], and understanding the technology and company they have built, I was convinced that I wanted to join the team to capture this amazing opportunity. I am looking forward to working closely with the executive team as we continue to expand our customer base towards ubiquitous use in professional services firms and increasingly into mainstream corporations, scaling the impact that Kira can have on how people work."

APAC LDM Global has announced **Vivek Sharma** as its new Chief Financial Officer. LDM is a global consultancy focusing on eDiscovery, digital forensics, document review and cybersecurity, with offices and certified consultants around the world. Sharma has over 20 years' experience as a senior financial leader with significant international experience. He is a qualified chartered accountant and has worked for PwC, Citigroup, Tele 2 and Digicel. "LDM Global is experiencing rapid growth, recruiting experienced staff and expanding into new markets around the world to support our client needs," said CEO **Conor Looney**. "Vivek's experience working across regions is crucial for us as we work to deliver a seamless client-focused operation." Sharma has implemented several strategic initiatives in his previous roles, including integrating multiple businesses and people across geographies to ensure profitable growth, as well as creating and implementing new commercial models. Sharma said: "I look forward to working with our global team, building on the great success over the past two decades as well as expanding our business into new services."

(((Jonathan Maas)))
@MaasJonathan

So it's a massive happy birthday to @chillmedia today!

GIF

▶ Happy summer hols!

My huge thanks to everyone who sent birthday wishes over Twitter, LinkedIn and email on 29 July – it was press day so not an awful lot of fun but thank you for the flattering pictures (left). Have a FANTASTIC summer break. We will be here on the website pretty much every day as always, but the next Orange Rag newsletter will be out at the end of September.

Caroline Hill aka @chillmedia

legal**it** insider

The next Insider newsletter will be published on Wednesday 25 September.

To keep up with the latest news visit **www.legaltechnology.com**
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