

# legal insider

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## ▶ Eversheds Sutherland & CC restructure tech teams

*Two top 20 law firms restructure technology capabilities to reflect changing demands*

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

Eversheds Sutherland IT director Andrew McManus now focuses exclusively on client-facing technology and also spearheads the firm's innovation push.

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

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

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

McManus describes this as the two canoe challenge. "If you stand in two canoes long enough

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

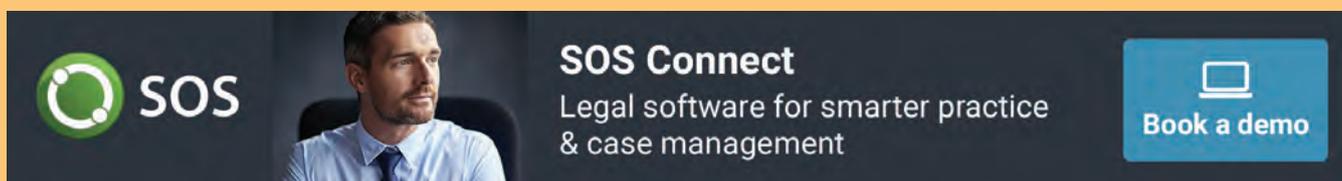
*EVERSHEDS SUTHERLAND & CC RESTRUCTURE TECH TEAMS CONTINUES ON P2*

## ▶ Fulcrum solves eBilling crisis at Bradford & Barthel

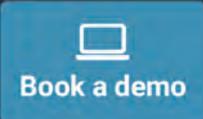
Fulcrum Global Technologies has built West Coast employment firm Bradford & Barthel a customised eBilling solution in place of Thomson Reuters' eBillingHub, after the firm says it was left with no developers following Thomson Reuters' (TR's) closure of eBillingHub's headquarters in Pittsburgh as part of its widescale restructuring programme.

Bradford & Barthel in July last year signed to swap out Aderant for Fulcrum Snap, which is Fulcrum's integrated business suite incorporating new business intake; time management; matter management; billing, finance and practice management; and analytics solution Snap Insights.

*FULCRUM SOLVES EBILLING CRISIS AT BRADFORD & BARTHEL CONTINUES ON P2*



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## ► Eversheds Sutherland & CC restructure tech teams

CONTINUED FROM FRONT COVER

Clifford Chance has also taken the decision to separate its legal technology operations from its legal technology solutions – the division which focuses on the more innovative and emerging tech.

According to Clifford Chance CIO Paul Greenwood, the decision to restructure was based on the differing speed at which the two teams operate.

“The reason behind splitting legal technology operations from legal technology solutions was to reflect the different pace at which the two work,” Greenwood said in our profile of Clifford Chance’s legal tech team (see page 24).

Clifford Chance’s global technology operations are headed up by Mike Brown, while the legal technology solutions division is headed up by Anthony Vigneron. Alongside department heads for cyber security, technology services and programme management, both report to Greenwood.

## ► Fulcrum solves eBilling crisis at Bradford & Barthel

CONTINUED FROM FRONT COVER

The project began on 1 August and it was ready to go live in October. However, it has subsequently emerged that go-live had to be pushed back after the firm discovered that eBillingHub’s developers had been let go and were not available to build a bridge to the new system.

Speaking to Legal IT Insider, CTO Eric Hunter, who was formerly directly of knowledge but promoted to CTO in January, said: “I said to Ahmed ‘let’s work out what’s happening but I suspect that you’re to have to build a custom interface because I get the impression that Thomson Reuters can’t build the bridge.’

“I realised that because of the redundancies in

Pittsburgh there was no-one to help us and I thought, ‘Holy cow, we need it now!’ We agreed to push back go-live and Fulcrum built an entirely new custom interface and also a mobile time entry solution and web-based time entry customisations due in phase two.”

The new go-live date is in March, after the firm’s year end.

Fulcrum Snap replaces Aderant’s financial services, web-based On the Go time entry and billing solutions as well as Tableau’s dashboard and reporting. Hunter said: “Visual analytics and dashboarding are built in.”

He added: “We’ve wanted a financial cloud system for years and have looked at solutions in and out of legal, but it wasn’t until we partnered with Ahmed and went with Fulcrum as a technology partner that we felt comfortable. We have an environment with Google and Amazon, we felt this was a very comfortable fit.”

Despite being in place at firms including Linklaters, Baker McKenzie, Norton Rose Fulbright and Shoosmiths, SAP is still regarded with apprehension by many law firms and most will tell you that SAP Fulcrum is wildly expensive. Hunter denies this, commenting: “The way that Fulcrum structures their pricing means that we are saving a ton of money. We were expecting ‘sticker shock’ but were surprised. When you’re in a position where you’re trying to work with a partner who understands the future of law you need to fix the price point at the right level.”

Following Hunter’s appointment as CTO, Bradford & Barthel has appointed Amir Riaby to the role of director of technology and innovation. Riaby was senior programme manager and was promoted to the new role in January.

Knowledge has been split off and is now headed by San Diego-based equity partner and now chief knowledge officer Alec Bradford.

It’s been a good couple of months for Fulcrum, which, as we first revealed on the Legal IT Insider website on 29 January, has won respected Wall Street firm Seward & Kissel as client.

The 160-attorney firm is swapping out Thomson Reuters’ Elite Enterprise for Fulcrum’s intake, conflicts, time, billing, finance, collection and expense modules.

Seward & Kissel made a decision to go with Fulcrum in October but didn’t finalise that until the end of December. The firm, which has offices in New York and Washington, is looking to go live in six months.

The selection process was necessitated by Elite’s announcement in 2016 that it is to sunset Enterprise.

## ► Dentons signs three-year global deal with iManage

Dentons has signed a three-year deal that extends its relationship with iManage, with plans to adopt iManage Work 10 in all locations globally, with the option to deploy in the cloud or on premise.

As we first revealed in September 2016, Dentons had planned to conduct a side-by-side proof of concept effectively pitting NetDocuments against iManage Work 10 in its then greenfield site in China. However, the PoC never really got off the ground thanks to the fact that many of Dentons' acquisition firms use iManage so that in many jurisdictions a hybrid solution is required.

Dentons global CIO Marcel Henri told us: "The fact is that we have continued to grow and have found that our new partners typically use iManage and operate in jurisdictions where what's needed is a hybrid solution – in those regions with on premises solutions that is often still preferred so we would need a hybrid solution."

He adds: "We're committed to iManage and will continue to evaluate that space over the next few years. We are going to aggressively align our document management system worldwide so that there is commonality across EMEA, Australia, Singapore, China, Latin America, the Caribbean, Africa and South East Asia."

In a statement to be issued by iManage shortly, Henri says: "Having assessed market offerings and Dentons' complex deployment requirements, we have chosen iManage Work as our standard Document Management System, with the option to deploy in the cloud or on premise as needed."

Dentons will soon embark on a global adoption programme of iManage Work 10, the latest version of iManage's document and email management system.

## ► The PMS shakedown: SAGlobal and Oracle enter the fray

Not for a long time has the legal practice management system market looked so interesting and yet so volatile: the start of 2019 saw LexisNexis sell LexisOne to Dynamics shop SAGlobal; Oracle formally launched its dedicated legal PMS, becoming the first mainstream tech giant to target the legal sector directly; and Peppermint Technology gained a new Silicon Valley investor with funding of over £7m. Oh yes, and Thomson Reuters is to sunset CRM system 3E Business Development (formerly Business Development Premier) but is to launch 3E in the cloud.

As we revealed on 7 January, Oracle's PMS launch is being led out of the UK in association with PwC and targeted at UK-headquartered law firms, with the intention to expand out later to the United States.

The formal launch took place on 16-17 January at Oracle OpenWorld or, more accurately (as we registered after queuing an hour for the main event), on the Sunborn Yacht Hotel opposite the ExCel conference venue, which was commandeered by PwC for the event.

Compared to the sheer size of the main event it was a low-key affair – it is clear that Oracle wanted a soft launch for the global PMS, and to be fair it seems willing to listen to early feedback.

Off the bat with that feedback – the launch focussed very little on the actual PMS. What preceded the demo for an hour was a discussion about the legal market and change and innovation and PwC's view of the world.

The demo itself has been ably covered by Neil Cameron, if you haven't had a chance to read his initial impressions, click here: <https://www.legaltechnology.com/latest-news/oracles-global-pms-launch-functionality-first-impressions-and-a-few-key-questions/>

There were a handful of international law firms at the launch and there is definite interest from the market and a very evident need for more competition. What isn't clear yet is whether Oracle, which has spent 18 months consulting law firms and PwC, understands and has catered for the specific needs of law firms.

SAGlobal, meanwhile, is very positive about why it is the right home for LexisOne – don't miss our interview with CEO for the Americas Whit Mclsaac on page 13.

***We will shortly be writing an in-depth analysis of the latest developments, if you want to be involved, email [caroline.hill@liti.co.uk](mailto:caroline.hill@liti.co.uk)***

## ► Thomson Reuters' wholesale restructure: the facts you need to know

Thomson Reuters has for 12 months now been conducting a wholesale restructure that has many outsiders, and more than a few insiders, feeling confused about how the new look company now operates and where its legal solutions business Elite fits in.

We spoke to both newly-appointed head of software and solutions, global large law, Kaye Sycamore, and Lucinda Case, who now, within the legal division, heads all of Europe, to help us understand the new look TR.

The story began with the disposal of TR's finance and risk business to Blackstone for around \$17bn. This represented over half of TR's business, and the deal took around nine months to unpick. Case tells us: "We're now professional services focussed. Before it was about the banks but now that's not at all what we are thinking. It's all about our legal, tax and corporate customers."

So began the question as to how to reorganise the remaining business to make it more sustainable, and the decision was taken to divide it into three segments:

- **Legal professionals:** including law firms; government; academics; and the Bar;
- **Corporates:** all the work that Thomson Reuters does with corporations, whether with general counsel or CFOs; and
- **Tax professionals:** including the work that Thomson Reuters does with accountants.

Reuters News, still said to be a very important part of the business, is separate.

### Legal Professionals

The legal professionals division is headed by Brian Peccarelli, who has a leadership of 10 and five business owners under him, structured around customer segments:

- Mark Haddad is general manager of the circa \$600m **small law firm segment**, a massive sector incorporating around 50,000 firms;
- Barb McGivern is general manager of the **mid-size law firm segment**;
- Neil Sternthal is managing director of **global large law and Canada**, with responsibility for TR's largest global customers. It is within this segment that Sycamore is responsible for all the software and solutions that TR sells, including Contract Express, Elite, Peer Monitor and a soon-to-be-unveiled workflow product;
- Steve Rubley is managing director of the **US government segment**, with P&L responsibility for the federal, state and local government arena.

Case is managing director for **Europe**. She looks after the UK and Ireland but also TR's Spanish business. TR doesn't have any other local law products but is said to be in good shape in Spain and is looking at how it can grow across Europe. She has five sales leaders reporting to her, plus the Elite sales team in Europe now reports to her, instead of to the US.

Each group has its own head of product, tech and marketing, etc. Aside from small law, they will now add the Elite asset to their portfolio of client products that includes Practical Law, Westlaw, and Contract Express.

Case says: "So, we redrew into these segments and where before I had responsibility for Contract Express but not the Elite asset, we agreed that from a customer perspective that's crazy.

"Now customers know they won't have different teams from across TR saying, 'I look after eBillingHub' or 'I look after Contract Express'. We're more aligned and behind the scenes it has made us look at the portfolio and how it all fits together."

She adds: "We still have pretty much the same sales folks, just the Elite sales team reports to me rather than Bill Burch and the US."

Burch, who is vice president of global sales, is retiring shortly and TR is currently looking for a replacement.

Case says: "When we talk to law firms, they are trying to reduce the number of suppliers. Yes, we're going to be more joined up. A product we'll be talking about soon is a new workflow solution that sits between 3E and Practical Law, so the timing of bringing Elite into the main business and giving me responsibility helped by Kaye is great timing."

### Case's five sales reports are:

1. Head of strategic accounts – John Shatwell (responsible for the UK top 200, the MoJ and government business)
2. Head of field sales – Chris Chapman (below the top 200/ regional)
3. Head of inside sales (these are typically very small customers) - Chioma Wigwe
4. Head of software sales – Jim Godman (UK Elite boss, took over from Peter Gill)
5. Leader in Spain - Alex Castex

While these are the go-to-market teams, elsewhere many roles remain the same. Patrick Hurley is still VP of customer advocacy and Elizabeth Hardy VP of product management for Elite globally.

Is TR at the end of its restructuring? "Yes," says Case. "We've done more comms since the start of the year to reassure and explain what has happened."

TR has suffered multiple headlines about redundancies and office closures around the world, but Sycamore says: "When I've gone through what's happening with customers, they instantly know it's simpler and better. They understand where we're going

and can see we're easier to do business with. It's only confusing in the abstract."

One of the office closures that has caused detriment to clients is the closure of the eBillingHub Pittsburgh office (see page 1) but rumours that eBillingHub or 3E are being sunsetted are strongly denied.

Sycamore says: "I'm perplexed by the rumours. The Elite product portfolio is one of the central products for legal. We have a couple of key flagship platforms and 3E is one of them. Westlaw is another. We're putting in more investment. eBillingHub is a really key product used by hundreds of thousands of people and it remains central and more investment is going into that to achieve closer integration between eBillingHub and 3E."

Where it starts to get exciting is when it comes to TR's plans for knitting its offerings together. The likes of Practical Law will integrate with 3E and while we aren't able to say too much about the new workflow tool before its release, it will apply data insights across the core product suite.

There is no doubt that the restructuring has been painful for many TR employees and customers and in many cases could have been handled a lot better, but long term, much as Sycamore spelled out above, there will undoubtedly be some huge benefits.

And while 2018 may have appeared to be an *annus horribilis* Sycamore says: "2018 was a phenomenal year for the business – it was hugely successful. Customers need to know we're still the market leaders and winning the majority of pitches." Stats are, apparently, due out that will evidence the number of clients live on 3E in 2018, for example, which we understand to be 25 at the last count.

As TR comes out of the end of its restructuring it will need to rebuild shaken trust. The office closures and redundancies coincide with a practice management market undergoing massive flux in large part thanks to TR's decision to sunset Elite Enterprise, and very recently its CRM 3E Business Development.

Being clear and transparent with the market for the first time about what the changes are and what they mean is a good start.

## ► CLOC: New president Mary O'Carroll talks strategy and politics

It wasn't until I met CLOC's new president, Mary O'Carroll, at the London CLOC conference in January that I realised I had a lot of preconceptions that turned out mostly to be wrong.

Highly personable, O'Carroll, while utterly dedicated to CLOC and its success, is less evangelical than I'd imagined, and being a cynical Brit, I say that as a compliment. While

we talk about early ambitions, she is notably keen not to make promises that she can't deliver on.

We met, to give it its proper title, at CLOC's second European Institute in the Landmark Hotel in London. While people who have attended CLOC's Las Vegas flagship conference tell me that the London event is nothing to write home about by comparison, at around 400 delegates it is radically bigger than last year: a great achievement in only the second year.

O'Carroll, who is director of legal operations, technology and strategy for Google, is meeting me to discuss what 2019 looks like for CLOC. She has only been in the role a matter of days, having been elected to take over from Connie Brenton, who unexpectedly resigned at the start of the year. Besides Brenton, O'Carroll has long been the face of CLOC and, while there was a proper board vote and a "process" to elect her, it's difficult to see who else it would have been.

CLOC is at an interesting stage in its development. The organisation that famously started out as a book club has enjoyed dramatic global growth, and vendors are realising that, through CLOC, they can access not only legal operations teams but the law firms that want to be in the same vicinity – two bites of the cherry instead of one.

But vendors don't like uncertainty, and the recent fallout – alongside Brenton, board member Jeff Franke also left – has made them nervous that the still fledgling organisation is at risk of pulling in different directions.

O'Carroll isn't keen to dwell on what's happened, but says: "There is nothing to worry about. This stuff happens within all growing organisations and it's okay. Change can sometimes be good; we respect and are grateful for everything that Connie has done."

She adds: "There's no 'politics' now and we haven't slowed down one bit. We're really excited about the



future and are feeling more aligned and passionate than ever."

So, what is the strategy for 2019?

"At its core, the strategy is to grow the community and focus on members' needs," says O'Carroll. "We've talked a lot about the ecosystem and haven't delivered on engaging law firms, vendors and everyone else and certainly that's a priority. Generally, though, we're going back to our roots.

"As a new board we will have the chance to think strategically about our priorities for this year. We're being bombarded by so many great ideas that are all hugely impactful. But I'd rather do a few things really well than be distracted by 20 different things that we talk about but don't deliver on."

One thing CLOC won't want to do is dilute the value of the exclusive legal ops community it has built up and, if anything, it looks likely that CLOC would create a separate membership for law firms – right now law firms have no engagement at all apart from attending the institutes. O'Carroll, who has had several meetings with law firms to thrash out this topic, says: "There is no question that we want to engage more with law firms, but the question is, what does that look like? What does it entail? We have to work that out, so that we ensure we deliver something meaningful to the firms and to our existing community." There are lots of ideas in the offing: engagement could mean a forum, a piece of software, or a new platform.

For existing members, the priority and the challenge is to deliver excellent content globally. O'Carroll says: "This is our second year here in London and in Sydney, so it's got to the stage where we can take a step back and take some focus away from the Institutes. We want to look at what our members need, what they need to know and how we can help them in their jobs. We're also listening to the voices of the firms and the vendors. People have different needs in different industries, department sizes, experience levels, etc. Some content isn't helpful if you're working for a small company or, similarly, a large one and some is too complicated for some and too basic for others."

I raise the point that providing knowledge and content is where law firms come into their own, and O'Carroll says: "We realise that providers and law firms have great knowledge – it's how do we engage."

The legal operations market has grown exponentially in the US and at last tally accounted for 78% of director roles. The figure below is from research conducted in 2018 by CLOC and LawGeex.

In the UK that figure pales into insignificance but is growing rapidly nonetheless.

Where the UK differs whether by virtue of culture or otherwise is that many legal ops heads are put off by the tub-thumping approach that CLOC has sometimes adopted. I sat at a conference of highly intelligent people two years ago where we got lectured by a CLOC-ite with a mic about how it was legal ops' way, or the

highway and we'd better get with the programme. "Oh, do shut up", I thought.

O'Carroll seems genuinely surprised by these observations and says: "We're not trying to take any position. Our main purpose is to connect people and help them do their jobs, so they are not recreating the wheel. We're very much getting back to our roots, which is about making things easier for people. It's about sharing and working collaboratively. And it's not about competing with other organisations."

CLOC is starting to mature, and I get the impression that it is going to be an easier organisation to work with going forward. It should note that the vendors it relies on for funding sometimes feel like an inconvenience – ILTA is learning after many years that vendors need to be managed but, having paid a shed load of cash, also need to feel appreciated.

My final question for O'Carroll arises from talking to a US-based vendor who is thinking about paying CLOC a shed load of cash. He has a few reservations, one of which, as he observed to me over a beer or two, is that the organisation at board level still gives the impression of being a Silicon Valley tech outfit – all of the board are from big tech companies. If they are really becoming global, and really embracing all sectors, where is, for example, the financial institutions representation?

"We're going to be making some board announcements shortly and we are looking at what the right composition is," O'Carroll tells me. "We're looking at who we need to bring on board to achieve geographic diversity and the right skill sets. Yes, the Board may appear tech-centric but that's simply due to how CLOC got started - there were a bunch of us in Silicon Valley who initially got together. We've become global now and every industry is represented in CLOC because we have different interest groups and leaders around the world. CLOC includes every industry imaginable and every geography and every diverse group. The board isn't CLOC, the entire community and our regional group leaders make up CLOC. We have a whole group called Financial Services. But I can tell you that we are focused on new Board additions having an amazing slate."

For financial services organisations to truly embrace the CLOC culture they will have to turn the mirror on themselves and overcome the culture of secrecy that makes it difficult for them to exchange information in the way the tech sector has.

CLOC has come an awfully long way in a very short time and, following the change of management, now is not the time to throw the baby out with the bath water. O'Carroll is aware of that. And she wouldn't have the time to do it even if she had the inclination.

What is needed over the next year is stability. Some good listening. And less of that "my way or the highway" stuff. The signs, I'd say, are good.



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## ► Inside the multi-million government project to “unlock AI”

*The UK government last year launched a heavyweight research project into the potential for AI in the insurance and legal sectors. Legal IT Insider editor Caroline Hill spoke in depth to the Oxford professor leading the legal sector research about the remit of the project and what they are trying to achieve.*

Professor John Armour, to get his title right, is a professor of law and finance at Oxford University and a Fellow of the British Academy and the European Corporate Governance Institute.

He and Mari Sako, professor of management studies at Saïd Business School (who, we're excited to say, is speaking at Legal IT Insider's CIO conference in Gleneagles at the start of March), are looking at the different ways that AI will impact legal practice and how we can harness that, as part of a huge £1.2m government-funded research project announced in November.

Professor Armour told us: “The first work package we're looking at is business models that are using AI in legal services. Here we have two sets of questions. The first is how firm governance choices are affecting the way in which investment in technology gets made, and we are looking at the organisational structure.

“Areas of consideration are whether a firm has a corporate structure; whether they make or buy technology; and how firms and product vendors contract over the value that is developed out of a firm's data. We're also looking at how AI is impacting on professional knowledge and legal careers, especially lawyers versus non-lawyers. We'll examine the emergence of different careers and whether this is a shift in legal knowledge.

“We have a five-track research methodology,” Professor Armour says: “The first is a survey and we're working with the Law Society, which will help us promote a survey among their members. We probably won't have a pilot until Spring. It will be a large-scale survey and we may use the Legal IT Insider top 200 as a basis of people involved in technology. We want to survey firms that are using technology. The other approach of this track is qualitative, where we're identifying cases studies from across different types of law firms; inhouse teams; accounting firms doing legal services; and some startups. That's already underway and we have about half of our case studies identified, and they require a lot of personal contact. By March we will know what the survey is going

to look at and have cases studies identified.

“The second track is about automation, in particular in the context of dispute resolution, and it has two dimensions. The first will look at public adjudication for dispute resolution, such as tribunals, and private hearings, such as arbitrations. We are trying to study what the legal limitations are on the use of automation in this content - what is technically possible and what the economic incentives are and to map those together to create a matrix as to what adds the most value.

“The third track looks at the application of state-of-the-art AI techniques to legal materials. We'll be looking at new tools and whether we can apply them successfully in a legal context.

“The fourth track is about what is happening in competitor jurisdictions such as the United States, Singapore and Hong Kong, and that involves looking at the particular policies that government has in place to promote skills and use technology to promote high value services. We're trying to see what we can learn by what the competition is doing, and the output will be policy recommendations.

“The fifth and final track is the piece that glues the whole thing together - about education and training. What we're doing firstly is trying to identify existing training and education needs and secondly identifying training and education gaps that are inhibiting the use of technology. You have to have complementary skills in the use of technology. When big change happens, it upsets the pattern of education and training. Where change happens rapidly people need to learn at the same time and in this part of the project we will be working in Oxford from the law faculty, with the education department and computer science department, with Slaughter and May and Allen & Overy. The idea is to identify gaps in knowledge and offer ways of overcoming them. We'll engage in course design, which we will make available as open source.”

Professor Armour and the team are in the process of recruiting three researchers and an administrator for the project. “People from industry would be the best people, ideally with a background in areas including law and computer science, we need a range of experience,” he says.

**If you are an IT or innovation head and want to register for #GlenLegal19, email: [registrations@liti.co.uk](mailto:registrations@liti.co.uk)**

## ► TRE sunsets CRM system + launches 3E Cloud

Yes, yes, this month it's all about Thomson Reuters. The end of January saw Elite announce that its CRM Business Development Premier (rebranded as 3E Business Development) is to be sunsetted after what is understood to be a lack of significant uptake. The data engine ContactNet (now rebranded 3E Business Development Data Engine) will be sold as a standalone module.

BDP (as it is still best known), will be put in maintenance mode for seven years. It comes in the midst of a wholesale restructure of Thomson Reuters (see page 4) and we understand that the BDP development team in the United States has already been made redundant. While TR is still focussed on business development, its high-level strategy is to move away from what it refers to as automated marketing activity.

However, in a highly significant announcement for Thomson Reuters Elite, 3E is now widely available in the cloud for large and mid-sized law firms.

3E 2.8.2, the latest version of its flagship financial and practice management solution, utilised by more than 260 firms around the globe, enables the wide

availability of 3E in the cloud, the first Software-as-a-Service (SaaS) financial management solution for large and mid-sized law firms. This new cloud offering provides an Elite-managed cloud environment using the Microsoft Azure platform.

## ► LoopUp signs £2.34m contract with Clifford Chance

In a development that has received the attention of the financial media, remote meetings technology company [LoopUp](#) has signed a "material contract renewal" with Clifford Chance. The minimum total contract value is £2.34m over a three-year term.

AIM-listed LoopUp will be providing conference calls across Clifford Chance's global operations, spanning 32 major financial centres in the Americas, Asia Pacific, Europe, the Middle East and Africa.

While the LoopUp product is typically offered on a pay-as-you-go basis, the deal with Clifford Chance is based on a guaranteed minimum spend. It is a major win for the company, whose total revenue in 2017 was £17.5m.

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## ► Business Drivers for Document Management

by Keith Lipman

Law firms and lawyers exist to create documents for clients—but do not own them. Clients do. Like many owners, clients have many concerns about how others interact with their property, particularly stemming from cybersecurity and privacy needs. In fact, the management of documents, email and other content comprise nearly all the top concerns of chief legal officers which are, in this order<sup>1</sup>: (1) regulatory changes; (2) protection of corporate data; (3) governance and management of data; and (4) ethics and compliance requirements.

Clients, therefore, have made some rules with some wake-up-call consequences: not being paid, sued, or simply fired. Commonly known as Outside Counsel Guidelines (“OCG”), the rules exist to control process. OCGs have moved from guidelines to actual contracts that provide for indemnification of the client for cyberbreach and violation of privacy laws and require firms explicitly to secure the client’s data. 79% of legal departments now provide OCGs to their law firms, a 30% increase over 2017<sup>2</sup>, and they are overwhelmingly the most effective method for legal departments to control spend and mitigate risk.

Firms are challenged to comply with OCGs, and this is causing collection cycles to increase, invoices to be rejected and line items to be met with refusal to pay, written off or, in some cases, whole firms to be sued or fired. 39% of clients measure law firm performance against OCGs and almost half of chief legal officers will fire their law firms in 2019, redirecting that work to another firm as a result<sup>3</sup>.

The principles are simple. All organisations need to make sure they follow best practices on mitigating cybersecurity risk: through education, data encryption, strong perimeter security and password policy. Firms need to have a process to make sure that clients’ documents are organised, the non-public data secured to those who need access it, the ability to report on it and then destroy or transfer it when requested.

To comply with the data side of the OCGs, firms must have a clear information governance strategy, for which the firm’s document management system is the foundational system.

### To Have is not to Hold

That is why 98% of law firms report owning a document management system (DMS)<sup>4</sup>. This is the most logical location for the electronic matter file. However, it is an unfortunate commonplace (across many verticals, including legal) that owning technology is not equal to the adoption and proper running of it. In a recent survey of over 2,000 lawyers across a wide range of projects, the

data illustrated that lawyers explicitly avoid working in (insert any name) DMS<sup>5</sup> and, instead, will put files on their local C drive, or a network share, because this is what’s easier and makes more sense to a lawyer—or at least to one blind to the business drivers. It’s time to prioritise adoption, starting with removing the blinders.

The problem is that partners are disconnected from the business drivers contracted in OCGs rendering the firm’s liability and revenue loss potential invisible.

### Adoption Means an Electronic File in the DMS

Why do firms own a DMS in the first place and what do we mean by its adoption? The DMS can be divided into two essential cases:

- Work-in-process: drafting, versioning and delivering documents – getting the document out of the door;
- The electronic matter file: creating a record of all documents related to a matter plus email in a single location.

Complying with the top chief legal officers’ concerns is not possible without an electronic file. This is because information governance can only apply to the known. This is not an epistemological tautology.

A firm cannot create a process over data it does not know it does not have: it cannot govern, cannot create and implement retention and destruction policies, cannot secure or lockdown unknown entities. This means matters require a proper electronic file to be maintained and to include all client documents, plus related email, in order to govern the known. Lawyers storing documents outside of the electronic file, therefore, expose the firm to multiple layers of risk—financial, ethical, regulatory and security.

### The Electronic File will get Firms Compliance with OCG

Firms can count on clients’ enforcement of OCGs to make sure their data isn’t the next headline news story. Here are a few more key client concerns stipulated in OCGs that require firms to maintain an electronic file to support proper governance and security:

**1. Regulatory changes.** Firms today face multiple regulatory mandates directly and indirectly through their clients’ regulators. Among others, the General Data Protection Regulation (GDPR) provides for significant fines – up to four percent of a firm’s global annual revenue – for compliance failures. This regulation mandates, among other requirements, that firms be able to track and, if requested, delete personal data held anywhere by the firm – on behalf of clients and otherwise. This alone necessitates a structured, electronic system for managing such content. For client files, the DMS is the only sensible such option.

**2. Security.** Clients are stipulating “need to know” security. This means data is secured and limited only to those who need to know, then deleted or transferred back to the client as soon as it is no longer necessary. The Association of Corporate Counsel (ACC) memorialised this



in 2017 in: "[Model Information Protection and Security Controls for Outside Counsel Possessing Company Confidential Information](#)" and it is now delivered in OCGs to firms.

**3. Ethics and compliance.** Moreover, the electronic file is not just a good idea but rather a regulatory or ethical duty of a lawyer's license to practice law. A client can request a copy of their file at any time - an inefficient delivery on this request will not be paid for by the client, nor (and maybe worse) appreciated. Each jurisdiction has different requirements about what exact information the firm needs to provide in a file transfer. There are ethics opinions in the United States that indicate that if you do not maintain a file the cost of creating one is on the firm.

**4. Strategy.** Client files are typically transferred as a result of law firm partners ("laterals") moving firms, and in the 7-year period between 2010 and 2017 close to 50% of all partners moved firms in the US market - with the Atlanta and Chicago markets exceeding 50% of all partners. 2018 was even more aggressive as the busiest year on record for partner lateral moves in the Am Law 100<sup>6</sup>. In the UK there are between 500 to 1,000 moves per year which adds up to about 3,500 moves that are considered "substantial", meaning that the number is even larger as only the "newsworthy" moves are reported. This is a huge business challenge for firms to sustain continuous governance and security over client records.

The implementation and adoption of an electronic file solution within the firm's DMS is therefore a core element of a firm's information governance strategy.

In Part II, we will tell you how to do this successfully.

**Keith Lipman is CEO and co-founder of Prosperoware**

<sup>1</sup> 2018 ACC Chief Legal Officer Survey

<sup>2</sup> 2018 Altman Weil Chief Legal Officer Survey

<sup>3</sup> 2018 ACC Chief Legal Officer Survey.

<sup>4</sup> ILTA 2018 Tech Survey

<sup>5</sup> Survey by Fireman & Co

<sup>6</sup> 2018 ALM Intelligence Report

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## ▶ **New HFW CIO restructures team to "modernise" IT**

Chris White, who joined HFW as CIO from Clyde & Co in September last year, is in the process of restructuring his 45-strong team in order to "help modernise IT".

"HFW is a firm that has grown very quickly and plans to grow a lot further," White told Legal IT Insider as part of our profile of the firm's IT function, which will now be published on the Legal IT Insider website in early February.

"It is fair to say that a lot of the technology currently in place is not fit for purpose for a firm with those ambitions.

"I have been brought in to change that. It is not just about making sure we have the right applications and hardware, it's about getting the right IT governance across the business, the right processes and the right culture."

A key priority for White is creating a governance structure that ensures that the firm is making decisions at the right level of seniority.

"IT is a critical part of our business. We spend a great deal of money on IT every year, and it's very important that we take IT decisions for the right business reasons," says White. "So, I am putting in place a change board at a senior level across the business, a top-level governance group which will set the direction of IT and make sure it is consistent with the strategic objectives of the firm."

As part of the restructuring White has also brought several former colleagues over from Clyde & Co. He has recruited John Court as head of programme management and Sarah Chipping as head of IT service transformation.

You can read the full story here: <https://www.legaltechnology.com/latest-news/new-hfw-cio-restructures-team-to-modernise-it-at-the-firm/>.

## ▶ **Quote/Unquote**

"I know a firm that said they really had to have RAVN but now they've got it, they are like men with expensive watches or cars, they have absolutely no idea how to use it."

**A legal tech consultant on the Continent laments the shiny things culture.**

## ► How to Evaluate Legal Technology that Improves Efficiency

by Dera Nevin

I dislike much of the marketing around legal technology. As a long-time evaluator and buyer of legal technology, I find that the information that I am given about products does not help me understand how the technology will likely impact those I buy and implement it for – usually, the working lawyer whether in a law firm or law department – or their business. I find my observations to be particularly prevalent in the segment of the market that I refer to as “efficiency technology” – products that advertise themselves as helping to streamline legal services delivery. Let’s dig into what to look at when evaluating efficiency technology and deciding whether it is appropriate to buy, and where and how to implement.

Frequently, the key selling point of an “efficiency technology” is that it improves or eliminates inefficient processes. Such technology is advertised feature-first, with an emphasis on those features and functions that replace specific manual tasks currently done to deliver legal advice or services. This go-to-market approach is currently prevalent for expert systems, analytics and “AI” techniques such as natural language processing and machine learning. The marketing for such technology often emphasises that, once it is incorporated into legal service delivery, it can help with automating manual tasks to reduce time associated with completing work. The legal technology helps to reduce costs largely by removing billable hours and assigning them to a machine or by permitting the work to be assigned to a lower-cost resource by standardising the work – or both.

Often, and particularly early in an efficiency technology product’s life, the efficiency to be gained is not expressed with precision against a defined benchmark. The focus of the product’s marketing is on “saved or reduced time” and “reduced cost” without stating explicitly how much time or money will be saved. Sometimes the cost-savings to be achieved by its introduction are obvious, but this is not always true and the return on investment (RoI) can be difficult to calculate.

While “saving costs” in the delivery of legal services by using technology in lieu of person-hours can be laudable, there is often little analysis or hard fact to show the full scope of the cost impacts from a total-cost-of-ownership perspective (including capital costs and indirect expenses) of introducing this technology.

For example, a lot of the new technology will require significant manpower (often, non-billable)

to train and manage the inputs and outputs of the technology; this can be very true of machine learning technology but is not limited to just machine learning technology. Sometimes these costs are borne by the vendor and incorporated into the cost of the product but, in other contexts, the new users need to train, configure or set-up the technology before it can be reliably used. This means there can be significant labour and time costs imposed on a purchaser in addition to the cost of licensing or acquiring the software or technology system.

In addition to this labour cost, there can be costs associated with cleaning up data, implementing new workflows or in training before the technology can be relied upon actually to replace the work carried out by humans or permit humans to trust it to use it without human intervention. During this period there can be significant loss of productivity with hours diverted from billable work, not to mention the need to duplicate efforts (while training or testing the outputs from the technology). This time and these costs are often not factored into the evaluations of cost-savings possible when “efficiency technology” is used but these are important to factor into any assessment of the cost of the new technology and to evaluate the total cost and RoI of the service delivery associated with its purchase.

Introducing technology to achieve efficiency is still a significant innovation. There can be challenges to business models associated with the introduction of this kind of technology, as has happened with the movement of much document review to lower-cost and specialty providers. But efficiency is often really secondary to what has actually happened: the removal and/or replacement of lawyers from delivery of the work, largely because the technology allowed for standardising an aspect of their work that formerly required opaque judgments that previously could not be easily measured.

Standardisation is valuable, but in evaluating the impact of this technology I also work to understand the total cost of implementing it, because new technology changes the way delivery costs are borne (and by whom). For example, much of the writing about efficiency technology looks to what costs (often labour) are currently within the service delivery model that will be externalised. However, there are often new (and sometimes higher) costs that will be introduced alongside the technology that need to be factored into understanding how the technology will impact the business. In addition to understanding how the technology will impact the business, as I evaluate how the technology performs I also try to understand how the technology will accelerate changes to the business, including the revenue and cost model. These, largely, are strategic questions and indicate how technology purchases relate to overall business strategy.

Buyers of legal technology can play a critical role in improving the purchase of legal technology by ensuring the strategic questions are asked and fully answered within a business requirements document before going

to market. This has a number of benefits in addition to understanding the true cost of the proposed technology purchase. Most importantly, when a buyer has really worked through how the proposed new technology will affect the business, more effective implementation decisions may be possible because the question "why is this technology available to me" will be more transparent and relevant to the practising lawyer.

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## ▶ ContractPodAi launches Salesforce App

As we first [exclusively revealed](#) in January, IBM Watson-backed contract management system ContractPodAi is continuing its aggressive push outside the legal sphere with a native Salesforce application launching on the Salesforce App Exchange.

Following its launch on Salesforce CRM last year, ContractPodAi customers have increasingly been using its services across a number of business functions including sales and marketing, according to CEO and co-founder Sarvarth Misra.

"Launching a pure play native application on Salesforce was therefore a no-brainer for us, giving us further growth scalability," Misra said. "Without leaving their native salesforce environment, business users will now have everything they need to manage the contracting process, from contract generation through to negotiation and signature – speeding up the overall sales process and reducing demands from the legal team."

## ▶ Legaltech Investment

eDiscovery vendor DISCO on 24 January announced it has raised \$83m, bringing its total funding to \$135m. Legal tech is now firmly on the investment fund radar – we also revealed on 24 January that Silicon Valley investor Accel-KKR has, alongside Scottish Equity Partners, invested \$10m in Peppermint Technology. One of the reasons for that is that the legal tech sector is perceived by investors as a hot and still untapped opportunity.

DISCO's funding was led by Georgian Partners, a Toronto-based venture capital firm with deep expertise in applied artificial intelligence. Existing investors Bessemer Venture Partners, LiveOak Venture Partners, The Stephens Group and venture-debt provider Comerica all participated in the round. Tyson Baber, a partner at Georgian Partners, joined DISCO's board of directors.

An announcement said: "This investment reflects the market's consolidation behind DISCO as the leading cloud eDiscovery platform, and the growing customer consensus that cloud eDiscovery will replace legacy eDiscovery services vendors and software providers."

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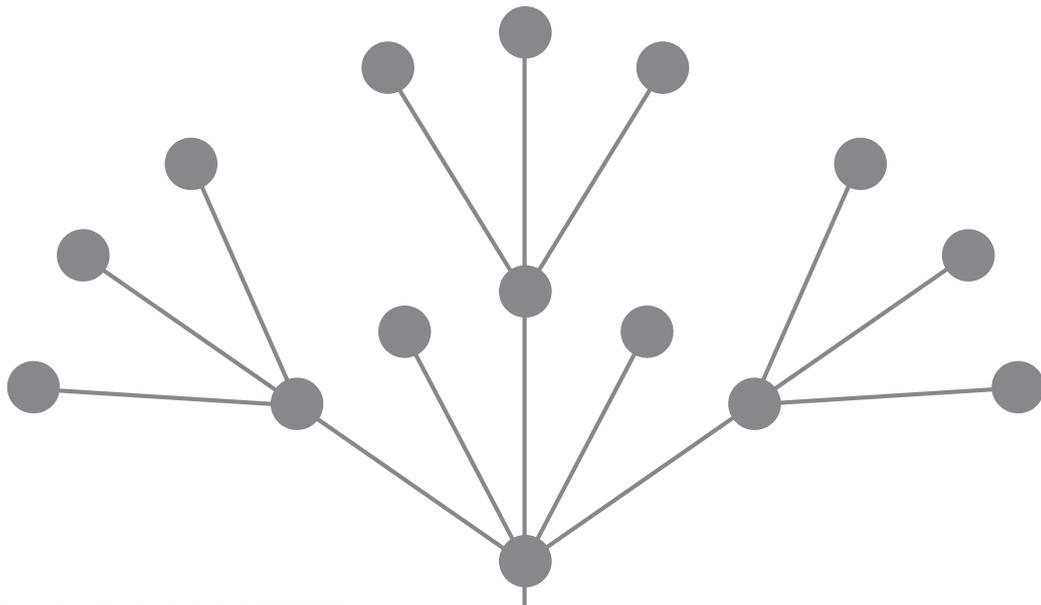
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## ► Blockchain: Separating the fact and fiction

When it comes to the business of law and the technology that law firms rely on to operate, blockchain has until very recently been of limited relevance, with CIOs and their teams only interested at the very fringes – the majority will tell you off the bat that blockchain is massively overhyped, and to a great extent they are right.

But in contrast with the fact that blockchain in 2018 officially entered the trough of disillusionment (according to Gartner), there are several very good practical reasons why in 2019 it should be on everyone's radar.

### Integrations

At its very simplest, blockchain means that a set of facts, such as in a contract, can be recorded (encrypted) on a distributed ledger and can't be altered unilaterally.

As you'll have read elsewhere, there are different types of blockchain infrastructure – public and private – and in the latter camp sits Integra Ledger, the company that founded the Global Legal Blockchain Consortium and the technology that underpins recent integrations with both Thomson Reuters Contract Express and NetDocuments.

It is through these integrations – one of which is at proof of concept stage and the other now in beta in the United States – that lawyers will shortly be able to encrypt their documents via blockchain technology.

He may be optimistic, but Integra Ledger's founder David Fisher tells us: "By the end of this year all the major applications in law will be integrated and that means the majority of lawyers by end of the year will be using blockchain and won't even know it."

### Thomson Reuters Contract Express

The integration with Contract Express and NetDocuments came about because Integra's CTO David Berger thought about what technology across the legal technology landscape Integra needed to integrate with if it's to be the platform for document exchange and version control – the fabric for digital documents.

They first identified NetDocuments (see below for more detail about that integration), and then document assembly.

Andy Wishart, global head of drafting and automation at Thomson Reuters, says: "They were super proactive. David Berger signed up for a trial of Contract Express online. When he had signed up, he was able to download our API and just got to work. He read the API and built a template and proof of concept against

our API, then created a video and sent it to me, saying 'we should talk'. I just loved the proactive nature of that - I love how it tells a great story of how far we've come from an API perspective at Contract Express. Immediately we got engaged and refined the proof of concept, which we used as the basis for Thomson Reuters to become a member of GLBC and used that as the first area of integration between TR and Integra."

About blockchain more generally, Wishart says: "Blockchain is really good at tracking assets and the identification of a document. So, we refer to what Integra would do as documentary proof of existence: there is a record on the blockchain that's immutable that says this document existed at one time in the past.

"How they have weaved it into Contract Express is that once a document is created in Contract Express and is finalised, we can create a reference of that on the Integra blockchain by creating a unique reference or thumbprint. Integra stores the thumbprint but also the data that was used to create that document. So, imagine the document was a lease agreement. Alongside the thumbprint we might store the rent amount, the parties, the address and the permit of use of the premise – we store that rich data on the blockchain. What that enables us to do in the future is at the point of time when some form of event is to happen like a rent payment or a termination or an assignment, we can go back to the blockchain and look up the data and write more records attached to the block so that there is an immutable audit."

While that may suggest easier analytics Wishart says: "Yes, a number of companies are looking at how you draw analytics out of blockchain; I'm not sure it's any easier than if the information is stored within in a regular database. It's more about having a record of the contract and the data related to it that no single party has complete control of. It's decentralised. The landlord can't say 'I've no record of that contract' – it's publicly available."

One of the potential concerns around private blockchain is which would be the definitive blockchain were there to be a number of consortia creating a platform and fighting for dominance, but Wishart says: "We're so far away from that and Integra has done a great job in creating momentum and getting law firms to sign up to the consortium. The consortium members are really interested to hear how Integra will evolve, but it's early days."

He adds: "The use cases that have been identified around document proof of existence have a place to play in legal. I'm not surprised that big companies like NetDocuments are putting in significant time and resources."

While Wishart thinks that Fisher's prediction of a year for full vendor integration is ambitious, he agrees that it is through vendor integration that blockchain will

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gain widespread adoption.

"David thinks that users and those practising law should not be aware that what they are producing is being stored on the blockchain. I don't think lawyers care so much about what is under the hood but what is the benefit. If there is a benefit to the exchange of information between law firm and client and other lawyers, then that's a good thing. But the end user shouldn't know the technology is there – it should be just a core part of how a law firm works, much like the document management system," he says.

Thomson Reuters' integration is still at proof of concept stage, with Wishart and the team exploring different use cases with clients. He says: "We've had positive feedback from those law firms actively engaged in the blockchain community but haven't gone deep with most firms."

### **NetDocuments integration**

While speaking to Wishart helps to explain the genesis of the two main legal technology integrations, NetDocuments is further along the track and VP of product strategy Peter Buck says: "We've proved it works and does e-signatures and now we're releasing it with a customer in the later part of this year in the context of deal binders and closing sets. You and I may be buying a company and the 50 documents will be registered on the blockchain."

Specifically, the integration means that documents finalised within deal management platform Closing Room, which NetDocuments acquired from Chapman and Cutler in November 2018, can be stored on the blockchain.

Buck said: "There are four organisations working with us. One is a corporate and one is their outside counsel. We've partnered with those two to drive beta adoption in the corporate and deal binder space on that basis.

"This is the starting point," he adds. "It sets the baseline and we can see if it works and might go down the email attachment encryption route. So, you send me an attachment that's not encrypted and when you send the attachment, I'd like to encrypt it so that only I can read it but there's a secret you have to open - that secret we put on the blockchain."

He agrees with Wishart that lawyers don't need to know about the underlying technology, commenting: "People don't care about how email gets from A to B.

"Blockchain will see the emergence of standards and vendors adopting protocols so you won't care. It will replace digital signatures - we will be able to use blockchain to establish that trust."

Trust is at the very core of blockchain's existence and Buck says: "Right now, when I share things with you, you know me so you can call and say, 'what you sent is wrong' and we can negotiate and get the right

thing. But if parties don't trust each other we need a mechanism to establish that trust - the connective tissue between organisations who are not on the same wavelength."

While CIOs are being asked by their transactional teams to explain blockchain to clients, their direct exposure so far is limited and Buck says that blockchain also has an image problem, commenting: "Blockchain was first used over cryptocurrency - that casts a huge shadow over blockchain."

But he adds: "If we have this conversation 10 months from now it will be different; we're on the really early edge of the curve - we're putting the plumbing together and then people will want to use it."

So, does Buck agree with Fisher that by the end of this year all legal tech applications will have blockchain integrations? He doesn't, and says: "Remember email – it was essentially a hobby product for five years and took three years to move from hobby to reality."

But his estimate isn't so far away either. "Last year was scepticism. This year awareness. Next year adoption."

### ***A fireside chat with David Fisher, founder of Integra Ledger***

***Integra Ledger is the "blockchain for law" and Fisher also founded the Global Legal Blockchain Consortium. Here he explains the platform's genesis, why 2019 will be a turning point and why he predicts that the legal industry will see the most ubiquitous use of blockchain of any industry.***

**"I founded the Global Legal Blockchain Consortium in August 2017** and we currently have 175-member organisations and institutions from five countries. We have a combination of law firms from Baker McKenzie, to White & Case to Orrick, that sort of thing. On the corporate side we have IBM, AIG, Liberty Mutual and some giant companies. On the legal tech side, we have the likes of NetDocuments, Thomson Reuters, Wolters Kluwer and we also have around a dozen law schools.

**"My idea was to have a level playing field.** If you're trying to get a new data integrity structure for the legal industry, you need to engage everybody. Most of the organisations in this industry are not open to all - people are either excluded or have to pay more. In our view that works against collaboration. We think that, given some of the challenges in legal with siloed data and insufficient scale, anything that can lower the cost of innovation is valuable. Blockchain by its nature is distributed network technology and, like all networks, that becomes more valuable as more people are part of it.

**"I came into the industries and saw the silos and I wanted to break down the barriers** to improve scale economies at the high-level strategy. Underneath it,

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we're a blockchain company for the legal industry. We're not so focussed on higher level applications. Most people when they think of blockchain, think of smart contracts. We're working at the foundation level.

**"A question I'm regularly asked is 'what blockchain do you use?'"** Bitcoin and the Ethereum blockchain is a big question and a big problem for enterprise to use, especially law firms, where there are privacy issues. I felt that the legal sector needed its own infrastructure, and that's what the Integra Ledger is and the GLBC is the umbrella organisation for that.

**"We're one of the only blockchain companies in the world focused on the business of law -** we operate all over the world and NetDocuments has spent a year building a deep integration far enough along that it was showcased at their annual user conference and people are clamouring to turn it on.

**"I predict that the legal industry will see the most ubiquitous use of blockchain** in its day-to-day business of any industry and will be the first most penetrated because we're not focused on moving value around but confirming the integrity of data and we're already well down that path with Contract Express.

**"Blockchain is a distributed ledger - the fact that it's distributed gives rise to the trust.** That's what matters, not the functionality. In the legal industry it's foolish to go into a law firm to say 'switch the way you store documents': they aren't going to change. We've taken the approach that you should add digital trust to the application. Law is a very collaborative field. Everything lawyers do is about sharing data and blockchain allows to achieve that with better trust and privacy.

**"Integra allows data interactions but if you only have one telephone it's not useful.** If you think about network technology, not only do you have to build out the phone lines, you have to convince the end user to buy the hardware and use it, and what we're doing is very complicated from that point of view. We think of ourselves as allies with everyone. No-one pays us for anything right now. We need to build the infrastructure first.

**"If we say 'buy blockchain' no-one will use it because other firms and clients don't have it.** Unlike 99.9% of technology companies that build something that does something sophisticated, ours is a new infrastructure that allows counterparties to connect much more securely using the same infrastructure and that's doable, but we refer to it as the 'warm the ocean' strategy. We're solving a problem that everyone has but the only way it becomes valuable is if everyone uses it simultaneously.

**"In six months, lawyers are going to wake up and by the end of this year all the major applications in law will be integrated with blockchain** and that means that the majority of lawyers by end of the year will be

using blockchain and won't even know it. The industry is such a chaotic mess – there are certain expectations that new software is going to more sophisticated and complicated. The reason we're hiding in plain site is that we take the opposite approach: we think simplicity is the way forward.

**"Even if the UX is simple behind the scenes technology is becoming ever more complex** and that creates security vulnerabilities. We've rethought the basis of data infrastructure and what blockchain allows us to do is take a law firm that uses iManage to interact with a firm on NetDocuments. It allows them to move documents back and forth. Despite the fact they have different software systems, they can prove that it's the same document.

**"Everyone has blockchain wrong - just think of it as a trust architecture** that allows you to do certain things. If I email you a PDF of a signed contract you then have that document and you store it as evidence that you and I made a contract - referred to as social trust, we have a copy to remind each other of what we agreed to.

**"Say you're a landlord and I'm a tenant and we agree a lease. The copy I have gives me evidence that I can occupy this space.** Yours shows I owe you monthly rent. Say you go to the bank and ask, 'I have a tenant, can you loan me money against that income stream?' The bank has no way of proving that the contract is valid. Our law is backed by warranties and consequences. The contract doesn't do anything and there is no trust beyond social trust. To understand how profound what we're doing in our world is, take this example. I'm the tenant and you're the landlord and we create and sign a PDF contract. My identity and your identity are immortalised and the bank can instantaneously prove the existence of that contract – which is a big deal when you multiply that across hundreds of millions of contracts.

**"So, we know its authentic but then as long as I'm sending a PDF why not embed the metadata** like the fact that the lease is worth \$10,000 per calendar month. I send the PDF and embedded are these computable fields. Now without a blockchain world, you get the PDF and who the heck knows if the metadata is valid - I could have changed it. But in a blockchain world, that's how you get to computability. Now I can instantly confirm that its valid and those are the numbers for lease management or due diligence purposes. And imagine I have 25 tenants and leases and I send them to the bank and in seconds the bank can validate those income streams and give me a decision in minutes. Now keep in mind that our approach is to integrate with all vendors and I think the legal world will wake up in six to 12 months and realise that all contracts are going to happen on the blockchain."

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### *The blockchain activists*

**Blockchain for legal start-up Legaler is building a distribution network for the legal industry but is taking a very different approach to Integra Ledger and plays mainly in the access to justice space. Its token incentive platform Legaler Aid matches people who need legal advice but can't afford it with people who are willing to give advice pro-bono. We find out more from founder, Stevie Ghiassi.**

"We're the Ethereum for law - our philosophy is that public blockchain will become the main infrastructure because it's not in any person's or administrator's control. If a company is managing assets that run into billions of dollars there's a risk that it might not be there tomorrow. It needs to be decentralised.

"We have different use cases but are more concerned with commoditised legal services and our vision is to reduce the justice gap by making legal services cheaper and more accessible. We have different use cases and business cases to Integra. We are allowing developers and companies to build legal services without intermediaries, and we want to create technology that will disrupt marketplaces that take commission, where the profit goes to the shareholder.

"We believe that you can remove intermediaries from all kinds of services so, if you're an intermediary in financial service or legal for example, you are at risk of being disrupted via smart contracts. We are creating a platform where lawyers and clients can connect directly and you can create marketplaces in all different jurisdictions.

"The first thing we're looking at is legal aid, where you can track payments and incentivise lawyers through a pro bono programme and, instead of paying intermediaries, pay via smart contracts that release the funds when you've done the work. We're building all of that infrastructure.

"Where Integra Ledger is looking to make money from is its APIs, not cryptocurrency. In ours you need a cryptocurrency because there is no administrator.

"Most lawyers' perception of blockchain would be from the darkweb and nefarious activity. There's all kinds of money laundering and bad things going on and I think they haven't yet seen the good things. But all these different corners, like Integra and Contract Express, are starting to provide real utility.

"By March we'll have four products in the market. Legaler ID is built and in test phase right now. It's an identity for the legal industry - a way for lawyers and clients to have one global ID they can use across different platforms and services. LegalMeets is getting a revamp and new features at the end of January.

"The more these apps can evolve, the better. Blockchain has a user experience problem - only recently has it got more mainstream attention. The UX problem is one that lots of people are working to

solve and we can add to that. When you see platforms like Rocket Lawyer and LegalZoom integrate with blockchain it's not hard to imagine that the consumer will become adopters of smart contracts without the help of lawyers."

### **A few other blockchain integrations of note**

- OpenLaw (openlaw.io) is the first project to comprehensively stitch together traditional legal agreements with blockchain-based smart contracts and to do so in a user-friendly and legally compliant manner. You can watch the demo here: <https://www.youtube.com/watch?v=ySlxEl5yME>
- At the start of September 2018 RocketLawyer announced that it will open up self-executing smart legal contracts to its consumer base. On 17 September, rival LegalZoom announced a not-dissimilar initiative, which sees it partner with Clause.io to provide self-executing contracts to consumers and small businesses.
- Not an integration, but it's worth noting that evidence management company CaseLines is attempting to patent the use of blockchain for handling legal documents.



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## ► What now for LexisOne?

The sale in January of legal ERP LexisOne by LexisNexis to SAGlobal inevitably caused a few shockwaves in the market and sparked a fairly lively debate on the Legal IT Insider website over the future direction of the practice management system market.

We spoke to SAGlobal's CEO for the Americas, Whit Mclsaac, about the Microsoft partner's strategy, roadmap and why customers should feel reassured that the LexisOne IP is in good hands.

### Whit tell us about SAGlobal, both from a technical and legal perspective

"I merged my companies into SAGlobal last year - Legal360 and also AEC360, and I've been working with the guys there for four years. We're close friends and we've worked on a bunch of projects - we bring CRM and they ERP, and we have built some integration tools and BI functionality together. Ultimately, we felt we wanted to take our solutions global. They wanted to move more into CRM and front office solutions

(they were in with the accounting, media, architect, engineering and consultant sector). We work with architects, engineers and the legal sector. So there was a lot of synergy and they wanted to go into legal and we wanted to move into media and accounting.

"We talked about JVs and all sorts of idea and we decided it was best to merge together. In 2017 we were Microsoft's global partner of the year and the following year it was SAGlobal. Between us we own nine Partner of the Year awards and there's a lot of similarity in the way we do business. So, we merged groups and integrated our IT."

### How did you get to know Lexis and how will you integrate LexisOne?

"There was a project that about two years ago we worked on with SAGlobal. A very large regional tax advisory firm was on Elite and they wanted to go to Dynamics for CRM and ERP and practice management. SAGlobal brought a company in to see if their IP was ready for this group. That company was called LexisNexis. So ultimately it was during Microsoft's transition year [from AX to 365] that's how long ago this relationship started getting forged.

"In the end we didn't use the Lexis functionality but SAGlobal built what this accounting firm needed - referred to as Projects+.

"While LexisOne was doing its thing, SAGlobal were building their professional services project matter engagement system, which is what we were integrating Legal360 with. So, the objective is to take the IP that Lexis has invested in and the IP that SAGlobal has with Projects+ and to merge that functionality. Projects+ has about 40-45 clients globally. We'll let the market tell us what they think but we think it's a pretty compelling offering.

"What we're looking to do is infuse a massive amount of law firm expertise to combine that with the team already in place at SAGlobal. We also want to integrate Legal360 CRM and the experience management tools we've built on Dynamics into this package, so it becomes an end-to-end solution."

### What didn't work out for Lexis and how will things be different at SAGlobal?

"A bit more history may help us answer this. 45% of the projects that SAGlobal does are projects where another partner was involved, so we come in as the second partner and take what's already been built, extend it, reimplement it, reconfigure it. Not that those partners are bad, or their technology is not good. The SAGlobal team has been working with this Dynamics product for over 20 years and are very highly skilled. They have built software for Microsoft and some of the largest professional services firms around the world. There's one going in right now that has 47,000 users in the advertising/marketing space that is using Dynamics 365 with Projects+."

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**What is more important, the tech experience or deep legal knowledge and experience?**

"There was a significant reason that we're bringing the team across from Lexis and that's because not only did we want legal expertise, but we wanted it on this side of the pond. We want to be a major player in the legal market and have a platform to drive Legal360 into the market place and having that team on board is huge."

**What changes will you make to the product?**

"We're going to let the clients help guide us with that. We've also got a Power BI team under our umbrella and I'm sure we're going to extend the business intelligence capability. The other thing we're going to do is that the integration from the CRM with the back office now becomes the same database, so once I do a client plan and manage all the activity and the information surrounding that new client or new instruction, I don't have to do anything other than open a new matter via the system."

"The idea of a massively complicated integration between front and back office doesn't then exist any longer: data flows back and forth between the systems. So, when I'm out pursuing work I have the luxury of knowing how much work we've done for which client and who the time keepers were and if we were successful and who the outside parties are – it's an extension of the CRM that law firms haven't had historically."

**Who are your target firms?**

"Microsoft has a block of about 750 law firms that fit on their premier client list - their major law firms that have invested heavily with Microsoft. Our go-to-market strategy is really closely tied to those top 750 firms that Microsoft is engaged with and that have invested in Microsoft technology and from a business strategy point of view, that puts us in a good position because Microsoft already has good relations with those firms. But what we're planning to do with this platform makes it very easy to go down market. I don't know how far down we can get with a cost-effective solution but I'm thinking 100 timekeepers on the lower end. And then Microsoft has some technology called Business Central for smaller businesses."

**What has been the customer reaction to your acquisition?**

"They are curious. They needed clarity. They had lots of questions. And some of those questions we're still in the process of answering. One thing that is clear from everybody is that having this IP in the hands of SAGlobal is very reassuring. It's a large, stable, reliable professional services organisation that has a large footing."

**Change inevitably makes people nervous, how can you reassure customers that you are in it for the long-term?**

"The company continues to enjoy significant controlled growth, profitability, zero debt and a relationship with Microsoft that very few other organisations have anywhere in the globe."

"Vendors in this space need to do something architecturally significant to move to the next generation. The market is going to be demanding more state-of-the-art platforms and a cloud platform that offers the security that law firms need to have."

► **Quote/Unquote**

"Well it's really well attended, but then legal ops people come to the opening of a paper bag, don't they?"

*A delegate at CLOC gives a not complimentary compliment to the well-attended event.*



## ► ICYMI

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

### New Year, New eDiscovery View

**22 eDiscovery predictions for 2019** <https://maas-bong.io/2R7EI7u>

Relativity had 22 separate eDiscovery professionals provide one prediction each, collated under different headings (much like this column): Early Exposure to Tech, Innovation, Moving to the Cloud, Navigating Regulatory Changes, Changing Data Sources & Workflows and Security.

**The year ahead: 2019 eDiscovery predictions** <https://maas-bong.io/2Cax5SO>

Similarly, QDiscovery asked 12 eDiscovery professionals to rub their balls and offer up predictions under the headings: Expanding Data Sources, Analytics and The eDiscovery Industry.

**eDiscovery market: The booming market showing strong position in future, key insights and forecast to 2025** <https://maas-bong.io/2ChKhpn>

This report, from MarketInsightsReports, costs around \$300. I haven't read it, but the overview states that they review the market by "manufacturers, regions, type and application (in our world I think that means by provider, region, EDRM stage and type of organisation – law firm, corporate legal department or government). The regions considered are America, China, Europe, Japan, South-east Asia, India and "others". The market factors explained are key strategic developments, key market features and analytical tools.

**A Chill in the Air: eDiscovery business confidence survey results - Winter 2019** <https://maas-bong.io/2Cb2vIM>

This is the 13th quarterly eDiscovery business confidence survey conducted by Rob Robinson at ComplexDiscovery. I consider it to be an interesting litmus test of the health of the eDiscovery industry, as seen through the eyes of those working in it (mainly in the USA). I'm not sure I agree with Rob's analysis of "a chill in the air" – it seems more to me that the survey reflects a more positive feeling in the market (as indicated by the more upbeat report above).

**Is the future of eDiscovery really in the cloud?** <https://maas-bong.io/2QURhO1>

An infographic from Relativity showing the increased prevalence of cloud computing in the business world generally, and then briefly touches on the percentage of law firms considering a formal cloud strategy. The only reference to eDiscovery in the cloud is, perhaps not surprisingly, a plug for RelativityOne.

This is all part of what I see as the eventual polarisation between cloud and on-premise solutions, same as there is/was for a firm's traditional litigation support function.

### New eDiscovery rules and procedures

**The Disclosure Pilot: Time to get ready** <https://maas-bong.io/2SsZ6M1>

This timely article, written at the end of November by Hardwicke's Michael Wheeler and Charles Raffin (authors of "Electronic Disclosure – Law and Practice"), reminds those involved in paper and electronic disclosure in England & Wales that the procedure is fundamentally changing from 01 January 2019 with the implementation of a Disclosure Pilot Scheme in the Business and Property Courts. Heads up, folks!

**The UK ILTA eDisclosure SIG needs your feedback on their draft Exchange Protocol** (<https://maas-bong.io/2KWvaW3>) **and accompanying Guidance notes** (<https://maas-bong.io/2BSZ3DW>). The aim of the Protocol is to provide best practice for people who don't have a litigation support department

Andrew Haslam and others on the UK ILTA eDisclosure Special Interest Group produced these two documents for public consultation in early December (the consultation period closed on 22 January). Andrew, now eDisclosure Project Manager at Squire Patton Boggs in London, has been behind a number of other initiatives over the years, most notably the Technology and Construction Court's eDisclosure Protocol and his annually updated Buyer's Guide to Litigation Support Systems. The links here are to the two documents (Exchange Protocol and Guidance Notes), almost certainly without any public comments incorporated at the time of going to press (but definitely of great use nonetheless).

**Event: New EU Rules on e-Evidence - The proposed European Production and Preservation Orders** <https://maas-bong.io/2R5THtk> (£)

This commercial two-day event in London, presented by the Academy of European Law, will examine the European Commission's proposals for a new regime for cross-border evidence gathering from service providers. As the ERA says: "Whatever the outcome of the Brexit negotiations, online investigations are cross-border by nature, and practitioners in the EU, UK and other jurisdictions will all benefit from understanding the new EU regime".

**Second edition of The Sedona Conference's Commentary on Legal Holds** <https://maas-bong.io/2LbpGqQ>

Doug Austin at CloudNine gives us a breakdown of TSC's update to their commentary some eight years after they released the first edition. As Doug says, much has changed in the law and technology since. The guidelines are worth considering whatever your jurisdiction.

## eDiscovery Day is a "Thing"

### **Celebrating eDiscovery Day with George Socha**

<https://maas-bong.io/2Srpfz2>

Tim Rollins of Exterro has an interesting interview with George Socha of EDRM fame and now a managing director at BDO USA.

## eDiscovery Pricing

### **"Mashup" of eDiscovery market estimates**

<https://maas-bong.io/2SuDgb9>

The hand of Rob Robinson strikes again, this time bringing data from a number of different sources together in a market size "mashup" of worldwide eDiscovery software and services.

### **Shopping for eDiscovery? Winter 2019 eDiscovery pricing survey results**

<https://maas-bong.io/2LcPa6V>

Following a December pricing survey ComplexDiscovery's Rob Robinson pops up yet again with the results. His survey addressed pricing for collection, processing, hosting and review, with various flavours of each.

### **Is data culling inversely proportional to eDiscovery costs?**

<https://maas-bong.io/2R4l3QB>  
Yes.

## Of General eDiscovery Interest

### **eDiscovery requests are up among US law firms**

<https://maas-bong.io/2G4gWIP>

A finding of the American Bar Association's 2018 Legal Technology Report is that ESI and eDiscovery continue to grow in importance in the minds of US contentious lawyers, with a regular annual increase in the number of eDiscovery requests filed. Even though a staggering 35% said they never make eDiscovery requests (a thankful slight decrease from 2017's 42%).

### **Are eDiscovery and cybersecurity two sides of the same coin?**

<https://maas-bong.io/2QQi9P6>

This move by BIA, to launch "a new data breach discovery service applying eDiscovery technology and practices", supports my long-held view that eDiscovery tools and skills are deployable in many other areas of law and industry sectors. After all, the Panama Papers were knocked together in Nuix.

### **A day in the life of an eDiscovery professional: Linda Luperchio, CEDS**

<https://maas-bong.io/2R6jW2N>

It's always fascinating to see what other eDiscovery folk get up to during the "typical working day" (discuss). Here, Linda Luperchio, director of eDiscovery and information governance at the Hanover Group, throws her day open to Tim Rollins from Exterro. Her day seems to stop at 1730, or maybe that's when she had lunch...

## eDiscovery Discovered

### **Legal holds: You gotta know when to hold 'em...**

<https://maas-bong.io/2RgmbW9>

Mike Quartararo, MD of eDPM Advisory Services and a big music fan, quotes Kenny Rogers as he asks why people are still talking about legal hold when the concept has been around since the dawn of legal time. He has a point.

### **On legal teams and eDiscovery processing**

<https://maas-bong.io/2C7GFGb>

US Law firm Kilpatrick Townsend & Stockton helpfully sets out, for lawyers, what the data processing stage of the EDRM is all about.

### **eDiscovery project management: Ask forgiveness, not permission**

<https://maas-bong.io/2Ld3fBt>

Music-loving Mike Q (see above) asks useful questions in relation to managing eDiscovery projects (not the wider PRINCE2-type projects): Do you need approval to save money? To reduce risk? To implement efficient, defensible processes for managing your work? I agree with him (read it to see).

### **Disclosure and documents demystified**

<https://maas-bong.io/2Rn4apq>

A recent panel, moderated by Ed Crosse of Simmons & Simmons, looked at the practical ramifications of the Disclosure Pilot Scheme (see above). Ed was part of the working group that drafted the proposed rule changes. The panel consisted of representatives from Pinsent Masons, HFW and Barclays Bank.

### **Key activities and common tools: Processing fundamentals series Part 2**

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

In another article on processing, Xact's Matthew Verga takes those ready for the journey on a slightly more technical explanation of processing, focussing on expansion, extraction & normalisation, indexing and common tools.

### **Web's most asked questions: eDiscovery**

<https://maas-bong.io/2R5rEKq>

In his spare time, Martin Nickel of Deloitte ponders what questions Google would prompt you for if you just type "eDiscovery" in the search bar.

## Interesting Product / Provider news

### **Legal technology company DISCO raises \$83 million, bringing total investment to \$135 million**

<https://maas-bong.io/2FZv0Na>

Clearly investors continue to think the global eDiscovery business is booming. DISCO report this as a record investment in an "enterprise legaltech company".

**Relativity develops “pre-crime” abilities with Trace app at ING Bank** <https://maas-bong.io/2E7qzyU>

Move over Tom Cruise in Minority Report, Relativity and Intelligent voice have developed precogs at ING with an app known as Trace. Cool stuff.

**Epiq has a new CEO with eyes set on overseas growth** <https://maas-bong.io/2Cdu5p3>

It's always interesting when the hand on the helm of big business changes. It's no different when that big business is legal service provider Epiq. I think “overseas” in this instance here means Europe and APAC.

**Herbert Smith Freehills boosts “follow-the-sun” eDiscovery capabilities** <https://maas-bong.io/2R7xlry>

News from Australia about HSF's global alternative legal services (ALT) business to include a new eDiscovery team. The firm will now be able to provide 24/7 support from its offices in Beijing, Belfast, Brisbane, Johannesburg, London, Melbourne, New York, Perth, Shanghai and Sydney.

**Compliance Discovery Solutions partners with X1 and Brainspace for real-time, pre-collection analysis of unstructured data across thousands of custodians** <https://maas-bong.io/2G1iCff>

Some might say this is the Holy Grail of ESI collection: the ability to identify, analyse, collect and cull at source, allowing faster and more precise collections and reducing cost and business disruption.

**Interesting eDiscovery in the courts**

**2018 eDiscovery US case law year in review, Part 1** <https://maas-bong.io/2C6alnF>

**2018 eDiscovery US case law year in review, Part 2** <https://maas-bong.io/2G0q7Dx>

**2018 eDiscovery US case law year in review, Part 3** <https://maas-bong.io/2RejPIQ>

**2018 eDiscovery US case law year in review, Part 4** <https://maas-bong.io/2CgCTu3>

I think this nice little collection, from Doug Austin at CloudNine is self-explanatory.

**Judge penalises lawyers for not using artificial intelligence** <https://maas-bong.io/2RiFcXV>

This report, in early January, caused some comment: a Canadian judge penalised lawyers when assessing their application for reimbursement of their fees following the dismissal of the action in question. Essentially, the judge decided they had not been efficient in conducting their research and docked them accordingly. Although a minor point (the sum in question was only \$900) it is, nonetheless, a point.

**Party failed to follow court's ESI Protocol Order in requesting an exception** <https://maas-bong.io/2LabFJP>

In this bizarre ruling, brought to us by Zapproved, a party successfully complained that the production to it of

ESI in its native format was inconvenient as it effectively prohibited them from applying traditional hard copy processes (such as Bates numbering)! The producing party had failed to follow the court's protocol that stated that all ESI should be converted to TIFF so that it could follow the traditional (and more familiar) hard copy path.

**PDF production “not unreasonable”, but also not “unduly burdensome” to re-produce** <https://maas-bong.io/2LaOjUr>

Another needless ESI format confusion. Top tip: meet and confer!

**Killer is convicted in part due to an IoT device, this time a Garmin GPS watch** <https://maas-bong.io/2QQmWQN>

The Internet of Things is the Internet of Sneaks shocker. Another revelation that technology can be your downfall. In this case a smart watch put the wearer somewhere where the wearer couldn't bear to be.

**Are your cases won and lost on eDiscovery cooperation?** <https://maas-bong.io/2CfX2Rf>

Just how important is it to look mature and helpful with opposing parties? Shouldn't you be deploying the meanest tricks you can in pursuing your client's case? Both, really? This panel at Relativity Fest tells us.

**Lessons from *Michael Cohen v United States*: Criminal defendants should not be at the mercy of technology for privilege review** <https://maas-bong.io/2QN9HQM>

This is a handy reminder that the prevalence of technology in civil matters does not mean it is always as appropriate in criminal matters.

**Mike Lynch & VP for finance Stephen Chamberlain charged with fraud in US over sale of Autonomy** <https://maas-bong.io/2SmRXgl>

This is the dispute that just keeps on giving to the eDiscovery community. Mike Lynch sells eDiscovery software company Autonomy to HP back in 1874 (2011, really). HP later accused him of cooking the books to inflate the company's value. He denied everything. Things have now got a bit more interesting for him and his then CFO...

aka 'The Orange Rag'

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## ► UK Top 50 IT profiles: Clifford Chance and Pinsent Masons

As part of a huge project to profile all of the top 200 legal IT teams, our contributing editor Amy Carroll spoke to Clifford Chance and Pinsent Masons about the structure and strategy of their teams which, like many others, are increasingly engaged in client-facing solutions.

### Clifford Chance: At a glance

**Team size:** "Several hundred" – no exact figures disclosed.

**Leadership:** Paul Greenwood, CIO (Reports to global COO, Caroline Firstbrook)

#### **Key divisions reporting into Paul Greenwood:**

- Technology Services (Evette Pastoriza)
- Global Technology Operations (Mike Brown)
- Legal Technology Solutions (Anthony Vigneron)
- Programme Management (Jason Deverell)
- Information & Cyber Security (Chris Leather)

**Investment in IT:** Not disclosed

**Innovation:** Legal Technology Solutions division focuses on innovation. Recently separated from Legal Technology Operations. Both still report to Paul Greenwood.

**Priorities:** Investing in innovation and change; client experience; modernising core systems; cyber defence; data and data science

#### Paul Greenwood, CIO, Clifford Chance

##### **How are Clifford Chance's IT operations structured?**

As CIO, I am responsible for all technology, anywhere in the world. We have several hundred people working in IT globally. The team is structured into a number of different areas. We have Technology Services, which are the actual lawyer-facing support teams. They are operated on a regional basis. Then we have our Global Technology Operations, which operate our traditional systems of record - so our document management, our HR systems and so on. We have Legal Technology Solutions, which look after the more innovative and emerging technologies - areas with a faster pace of change and a more direct impact on our work. Then we have Programme Management and Information & Cyber Security. So, five areas in all. There is a head of each of those divisions who reports to me and I report to our global COO Caroline Firstbrook.

##### **Why was the decision made to separate the innovation function?**

The reason behind splitting Legal Technology Operations from Legal Technology Solutions was to reflect the different pace at which the two work.

##### **What are your top-level objectives for the IT function?**

We are trying to prepare the ground for a different kind of IT function. IT in a law firm has traditionally been rather back office focused. It has been all about just giving people what they ask for. But in a world where technology is becoming more and more fundamental to the delivery of legal services, we have to have a different kind of structure and a different kind of relationship with the front office. That is what we are working towards.

So, our key objectives are around making support work differently; splitting those two divisions so that they can react in different ways; looking at the way we manage programmes and projects, and so on. There are a number of ongoing shifts that will enable us to build this new IT organisation for the future.

##### **If we drill down a bit, what are your specific priorities for 2019?**

We are investing in innovation and change. We have something we are calling "best delivery" which is really all about giving a great client experience. Technology is an important part of that now. We are modernising some of our systems. We have a number of systems going through an upgrade cycle at the moment. We're in the final stages of changing our matter intake and HR systems and soon we will be embarking on a document management replacement. Cyber defence is the fourth priority. We are also organising our data and data science, which will be a fifth.

##### **What new technology have you introduced over the past year?**

There has been lots. We have moved everyone to a more agile working environment. All our lawyers now have a laptop and are using Windows 10. We are using Surface Hub technologies in meeting rooms and more Cisco telepresence solutions. We are using more agile printing, so you can print from anywhere and collect output from anywhere. We have LoopUp for teleconferencing. There have been a variety of things.

##### **What is your approach to shadow IT?**

I don't think we really have very much of it, thankfully. Everything is kept in a single global IT budget. Offices then receive a recharge. Everything is consolidated in one place to manage total IT spend for the firm.

##### **What is your approach to innovation?**

If there is a solution available, we always prefer to buy rather than build.

But the challenge for Clifford Chance is that we are often the first to do things, so we sometimes find ourselves

having to build solutions because there isn't anything to buy in the market.

**What is your biggest challenge, or frustration, as CIO?**

There is a lot of exciting new technology coming to the legal market but there are two challenges to making that technology really achieve its value potential. One is that the business is incredibly busy and therefore the time available to understand the new technologies and learn about their impact is limited. But more fundamentally, a lot of these technologies are single point-of-view start-ups. They have a single purpose and a single delivery model. But they are not integrated together so the operating maturity isn't there.

We might use four or five of these innovative new technologies on a matter. Unfortunately, today, that means five different interfaces and uploading documents to five different solutions. We want to get away from that to a model where we can integrate these new exciting solutions much more seamlessly in a way that enables us to offer a better service to the client.

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

An IT function that is a much more client-facing operation and that has a self-confidence about its role and its value to the business that is reflected in the perception of IT by our lawyers.

**Pinsent Masons: At a glance**

**Team size: Internal IT function -120 SmartDelivery – 32**

**Leadership:**

**Colin Smith – IT Director (focus on core IT service delivery into the business. Reports to COO Alastair Mitchell.)**

**David Halliwell – Director of Knowledge and Innovation Delivery (focus on innovation and provision of technology to support legal services. Reports to COO Alastair Mitchell on operational and delivery; reports to Head of Client Strategy Alastair Morrison on innovation strategy and legal services.)**

**Nigel Tranter – Head of IT Strategy & Architecture (reports to Colin Smith.)**

**Orlando Conetta – Head of SmartDelivery (reports to David Halliwell.)**

**Nigel Tranter, David Halliwell and Orlando Conetta of Pinsent Masons**

**What are your respective remits at the firm and how do your roles fit together?**

**Halliwell:** I am Director of Knowledge and Innovation Delivery, so I work with the Head of Client Strategy and the Board on what our innovation strategy should be and how it should be implemented across the firm. A primary focus is looking at the way legal technology is deployed for the delivery of legal services.

Orlando reports to me as Head of SmartDelivery. His primary focus is on developing and implementing

technology for front line legal services and client relationships. Nigel is Head of IT Strategy & Architecture. He reports into IT Director Colin Smith. They are responsible for IT in terms of core service delivery into the business.

Both Colin and I report into our COO, who is responsible for all business operations, apart from finance. On the innovation side, I also report directly into the head of client strategy, who is a member of the board.

**Conetta:** My job is really to manage the delivery of client solutions and the technology solutions we use internally to improve our legal services. The team is split across four main groups. We have a legal technology team that consists of software engineers. Their job is to integrate and create technologies that enable us to model our legal processes and also provide a means of integrating other technologies into those processes.

The second team we call legal engineering. A few firms have this, but I think it is fair to say we were pioneers. That team is made up of people with various backgrounds. Some are lawyers, some are paralegals, some have a law degree but went straight into legal engineering. It is becoming a clearly defined career path.

That team's main focus is modelling legal processes throughout the business and then using the technology from the legal technology team to systemise them. They bring people, process and technology together. The two teams combined are focused on making sure our lawyers have access to the right knowledge, the right templates and the right tools for the type of work they are undertaking.

There are also two other teams which emphasise how legal services are changing. One is our client consulting group. With client consulting, we recognise that there will be clients that require our technology and our processes to be seamlessly integrated into their own beyond any one particular matter, or who want advice or consultancy on the wider range of legal technologies available in the market. The client consulting group undertakes the project management on those specific client engagements. It is a dedicated function and not an add-on to our legal engineering and legal technology functions.

Then there is a final team, which we are very proud of and again represents something we have pioneered. Their focus is on data science and legal analytics. The legal analytics team's job is to work alongside lawyers on actual transactions and matters. Because it is not just about having the right technology in place, but having the right skills in situ when a particular matter is being undertaken.

**Tranter:** What my team does is complementary to what David and Orlando are doing. We focus on ensuring technology that the organisation uses is efficient and optimised, particularly as we expand internationally, as well as providing a degree of innovation internally.

There are around 140 people in the team as a whole, including enterprise architects, the business change team, operations team and a "follow the sun" service delivery model.

**And how many people are in the SmartDelivery team?**

**Conetta:** We have a complement of 32 people in SmartDelivery, including 10 software engineers and 13 legal engineers.

I also think it is important to emphasise that we see a need to embed different skillsets throughout the business. We are not ring-fencing our capabilities within an isolated group. Rather, we are finding ways to embed those skills directly within the delivery teams of our legal services.

**What are your top line objectives as an IT division?**

**Halliwell:** We don't just see technology as a way to improve our own efficiency – to be faster, better, cheaper. Using our technology platforms we are generating data we can use to provide clients with insights into their own businesses. There are a couple of examples where we are already feeding that back to clients. The more that we systematise what we are doing with technology platforms, the more we will be able to do that.

**Tranter:** I would agree with David about the importance of data. It is certainly something we are looking to exploit through our internal IT strategy as well. Technology transparency is also key. We want to ensure that technology empowers the organisation, rather than getting in the way. This means being device-agnostic and

creating digital end points for services that are consumed by our internal business colleagues in the way that they want to consume them - in any location and at whatever time is necessary. A key objective for me is ensuring we have the architecture, platforms and processes to enable us to do that.

**What key pieces of new technology have been introduced over the past year or so?**

**Conetta:** One of the key things that we have introduced ourselves is a platform called Matter Management. We recognised a good few years ago that many of the workflow platforms on the market, be they focused on law or otherwise, did not match the way that lawyers approach their workload. So we have applied rule-based artificial intelligence to the challenge, recognising that what lawyers need is the right checklist, the right list of templates and the right list of roles that they need to fill, as well, of course, as a project plan in front of them.

That's where our technology kicks in. We have a proven ability to enable legal engineers to model scenarios. For example, it could involve tribunals raised because of sex discrimination, or wrongful termination or contract disputes. Whilst the overall process is the same, the checklist, templates and work that needs to be done by the lawyer could differ widely across those scenarios

It takes the whole concept of a work type and breaks it down to a far more granular level. It integrates our data technology with workflow technology together with AI rule-based technology, so lawyers have just one place to go to see the matters they are working on, but also the correct checklist they should be operating against.

**That is clearly a case of the firm building what it is unable to buy. What is your approach, as a whole, to innovation?**

**Halliwell:** We don't invest directly in start-ups like Allen & Overy or Mishcon de Reya. But we do have a combination of different things we are doing in a similar space. First, we are building our own internal capabilities, as Orlando mentioned. Second, we have collaborated with technology companies to create joint venture propositions. We built a business called Cerico alongside a tech company called Campbell Nash. We grew that into a really exciting business that we sold to Dow Jones.

The third area of focus is quite a new one. We are looking at ways to access a really broad set of international tech start-ups, focused on a whole range of industry sectors rather than just the law, and we've got some ideas about that that we're looking at now.

**What specific projects or priorities do you have for 2019?**

**Conetta:** There are some public initiatives that we have put our name to, particularly around blockchain and the future of contracts. We are part of the Global Legal Blockchain Consortium, which has been pioneered by the team behind Integra. That particular initiative is about standardisation on platforms and we are working with

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other law firms and, of course the consortium as a whole, to investigate various proofs of concept to see how that might work.

We have also signed up with the Accord project. That initiative is trying to deal with the problem from another angle. It is examining the extent to which we are able to standardise particular forms of computable contracts in specific areas of expertise such as supply chain, for example. We have lawyers involved in each of the working groups they have set up and, of course, we are involved in the technology working groups as well.

I think this gives an indication that, while we are willing to build our own technology, we look to do so based on collaborative standards. It is also about taking risks. No-one can predict exactly which direction legal blockchain is going to take. We want to be part of that journey.

#### **What would you say is the biggest challenge, or frustration, in each of your roles?**

**Tranter:** I would add that the internal adoption of cloud-based technologies – for example Office 365 – is both a challenge and an opportunity. Rather than focussed on technology it represents a cultural shift and adoption of how we operate, how we collaborate. Some of our colleagues will readily adapt to these changes. For others, it will take a little longer.

The other challenge that we face is around perception of the cloud and security. However, if we can resolve the perception, there will be good opportunities to lead in new innovative directions.

**Conetta:** From my perspective, the big challenge we see is around expectations for artificial intelligence. There is a view amongst some lawyers, and clients, that technology will do the same job that lawyers are doing right now. Some people find that really exciting. For others it is a threat – they simply don't believe a computer could do what they do. Either way, I don't think this is a helpful way to think about technology.

I would like to move to a bigger picture conversation about how we can use capabilities to reinvent our legal services. It is about how we can solve problems that were hitherto impossible to solve. AI is part of that story, certainly. But it's a capability, not a product you can just slot in to fix all your historical legal problems.

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

**Halliwell:** For me, success would be no longer having a named innovation team. Innovation would just be the normal way in which Pinsent Masons does all of its business.

**Tranter:** For me it would be technology transparency and empowerment. It would meet the need to support the firm to work in a way that supports a dynamic global organisation.

**Conetta:** I would add that our legal services will be easier to consume and will proactively address the strategic challenges of clients on their own transformation journeys.

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

**UK & EMEA** Top 100 UK multi-disciplinary law firm **Walker Morris** is to swap out its in-house case management system for **Lexis Visualfiles**. Initially Visualfiles will be deployed in the firm's mortgage repossession department, with a subsequent implementation to 100 users in the Collections & Recoveries and Banking & Finance Litigation departments. **Rob Aberdein**, a partner at Walker Morris, which has a staff of over 450 including 45 partners, gave an insight into the firm's rationale behind the selection. "The great thing about Visualfiles is that it can be deployed in the business exactly as we want it to be," he said. "At one end of the spectrum, it allows us the flexibility to develop new and innovative ways of working that will set us noticeably apart in the industry. At the other end, we can simply use the standard functionality for everyday operations such as time recording. With all of this, we can use the Visualfiles Robot technology to remove human interaction and automate processes to ensure that we are as efficient as possible, which is vital when managing large volume of transactions."

UK top 60 law firm **Brodies** has selected **Aderant Expert**, swapping out its soon-to-be-sunsetted Thomson Reuters Elite Enterprise practice management system. Brodies was the first UK client to go live on Elite's Business Development Premier integral CRM solution, which it will continue to use. Brodies, Scotland's largest law firm, conducted what finance director **David Edwards** describes as a desktop assessment of all the leading practice management systems before receiving demonstrations from "a shortlist", which inevitably included Elite 3E and Aderant. He would not be drawn on which other PMS vendors, if any, were on that shortlist. With regard to why Aderant won, Edwards said: "There was no one single thing. I'm a bit old fashioned and these things come down to both systems and people, and Aderant seemed that little bit better than the others."

Global law firm **Taylor Vinters** has expanded its **DocsCorp** portfolio by rolling out **pdfDocs** for creating, editing and collating their PDF documents.

Award-winning law firm **DMH Stallard** has chosen **iManage Work 10** to provide its professionals with industry-leading document and email management. Having previously relied on an all-in-one practice management system they now wanted improved functionality. The firm was drawn to iManage Work 10 for its smart and personalised search, which quickly cuts through clutter and locates relevant information in less time using machine learning and data analytics. "iManage makes it very easy to save our emails and documents and find relevant information quickly," said **Peter Blackwell**, head of IT at DMH Stallard. "Work 10 automatically suggests save locations for documents and emails, helping ensure

important documents are filed in the right place. Plus, the simple interface means lawyers can just type what they're looking for into the search box and pull up documents instantly." iManage partner **Phoenix Business Solutions** is assisting DMH Stallard with its deployment of iManage Work 10.

Following a record quarter at the end of last year, and its growth in general in 2018 when 19 clients signed up to their secure file sharing and collaboration platform, **Hubshare** from **Nikec Solutions** has signed **Birkett Long** as their first new collaboration of 2019. The Essex-based firm selected Hubshare as its new data room platform.

Elsewhere, Dorset-based **Frettons Solicitors**, which specialises in corporate & commercial, commercial property, employment, dispute resolution and private client work, has selected **Hubshare** as its client portal and document collaboration platform. Commenting on the growth of Hubshare in 2018, **Nicholas Child**, CEO, said: "2018 was a very positive year for Hubshare. We had some significant product releases and integrations, as well as many new clients across the globe. We now have clients in the US, Canada, England, Ireland, France, Switzerland and Australia."

**Reynen Court LLC**, a technology start-up building a services automation platform for the legal industry, has announced the completion of a Series A investment round with financing from **Latham & Watkins, Clifford Chance** and **Prins H LLC**, an affiliate of **Andrew D. Klein**, the company's founder and CEO. Reynen Court aims to make it easy, secure and efficient for law firms to deploy heavy computing applications. A consortium of law firms, co-chaired by Clifford Chance and Latham & Watkins, is supporting the development and launch of the platform. Other participating firms include **Paul Weiss** (vice chair); **Covington; Cravath, Swaine & Moore; Freshfields Bruckhaus Deringer; Gibson Dunn; Linklaters; Orrick; Ropes & Gray; Skadden Arps;** and **White & Case**. **Paul Greenwood**, CIO at Clifford Chance, and **Ken Heaps**, CIO at Latham & Watkins, will join Reynen Court's board of directors. "Both of these great firms have provided incredible strategic support since our inception," said Klein. "We could not imagine more valuable, aligned investors." Reynen Court will use the funds to hire more engineers and product managers and also put in place experienced account and deployment managers as it prepares to launch pilots with members of the consortium. A range of legal technology vendors covering document automation, process engineering and AI are working towards making their applications available through the Reynen Court platform.

In a significant boost for legal technology cloud provider **Peppermint Technology**, Silicon Valley tech investment firm **Accel-KKR** and long-term investors **Scottish Equity Partners** (SEP) are to invest over £7m to accelerate Peppermint's growth and further develop its legal software-as-a-service platform. Based on Microsoft Dynamics CRM, Peppermint provides the full suite of legal applications, delivered as a SaaS product. Last year it launched a Dynamics 365 public cloud customer

relationship management system that is said to be gaining the interest of Microsoft's larger enterprise clients, leading Microsoft to say that Peppermint has "shifted gears". CEO **Gary Young** said: "This is a very exciting time for Peppermint. The backing of both Accel-KKR and SEP reinforces that our innovative approach to transforming legal services through technology fundamentally sets us apart in the industry". **Samantha Shows**, managing director at Accel-KKR said: "Since we first began conversations with Peppermint, we have been impressed with the sophistication and focus of the management team and their mission to leverage technology to make their customers' lives easier and more efficient. We are excited to back this customer-centric business as they continue building their momentum in the market."

Silicon Valley-based alternative legal services provider **InCloudCounsel** is to launch in Europe, with its new London office led by former Kirkland & Ellis corporate and capital markets associate **Bridget Deiters**. The business also intends to launch in Asia-Pacific by the end of the year. InCloudCounsel takes care of companies' routine, high volume legal work via a remote network of lawyers and account managers using a proprietary cloud-based contract management platform. Much like its potential competitors (in the UK that would include the likes of LOD), the company also sells itself on the alternative career path it can offer lawyers, allowing experienced professionals to continue to practice but with a more attractive work/life balance - a gig economy for the legal sector. InCloudCounsel was founded by a trio of legal, business and technology professionals. CEO **Troy Pospisil** previously worked at private equity firm HIG Capital, where he says he experienced the frustrations of badly handled routine legal work first-hand. COO **Ben Levi** joined from Kirkland & Ellis, while CTO **Lane Lillquist** was the vice president of engineering at Uversity.

South of England law firm **Glanvilles LLP** has selected **Liberate** from **Linetime** to allow the firm to meet the high standards set by compliance and regulatory bodies, including the SRA and Lexcel, across their wide range of legal services. The selection of the Liberate system demonstrates Glanvilles' commitment to ensuring a streamlined and efficient firm-wide IT system. The ability to standardise and optimise processes will enable the firm to continue offering its clients high quality customer service in all aspects of legal work. **Jeremy Weeks**, Glanville's chief executive officer, said: "As a full service law firm with three offices across the South Coast, we continue to enhance our customer service experience as our absolute priority and therefore making the change from our long-standing case management system to Linetime in 2019 will help us streamline our service and provide additional benefits to our clients and staff. We look forward to developing our working relationship and case management services with Linetime"

Portsmouth and Waterlooville-based commercial and family law specialists **Larcomes** has become the latest law firm to invest in **Liberate**, **Linetime's** single-system practice management solution. Following a

diligent selection process and extensive consultation with existing customers, the firm has chosen Linetime's combined accounting, CMS and CRM system to assist with operational efficiency and to enhance their existing high quality of client service. Larcomes has a well-established reputation for providing personal and business legal advice. The Liberate system and, in particular, the **Liberate Self-Serve mobile** application, will enable the firm to deliver a top-quality legal service to both existing and new clients. **Janice Ward**, Managing Partner of Larcomes said: "We were impressed with the Linetime approach and feel confident that Linetime will deliver a future-proof solution for the firm and feel that the technology, software and integrations will give the firm all that it needs to continue to give, and exceed, our high level of service to existing and future clients. We look forward to the forthcoming roll-out and the benefits and improvements it will provide to our clients and staff."

Leading French law firm **CMS Francis Lefebvre Avocats** (CMS FL) is set to implement the **Intapp Professional Services Platform**, which spans the entire client life cycle, covering all areas from new business development, unified business acceptance and time management. **Philippe Grousset**, partner and general director at CMS FL, said: "At a time of huge opportunity for CMS FL, we knew we needed to position ourselves above the competition. Our vision and strategy has always been about putting our clients first by providing innovative and high value-added legal solutions. By investing in the Intapp Professional Services Platform we have the ability to deliver greater successes for our clients while also making it easier for our lawyers to conduct business day-to-day. We shall be able to use the data insights from the platform to inform us strategically on upcoming projects and help us excel as a firm."

UK top 150 law firm **Higgs & Sons** has selected **Aderant Expert** as its practice management system. **Paul Hunt**, managing partner, said: "We are excited to be partnering with Aderant. We believe that the current and future needs of both our lawyers and our clients will be maximised by the effective and timely deployment of not only one of the most 'fit for purpose' but also one of most progressive solutions available in the legal software market."

Norwegian law firm **Advokatfirmaet Haavind AS** has purchased **contentCrawler** from **DocsCorp** to ensure all documents in its iManage repositories are fully searchable.

Contract intelligence vendor **ThoughtRiver** has been awarded funding from **Innovate UK** for a £400,000 project to develop what it refers to as "thinking AI". ThoughtRiver's technology automates the day-to-day routing and prioritisation of decisions in corporate legal functions, using machine learning to interpret contracts and assess their risk based on corporate policies and protocols. Each contract pre-screen undertaken by ThoughtRiver triggers thousands of software-answered questions on each contract in order to replicate what actually happens when a junior lawyer or paralegal conducts an initial scan of a contract. Pre-screening then rolls up the answers in order to deliver a single final context-sensitive recommendation

about whether a contract needs further review and, if so, by whom. The new research project, which ThoughtRiver will undertake in collaboration with NLP consultancy **iLexIR** and its founder **Professor Ted Briscoe** of Cambridge University, is intended to result in a significant advance in the ability of computers to rationalise complex problems in novel scenarios based on self-taught logic.

West Yorkshire law firm **Chadwick Lawrence** has switched to **SOS Connect** from **Solicitors Own Software**. The firm, which has seven offices across the county, offers a range of legal services for both personal and business clients and is one of the few law firms in the area that has specialist medical negligence and sports law capabilities. Managing partner **Neil Wilson** said the firm had decided to replace its previous legal software with a view to creating a more flexible and efficient working platform as part of its strategic plan. "We chose SOS Connect following a very thorough procurement exercise," he said. "During this process SOS clearly demonstrated not only that its practice management solution is one of the best on the market but also that its way of working sits comfortably within our established values."

**Lydian**, Belgium's Best Law Firm 2018, has adopted two **DocsCorp** applications: **pdfDocs** for project-centric PDF management and **compareDocs** for document comparison.

**LexisNexis** is to exit the practice management system market with the sale of enterprise resource planning system LexisOne to Dynamics 365 gold partner **SAGlobal**. The sale will be a blow to early law firm adopters of the Microsoft Dynamics 365-based ERP, which has, despite the success stories surrounding its flagship law firm customer Fieldfisher, failed to gain significant traction in the legal sector, with one CIO recently commenting quite simply, "Dynamics is not proven." The sale comes despite very considerable investment in LexisOne by LexisNexis which, at the end of 2015, opened an R&D facility in Leeds intended to be the UK hub of product development for LexisOne. While the Leeds office is also the hub for long-established case management system Visualfiles, at the time the Leeds office opened, enterprise solutions general manager **Andy Sparkes** said: "This is part of our investment in and commitment to LexisOne." Firms will inevitably be asking how SAGlobal will be able to succeed where Lexis has failed. However, the company is a gold certified worldwide Microsoft Dynamics 365 implementation partner and is the only Dynamics 365 partner able to offer CRM, ERP and HCP to professional services firms. It has been significantly ramping up its legal capability and last year joined forces with **360 Vertical Solutions**. The combined company, which has around 600 employees operating out of offices in 18 countries around the world, operates as SAGlobal, albeit that it retains the Legal360 brand name.

**PracticeEvolve** has announced that **Silk Family Law** in Newcastle and **Wilson McKendrick** in Glasgow, have joined their growing family. Both firms currently run the end-of-lived Elite Envision (aka Pilgrim LawSoft) practice management system. PracticeEvolve is a modern and

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feature-rich document management, legal accounts and workflow solution that offers a blend of feature-rich functionality and value for money. Partner and barrister **Ian Kennerley** commented: "Silk Family Law is delighted to be joining the growing stable of PracticeEvolve legal teams. As a niche family law practice, PracticeEvolve meets our needs for a cost-efficient integrated system which combines effective document and financial management systems". **Mark Wilson**, Director at Wilson McKendrick reflected: "We reviewed a large number of practice and case management products to replace our Envision application and PracticeEvolve stood out due to the comprehensive feature set, modern and user-friendly interface and the attitude and commitment of the company representatives."

Remote meetings technology company **LoopUp Group** has signed a "material contract renewal" with **Clifford Chance**. The minimum total contract value is £2.34m over a three-year term. AIM-listed LoopUp will be providing conference calls across Clifford Chance's global operations, spanning 32 major financial centres in the Americas, Asia Pacific, Europe, the Middle East and Africa. While the LoopUp product is typically offered on a pay-as-you-go basis, the deal with Clifford Chance is based on a guaranteed minimum spend. It is a major win for the company whose total revenue in 2017 was £17.5m.

Full-service law firm **Paris Smith LLP** has chosen **Liberate** from **Linetime** for practice and case management across their offices in southern and central England. After a careful selection process, coupled with feedback from existing Liberate users, the firm identified Liberate as the solution to elevate their efficiency and productivity. Management was particularly drawn to Liberate's seamless combination of accounts, case management and CRM, which will enable the firm to take full advantage of its information and knowledge base without the need for expensive and time-consuming integration projects. **Edward Power**, technology partner at Paris Smith said: "We are delighted to have selected Linetime's Liberate and are excited about the benefits Liberate offers to both our staff and the service we offer our clients".

**North America** **Elevate Services** has acquired **Sumati Group**, a leading provider of contract lifecycle management (CLM) services. The move expands Elevate's existing contracts support capabilities globally with over 200 Sumati lawyers and technologists providing contract review and analysis, and CLM services on over 20 leading CLM platforms. The deal also adds Sumati's proprietary software for contract review and analysis to Elevate's technology arsenal, which was recently expanded by

Elevate's November 2018 acquisition of enterprise legal AI technology and consulting firm **LexPredict**. "The combination with Sumati provides us additional capabilities and capacity to meet growing customer demand for contract support solutions across the contract lifecycle continuum," says **Kunoor Chopra**, VP of legal services at Elevate. "Sumati is the only service provider 100% focused on contract management and merging with Elevate achieves our long-standing goal of being part of a world-class platform and team that can leverage this expertise," says **Prashant Dubey**, president and CEO of Sumati.

Acquisition-hungry **Elevate Services** has also acquired senior flexible resource law firm **Halebury**, in the process converting to become an alternative business structure (ABS) to facilitate the acquisition of the UK-regulated practice. Halebury will be an Elevate business, retaining its own team and building on its flexible lawyering capability most often utilised by in-house legal teams but seen recently in private practice in a programme led by Stephen Allen at Hogan Lovells. With Halebury on board, Elevate plans to provide both in-house legal teams and law firms with a 360-degree service offering spanning talent, resourcing, consulting, technology and managed services. Commenting on the acquisition, **John Croft**, president of Elevate, said: "Halebury's expert talent gives our customers access to an even deeper pool of senior in-house resources and a combined team that can lead and manage complex legal projects from end to end." He told Legal IT Insider: "We now have an ABS license as a law company - we might be the first. The massive benefit to clients of this acquisition is that before they were able to offer flexible lawyers, but they are working with the kind of law departments who are trying to become more efficient and asking for consulting and technology and a more managed or offshore service and, until today, they have not been able to offer that, but now they can." **Denise Nurse**, co-founder of Halebury (alongside Janvi Patel), said: "In addition to what this means for our clients, we are thrilled about what it means for our people. Halebury and Elevate combined provide an ideal home for specialist, creative and innovative talent. Our team can now operate on a global scale, leveraging the best possible training and career development opportunities, and our clients will benefit from our ability to attract and retain the finest legal and business minds."

Acquisition-starved **Elevate Services** has now acquired eDiscovery and managed services provider **Yerra Solutions**. Following by far the biggest of its acquisitions, Elevate and Yerra will fully integrate their respective service offerings, which are said to closely parallel each other in consulting, technology and tech-

enabled managed services for law departments and law firms. The Yerra leadership team have all joined Elevate, whose combined 1,200 team members, fluent in over 20 languages, serve customers from locations throughout North America, Europe and Asia Pacific. Elevate CEO **Lokendra Tomar** commented: "Customers have told us they want consulting, technology and tech-enabled services from one provider that has experience working with peers in their specific industries. We have built a full range of capabilities that a Global 1000 general counsel can draw upon, and we are increasingly focused on the sector-specific nuances of running a law department. Yerra's team deepens our financial services and life sciences sector expertise." Along with Yerra's international presence and expertise, Yerra's roster of marquee global customers was a decisive factor in this acquisition. **Credit Suisse** acted as exclusive financial advisor to Yerra.

**DFIN**, the recently rebranded name for Donnelley Financial Solutions, an end-to-end risk and compliance company that was spun out of RR Donnelley in 2016, has announced the acquisition of AI-backed contract analytics platform **eBrevia** for \$19.5m. DFIN's global capital markets president **Craig Clay** explained: "We're helping businesses to collaborate and understand the documents around their business and providing the solutions around that. We partnered with eBrevia in 2015, invested in them in 2016 and have now acquired them. It was a natural extension of the partnership to make the acquisition." eBrevia already plugs into DFIN's bank-grade security virtual data room **DFIN Venue**, providing clients with in-depth insights into the copious pools of documents stored there. DFIN is not only plugging eBrevia into its existing offering but says it plans to accelerate eBrevia's growth.

**FileTrail**, a supplier of information governance and records management software, has announced that prominent US law firm **Davis Wright Tremaine LLP** (DWT) has selected them to expand its existing records management implementation and advance the firm's information governance (IG) programme. DWT chose **FileTrail GPS**, Governance Policy Suite, for both its automated retention and disposition and its advanced matter mobility tools. FileTrail integrates with popular document management platforms, including NetDocuments, which DWT uses as a combined solution to access physical records without leaving the DMS. The platform also includes connectors to synchronise data from new business intake, provisioning (ethical walls) and billing systems to eliminate redundant data entry and ensure consistency, yielding greater efficiency and improved productivity. The firm is now adding FileTrail GPS to gain a modern, holistic approach to IG. GPS improves the implementation of the firm's IG policies and outside counsel guidelines by managing retention policies across all repositories within the firm's ecosystem and automating their review cycles to achieve auditable, defensible disposition.

Enterprise legal and contract management software provider Onit has secured \$200 million from West Coast private equity firm **K1 Investment Management**, which it says it will use to scale operations to meet increasing

client demand for its process automation technology and enhance its scalable platform. Additionally, the investment will help fund go-to-market strategies, accelerate new product development and enhance functionality of existing product offerings. "Onit's platform has raised the bar on what users expect from software that extends across the enterprise," said Neil Malik, managing partner at K1. "We've seen the company more than triple its customer base and revenue in two years and we have tremendous confidence in the management team's long-term vision. It's exciting to partner with a team that pioneered the enterprise legal management software space nearly 20 years ago and to now see how their innovative solutions are transforming the way Fortune 500 companies and legal departments operate."

**OpenText** has announced that leading international law firm **Pillsbury Winthrop Shaw Pittman LLP** will be the first law firm to deploy **OpenText Magellan**, OpenText's AI-enabled analytics platform. "Technology is rapidly disrupting the legal profession and Pillsbury is leading the transformation. We were pioneers in the use of technology-assisted review and cloud-based eDiscovery, and we have achieved remarkable efficiencies for Pillsbury's clients using our OpenText Accelerate platform," said Pillsbury litigation partner **David Stanton**. "Now, we are working with OpenText to integrate the Magellan AI suite, another industry first. It gives us flexible machine learning capabilities and an adaptive suite of text-mining and visualisation tools, which will change how we approach big data - driving faster and more in-depth legal analytics and permitting us to leverage custom data models and taxonomies to streamline labour-intensive tasks." Magellan complements the firm's existing OpenText Accelerate Cloud deployment and will deliver extended machine learning abilities beyond traditional eDiscovery - enabling Pillsbury's lawyers to interact with large data collections in new ways that will make it easier to understand and present legal case narratives and to unearth investigatory facts.

**Foundation Software Group**, a developer of next-generation software for large law firms, has announced **Akin Gump** as a new client. Foundation helps law firms leverage their collective work experience and the expertise of their lawyers. It provides a single comprehensive repository that is tightly integrated with existing business applications and, at the same time, supports the collection of additional information during the matter lifecycle. "One of the keys to providing excellent service to our clients is our ability to optimally leverage the vast pool of experience within our global firm," explained **Aaron Ruleman**, CIO at Akin Gump. "We chose Foundation's configurable platform architecture because it enables us to continuously adapt to meet the evolving needs of our clients and lawyers over time. This solution will put all our collective work experience and talent - drawn from both internal and external data sources - more rapidly at our fingertips, ensuring that we continue to provide the best outcomes for our clients."

National law firm Dykema, with more than 400 legal

professionals and over a dozen offices in the US, has selected **Aderant Expert** for its legal practice and financial management. "After a lengthy and detailed evaluation process, the entire finance and accounting team at Dykema agreed that the Aderant Expert product will more than satisfy the current and future needs of the firm as we continue to expand into new markets and practice areas," said **Christian Lueth**, Dykema's chief financial officer. He added: "It will allow us to streamline and simplify many of our current processes, which will lead to greater efficiencies and improved matter management."

**Litera Microsystems** has announced that Lewis Roca Rothgerber Christie LLP, an Am Law 200 commercial law firm headquartered in Phoenix, Arizona, has elected to roll out their complete product suite across the firm. Litera Microsystems' full document drafting suite, Litera Desktop, is comprised of products for drafting, proofreading, comparing, repairing, cleaning and securing documents, collectively supporting the document drafting lifecycle. **Andrew Johnson**, Lewis Roca Rothgerber Christie CIO, said, "We knew when Litera Microsystems presented their integrated product suite that we were seeing the complete solution we've been looking for. We're delighted that we were able to select a single provider that offers high-quality products while simplifying our vendor relationships."

**Neota Logic**, a platform created to capture and automate expertise, has announced that **Actuate Law LLC**, an innovative law firm serving the next generation of business leaders, has selected their platform to build and deliver a range of AI-driven legal and compliance solutions to their clients. **Jeffrey Sharer**, chief innovation counsel at the firm, commented: "Prior to joining Actuate Law I worked extensively with the Neota platform and knew the value of automating expertise for clients. Actuate Law was founded to break moulds and, using Neota, we're able to put fact-specific legal advice at clients' fingertips, 24/7/365, empowering them to 'self-serve' in most circumstances and to escalate to counsel where complexity or nuance warrant. It's a powerful combination and we look forward to building a multitude of solutions on the Neota platform."

**APAC** After a quiet end to 2018 and even quieter start to 2019, **Elevate Services** has just acquired **Cognatio Law**, a Hong Kong-based flexible lawyering and legal consulting business serving in-house legal and compliance teams as well as law firms across Asia Pacific. This move expands Elevate's reach and local expertise in Hong Kong and Singapore, building upon the company's operations that already serve customers on four continents. "Cognatio is a key element of our strategic growth plan," explained Elevate's CEO **Lokendra Tomar**. "Our customers tell us they want consulting, technology and tech-enabled services from a single provider with a global footprint and deep experience in each regional market. Cognatio's experience in Hong Kong and Singapore, especially with flexible lawyering, will enable us to better serve customers in Asia." **Lesley Hobbs**, founder and CEO of Cognatio, added: "We are delighted to join Elevate. As the flexible

legal services market continues to grow in Hong Kong, we believe joining forces with a full-service global provider like Elevate is the best way to reach more in-house legal teams and law firms."

## ► Movers & Shakers

**UK & EMEA** **EY Riverview Law** has appointed ex-**Barclays Bank** GC Rob Dinning as director of legal function co-sourcing. EY Riverview Law's CEO **Chris Price** said: "Rob brings a wealth of knowledge and experience in leading legal transformation initiatives including departmental restructurings, legal panel management and evolution and external sourcing strategies utilising both managed service and contract lawyers."

**Richard Hodgkinson** has joined **Freeths** as its first-ever chief technology officer, as the UK top 60 law firm engages in a transformation programme that will see it overhaul its underlying technology stack before moving on to more strategic planning. Hodgkinson was previously CTO at DWF, where he was a member of the executive board as well as chairman of DWF's software arm DWF360. A legal tech veteran, before DWF he was group IT and operations director at Irwin Mitchell.

**Norton Rose Fulbright** CIO **Edie Dillon** has joined **Markwardt Performance Consulting** and been replaced for the time being by **Rob Otty**, managing partner, business integration, who is acting CIO.

**Deloitte** has hired Allen & Overy partner **Michael Castle** as its new managing partner for **Deloitte Legal** in the UK, having last year announced that it will offer legal advice alongside technology-enabled delivery and process optimisation. Castle will be the first permanent lead partner for Deloitte Legal, and will begin in the role in February 2019, based in London. Castle joins after spending more than two decades at A&O, where he was a partner in the banking practice. As managing partner at Deloitte Legal, Castle will make use of capabilities from across Deloitte and develop new ways to take legal solutions to the market. This will combine legal advice with legal managed services, technology and consultancy to provide solutions to clients looking to optimise the management of their legal operations. Commenting on the appointment, **Matt Ellis**, managing partner for tax and legal, Deloitte North West Europe, said: "We have sky-high ambitions for Deloitte Legal in the UK, and this is why it is excellent to have someone of Michael's calibre at the helm to build our presence and grow our distinctive suite of legal offerings. Michael brings a wealth of experience and it is clear to see that his leadership and understanding of the legal market and appreciation of legal technology will only benefit the rest of the team and our clients. We have an ambitious, talented team that looks set to grow rapidly as we ramp up our recruitment across Deloitte Legal." Castle added: "Deloitte Legal is ideally placed to fill the digital gap in the legal market and provide legal solutions to tackle these complexities head on. By drawing not only on our legal expertise, but also on our deep understanding of the

latest technology and tried-and-tested ways of improving processes, we can help legal departments improve efficiencies and increase the value they deliver back to their business."

**The Law Society's** executive director of business development, **Simon Drane**, has left to set up his own consultancy, with the plan to advise start-ups, established tech companies, professional services organisations and investors on the creation of product strategies that drive commercial growth. **Earlsferry Advisory** will be working with technology businesses at varying stages of their evolution, and professional services firms as they engage more in providing productised services for their clients, as well as helping those investing in technology businesses to make the right choices. Speaking to Legal IT Insider, Drane, who was latterly on the executive board of the Law Society running their commercial arm and was responsible for its relationships with Legal Geek, Seedrs and Barclays Eagle Lab, said: "A lot of what I did at The Law Society involved working with investment boards and at LexisNexis I did a lot of their product strategy, which I loved."

**Select Legal Systems**, suppliers of LAWFUSION, the legal practice management software, has appointed **Alex Smales** as their first general manager. Smales brings a wealth of experience to the growing business in the areas of IT, process improvement and facilities management. **Steve Dixon**, co-owner/director said: "Alex joins us at an exciting time. His appointment will ensure we continue to build on the solid foundations of the business and allow further growth, continued improvement and implementation of the exciting development plans we have for LAWFUSION over the next five years." Smales added: "I shall take full responsibility for fine tuning all of Select Legal's business procedures across all departments, as well as the facilities management for the business. Steve Dixon will continue to drive innovation and the development of LAWFUSION, as well as talent management and sales and marketing for the business. Co-owner/director Mike Craven remains focused on finances and overseeing the smooth running of quality and compliance as part of service delivery."

**Allen & Overy** (A&O) has at last found a replacement for former chief technology officer Ian Storer, with the out-of-sector appointment of **John O'Donovan**, who joins from TalkTalk where he was chief architect. Aside from TalkTalk, O'Donovan has held senior tech roles at Dow Jones (CTO, consumer products and platforms); the Financial Times (CTO); and the BBC (chief architect, BBC news and sport interactive technology). **Andrew Brammer**, A&O's IT and shared services director, commented: "With the firm's advanced delivery capability widely recognised in the market and a major technology transformation under way, John joins at a time when his skills and experience will help the firm to stay ahead of its competitors."

**LegalRM Limited**, experts in records management and information governance solutions for law firms, has strengthened their team by adding seasoned law firm operations director **Nick Mercer** to the team. Mercer will help founder and **CEO Chris Giles** with business and

marketing, strategy and communications. Mercer said: "I've known Chris since he and Keith Dacey created the company and I've always been an enthusiastic advocate for their knowledge, vision and technical skill". Commenting on hiring Nick, Giles explained, "We've delivered leading records management solutions for law firms, including four of the top 10 global firms, for nearly 15 years. Our clients see the integration of our flagship records management platform, iCompli, as a natural progression to deliver an integrated information governance solution. They're upgrading fast and new clients are building up, so I realised I needed skilled help shaping and managing this growth; and I thought of Nick, with his experience, enthusiasm and drive."

**North America** Industry consultant and well-known US commentator and blogger **Ron Friedmann** has joined **LAC Group** to fill the newly-created executive role of chief knowledge and information officer. Friedmann, who was previously a partner at legal management consulting firm Fireman & Company, will report to LAC's chief executive officer **Robert Corrao** and lead the firm's technology initiatives, specifically understanding clients' business and technology needs and developing strategic solutions for them. Friedmann's role will be both internal and client-facing, and he tells us: "One of the important elements of my role will be to help further tech-enable LAC for internal use as well as being client-facing, which can touch anything from intranets to mobile devices." He adds: "People in business are consuming information in many different contexts so a question I have is how and when do they want to consume information; where do they want to get it; and how can we make sure it's delivered cost-effectively."

**Baker McKenzie** has announced the addition of market-leading legal business professionals **D. Casey Flaherty** and **Jae Um** as the firm continues to enhance and reimagine the delivery of its legal services to global clients. Flaherty joins the firm as director of legal project management, responsible for accelerating the growth of their LPM capability and sharpening the attendant focus on client alignment. Based in Austin, Texas, Flaherty brings more than 14 years of experience as a lawyer and consultant. Um joins the firm as director of pricing strategy, responsible for advancing the firm's approach to pricing and strengthening enabling capabilities to drive firm-wide implementation at scale. Um brings over 12 years of cross-functional experience in legal business and is based in New York. Um and Flaherty will work closely with **David Cambria**, global director of legal operations, to deliver on the firm's commitment to client value. David joined Baker McKenzie in June 2018 from Archer Daniels Midland Company, a Fortune 50 company and one of the world's largest agricultural processors and ingredient providers. There, he held the position of global director of operations - Law, Compliance and Government Relations for five years. **Jason Marty**, the firm's global chief operating officer, explains, "David has added an invaluable 'voice of the client' to our firm's leadership that

signals serious commitment to helping our clients navigate complexity and create value. Delivering on that promise at scale means investing further in the team and adding top quality talent like Jae and Casey will accelerate our ability to enhance our service delivery while innovating for the future." David Cambria adds: "We are thrilled to add Casey and Jae to our team. They are both widely recognised domain experts in legal business and strategic sourcing, bringing fresh perspectives and unique insights into the evolving needs of our clients, as well as decades of experience in the frontline work of service delivery innovation. "

**K&L Gates'** chief information officer, **Neeraj Rajpal**, has moved on (see below) and been replaced for the time being by **Bart Gabler**, formerly director of pricing and project management, as acting CIO.

In a hugely significant hire for the blockchain community, K&L Gates' former chief information officer **Neeraj Rajpal** has taken on the new role of chief innovation officer at blockchain technology infrastructure provider **Integra Ledger**. Rajpal is tasked with identifying opportunities to work with law firms, corporate legal teams and software companies, developing proofs of concept to help showcase Integra's blockchain platform, which is unique in being dedicated to the legal sector. Integra is focused on the business of law and underpins the blockchain integrations at both NetDocuments and Thomson Reuters Contract Express. Rajpal will also be working with the Global Legal Blockchain Consortium (GLBC), which was founded by Integra's founder and CEO David Fisher and has now reached 175 member-organisations across the globe. Members include law firms Baker McKenzie, White & Case and Orrick as well as corporate giants such as IBM, AIG and Liberty Mutual and software vendors such as Thomson Reuters and Wolters Kluwer. Around a dozen law schools are also members of the GLBC. Rajpal, who will be based in New York and who has also held the CIO role at firms including Bryan Cave and Morrison & Foerster, told Legal IT Insider: "What I'm trying to do is create a proof of concept with a couple of firms to showcase our technology at no cost. In a couple of days, we can showcase something that you can use day in and day out, using technology that is very simple to use. Law firms have traditionally not been very open to change but their clients are now pushing them to change and the clients we've spoken to are very interested in Integra's technology.

**Hanzo**, the company known for dynamic web archiving for compliance and eDiscovery professionals, has announced the appointment of **James Murphy** as vice-president of product. Murphy brings a customer-centric approach to identifying market needs and guiding the direction of product development to support Hanzo's rapid growth. Murphy will be responsible for defining product vision, strategy, planning and execution. For the last five years Murphy was Hanzo's director of service delivery and has more than 19 years' experience working within litigation support, information technology, eDiscovery and web archiving. Before joining Hanzo

Murphy was director of professional services/operations engineering with the Merrill Corporation and has held various roles in technical support, business information technology and solutions architecture. "Jim pairs extensive experience in supporting eDiscovery and compliance with first-hand knowledge of Hanzo's technology and customer base, making him ideally positioned to evolve the product roadmap towards the next generation of AI-based automation and dynamic content review and analysis," said **Denis Maurin**, chief technology officer. "His innovative and customer-centric approach, along with his commitment to results, will enable us to deliver the right products to serve real-world market challenges."

**Epiq**, a global legal services company, has announced that **David C. Dobson** has joined as the new CEO and **John Davenport Jr**, the current CEO, will move up to be executive chairman of the board. Davenport founded Epiq, then known as Document Technologies, in 1998 and grew the business from a handful of employees and clients to a billion-dollar global organisation. "We have found a remarkable leader that embodies our core values and client-centric focus to assume leadership of Epiq," said Davenport. "I'm looking forward to my new role as chairman and to working with David, who will continue to execute on our vision and strategy of being the premier global legal services partner to clients around the globe. I believe that he is the right person to lead Epiq into the future." Dobson added: "I am very excited and honoured to be joining such an incredible team at this important time in our company's history. I look forward to building on the momentum that John and his team have created. We have a tremendous opportunity to extend our leadership position further in delivering high value services to our clients around the world." Dobson previously served as the chief executive officer of Digital River, a global eCommerce platform and services company. Before Digital River Dobson held senior positions at IBM, Corel, Pitney Bowes and CA Technologies.

**Adaptive Solutions** has appointed **Beth Thompson** to the role of director of sales and marketing. Thompson originally joined in March 2018 as director of strategic accounts. In her new role she will lead the company's efforts to expand and strengthen client relationships. "It's an exciting time to be at Adaptive Solutions," says Thompson. "We are well positioned for healthy growth as firms increasingly adopt cloud strategies for document management, communications and collaboration. Adaptive Solutions helps clients to achieve those objectives while reducing cyber risk and improving compliance policies and processes." "We are pleased to have Beth on board to lead our expansion in client-facing sales and marketing efforts," says **Adam Doblo**, co-founder and CEO of Adaptive Solutions. "Beth's deep knowledge of the legal technology arena and her strong track record in offering effective solutions to her clients exemplify our commitment to provide outstanding service to our customers."

Following the unexpected departure of Connie Brenton, the **Corporate Legal Operations Consortium**

(CLOC) board of directors has unanimously elected long-serving CLOC board member **Mary Shen O'Carroll** to step into the role of CLOC president and has appointed European institute head **Aine Lyons** to the board of directors. O'Carroll and Lyons will assume their positions immediately. O'Carroll is director of legal operations, technology and strategy at Google and one of the original leaders of CLOC. Based in Silicon Valley, O'Carroll has long been the face of CLOC alongside Brenton, but her appointment will not help to disperse the gripe among some vendors that CLOC's leadership all emanates from the tech sector and needs to be more inclusive of other industries. CLOC has been a galvanising force in the growth of the legal operations role and, in a recent announcement, O'Carroll said: "The opportunities are immense for legal operations professionals and we are dedicated to the task of taking CLOC and the legal operations profession to the next level in reforming and shaping our industry." Lyons, who is vice-president & deputy general counsel, WW legal operations at VMware, said: "Now, more than ever, the legal operations role is a vital component of the modern legal department and is a critical partner to the general counsel. We all have an opportunity, and an obligation, to demonstrate the value that in-house legal teams bring to the bottom line and to transform and grow the businesses that we serve. I believe that CLOC has a strategic role to play in driving increased diversity and innovation across the legal industry, and that its members are integral to that cultural shift."

**Keno Kozie Associates**, a provider of information technology design, service and support to law firms and legal departments, has announced that it has added **Greg Langosch** as director of managed services. Langosch comes to Keno Kozie with extensive experience in the IT community. Before joining Keno Kozie, Langosch most recently worked as executive director of an international managed service provider, where he was responsible for leading the global managed services operations centre, owning service delivery, revenue growth and client relationships. "We are thrilled to have Greg join our company," said **Eli Nussbaum**, managing director and director of business development at Keno Kozie. "He has extensive experience and proven leadership skills in managed IT services. He brings with him over 20 years of experience building managed services practices while also positively affecting client operations and performance. We are excited to have him as part of our team and look forward to him leading the integration between our engineering and managed services divisions to ensure that our clients have the best solutions available to them at all times."

**Pinnacle** has announced a significant investment in the US, restructuring and expanding its existing operations in response to growing demands for its business consulting and implementation services across both Elite 3E and Intapp portfolios. It has appointed NexLaw Partners co-founder **Bob Beach** as Pinnacle US's first CEO to oversee practice development and drive new business. He will look to double the size of the consulting team in 2019 to

support projects being run out of US headquartered firms. While Pinnacle US will continue to assist Pinnacle UK with international work, the primary aim is to build up regional capabilities to serve Am Law 200 and NLJ 500 firms. With immediate effect Pinnacle veteran and Elite specialist **Beau Lynch** will take up the new post of Elite 3E Practice Director. The move signals an intensifying of focus on the financial management systems space, as firms look for both technical and advisory input on data conversions, business intelligence, time and billing. The 3E practice will see immediate strengthening with new hires in application consulting, project management, BPO, and BI. Beach will act in a similar role for the Intapp practice, with new business acceptance, compliant time and pricing set for sustained growth in 2019. Both practice areas will be able to draw on Pinnacle UK's team, ensuring that additional functional and technical expertise will be readily available to US firms. Pinnacle managing director **Mike Bailey** said: "We have some excellent relationships and have been involved in an increasing number of projects in the US over the years but now is the time to take things to the next level, building out a substantial practice to better serve an active market."

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## ► #GlenLegal19 - The agenda and speakers!

The programme for #GlenLegal19 is pretty much finalised and we are really excited about what is in store for our delegates. Aside from the fabulous UK speakers we have speakers flying in from the US, including co-chair Rick Howell, CIO at Perkins Coie; Daniel Katz, professor of law at Chicago Kent College of law and director of The Law Lab @ Illinois Tech – Chicago Kent College; Doug Caddell, global CIO at Mayer Brown; and Eric Hunter, now CTO at Bradford & Barthel. Bas Boris Visser, Clifford Chance's Amsterdam-based global head of innovation and business change, will talk about the magic circle firm's new digital business Applied Solutions, which launched in 2018.

We will look at how the CIO stays relevant in the modern law firm and how traditional IT teams can work best within the context of the new innovation-focused and client-facing IT infrastructure. We will look at data and who needs what across the firm; at unlocking the value of AI (from the team behind the new £1m+ government funded project announced last year – see more on this project on Page 7); using RPA (Robotic Process Automation) to ease the pressure on resources; managing your supply chain risk; and how to avoid shadow IT altogether. And, at the risk of sounding like a tacky holiday brochure, oh, so much more.

For a full list of our speakers, sponsors, delegates and the agenda see [www.GlenLegal.com](http://www.GlenLegal.com) – thank you to everyone who has agreed to be involved, we are really grateful and will ensure that it will be a valuable and, dare we say, fun use of your time. If you are a legal tech leader and haven't yet signed up to attend, please contact [registrations@liti.co.uk](mailto:registrations@liti.co.uk)

# legal*i* insider

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