

# legal*i* insider

THE JULY/AUGUST ORANGE RAG

July/August 2024  
Issue 374



# EDITOR'S COMMENT

Hi and welcome to the July/August Orange Rag, which comes out just after ILTACON 2024 in Nashville. We bring you some of the biggest announcements from the conference as well as the usual raft of wins, deals and people moves from the past month.

What's interesting is how much we've had to leave out. Yes it's a double issue, but vendors are seemingly working at double speed to get updates and proofs of concept to the legal market. Also notable is the continued influx of funding – take a look at that section of the newsletter, which has funding from Clio, Harvey, Leya and more.

Legal IT Insider on 16 July launched the first-ever practice management system industry report, which takes an unparalleled, in-depth look at the functionality of many PMS systems in the market. To read the PMS report in full, sign up [here](#). We have a Gen AI report out now, see inside the newsletter for how to download that.

I'm really proud of the work we're doing and grateful to you all for your continued support at this incredibly busy time for all of us.

**Caroline Hill**

Editor-in-Chief, Legal IT Insider



# TOP STORIES

## YOUR ILTACON 2024 NEWS AND UPDATES!

The July/August Orange Rag is published just after ILTACON 2024 and in our Top Stories section this month, we bring you many of the announcements being made from the conference in Nashville. Not only are conference announcements an interesting market temperature gauge, but they will give us something of a benchmark to measure progress against this time next year.



### LEXISNEXIS UNVEILS COMMERCIAL PREVIEW OF AI ASSISTANT PROTÉGÉ

LexisNexis Legal & Professional has announced the US commercial preview program for LexisNexis Protégé Legal AI Assistant on Lexis+ AI.

Protégé is described by LexisNexis as a private legal AI Assistant, unique to each legal professional. Personalization choices are controlled by the user or their organization.

Last month, LexisNexis acquired Henschman, which enriches data from law firms' document management systems. Integrating Henschman's DMS technology with LexisNexis content using its proprietary Retrieval Augmented Generation (RAG) 2.0 platform improves answer quality and accelerates personalized generative AI.

Protégé personalization capabilities fuel a wide set of new AI-enabled tasks. Protégé knows specifics about each user like workflow preferences, daily task requirements, firm standards, teamwork and communication styles, legal areas of specialization, and past work product. It proactively suggests subscribed LexisNexis products to provide insights and analytics.

LexisNexis is teaming up with a number of as yet unnamed Am Law 100 firms as part of the US commercial preview program.

"Our customers are at the forefront of co-developing legal generative AI technology with us by testing, providing feedback, and adopting Lexis+ AI." said Sean Fitzpatrick, CEO of LexisNexis North America, UK and Ireland. "Customers guide our vision. They are ready to progress from a Legal AI Assistant built for everyone, to the next phase – a Legal AI Assistant uniquely customized and tailored for each individual legal professional."

## THOMSON REUTERS UNVEILS COCOUNSEL 2.0

Thomson Reuters during ILTACON 2024 announced CoCounsel 2.0, the next generation of its GenAI assistant that started out life as Casetext.

### **We're told that CoCounsel 2.0 will be:**

- Accessible from within Thomson Reuters products, beginning with Westlaw Precision and Practical Law.
- Accessible from within Microsoft 365, beginning with Word, Teams, and Outlook.
- Able to access customer documents directly, through server-to-server integrations with data storage solutions iManage, NetDocuments, and SharePoint.

TR says that CoCounsel 2.0 will work three times faster than the first generation of CoCounsel, generating answers in seconds, not minutes, and be able to provide more nuanced results after considering the full context and history.

David Wong, chief product officer for Thomson Reuters said: "CoCounsel 2.0 is founded upon our ability to combine our data, expertise, and trusted content with cutting edge technology. Partnering with leading LLM providers is a key part of our strategy and will help us deliver even more for our customers, enabling them to accomplish what they need to evolve their businesses more quickly and more effectively than ever."

CoCounsel leverages multiple LLMs including most recently Google Gemini 1.5 Pro. Testing shows that a blend of multiple LLMs delivers optimal accuracy and user experience.

## NETDOCUMENTS EXPANDS NDMAX AI OFFERINGS

NetDocuments at ILTACON 2024 launched ndMAX Assist, a new intelligent agent that uses AI and natural language processing (NLP). NetDocuments PatternBuilder MAX customers – now over 13,000 users worldwide - can experience ndMAX Assist in a closed beta shortly following ILTACON, with wider availability coming later this year.

The new intelligent agent enables users to interact with NetDocuments through natural language commands and queries to find information, answer questions in documents, create summaries, and draft responses or revisions to content.

"We're excited about ndMAX Assist and how it creates an easy, accessible way for legal organizations to introduce AI-powered capabilities into their everyday workflows," said Josh Baxter, CEO of NetDocuments. "Having an intelligent agent inside NetDocuments gives users another way to securely interact with their documents through generative AI without needing to transfer content into another platform."

ndMAX Assist also includes a Microsoft Copilot integration, enabling users to submit queries to Copilot which can reach into NetDocuments while respecting relevant content permissions, ethical walls, and other organization-specific security measures, when generating a response.

NetDocuments is showcasing several upcoming enhancements for the ndMAX AI and automation portfolio, including specialized agents for common tasks like contract analysis and review, automated document classification, and the ability to initiate any PatternBuilder MAX automation from the ndMAX Assist agent.

Additionally, as announced at the ILTACON G100 (top 100 law firm CIO program), NetDocuments will bring semantic search capabilities to its platform in the first half of 2025. “We believe this is a critical capability for helping customers search their content more effectively, moving beyond keywords to true natural language search and returning the results that legal professionals expect,” said Dan Hauck, chief product officer of NetDocuments.

Other new developments include ChatLink for collaboration in Microsoft Teams and desktop co-authoring.

## EVERLAW ANNOUNCES GENERAL AVAILABILITY FOR GEN AI ASSISTANT

Everlaw, the cloud-native investigation and litigation platform, on 14 August announced the general availability and pricing of its GenAI-powered Everlaw Assistant after a year-long beta program with about 125 companies and 2,900 users. One of the biggest advances, according to Everlaw’s founder and CEO AJ Shankar, is Everlaw Assistant’s impact on the potentially lengthy and costly discovery process.

The opportunity for GenAI to drive greater efficiency in litigation is vast. Large companies in the US alone spent \$23B on litigation in 2021 and up to 70% of those costs are consumed by discovery work where legal teams decipher millions of documents to start building cases.

Everlaw’s team of AI experts has spent the past year testing, quantifying and refining the controllable variables in GenAI applications. Features include:

- Searching within the ‘four-corners of the document’ to minimize hallucinations
- Making results verifiable with cited source documents
- Labeling GenAI content vs. human-generated content in written materials as some court orders now request and future regulation may require

The new features include coding suggestions to help users find relevant or responsive documents faster; review assistant, to provide document summaries; and topic, sentiment and entity extraction.

“Everlaw Assistant is an advance for one of the most challenging and time-consuming parts of litigation and investigations – discovery,” said Shankar. “While it’s still early days of Gen AI, our adopters have applied it as they would a ‘smart intern,’ making significant impacts on real-world cases.”

Julie Brown, director of practice technology at Vorys, said: “Everlaw combines the best of traditional AI with the strengths of Gen AI. We use Everlaw’s predictive coding to pull important docs from a corpus. Everlaw AI Assistant summarizes documents to improve our review rates, shaving off hours for the team. Then we organize the most important documents in Storybuilder as we prepare our case strategy. Having AI embedded in the ediscovery workflow drives efficiency.

Everlaw Review Assistant stands out in its ability to summarize long, dense documents – over 100 pages, which is key for lengthy depositions.” She added: “We’ve used Writing Assistant to draft a statement of facts and deposition questions based on my guidance with quality output– saving us time. Top to bottom Everlaw software, support and training materials are incredible.”

## **DISCO ANNOUNCES GENERAL AVAILABILITY OF CECILIA AUTO REVIEW**

NYSE-listed eDiscovery vendor DISCO announced at ILTACON the general availability of Cecilia Auto Review, a solution that enables users to perform document review using generative AI. Cecilia Auto Review, part of the Cecilia AI suite of capabilities, provides tags for each document, allowing legal professionals to locate documents relevant to legal issues at the outset of a litigation or investigation.

Legal teams expend significant budget and resources on the first-pass document review stage, which can delay case strategy and impact a team’s ability to effectively counsel clients. Relying on human reviewers for first-pass document reviews can also be costly and lead to inconsistencies. Cecilia Auto Review is a generative AI tool that addresses these challenges by enabling attorneys to review documents faster and more consistently, with the ability to provide detailed explanations for each tagging decision.

General availability comes after a series of pilots with top Am Law firms, who, DISCO says, came away impressed with the results. DISCO’s testing of Cecilia Auto Review on customer data demonstrated review speeds of 3,800 documents per hour — over a 24 hour period, equivalent to a 140-person review team working an eight-hour day — and precision and recall metrics 10-20% higher than typical from human reviewers. Cecilia Auto Review.

“As we integrate AI-driven tools into the suite of solutions we offer our lawyers, we are excited to test promising tools. DISCO’s Cecilia Auto Review is such a tool – and we found the verified results of first pass document review to achieve an accuracy level that was game changing for our case team,” said Daryl E. Shetterly, managing director of Orrick Analytics, global operations & innovation center. “We believe generative AI solutions like Cecilia will fundamentally improve the practice of law and the value we deliver for our clients.”

“We are fortunate to be collaborating with DISCO on promising generative AI technology like Cecilia Auto Review, which enabled us to identify responsive documents with unprecedented speed,” said Shelby Rampolo, an associate at Perkins Coie. “When my team is facing a large document review at the beginning of a key case, Cecilia can not only speed up our ability to advise the client but enhance the accuracy of the review.”

## HAYSTACKID LAUNCHES CORE INTELLIGENCE AI

[HaystackID](#) has launched Core Intelligence AI, which allows legal professionals to streamline discovery and review of electronically stored information (ESI) in the face of growing data volumes, data security complexities, eDiscovery costs, and information management inefficiencies.

The tool automates complex tasks such as data classification and categorization. It generates concise summaries and actionable insights from large datasets enabling quicker and better-informed decision-making.

“We’ve integrated generative AI capabilities into our platform to meet the unique needs of our clients, enabling them to tackle complex eDiscovery challenges with confidence,” said Andrea Wallack, president of HaystackID. “Our priority is to provide practical and efficient solutions, ensuring high levels of efficiency, defensibility, and compliance.”

## FINANCE AND BILLING ANNOUNCEMENTS

It’s not all gen AI announcements at ILTACON and there are some interesting product updates in the finance and billing sector:

### ***Actionstep announces initial integration of Legal Accounting***

[Actionstep](#) announced the initial integration of Legal Accounting (formerly Soluno) with the Actionstep practice management platform, along with the addition of Builder, a complete document automation solution, and Capture, Actionstep’s new forms solution. These new additions come on the heels of Matter View, which offers visibility across matter developments, activity, and files. The availability of accounting as an integrated part of Actionstep’s cloud-based practice management system will help it win larger law firm customers, which require this in-built functionality.

Existing Actionstep customers will have access to integrated Legal Accounting in October, and both Builder and Capture will be available in November after early adopter pilot programs. Matter View is already in active use by customers as part of Actionstep’s core practice management solution.

“Our top priority is to listen to our customers closely and build technology solutions that help midsize law firms thrive, work more efficiently, and provide the best client experience, all from within one central hub,” said Early Stephens, CEO of Actionstep.

If you haven’t yet checked out Legal IT Insider’s in-depth PMS report see [HERE](#).

## ***ODDR RELEASES CASHPREDICT AND ODDRPAY***

AI invoice-to-cash startup Oddr has launched two new modules; CashPredict and OddrPay. CashPredict provides predictive AI-driven insights into law firms’ cash flow for the next 12 months, while OddrPay delivers a consumer-grade, fully integrated payment solution backed by JP Morgan Chase that enables clients to review, schedule and pay invoices in 1-click.

Milan Bobde, CEO at Oddr comments: “CashPredict leverages proprietary algorithms to provide law firms with 12-month cash flow projections, empowering them to make informed financial decisions and optimize their operations.”

He added: “OddrPay offers firms unmatched security, reliability, and cost-efficiency: with 1-click invoice payments, saved payment methods, detailed transaction histories, and the ability to schedule future payments, OddrPay enhances client convenience and streamlines financial operations, setting a new standard of invoice payment in the legal industry.”

## ***ADERANT UNVEILS NEW TECH IN NASHVILLE***

Aderant debuted new technology solutions at ILTACON 2024 in Nashville. The US-headquartered practice management system vendor recently launched Stridyn, a new AI-driven cloud platform powering the company’s product suite and accelerating the work-to-cash cycle and at ILTACON 2024 is demoing the following:

viAllocate – Launched on 12 August, this solution helps law firms staff the right lawyers based on their skills and availability. viAllocate improves utilization and helps law firms develop talent.

AR Automation for Accounts Receivable – Available now to clients using Sierra, AR Automation leverages MADDI, Aderant’s AI-enabled virtual associate to provide cash receipt matching, an enhanced user interface (UI), and to import images for auditing purposes. This new module increases efficiency and accuracy for law firms.

General Ledger (GL) – Now in private preview mode for select Sierra clients, the GL module enables improved usability and MADDI-delivered insights. Clients can tap into new Chart of Accounts and Account Linking functions and an enhanced UI.

## **LEGAL IT INSIDER LAUNCHES 2024 GENERATIVE AI REPORT**

### ***Register to receive Legal IT Insider’s Generative AI Report***

Generative AI is the biggest technological development since the creation of the internet and will transform the way that law firms and corporate legal teams deliver their work product. In this in-depth report we look at how legal technology vendors are rising to the challenge of providing tools that leverage generative AI to create efficiencies; take a look at the latest regulatory position globally; and conduct our own tests to see how legal v mainstream LLMs compare in their answers to questions about well-trodden caselaw.

To read the Gen AI report, sign up [here](#)





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# WINS AND DEALS

## UK AND EMEA

Legal IT Insider in July exclusively revealed that leading global law firm Clyde & Co will be moving its core financial and practice management systems to the cloud with Elite 3E, with Harbor as its implementation partner.

Founded in 1933, Clyde & Co has more than 3,200 legal professionals—including 492 partners and more than 2,700 lawyers—working across 60+ offices on six continents. It has been an on-prem 3E customer since 2016, and before that an Enterprise customer for more than two decades.

Speaking to Legal IT Insider about the selection process, Clyde & Co's head of IT strategy, architecture and design, Jeremy Morris, said: "We wanted a SaaS solution, that's driven by an IT strategy that is cloud-first and the desire to reduce out of our data centre footprint."

He added: "The fact that Elite has rewritten the software and done the architecture work was important to us."

Clyde & Co says it will be evolving and enhancing its billing processes through expanded use of eBillingHub, and 3E Proforma.

You can read that story in full here: <https://legaltechnology.com/2024/07/24/exclusive-global-top-100-law-firm-clyde-co-to-move-pms-to-the-cloud-with-3e/>

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Bird & Bird has launched a proof of concept across multiple offices with Leya, a Swedish gen AI legal tech startup that has found success in Europe and recently officially entered the UK with the hire of Jakub Makowski from Robin AI. In preparation for the proof-of-concept trial, Bird & Bird has already rolled out a series of initiatives including the launch of a customised training programme with education partner Simplexico.

Founded in 2023 by CEO Max Junestrand, August Erseus, and CTO Sigge Labor, Leya's AI workspace automates tasks and provides access to both public and internal data for legal research purposes.

After trialling various gen AI legal assistants over the past few months, Bird & Bird says that during a six-month programme it will continuously assess the use of Leya across its international network, focusing on specific legal tasks including analysing local laws, court cases, case law, drafting contracts, and reviewing documents. Starting with user groups in the London-headquartered firm's offices in UK, Germany, Spain and the Nordics, the team will review use cases, the value the tool can bring to the firm, and prepare for future use cases.



Karen Jacks, chief technology officer at Bird & Bird, said: “This proof of concept trial with Leya is the latest addition to our gen AI toolkit and will be an important part of our five-year strategy as we guide organisations through a world shaped by technology, innovation and regulation, and driving the transformation of legal services delivery.”

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UK law firm Sills & Betteridge will migrate its on-premises iManage document and email management system (DMS) to the iManage Cloud later this year. The migration will be managed by Tiger Eye, a UK-based full service iManage Partner.

Sills & Betteridge has over 430 employees and provides a broad range of legal services to both businesses and individuals across the UK.

Tiger Eye will provide iManage consultancy services and ongoing support to the firm.

Liam Osborne, IT director at Sills & Betteridge, said: “Sills & Betteridge has provided legal services for over 260 years, and through mergers and acquisitions we have grown to a team of over 430 employees. While we still maintain our same dedication to client service, over time our processes have transformed to ensure that best-of-breed technology is at the heart of our practice. Our move to the iManage Cloud will enable us to benefit from the platform’s scalability, so that as the firm continues to grow, our systems will naturally grow with us.”

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LexisNexis Legal & Professional has acquired Belgian-founded contract drafting startup Henschman. Henschman was founded in 2020 by Jorn Vanysacker, Gilles Mattelin and Wouter Van Respaille. At the point of acquisition it had 170+ legal and corporate customers globally including Deloitte, Freeths, Cuatrecasas, and Cirio. Last year it reported growth of 1300% over the past year and a half.

By acquiring Henschman, LexisNexis says it will deliver personalized generative AI solutions to customers around the world. See our top story for more on that.

Vanysacker said: “This is a strategic acquisition for LexisNexis. We regularly got the request to access third party precedents while LexisNexis were told by customers that they would love to access data from their own repositories. This is super complimentary and as our conversation progressed over the past year it became clear that our vision was completely aligned.”



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iManage partner Ascertus has entered a strategic partnership with matter and spend management platform, Lawcadia. This partnership responds to a growing need in corporate legal departments to streamline operations, from intake and triage, matter and workflow management, to spend management and reporting.

Lawcadia CEO and co-founder, Warwick Walsh, said: "Ascertus has over 20 years' experience building long-term relationships and providing exceptional client service in the UK and European markets. Importantly we are also aligned in our core values and focus on client-oriented outcomes."

Ascertus enables a centralised approach to matter management, with the iManage Work platform sitting at the core as a central repository for documents, files, communications, and emails. Ascertus tailors the solution to enable corporate legal departments to triage, prioritise and track legal matters.

iManage partner Tiger Eye on 25th July announced a strategic partnership with Novaplex, a UK-based provider of software solutions for document creation and automation. Novaplex has joined Tiger Eye's partner network as a specialist template solutions provider, enabling Tiger Eye to deliver Novaplex's Template Studio solution to the iManage Partner's global customer base.

The development forms part of Tiger Eye's ongoing growth and development strategy, and the organisation's mission to provide solutions for every step of the document and email journey. Novaplex's Template Studio suite includes software for managing documents, presentations, Excel workbooks and document printing.

Ben Mitchell, COO at Novaplex, who was previously a senior exec at DocsCorp, said: "Our solutions are a natural fit for the portfolio offered by Tiger Eye and will provide additional document productivity capabilities. iManage integration is included in all our solutions, and that combination means Tiger Eye can now offer all the software firms need throughout the document lifecycle, from creation, through drafting and onto final disposition."

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Dentons on 16 July announced that it has partnered with AI fintech startup Intanify to accelerate and improve the process of creating IP inventories and assessing IP opportunities and risk. Dentons was an angel investor in Intanify's £410,000 pre-seed funding round in July last year and under the partnership will refer clients to Intanify for a fee.

Intanify, co-founded in 2021 by CEO Dylan Dryden and CTO Viet Lee, has developed knowledge graphs covering IP due diligence and risk together with AI Professor Viktor Döfler from University of Strathclyde Business School. The concepts are being incorporated into Intanify's platform and have been piloted by Dentons to allow companies to surface risks before they materialise or are identified by another party, acquirer or investor.

Dr Justin Hill, partner & co-chair of IP at Dentons, said: "We look to pioneer the use of technology in legal service delivery. Today, this means procuring and deploying best of breed technologies in support of our operations and our clients. Intanify sets itself apart as a first mover with this type of Expert system in the IP sector and we are keen to deliver the additional insights and enhanced efficiencies to our clients."

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Legal challenger LawNeeds has joined the LSSA (Legal Software Suppliers Association). As an industry body for developers and vendors of legal systems, the LSSA maintains standards in technology and manages areas of mutual interest between lawyers and providers of legal software.

Founded in 2024 by Steve Okolo, LawNeeds is based in London and aims to make legal assistance more accessible and efficient, delivering services via a mobile app.

Okolo said: "Joining the LSSA marks a significant milestone for LawNeeds. Our mission is to make high-quality legal services more accessible and affordable through our AI-powered mobile app. We aim to boost the brand by enhancing its credibility and trustworthiness through recognised industry affiliation and networking opportunities with the LSSA."

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# WINS AND DEALS

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# NORTH AMERICA

Document comparison solutions provider Draftable is marking its first year since launching a legal solution at ILTACON 2023 in Orlando, by announcing Jones Walker as one of its 400+ customers and reporting over 45,000 document comparisons completed each month.

Timothy Toner, Draftable's founder and CEO, who is attending ILTACON from Australia, said: "Signing our 400th customer for Draftable around the anniversary of our launch is a great milestone and being able to announce it in the US, where more than 50 per cent of our customer base is, makes it even better.

"Draftable is rapidly becoming the preferred choice for law firms and legal teams worldwide, after we responded to the legal industry's calls for a high-quality document comparison solution with fair pricing and responsive customer support."

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First AML, the anti-money laundering (AML) scaleup, has announced its integration with 3E from Elite.

First AML empowers organisations to conduct AML, KYC and KYB processes via the platform solution Source, which streamlines the anti-money laundering onboarding and compliance process.

Having launched Source in 2023, the integration with 3E will grant law firms access to simplified workflows, reusable client data, automated screening and all-in-one onboarding questionnaires in one place. Comprehensive screening is available at the press of a button, while compliance is consistent regardless of legislative changes or staff turnover.

Bion Behdin, founder and chief revenue officer at First AML, commented: "With compliance and regulations becoming increasingly intricate, law firms are feeling growing pressure to keep one step ahead. This integration with 3E will relieve much of that burden, as organisations will have their anti-money laundering processes streamlined and secure at every point."

To learn more about the integration, visit the website [here](#).

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Leading U.S. law firm Greenspoon Marder has selected Elite 3E cloud.

Founded in 1981, Greenspoon Marder is a full-service law firm with over 225 lawyers and more than 20 office locations across the United States. The firm has used the on-prem version of 3E since 2011 and is looking forward to the increased capabilities and efficiencies this shift will provide.

importance to Greenspoon Marder in their choice of 3E in the cloud was the ability to benefit from automatic upgrades and quick access to new functionality, as well as automated workflows, real-time insights, and advanced analytics. The firm will also be transforming its billing processes through the adoption of eBillingHub and will be deploying [3E Data Insights](#).

“We see substantial value in leveraging 3E in the cloud, with its continuous enhancements, fixes and updates that don’t require full system upgrades. These tools not only streamline our operations but also empower us to deliver even more efficient and tailored client services,” said Jen Fante, COO/CFO of Greenspoon Marder.

Leading U.S. litigation law firm Morrison Mahoney has selected eBillingHub from Elite.

Founded in 1948, Morrison Mahoney LLP has more than 170 lawyers working across 11 offices in the United States and United Kingdom. The firm has been a user of 3E—Elite’s flagship financial and practice management solution—since 2000.

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U.S. law firm Elias Law Group has gone live on the cloud version of 3E.

Founded in 2021, Elias Law Group focuses on representing the Democratic Party, Democratic campaigns, nonprofit organizations, and individuals “committed to securing a progressive future.” The firm’s 110-strong team is based across two offices in Washington, D.C. and Seattle.

On the back of a period of exceptional growth and expansion, Elias Law Group sought to consolidate and upgrade its systems and infrastructure to move its business to the next level. By adopting 3E in the cloud, the firm has gained robust, out-of-the-box functionality, including automated workflows, real-time insights, and advanced analytics to improve profitability and boost efficiency.

It will also benefit from automatic upgrades and quick access to new functionality, thanks to a fully managed service provided by Elite.

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Newly founded, fast-growing gen AI alternative legal services provider Execo has entered a strategic partnership with ContractPodAi and will incorporate ContractPodAi’s assistant Leah within its client service delivery offering.

Execo’s model is to acquire other ALSPs and turn them into gen AI-powered managed legal services providers. The New York-founded company has recently acquired Cacti, Bandalier, Aspire, and Africa AI. It will use Leah to underpin a training ‘bootcamp’ in its delivery centres in India, Kenya and the Philippines.

“When thinking about truly embedding GenAI into workflows in a way that return on AI investments can be measured, we wanted to go with a firm that is proven and trusted in the legal tech space. ContractPodAi’s leadership in Contract Lifecycle Management software means that they are in the perfect position to lead in real GenAI – and that, combined with our delivery capabilities, we can offer clients industry-leading outcomes,” said Patrick Linton, CEO of Execo.



**Source Consulting Group** in Chicago has joined Elite's premier delivery partner program, becoming the third organisation to join the program since its launch in March this year. The other partners are Harbor and Helm360.

While Source is new to this program, which was formed after Elite was acquired by private equity house TPG from Thomson Reuters, it has been an alliance partner of Thomson Reuters Elite since 2011 and has delivered many 3E implementations since then.

The premier delivery partner program enables customers to work directly with a small number of service partners on their full cloud implementation and other post-implementation needs for 3E.

"We are looking forward to the synergies that our enhanced relationship with Elite can bring and to providing top-notch implementation support for customers who are making the move to the cloud with 3E," said Sonnie Yoon, managing director of Source Consulting Group.



Smith, Gambrell & Russell LLP (SGR) — a full-service, international law firm with 350 lawyers in 14 offices across the United States, the United Kingdom, and Germany — has selected iManage Cloud as the knowledge work platform of choice for its firm. A longtime on-premises iManage customer, SGR says it nonetheless conducted an extensive survey of the market before selecting iManage as the best cloud offering for the firm. SGR is working with iManage partner Harbor and expects to go live in early 2025.

The tight integration between iManage and Microsoft played a key role in the firm's decision-making. As well as the benefits of leveraging iManage through Microsoft Azure, the firm says it was drawn to the enhanced collaboration that native co-authoring capabilities and deep integration with Microsoft 365 applications provided.

SGR will also use Security Policy Manager to protect sensitive information with need-to-know security and ethical walls, and iManage Threat Manager for real-time threat detection and monitoring.

"As a continually growing firm, we need technology that can not only address our needs today but can effectively scale and grow with us to address our future needs," said Danny Rhinehart, chief information officer at SGR.



Litera on 29 July announced the acquisition of FileTrail, a global leader in information governance and records management. This is an expansion by Litera in the governance space, complementing Litera's CAM, PowerDesktop, and PS/Ship products to create overarching governance, risk, and compliance (GRC) capabilities for law firms and corporations.

"Firms have always prioritized information governance and safeguarding client and matter data, but in today's regulatory environment, it's become even more critical," said Litera's CEO Sheryl Hoskins. "It is essential for firms to maintain a complete view of client and matter data to comply with their regulatory obligations. FileTrail's strength lies in its ability to offer a unified view of all data within an organization, and this integration into Litera's existing GRC portfolio will provide firms and corporate departments with industry-leading Governance, Risk, and Compliance capabilities."

While Litera made 15 acquisitions since 2019, that has slowed and this is the first acquisition since it acquired Upper Sigma in 2023.

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Legaltech Hub (LTH), a global directory of legal technology solutions and services, has acquired Georgia-headquartered consultancy Legal Tech Consultants (LTC), with founder Cheryl Wilson Griffin joining LTH as vice president of vendor advisory.

Wilson Griffin, who before founding LTC in October 2020 was chief operating officer of Lupl, will focus on expanding LTH's advisory and content offerings to startups, tech companies, and service providers targeting the legal industry. Before Lupl, Wilson Griffin was director of legal technology solutions at US law firm King & Spalding.

Nicola Shaver, co-founder and CEO of Legaltech Hub said: "This acquisition marks a significant milestone in our journey to deliver top-tier insights and consulting services to the legal tech community. Together, we are well-positioned to provide even more comprehensive and impactful solutions to our clients."

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The American Arbitration Association has acquired ODR.com (a SaaS case management services company for dispute resolution) and its parent company Resourceful Internet Solutions (RIS), which owns Mediate.com and other websites. This was the AAA's first acquisition.

The immediate focus of the alliance will be expanding AAA's mediation services by developing a suite of online dispute resolution (ODR) products. "Demand for ODR is growing rapidly worldwide, and working with the AAA will keep us on the cutting edge," said RIS CEO Colin Rule. "Our shared goal is to make ADR an accessible choice for everyone, and this alliance will enable us to achieve that goal at an unprecedented level."

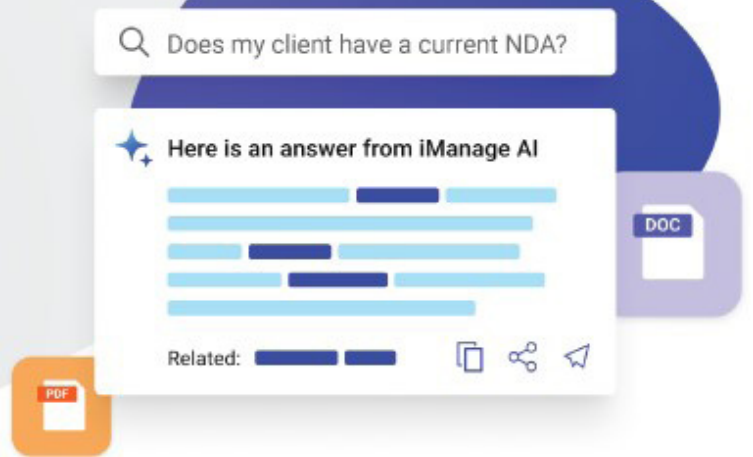
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## Meet iManage AI

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Bowman and Brooke LLP is using Trellis State Court search and analysis solution, it was announced recently. The nationally recognized trial defense firm has been a Trellis customer since 2021 but Trellis in July published a case study detailing for the first time the work that the firm is doing.

Bowman and Brooke has one of the largest product liability practices in the country. Since 1985, the firm has defended corporate clients in high-exposure and technically intricate lawsuits in multiple jurisdictions.

One of the fastest growing state dockets involves California consumer warranty and 'lemon law' claims for the firm's core automotive clients. Yet more often than not the firm says it found itself unable to access and analyze critical state court data, let alone in a unified fashion. A search for a credible, comprehensive option with broad and deep access to state court data took shape.

The firm subsequently found Trellis, engaged in a successful pilot and became a customer in 2021.



*The fact that Trellis is a really solid state resource makes it incredibly meaningful to our firm all the way around. We use the platform to get into state court data, filings & dockets across the country from a single point of access, with analytics layered on top - and Trellis has been huge for us. It's been a really good relationship, they are the best game in town.*

*- Amy Carr, Senior Manager Knowledge Management @ Bowman and Brooke*



# WINS AND DEALS

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## APAC

Full service national Australian law firm Carroll & O’Dea Lawyers has selected ShareDo’s case management system, we first revealed in July. Carroll & O’Dea will initially implement ShareDo in their commercial property practice, with plans to expand the platform’s use across the entire firm, including their personal injury practices.

The selection and implementation takes place in collaboration with ShareDo specialists Mosmar, a New South Wales legal technology consultancy led by CEO Rebecca Painter, who previously was IT director of Gadens Lawyers in Sydney.

This was an important decision for the firm, which has 10 offices across Australia, including seven in New South Wales, and John Willey, general manager at Carroll & O’Dea Lawyers, said: “After an extensive and detailed evaluation process, we found ShareDo to be the best fit for our practice. Their comprehensive case and matter management system, combined with the expertise of our partner Mosmar, will enable the firm to meet the needs of clients and streamline our internal processes. We see the ShareDo platform as supporting our business strategy to invest in people, process and technology to unlock value for the firm and our clients.”

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**Gilchrist Connell (GC)**, a leading national law firm, has selected ShareDo as their case management system after what is described as an exhaustive search to enhance efficiency, automate workflows, and transition to a cloud-based modern application. This strategic move reflects GC’s commitment to leveraging advanced technology to improve their legal practice management.

Kirk Rogers, chief information officer at GC, said: “Choosing ShareDo was a clear decision for us. Their comprehensive, out-of-the-box solutions, pre-built designs, and workflows will ensure a faster deployment and immediate value. ShareDo’s deep understanding of legal practice nuances means we aren’t going in blind; they’ve anticipated the challenges we face in managing multiple practice areas.”

Morae, a global provider of legal and compliance solutions, played a pivotal role in GC’s selection of ShareDo.

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Data integration platform Synclly has entered a partnership with Thomson Reuters, paving the way for Synclly to help firms integrate HighQ with their document management system and the Microsoft 365 stack. Going forward, TR will act as a Synclly reseller. Synclly enables firms to achieve real time, two-way synchronisation between legal platforms such as iManage, NetDocuments, HighQ and Microsoft Teams.

Thomson Reuters acquired HighQ in 2019 but many of the senior execs and founders have left and this is the start of an interesting and important partnership. Synclly was co-founded by CEO Stewart Rasmussen, previously head of client services for APAC at HighQ. Last year, as we first revealed in August, Synclly closed a seed funding round led by investor advisor Stuart Barr, who was the former chief product & strategy officer at HighQ. Following that funding round, Synclly hired Rishit Patel as chief technology officer. Patel was previously vice president of software development for HighQ at Thomson Reuters.

Elena Folkes, director of market development at Thomson Reuters, said of Synclly: “They have deep expertise and understanding of the legal technology industry, which is apparent through their integration platform and global client base. We are confident that the addition of Synclly to our partner ecosystem will continue to help our customers succeed in this dynamic and fast paced- market.”

## Global Trend Analysis 2024

# Trends Analysis for Legal Pricing and Budgeting

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# REPORTS

## LEGAL IT INSIDER LAUNCHES INAUGURAL PRACTICE MANAGEMENT SYSTEM REPORT – DOWNLOAD IT HERE!

Legal IT Insider on 16 July launched the first-ever practice management system industry report, which takes an unparalleled, in-depth look at the functionality of many PMS systems in the market.

This report is written by our lead analyst Neil Cameron, who has decades of experience working as a technology consultant for law firms, including experience of selecting and implementing software. It is the result of hours' worth of demos, and we are grateful to the participating vendors for their time and patience. It includes a functionality table that we know you will not find elsewhere. And it includes industry analysis that gives insight and context on both historical and latest trends.

To read the PMS report in full, [sign up here](#) (The report will be emailed directly to your inbox)

## AI “SET TO SAVE PROFESSIONALS 12 HOURS PER WEEK BY 2029”

Thomson Reuters in July released its 2024 Future of Professionals report, an annual survey of more than 2,200 professionals working across legal, tax, and risk & compliance fields globally. Respondents predicted that artificial intelligence (AI) has the potential to save them 12 hours per week in the next five years, or four hours per week over the upcoming year, equating to 200 hours annually.

This timesaving potential is the equivalent productivity boost of adding an extra colleague for every 10 team members on staff. For a U.S. lawyer, this could translate to an estimated \$100,000 in additional billable hours.\*

Overall, 77% of professionals now predict AI will have a high or transformational impact on their work over the next five years, up 10 percentage points from last year. In addition, 79% anticipate innovation at their companies will increase.

“Professionals no longer need to speculate on the potential for AI to impact their work as they are now witnessing its effects firsthand. As we look to the future, one thing is clear: AI-empowered professionals and their companies will outpace those who resist this transformative era,” said Steve Hasker, president and CEO, Thomson Reuters. “With professionals predicting that AI will save them up to 200 hours in the next year, the potential economic impact is significant. For a U.S. lawyer, the time saved could translate to up to \$100,000 a year in additional billable time, and we can expect similar productivity gains across other professions. The responsible use of AI is crucial, with nearly two-thirds of professionals stressing human oversight. As we navigate this change, we must remember the future of AI is ours to shape.”

You can download that report here: <https://www.thomsonreuters.com/en/c/future-of-professionals.html>

## UK LAW FIRMS FEELING PRESSURE TO PRIORITISE BUSINESS CONTINUITY OVER CYBER SECURITY

The fragmentation of IT is causing huge cyber defence issues for UK legal firms, according to a report out in July from managed threat detection & response provider, e2e-assure. The complexity in defence is exacerbated by the rise of the “citizen developer” in the legal sector, where technology is being put in the hands of those who feel the pressure to prioritise task optimisation and business continuity over security.

The report’s insights were gathered from CISOs (Chief Information Security Officers) and IT Managers in the UK 200Group, which is the UK’s leading professional services group of independent quality assured chartered accountancy and law firms.

Members of this group shared their thoughts under Chatham House Rules at the 2024 British Legal Tech Forum in London, during a roundtable discussion hosted by e2e-assure’s CEO Rob Demain and SoSafe’s chief security officer Andrew Rose, who is a regular speaker on security awareness.

### Issues highlighted include:

- the impact of new technology, such as AI and BYOD, and the difficulty of tracking who has access to data;
- staff using technology without using the proper security, permissions, or training, which is often due the pressure felt by lawyers to give clients access to shared team environments, using their own permissions which leads to oversharing and causes vulnerabilities;
- the friction across the legal supply chain, between small and larger firms, and firms with the clients or suppliers, driven by the difference in access to technology, and the level of security in place. One attendee spoke of “getting massive pushback from clients” because “not everyone has authenticators.” Another spoke of resistance on the “usability” of methods such as number matching.

Demain said: “The worst-case scenario is if an attacker breaks into an organisation’s environment, rather than a deal being put on pause before it can close. A successful cyber attack could lead to six to nine months of major issues, potentially even causing a firm to go out of business.”

To read the report visit <https://www.britishlegalitforum.com/wp-content/uploads/2024/06/e2e-assure-BLTF-Roundtable-Report-2024.pdf>

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# TALKING TECH

**CHARTING CHANGE IN LEGAL PODCAST, EPISODE 27 –  
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**CHARTING  
CHANGE IN  
LEGAL**

EP  
27

LITIGATION TRENDS, AI  
APPLICATIONS, SELF-SERVICE  
TRAINING, AND ILTACON

**ARI  
KAPLAN**

**CAROLINE  
HILL**

In this 27th episode of Charting Change in Legal, Caroline Hill, editor and publisher of Legal IT Insider, and leading global legal analyst Ari Kaplan, discussed litigation trends; AI applications; self-service training; and ILTACON.



## WEBINAR REPLAY: IS IT TIME TO RETURN TO THE OFFICE?



In [this webinar](#) on 23 July, Legal IT Insider's editor Caroline Hill chatted with David Aird, IT Director at DAC Beachcroft LLP; Shane Scott, IT Director at Gowling WLG; and Hamzah Hafesji, group product manager for performance and talent at our webinar partner Advanced, about what arrangements they think work – and don't work – when it comes to a return to the office.

In the wake of the Covid pandemic, it was widely assumed that working from home and hybrid working were here to stay for good. However, law firms are taking very different approaches: at Gowling WLG, legal teams have to be in 60% of the time and non-legal 40%. DAC Beachcroft, meanwhile, has a three-tier flexible approach depending on role type, with, in some cases, no mandatory days in the office. We discussed these arrangements in some depth, including garnering the panel's view on how to achieve maximum productivity and what the key issues are to overcome for an arrangement to succeed. Hafesji, for one, is of the view that there should be no strictly mandated time in the office and that you should have a grown-up, not parent-child, relationship with your employees.

Have a listen to the webinar, which included plenty of questions and feedback from our live audience. While the panel tried to disagree with one another for a good debate, in many cases, there was a lot of very useful consensus.

## PRODUCT WALK THROUGH: WESTLAW EDGE UK WITH COCOUNSEL



In this product walk through of Westlaw UK's AI-Assisted Research, we received a demonstration from Jessica Brown, who is director of client training at Thomson Reuters, and Andrew Buckley, who leads the team in the UK responsible for the product management of Westlaw.

The demonstration, recorded on 3 June, showcases Westlaw Edge UK with CoCounsel functionality. Brown demonstrated how users may interact with the system in natural language, and said that because the Assistant has been trained on Westlaw content and understands legal research, it doesn't need that depth of prompt training that can be required to use generative AI properly elsewhere.

Inevitably how you phrase the question is likely to frame the answer and Brown said: "If you ask a closed question, you might get a limited summary." She adds: "You ask it how you'd ask a colleague, in one or two sentences. You definitely don't have to be a prompt engineer in order to use this tool."

The AI Assistant runs a search on Westlaw content and the system leverages retrieval augmented generation (RAG) to reduce hallucinations. Then comes the generative piece, which kicks in when the documents are found. Brown said: "Because everything we're doing is grounded we can reduce hallucinations because it has to look at that context, and the generative piece only kicks in when those documents are found."

Buckley added: "The key word there is 'reduces.' No responsible vendor can claim to eliminate hallucination, but we can do a good job because of grounding it."

Buckley said that Thomson Reuters had tested the system "thousands of times" and didn't see any true hallucinations. He adds: "This is an incredible kickstart and will get you a good way along the line, but it won't be doing it for you."

This demo is a really useful walk through of the key functionality of Westlaw Edge UK with CoCounsel.

## WEBINAR REPLAY: HOW TO LEVERAGE MICROSOFT TEAMS PREMIUM AS YOUR ENTRY LEVEL GENERATIVE AI TOOL

# Webinar: How to leverage Microsoft Teams Premium as your entry level Generative AI tool



In this highly interactive webinar with senior executives from Symity and Microsoft, we looked at how law firms can leverage the new functionality in Teams Premium and how it can become a strategic stepping stone in your generative AI journey.

Teams Premium is an add-on licence that provides secure encrypted meetings, plus customisation of the Teams environment to enable corporate branding. It transcribes meetings and provides recaps, which is a great first step in your generative AI journey.

In this webinar on 6th June, Gordon Edwards and Wesley Budd from Symity spoke alongside Microsoft's senior GTM manager for modern work and AI, Gareth Bleasdale, discussing practical use cases for Teams Premium as well as high level generative AI developments from Microsoft.

**The key features of Premium are:**

**Intelligent Recap** – After a meeting is recorded, Intelligent Recap identifies the names and topics covered in a meeting;

**Branded lobbies** – Using corporate branding assets such as images and logos for meetings;

**Virtual appointments** – Teams can help with SMS text reminders and notifications to reduce missed appointments;

**Watermarking** – for highly confidential sessions you can apply a watermark across the screen. If you screenshot and share it on social media, it's clear who shared it;

**Live translation** – Auto translates multiple languages with subtitles at the bottom;

**Queues app** – acts as a mini contact centre in Teams, new this year, the Queues app is like a lightweight contact centre/ help desk;

**Microsoft Places** – not generally available yet, in public preview, it allows you to upload your building layout and you can request desks and rooms – it shows you who is in the office and can recommend when you should go in to maximise in person connections.

This was one of the most lively webinars we have hosted, and Gordon spent a lot of his time answering questions in the chat. It's well worth a listen.

# MOVERS AND SHAKERS

## UK AND EMEA



Hill Dickinson's long-standing director of IT and operations, Keith Feeny, has been promoted to chief technology officer, as the UK top 50 firm hires its first legal tech and innovation head to, among other things, help build out its generative AI strategy.

Edmund Chan started at the firm on 1 July. He is a qualified lawyer and set up and led Riverview's legal technology team, subsequently becoming a senior member of EY's global law innovation and technology team after EY acquired Riverview.



Feeny's role in practice will change little and comes amid a number of senior management changes, including the appointment last year of Craig Scott as its new CEO.

His promotion effectively makes way for Chan, who, like Scott, was previously an associate at DLA Piper. Speaking to Legal IT Insider about his promotion and the new hire, Feeny said: "I've been in legal tech for 29 years but I'm not a lawyer and the best person to talk to a lawyer is someone who is a lawyer themselves. Finding a lawyer who is interested in legal tech was always a challenge, but our CEO spotted that Ed was available and persuaded him to join us."

Feeny and Chan will work together on formalising a generative AI policy and Feeny says the board has given them "a pot" to invest but says: "From speaking to my peers it is clear that most firms don't have millions of pounds to invest in AI and currently no-one knows what is going to win."

Hill Dickinson, which has over 100 people now across IT and operations, has doubled its turnover since 2017. It has seven offices in the UK, four overseas, and an associated office in Limassol. The firm is just finishing a large automation project in its corporate and banking departments with Bam Legal, and Feeny and Chan will be looking strategically at the 'what next'. Feeny said: "It doesn't matter what we do or what AI we apply unless we get our data right."



StructureFlow has hired Chloe Doyle as a UK-based senior account manager as it grows its senior leadership team around a \$6m Series A announced in May. Doyle was previously at Litera, which she joined as part of the acquisition of contract review vendor Kira Systems. Doyle joined Kira in 2017 and was the first 'boots on the ground' UK employee.

Doyle's hire means she will be reunited with Alister Wyld, previously a senior sales director at Kira and then Litera, who joined StructureFlow in April as a senior sales executive in the United States. Patrick Bartz, who joined Litera in May 2022, joined StructureFlow in May this year as an enterprise account executive in North America. Ciana Lennon joined on 24 June as a key account manager. Her previous experience includes client success director at Kin&Co and she also spent some time at Workshare, which was acquired by Litera.

StructureFlow was founded in 2018 by Tim Follett and helps legal teams to visualise and map out corporate structures and deals.

Doyle was employee number 35 at Kira, co-founded by Noah Waisberg, and at StructureFlow she's number 25. She said: "Tim was first to market to create this whole space and whole section of a pie around diagramming and visualisation, much like Noah was with contract review. Kira spread far beyond where it started and StructureFlow has lots of integration and AI that means its expanding too. I'm really enjoying helping to figure out where it lives and what the value is."



Professor Richard Susskind has been appointed as Special Envoy for Justice and AI to the Secretary-General of The Commonwealth, tasked with helping the 56 Commonwealth countries to achieve equal access to justice by 2030 using artificial intelligence. The goal is based on the UN Sustainable Development Goal 16, to create peace, justice and strong institutions by 2030.

Announcing the appointment, the Rt Hon Patricia Scotland KC said: "We know that the progress towards SDG 16 is not on track. Artificial intelligence, when harnessed properly, can be a powerful tool to get us back on track. Prof Susskind's record of engagement in justice and artificial intelligence makes him eminently suited to drive the Commonwealth's Equal Access to Justice Declaration in line with SDG 16."

Susskind is a renowned author on the future of legal services and president of the Society for Computers and Law. He served as technology adviser to the Lord Chief Justice of England and Wales from 1998 to 2023. He has been working on artificial intelligence and the law since the 1980s. Nonetheless this is a hugely ambitious role. Replying to an email from Legal IT Insider asking about the scale of the new appointment, Susskind said: "It is an ambitious agenda. But really important." He added: "I have all sorts of ideas but my first job will be to listen to a wide range of people across many jurisdictions to gain a sense of the current level of technology use and planning."



UK-founded contract review assistant Robin AI has appointed Carina Negreanu PhD as its vice president of artificial intelligence, joining from Microsoft, where she was principal research manager. Negreanu had been at Microsoft for almost six years, prior to which she was at the University of Cambridge taking a PhD in Theoretical Cosmology, looking at alternative theories of gravity to Einstein's General Relativity.

Negreanu will be responsible for heading up Robin AI's R&D activities and ensuring alignment between the company's research activities – in fields such as machine learning and generative AI – and its product roadmap and commercial objectives.

She said that Robin AI is “one of the few AI companies truly walking the walk, building real products to solve real customer problems, and doing so in a sector where the entry bar for AI products is very high, with no margin for error.”

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Clifford Chance's chief technology officer Paul Greenwood will join the distinguished board of the University of London on 1 August for a period of three or more years, the University announced on 8 August.

Incoming chair Sir Mark Lowcock will be joined by Greenwood as well as four other fellow new joiners from outside of the legal sector.

“Each of these distinguished leaders brings a wealth of experience, expertise, and a commitment to advancing the University's mission, and we're thrilled to welcome them”, said vice-chancellor professor Wendy Thomson CBE. “Their collective wisdom, diverse perspectives, and dedication to excellence will be instrumental in guiding the University of London towards even greater success.”

The terms of the new board members run through 31 July 2027, when they may be extended for up to two further consecutive terms of up to three years.

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**Ascertus Limited** has announced the promotion of Shona Petley to chief financial officer. In this new role, Petley will spearhead strategic financial decision-making and oversee the company's overall financial performance. Ascertus provides document and information lifecycle management solutions to law firms and corporate legal departments in the UK and across Europe.

Petley joined Ascertus in 2019 as financial controller, where she played a pivotal role in establishing and developing the company's finance and accounting function. Her responsibilities ranged from team building and payroll management to implementing robust accounts payable and receivable systems, as well as overseeing in-house management accounting and reporting.

“This promotion recognises my contribution to the company and presents an exciting opportunity to take a more active role in strengthening the company's commercial position,” Petley said. “I'm particularly eager to focus on improving profitability and developing strategies that support sustainable business growth.”

# MOVERS AND SHAKERS

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## NORTH AMERICA



Epiq announced in August that David Cambria has joined as managing director to lead Epiq's Legal Business Advisory practice and help organizations improve their legal operations and service delivery.

Cambria's career history includes senior roles at PwC and Baker McKenzie. Before that he was global COO for the legal department at Archer Daniels Midland.

"The experts at Epiq and the knowledge that we have under one roof is unprecedented," Cambria said. "We have experience in navigating the marketplace, are solution-oriented, and move fast to engineer new operational structures and solutions to support today's highly efficient legal departments."



Elite has hired Steve Payne as its new chief revenue officer. Payne will lead the company's global sales team, as well as business development, solution consulting and sales operations.

Before Elite, Payne most recently worked with Comcast SportsTech and Boomtown Accelerators as an executive advisor to multiple investment partners and technology start-up companies. Prior to that, he spent 17 years at MediaKind (previously Ericsson Media Solutions and Tandberg Television), and he served as president and chief revenue officer in his last four years with the company. During his time there, we're told that he led the company through various phases of acquisitions and divestitures, while also driving cloud transformation.

"As a cloud-native, SaaS company, Elite is rapidly transforming the legal technology industry, and we are leading our customers through a period of significant change," said Mark Dorman, CEO of Elite. "Steve's proven leadership and deep experience forging new customer relationships, while strengthening existing ones, will be essential to accelerating our growth strategy and delivering increased value to our customers, the world's leading law firms."





Aderant continues to attract talent from the mainstream tech sector with the appointment of Michael “Mike” McKay as vice president of software engineering. McKay was an executive director at NCR and holds several patents from his 25-year IBM tenure before joining NCR.

McKay will be responsible for advancing Aderant’s practice-of-law technologies which include the vi by Aderant people management suite and Milana cloud-based calendaring and docketing solution. He also has the overarching responsibility of overseeing the company’s data and AI strategy, which has built solutions like recently launched askMADDI, an AI-driven chatbot.

“Mike is a valuable addition to our technology leadership team at Aderant,” said Andy Hoyt, CTO at Aderant. “He will set the vision for our software engineering team and will ensure that our team delivers upon that vision. Our practice-of-law solutions are part of the bedrock of Aderant’s offerings and askMADDI is an essential technology that has unlimited potential.”

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Cooley announced in July that David Wang will join the firm as chief innovation officer. Based in Palo Alto, Wang will be responsible for helping to shape and advance the firm’s global innovation strategy. Wang is expected to join the firm in late August 2024.

“David is an incredible innovation leader and we are delighted to welcome him to Cooley,” said Cooley’s CEO, Rachel Proffitt. “Leveraging renowned talent like David enables us to move forward with courage and conviction as we continue to innovate and evolve to meet the needs of our clients and our people.”

Wang joins Cooley from Wilson Sonsini Goodrich & Rosati, where he was the firm’s chief innovation officer. A leading voice on the impact of tech innovation and transformation, he has pioneered programs centered around digitization, automation, and artificial intelligence and data science. He previously practiced corporate and securities law for more than 10 years, working with private and public companies on general corporate and transactional matters. Prior to becoming a lawyer, Wang was an entrepreneur.

Wang will oversee the firm’s innovation department, working closely with the information services (IS) teams, firm leadership, and practice management on new and ongoing initiatives. Mike Santos recently was promoted to chief security and technology officer, overseeing Cooley’s global IS function.

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Reed Smith announced in July that Ryan McEnroe, its former global director of IT operations and customer services, is now the firm’s new chief information officer. He will oversee IT across the firm’s more than 30 offices in the United States, Europe, Middle East and Asia.

Since joining the firm in 2000, McEnroe has led a variety of technology functions including the IT Help Desk, network and solution operations, local office deskside support teams, mobility solutions, collaboration and audio/visual technologies, IT education, special projects, IT department administration and purchasing, as well as overseeing all technology aspects of the firm's geographic expansion.

McEnroe succeeds Steve Agnoli in the position. Agnoli will continue in a consulting role to help ensure a seamless transition, prior to his retirement.

"Ryan is exceptionally well qualified to assume the duties that Steve has so ably performed for nearly a decade," said Nick Bagiatis, the firm's chief operating officer. "We are confident Ryan will not only excel in leading the firm's IT function but will also contribute significantly to the innovation for which Reed Smith is so well known."

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UK-founded software development company Xperate in July announced a strategic launch in North America, with the hire of Anand Ablack as president. Ablack was previously VP for North American Legal Markets at Advanced. He has previously worked with Simon Hill, former head of Tikit, which was acquired by Advanced.

Hill and former Tikit CTO Mark Garnish launched Xperate three years ago, with a vision to provide services to clients all over the world. It wasn't long before Bharat Gidde joined the Xperate team as chief technology officer, leading operations in Pune, India, and that global expansion continues.

Hill said: "For our expansion into North America, we are thrilled to establish bases in Toronto and Montreal. Both cities are dynamic and strategically important to our growth plans in providing legal technology specialist development and bi-lingual professional services to North American law firms and legal technology vendors."

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Bloomberg Industry Group has named Bobby Puglia to the newly-created position of chief product officer. Puglia, who will report to CEO Josh Eastright, joins the organization after nearly 25 years at Bloomberg L.P., where he most recently headed the engineering team that supports a number of Bloomberg Industry Group's products.

As CPO, Puglia will oversee Bloomberg Law, Bloomberg Tax, Bloomberg Government, and the Product Experience organization. He will focus on tightly aligning the company's product development efforts and further leveraging artificial intelligence, taking advantage of Bloomberg Industry Group's one-of-a-kind content and data for the legal, tax, and government markets.

"I've worked closely with Bobby for years and am thrilled that he is joining Bloomberg Industry Group in this critical role," said Eastright. "He has deep familiarity with our products and technology and has played an instrumental role in the growth of our products and our adoption of generative AI. As our products evolve, AI will be a critical driver of our success, and we're fortunate to have a leader of Bobby's caliber to lead those efforts."



# FUNDING

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# UK AND EMEA

## DEFINELY SECURES £585,000 INNOVATE UK GRANT

UK-founded legal tech startup Definely was in July awarded a £585,000 grant from Innovate UK.

The funding, which closely follows Definely's \$7m Series A in May, will support Definely's focus on creating new GenAI products aimed at making accessing and understanding the information within legal documents simple.

Nnamdi Emelifeonwu, CEO and co-founder of Definely, commented: "This grant from Innovate UK is a testament to our mission of simplifying the way the legal world understands information. The project will allow us to invest further in the development of leading technology innovations, with AI at the core, to create solutions that make life easier, more efficient, and more competitive for legal professionals by simplifying the process of reviewing documents. We're grateful to Innovate UK for their confidence in our roadmap and are excited to see the plans come to fruition."

Innovate UK, part of UK Research and Innovation, is the UK's innovation agency. They help UK businesses to grow through the development and commercialisation of new products, processes and services.

Definely is already working with law firms and Fortune 500 companies such as A&O Shearman, Slaughter and May, Womble Bond Dickinson, Dentons, Eversheds Sutherland, DLA Piper, Deloitte and Barclays.

"We are always keen to explore new ways to improve the quality, consistency and speed of our delivery for clients. The challenge is always getting busy lawyers to find the time to try something new." Says Sam Dixon, Partner, Womble Bond Dickinson. "So how refreshing it has been to find a tool which meets lawyers where they are already working, can be used out of the box, delivers really obvious value every day and that lawyers actually want to use."

## LEYA RAISES \$25M SERIES A TWO MONTHS AFTER ANNOUNCING \$10.5M SEED FUNDING

Only two months after it announced its \$10.5m seed funding round, Swedish-founded legal gen AI startup Leya announced on 17 July that it has raised a \$25m Series A. The round was led by new, early and growth-stage US investor Redpoint Ventures, with participation from existing investors Benchmark, Y Combinator, and Wayfinder Ventures, plus new investor Alt Capital. Leya was founded last year.

“Our journey has been fueled by a relentless obsession with enhancing legal productivity,” said Max Junestrand, co-founder of Leya. “From our early days at Mannheimer Swartling to our trips to San Francisco, we’ve been driven by a vision of a more delightful, AI-powered way of working in legal. This funding will allow us to accelerate even faster, as it comes off the back of our previous round just two months ago.”

Leya’s platform integrates with law firms’ documents, playbooks, templates, and external legal sources. It assists lawyers with specific tasks related to reviewing, searching, and drafting, such as filling in transaction checklists, creating key terms reports, and writing memos.

Leya says that this new funding will accelerate its product development and growth. It recently entered the UK with its announcement that it is working with leading UK-headquartered law firm Bird & Bird and the hire of Jakub Makowski as UK head.

“The pace at which Leya is adding features and scaling is incredible,” said Jacob Effron, partner at Redpoint Ventures. “Max and the team have done a fantastic job making the product easy-to-use and valuable for lawyers across different parts of their work. AI is going to change the legal industry and we think Leya has the right combination of team, product and vision to drive that change.”



# FUNDING

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# NORTH AMERICA

## TWO-YEAR-OLD HARVEY RAISES \$100M SERIES C AND ACHIEVES UNICORN STATUS

Gen AI startup Harvey has announced a \$100m Series C led by GV (Google Ventures) with participation from OpenAI, Kleiner Perkins, Sequoia Capital, Elad Gil, and SV Angel. The two year old San Francisco-founded company has been valued at a \$1.5bn.

The raise follows Harvey's \$80m Series B in December.

In a blog post on 23 July, Harvey founders Winston Weinberg and Gabriel Pereyra said: "As we mark the company's two-year anniversary, Harvey is used daily by tens of thousands of lawyers at the largest law firms, professional service providers, enterprises and governments around the world. Since our last fundraise in December, we've tripled ARR and doubled employee headcount. We've been encouraged by the diversity of professional service providers who have found value in our platform and the breadth of problems that our clients are solving using Harvey. But, we're just getting started.

"Our Series C will enable Harvey to continue building the most trusted AI platform for professional services in the world. Our mission is to help all of our clients solve all of their challenges by making our platform more powerful, transparent, customizable and secure. We will use this new capital to invest in the engineering, data and domain expertise that are fundamental to building AI-native systems that facilitate the most complex knowledge work. Over the next 12 months, we will continue to collect and curate the data needed to build and train domain-specific models while growing our team by headcount and location to serve our clients where they are – globally.

"We will also deepen our partnerships with both cloud and model providers to integrate additional models into Harvey and broaden our training collaborations to continue improving model efficacy. These advancements will be combined with a growing set of products and integrations that can deliver our models more effectively for our clients and their workflows."

Law firms that have become Harvey customers include UK-headquartered firms Ashurst, Macfarlanes, CMS, and Harvey's first law firm client, transatlantic law firm A&O Shearman. In the US, law firm clients include O'Melveny and Reed Smith.

## CLIO RAISES \$900M IN SERIES F INVESTMENT

Cloud practice management system provider Clio on 23 July announced it has raised US \$900 million, based on a US \$3 billion valuation, in a Series F investment round led by New Enterprise Associates (NEA).

Clio says it will continue to expand its multi-product platform, including further investments in its AI portfolio and integrated legal payments. It will also accelerate its rapid market expansion upmarket and internationally, deepening its organic growth to more than 130 countries across the globe.

Clio powers every aspect of the legal process: it simplifies law firm management by centralizing client intake, case management, document management and legal payments. It now has more than 250+ legal technology software integrations.

“This historic raise was heavily oversubscribed, further demonstrating the overwhelming demand and confidence in Clio’s future,” said Jack Newton, CEO and founder of Clio. “I’m thrilled to embark on this journey with NEA and our group of exceptional investors. The Clio operating system is the undisputed platform of the legal technology sector, engineered to not only meet but anticipate future industry demands. We are pioneering this future for our customers, driven by our mission to transform the legal experience for all. Our commitment to delivering unparalleled value propels every decision we make, and we are inspired by the massive opportunities ahead.”

Tony Florence, Co-CEO at NEA, has joined Clio’s Board of Directors. Mr. Florence commented, “Clio embodies everything NEA looks for in a growth-stage investment: an exceptional, purpose-driven team, market and product leadership, and stellar business physics. Clio is mission critical to law firms, and the company’s best-in-class retention and NPS are testaments to the team’s ability to continuously innovate, deliver immense value, and meet the dynamic needs of the legal sector. With the right foundation in place for continued market expansion and advanced AI capabilities, we believe the best is yet to come. We look forward to applying NEA’s company-building expertise to partner with Jack and the Clio team on their next phase of growth.”

Clio raised its Series E funding in April 2021, a US \$110M growth equity round. Since then, Clio has grown its revenue beyond US \$200M ARR and has expanded internationally to the APAC region, as well as upmarket to become the leader in mid-market cloud legal practice management software, serving more than 1,000 mid-sized firms in the United States alone. To see the full functionality of the platform see Legal IT Insider’s in-depth Practice Management System report above.

Law firms Osler, Hoskin & Harcourt LLP and Wilson Sonsini Goodrich & Rosati served as legal counsel to Clio. William Blair acted as Clio’s exclusive financial advisor.

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## AI SEARCH STARTUP HEBBIA RAISES \$130M SERIES B

New York-headquartered startup Hebbia, which describes its technology offering as “reinventing search with natural language understanding” has raised a \$130M Series B from Andreessen Horowitz, Index Ventures, Google Ventures, and billionaire tech investor Peter Thiel. It’s \$30m Series A was in 2022, in which Index Vendors and Peter Thiel also participated.

TechCrunch first got wind of the Series B in June, although reported that the raise was approaching \$100m, based partly on an SEC filing in May.

Hebbia’s main product, Matrix, allows you to build AI agents that complete end-to-end tasks, instead of just chatting back and forth. It ingests structured and unstructured data across multiple files and formats, retrieves information when prompted, and delivers answers with citations. In addition to summarizing queries, Matrix shows the sourcing and individual steps it took to reach its conclusions.

Founded by Stanford maths and physics undergraduate George Sivulka, Hebbia has found early traction in the financial services sector, with customers including investment banking firms Centerview Partners and Charlesbank. 600-plus attorney US law firm Fisher Phillips is an existing client and legal use cases include lease extraction, customer contract analysis, due diligence and regulatory review.

Alex Immerman, a partner on the growth team at Andreessen Horowitz, who will join Hebbia’s board, said that a lot of the promise of AI has yet to be realised, but that Hebbia can change that, commenting: “Much of the innovation at the application layer has been limited to chat interfaces like ChatGPT. Inputs require precise engineering to capture value, and outputs are often verbose or untrustworthy. What’s needed is an interface that reflects the way knowledge workers work. For serious work, like financial services, that AI interface is Hebbia.”

Immerman’s post in full is here: <https://a16z.com/announcement/investing-in-hebbia/>

You can read Hebbia’s blog announcing the raise here: <https://www.hebbia.ai/blog/hebbia-raises-usd130m-series-b>

## DISCOVERAI RAISES \$2M SEED FUNDING

2024-founded legal tech startup DiscoverAI has raised \$2m in seed funding, led by Leo Capital, with participation from other prominent investors.

One of DiscoverAI’s standout features is its ability to query several million documents or several terabytes of data simultaneously, providing legal professionals with rapid and comprehensive access to vast amounts of data and analytics.

The \$2m raised will be allocated to enhance its AI capabilities, expand product features, grow its team, and invest in marketing and sales efforts to bring its solutions to a wider audience.

“Our goal is to empower the best attorneys in the fraternity with the immense power and capabilities of large language models, enabling them to significantly uplevel themselves against their competitors,” said Ravi Tandon, CEO of DiscoverAI. “This funding will allow us to take significant strides towards realizing this vision and making a real difference for legal professionals.”

# SECURITY AND INFORMATION GOVERNANCE

## THE CROWDSTRIKE GLOBAL IT OUTAGE – EARLY LESSONS LEARNED

We ran a quick fire poll on who was affected by the global IT outage on 19 July and here we took a look at the results, as well as opinions on what could have been done differently; and what we need to be looking at in terms of resilience and business continuity.

On 26 July, US cybersecurity giant CrowdStrike infamously released an update to Windows systems that triggered a logic error: systems running CrowdStrike's Falcon sensor for Windows 7.11 and above in many cases crashed and showed a blue screen of death (BSOD). CrowdStrike has since blamed a bug in its test software, and has promised to take steps to avoid a repeat of an incident that is estimated to have cost Fortune 500 companies over \$5bn.

People will likely remember where they were when they became aware of the outage, particularly if you work in IT, were due to fly, were in certain courts, in the middle of a transaction, or any variation of those 'need to happen now' situations that didn't happen. Around 8.5m Microsoft devices were affected, forcing them into a boot loop. Tempers and viewpoints unsurprisingly ran high.

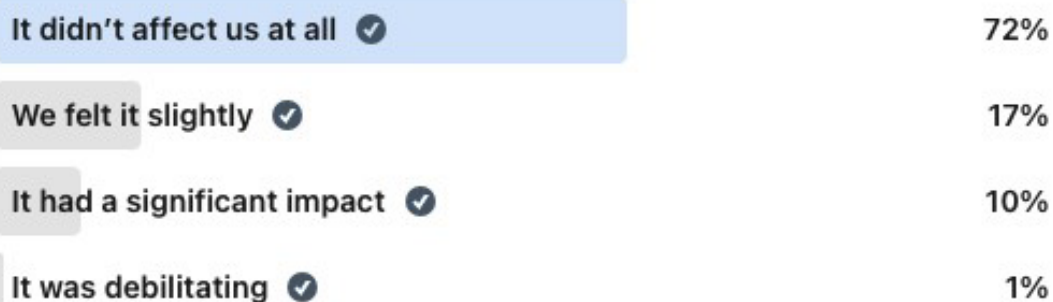
As organisations from banks to law firms to doctor's surgeries even now continue to pick up the pieces, there are serious questions being asked around what could have been done differently, other than the obvious, which is for CrowdStrike not to release the faulty update in the first place. While CrowdStrike gets the blame fair and square, is there an argument that Microsoft needs better resilience? Will firms be looking critically at their own business continuity and disaster recovery processes and procedures?

There are some important takeaways and views worth sharing, as we get our heads around how – or more likely if – we could prevent anything like this happening again.

Who was affected?

### How were/are you affected by the global Microsoft outage on 19 July?

You can see how people vote. [Learn more](#)



110 votes • Poll closed



In a snap 24-hour poll on LinkedIn on 19 July, Legal IT Insider tried to gauge how badly the legal sector was affected by the outage – see those results above. The majority weren't affected at all, according to our informal poll, but for 10% of firms, it had a significant impact. For 1%, it was debilitating.

Heavy CrowdStrike shops were hit hardest but those firms we spoke to were also largely cloud-based. In the US, Steptoe & Johnson's chief information officer Isidore Okoro told Legal IT Insider that the firm, where CrowdStrike is on every machine and server, is 100% cloud, commenting: "So the fix was much easier for us to implement than if we had physical servers on prem."

He added: "Very few SaaS services were affected. So iManage Cloud, our Zoom phone system, Microsoft 365, etc. were still up and functioning fine. In fact, that was what saved our bacon. We are heavily invested in SaaS based services."

In the UK, Sackers, which uses both CrowdStrike and Aderant Sierra, which was impacted, head of IT Danny O'Connor had a similar story, commenting: "I'm glad we're mostly SaaS, so this has been someone else's problem to fix."

Reflecting the views of many, O'Connor said: "How on earth did this update get out of testing? It should go through different bands before it reaches production, so how did it come to be released?"

### ***More regulation?***

This question from O'Connor is the million, or more like billion-dollar question, and the chaos and loss of business on Friday and beyond has led to calls for more regulation of big tech companies.

Professor Ciaran Martin, the former chief executive of the National Cyber Security Centre (NCSC), who is speaking at ILTACON Europe in November, told Sky News: "Until governments and the industry get together and work out how to design out some of these flaws, I'm afraid we are likely to see more of these again."

Not all agree, to say the least. In a delightfully bombastic post on 21 July, digital media attorney and journalist Greg Bufithis said: "I had to cringe by this tweet from FTC Chair Lina Khan who tried to make the current CrowdStrike/Microsoft global IT melt-down situation a crisis because of "big tech" and "consolidation" ...Pardon my French, Lina, but how in fuck is it that you don't understand systems, or their inherent complexity? Well, if you give someone a hammer, everything looks like a nail."

Bufithis added: "Any of my regular readers know that I'm a little skeptical (ok, completely skeptical and cynical) of government regulators (including the DOJ, the FTC, the SEC, etc etc) being able to control and rein in Big Tech, and more importantly, bring about change that is timely, impactful, and meaningful in the long run. This lack of understanding of the complexity of our model technology-reliant, digital-first world is why all of these regulators need to rethink regulation and regulatory frameworks."

Let us also not forget that it was EU regulation that prevented Microsoft from keeping third parties out of the kernel space: concerned over Microsoft's market dominance, the European Commission in 2009 secured a deal with Microsoft where it would give makers of security software the same level of access to Windows that Microsoft gets. Apple, on the other hand, in 2020 stopped giving developers access to its MacOS operating system, and consequently was not affected by the CrowdStrike update on Friday.

## ***Business continuity and resilience***

Like it or not, and whether we can agree on the solution or not, there is no doubt that the outage has (again) brought to the fore the business continuity risk of a global dependence on a small number of businesses.

The need to understand your supply chain was brought into sharp relief by global cyberattacks like Solar Winds but with the recent outage, experts are advising that organisations now need to identify dependencies and vulnerabilities in terms of resilience against disruptive events (so, not unlike a cyberattack.)

Much of the expert advice being dished out is well trodden ground – proactively identify dependencies and vulnerabilities; don't put your eggs in one basket; work out where your single points of failure are; back up, and actively and aggressively stress test.

But the outage has many IT heads shaken and thinking about any areas where we can do things differently. One question being raised is whether we need to rethink automatic updates. Cybersecurity member group ISC2 has a post worth reading on some of the lessons learned, and says: “Depending on the organization and the operating scenario, it may or may not be worth the risk of allowing systems to acquire and deploy their own updates automatically. That means either pulling those updates into an internal testing environment, or at least have direct automated updates disabled in favor of polling a centrally managed update server as part of a managed enterprise patch deployment solution. The latter can at least allow time to be built into the deployment process, to lower the risk of defective updates being rolled out to critical systems and users before issues are discovered.” This feels like a backwards step resource wise for cloud-based firms that are redeploying and retraining their IT staff.

## ***Microsoft, to blame, or not to blame?***

One question we have posed on LinkedIn, which has caused significant debate, is whether Microsoft itself should not have been more resilient.

While Legal IT Insider has seemingly been in the minority in arguing this point, J.J. Guy, CEO of Sevco Security made an interesting point on LinkedIn: “Yes, CrowdStrike pushed a kernel-level update that causes widespread blue screens. Yes, that should have been caught during quality assurance (QA)... This is a high-impact incident not because there was a blue screen, but because it causes repeated blue screens on reboot and [appears as of right now] to require manual, command-line intervention on each box to remediate (and even harder if BitLocker is enabled).

“That is the result of poor resiliency in the Microsoft Windows operating system. Any software causing repeated failures on boot should not be automatically reloaded. We've got to stop crucifying CrowdStrike for one bug, when it is the OS's behavior that is causing the repeated, systemic failures.”

As usual, where technology and in particular cybersecurity is involved, the issue is complicated.

Ben Swindale, CTO of Grant Thornton in Australia, told us on LinkedIn: “If Microsoft blocked alternate suppliers and forced their solution (Defender) as the only option or the default option, I'm sure the antitrust regulators would be back on their case. This is a Crowdstrike issue, I think it's a stretch to put the blame on others.”

Daniel Pollick, who is an independent IT consultant and Lawtech mentor among other things, was CIO of DLA Piper when it got hit by the NotPetya malware attack, added: “Yes it’s dopey architecture but imagine instead of a bad update causing a BSOD a bad actor had penetrated CrowdStrike’s updater and done far worse? That’s getting close to very bad. It’s basically what happened with NotPetya (I have the scars!) but a thousand times worse.”

Interestingly, better education and implementation could have played a part in minimising the impact, and Mike Walker, chief innovation and technology officer at Peppermint, said: “There is a recovery mode in the boot process but only if implemented, which would have noted a bad driver and auto disabled it...hence the reboot many times suggestions. The issue here is it needs to be configured and deployed properly.”

He added: “There is a Windows Recovery Environment and it is possible to remote manage as well so architecturally the issue is education and implementation.”

## Conclusion

In an interconnected world, cybersecurity experts are predicting that global tech outages such as this one are inevitable. There are a few conclusions and takeaways, and we’re sure you can add to this:

- Review your supply chain regularly
- Revisit your business continuity and disaster recovery plans
- Review your resourcing arrangements (people fixed this problem)
- Take on the wider lessons from this disaster (see Mike Walker’s observations above, for example)
- Be agile to change

Helpfully or unhelpfully, the outage is a reminder that even the largest tech vendors can completely screw up.

## **SUPERIOR COURT OF LOS ANGELES COUNTY SUFFERS RANSOMWARE ATTACK**

The Superior Court of Los Angeles County’s Court Technology Services (CTS) Division suffered a ransomware attack on Friday 19 July leading to it having to shut down the Court’s internal systems. This is the largest unified Superior Court in the United States, operating 37 courthouses throughout the county.

The attack began in the early hour of Friday and is believed to be unrelated to the CrowdStrike global IT outage on Friday.

In a statement on Friday evening, the Court said: “Immediately upon discovery of the attack, the Court disabled its network systems to mitigate further harm. The Court’s network systems will remain disabled at least through the weekend to enable the Court to further remediate the issue.

“The Court is receiving support from the California Governor’s

Office of Emergency Services (CALOES) as well as local, state and federal law enforcement agencies to investigate the breach and mitigate its impacts. At this time, the preliminary investigation shows no evidence of court user’s data being compromised.

“Over the past few years, the Court has invested heavily in its cybersecurity operations, modernizing its cybersecurity infrastructure and making strategic staff investments in the Cybersecurity Division within CTS. As a result of this investment, the Court was able to quickly detect an intrusion and address it immediately.”

The vast majority of cases in California begin in a Superior (or trial) court, one of which resides in each of the state’s 58 counties. The courts hear civil and criminal cases, as well as family, probate, mental health and juvenile cases.

## **QUISS TECHNOLOGY ACHIEVES ISO CERTIFICATIONS WITH ZERO NON-CONFORMANCES**

Quiss Technology, a leading provider of managed IT services and serving many UK law firms, recently achieved re-certification in two important standards, ISO 9001:2015 the globally recognized standard for quality management and the new ISO 27001:2022 standard, one of the world’s leading standards for information security management systems.

Although the audit process lasted around 7 days, successful re-certification followed a year of ongoing work that required a full gap analysis and new processes implementing to address the aspects added to the ISO27001:2022 standard.

Andrew Mountstephens, Quiss Technology’s information security manager commented: “Given the risks facing businesses in the current climate, information security has never been more important, which makes our re-certification good news for us and good news for the clients who rely on us to keep their systems running optimally and their networks secure.

“This is a continuous process, not a simple tick-box exercise and requires hard work by a lot of individuals throughout the business. It is immensely gratifying to not only attain the latest ISO27001:2022 accreditation, but now have a running streak of five consecutive years with no non-conformances, including two full re-certifications with both ISO 27001 and ISO9001.

“To not only pass the audits, but achieve zero non-conformances for 5 years running is a record the whole company can be proud of. It demonstrates our commitment to the highest levels of security and quality, while ensuring that we continue to improve.”

## **MODEONE ACHIEVES ISO/IEC 27001:2022 CERTIFICATION**

ModeOne, a leader in targeted, remote mobile data collection, has received ISO/IEC 27001:2022 certification for its patented SaaS framework that enables rapid, efficient collection and analysis of data from smartphones for litigators, cybersecurity, corporate compliance, and eDiscovery professionals.

ISO/IEC 27001:2022 is one of the most rigorous and globally recognized benchmarks for establishing and maintaining an information security management system.

“Achieving ISO/IEC 27001:2022 certification is a significant milestone for ModeOne,” said Jason Purviance, chief information officer, ModeOne. “This certification underscores our commitment to maintaining the highest standards of information security and protecting the data of our clients. It is a testament to the hard work and dedication of our entire team.”



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