Orange Rag July /August Issue is out now!

Editor’s note

Welcome to the July/August Orange Rag, where you can catch up on all the latest news, wins, deals and moves. Global M&A activity may well have nearly halved and deal values plummeted (according to Mergermarket) but in July in the legal tech sector a number of sizeable mergers and acquisitions were announced – often in the UK - including further consolidation within the eDiscovery sector.

Another theme was virtual hearings, including Florida’s first virtual trial. We also witnessed the rather unfortunate hearing of the teenager accused of hacking Twitter, where the judge didn’t password protect the call, leading for some fairly colourful commentary on social media.

And GPT-3 took the world by storm. You can find in this issue a link to our long commentary on what to expect (including long snoredom debates about the end of lawyers.)

If you would like to navigate to different sections of the issue, click on the three horizontal lines in the top right hand corner of your screen.

Enjoy!
Access Group acquires DPS Software

In further significant consolidation of the mid-tier practice and case management software market, The Access Group in July acquired DPS Software, vendor of SaaS-based practice management system Spitfire. The acquisition comes hot on the heels of Access’s acquisition of case, matter, and practice management system Eclipse Legal Systems for £56.5m from Capita.

Access – best known in the legal sector for Access HR – is a fast-growing UK software company jointly-owned by private equity firms TA Associates and HG, which owns Litera and is a majority investor in Mitratech (also alongside TA Associates.)

In a move that will be welcomed by existing customers, post-acquisition, DPS Software’s managing director and founder Osman Ismail will stay on in his current role for six months before moving into a consulting role with the group as a whole. IT director Scott Ridley will then take over from Ismail to lead the DPS team.

Spitfire is a web-based system that includes integrated case management functionality, so users can access email, calendar, tasks, case management and practice performance reports in the same space. Spitfire’s app, DPS Mobile, enables users to conduct all of the above from their mobile phone.

DocsCorp acquires document assembly platform verowave

DocsCorp has acquired UK-based document assembly vendor verowave technologies, with the verowave platform (verodocs, verosheets, and veroslides) to be integrated into the DocsCorp document productivity suite and re-branded as veroDocs.

verowave, founded in 2015 by Scott Hews, enables the creation and population of templates and customised documents without the need for soft coding. It is resold by Morae Global and integrates with iManage and NetDocuments. Speaking to Legal IT Insider, DocsCorp co-founder and CEO Dean Sappey said: “We started talking to Verowave around 12 months ago to see how their product works and who their customers are. Their main partner is Phoenix, which is a good partner of ours too and they’ve been involved in the conversation and given us a lot of feedback about what they think of the product.” He adds: “A big part of the acquisition is that we will be selling the product to the US and Australia, where it hasn’t been sold to date. Once we start showing it to customers it’s really going to turn some heads.”

Verowave enables users to build template management apps that will appear within the DocsCorp toolbar. Sappey said: “This is a full assembly engine so rather than using complex macro in Microsoft Word, a user can simply drag and drop in the app and produce a document assembly in under a minute.”
Ismail told Legal IT Insider: “Spitfire has come on incredibly every release and grown at every stage. They love our technology and the Saas that Spitfire brings. Of course, they get One Office & Outlook Office as well, Spitfire uses the same databases as One Office, so they can co-exist and the databases are MS SQL, so far more industry established.”

Ismail added: “There is no other true Saas based full function practice management system on the market at Spitfire’s maturity. I’m proud if what we’ve achieved in moving from the desktop to the full design UI, UX model that Spitfire represents.”

Access in June announced the agreement to acquired Eclipse, signaling its intention to further expand its presence in the sector. At the time of that acquisition, Access Group’s CEO Chris Bayne said: “The sector is exhibiting solid growth signals with the legal market forecast to grow at CAGR of more than 14% prior to Covid-19, reaching a total market size in excess of £1.8bn by 2024.”

Other recent acquisitions by Access include CoreHR and The Payroll Service Company.

What’s interesting is the level of investment HG now has in the legal tech sector, albeit in different areas of the market and with different tiers of client base (Litra is marketed primarily at large law, Access the mid-market and Mitratech too corporate legal teams.)

Morae Global ramps up UK advisory capability with acquisition of Janders Dean

Morae Global Corporation on 1 July announced that it has acquired respected legal management consultancy Janders Dean in a deal designed to give Morae a UK-based legal advisory practice group with a particular eye on the large law private practice and corporate legal market.

The eight-strong UK and APAC-based Janders Dean team will complement Morae’s existing US-based advisory team and will assist clients with legal spend management, resource management, process and policy enhancement, and technology and knowledge service transformation.

Morae, which now has around 600 staff off which around 120 are in the UK, is headquartered in Texas but in May last year began further building out its UK presence with the acquisition of document and information management company Phoenix Business Solutions. Morae is now organised along the lines of managed services, headed by James Rojas; legal technology, now headed by David Boswell (who took over the role in January); and strategic solutions, headed by Joy Saphia. Boswell took over from Phoenix founder and former CEO Matt Crocker, who has been promoted to chief strategy officer for both managed services and legal technology.

The Janders Dean team of senior analysts and consultants in the UK and APAC will continue to be led by founder Justin North in his new role as a managing director. The team will report into Rojas and help to effectively weaponise Morae’s legal tech capability but will work with both groups.

Microsoft Word you can use a document assembly app that’s built around the law firms own documents.’

Sappey said that the acquisition has been driven by client demand, commenting: “Products that are built using macros or older technology are hard to maintain and clients want an integrated set of apps from DocsCorp. A lot of products need a legal expert and someone with programming skills, which is hard to find and for a small firm incredibly expensive. But the new Microsoft office technology allows you to build apps and makes things much simpler, and that’s what verowave does. It’s much more modern Microsoft technology that means fee-earners don’t have to be a programmer.” The initial target market will be large law firms with multiple locations that require uniform templates.

Hews will continue to lead the development of the product and DocsCorp is joined by long-established legal tech Microsoft Office specialist Clare Waller, who is building a consultancy team around the new product. Waller is known for her work at Tikti, where she worked with the house style manager products, establishing Word legal standards and encouraging the use of standard styles.

UK-based eDiscovery and forensics business Anexsys acquired by Xact Data Discovery

In the first of two eDiscovery acquisitions, UK-based eDisclosure, digital forensics and managed services leader Anexsys has been acquired by U.S private-equity-backed company Xact Data Discovery (XDD) from Hobs Group following a restructure.

Anexsys’ managing director Rob Crowley will remain with the business. He said: “Having worked alongside the XDD executive team for several months, it became quite evident that merging forces was a natural fit highly beneficial to both organizations on multiple fronts.

‘Having access to XDD’s expansive services, operations and expertise will enable us to further strengthen our relationships with key clients, while expanding business opportunities with new organizations. XDD’s culture and commitment to exceeding client expectations aligns congruently with Anexsys’ approach. We look forward to integrating organizations over the next few months and working together in the UK.”

The Hobs Group said in a statement that the sale comes as it continues to focus and grow its market share in the reprographics and 3D services sectors.

Xact Data Discovery is a leading provider of eDiscovery, data management and managed services for law firms and corporations. It was acquired in January 2018 by JLL Partners, a mid-market private equity firm based in New York. As part of the transaction, JLL said it was partnering with XDD Founder and President Bob Polus on the “next phase of its growth as it continues to strengthen its market position as an industry leader and innovator within the eDiscovery and legal process
The acquisition follows several joint ventures and collaborations between the two companies and Morae plans to further invest and expand the advisory team over the coming year.

Founded in 2007 in Australia, Janders Dean expanded into the UK in 2010 and works with many of the world’s largest law firms and corporate in-house legal departments such as Hall & Wilcox, Clyde & Co, Baker McKenzie, Ashurst, Allen & Overy, DLA Piper, BAE Systems, Vodafone and UBS. The company has been in due diligence since the end of 2019.

Speaking to Legal IT Insider, Crocker said: “We now have ability to offer strategic advice to general counsel and managing partners of law firms and make sure that we’re up to date on what their needs are, particularly coming out of COVID-19. I want to be in the best position to help them so let’s have those conversations. My expectation is that Justin goes in and does the advisory work and maybe we’re looking at costs savings or maybe taking over the contract lifecycle with people, process and technology, Justin’s team will feed both sides of the business.”

North told Legal IT Insider: “This is a great time for Morae. They are in a very interesting growth stage and bringing new people on board and it’s a great opportunity for us because they are the engine and will give us even greater access to clients.”

In a statement out on 1 July, North said: “This is an extremely exciting deal that opens up a range of opportunities for our team and clients, who stand to benefit from the scale and coverage of Morae’s impressive global operations. Now more than ever, the legal industry is reimagining the way it works, from evaluating working practices to assessing cost models. There is a huge appetite to move beyond hype and towards implementing major transformation programmes that deliver measurable value.”

He added: “By joining forces with Morae, we can help drive meaningful improvement and lasting change for our clients. We have worked closely with the Morae team over the years and have always shared a common view on the possibilities for the future of the legal industry. This belief crystallised early last year when we worked together on a major transformation initiative for one of the world’s leading financial institutions. It was at that moment our conversations began about coming together. I could not think of a more appropriate place to bring the Janders Dean team. With our collective skills and experience and the strong proven history of the Morae leadership team, we are now able to significantly amplify the delivery of our services to clients around the world.”

In May 2017 then Morae Legal Corporation merged with Washington-headquartered legal, risk and compliance analytics and consulting firm Clutch Group, leading to the launch of Morae Global. [https://www.moraeglobal.com/morae-global-launched-clutch-group-morae-legal-complete-merger/](https://www.moraeglobal.com/morae-global-launched-clutch-group-morae-legal-complete-merger/)

Outsourcing markets.” It’s other recent acquisitions include FI Discovery, RVM Enterprises and Beyond IT forensics.

David Moran, XDD President and COO, said: “Complementing our recent domestic acquisitions, adding Anexys to the XDD family enables XDD to expand eDiscovery, Forensics and Managed Review services in the UK. Based strategically in London, UK, the Anexys team has earned a solid reputation for providing exemplary eDiscovery consultancy services to a wide variety of law firms, corporations and government agencies. Mirroring XDD’s customer-centric culture, we look forward to jointly servicing clients as we continue to expand our footprint abroad.”

**HaystackID merges with NightOwl Global**

And eDiscovery provider HaystackID has merged with NightOwl Global, a leader in the delivery of corporate law department enterprise data services.

Hal Brooks, CEO of HaystackID, said: "NightOwl is a leader and innovator in delivering highly focused enterprise data consulting and services to corporate legal departments throughout the world. The combination of NightOwl and HaystackID creates immediate and accessible value for our customers by providing the most effective and responsive cybersecurity and legal discovery services available as they face increasingly complex security, investigation, and litigation challenges. NightOwl’s strong growth in our current pandemic environment speaks volumes to the critical and essential value they provide customers. I am incredibly excited to work with Andrea Wallack and her team as she continues her industry leadership role as a board member, equity investor, and President at HaystackID. In that role she will be responsible for driving our consolidated efforts to achieve our collective vision of developing and delivering the highest level of service and support in the market."

The NightOwl merger is HaystackID’s fourth major investment event since April 2018. In April 2018, HaystackID acquired Envision Discovery, an eDiscovery managed services provider, and Inspired Review, a managed review and remote review services provider. In January 2019, HaystackID acquired eTERA Consulting, an eDiscovery managed services provider. Additionally, in February 2020, HaystackID completed a strategic recapitalization with Quad-C to support the continued growth and expansion of company depth, breadth, and reach. The HaystackID merger with NightOwl Global propels the combined company into the top tier of worldwide data and legal discovery service companies and positions it for continued record growth to meet customer needs regardless of complexity, location, or language.
Provisioning Microsoft Teams For Matters with Prosperoware

If you would like to be part of our webinar series, we would love to hear from you! Please email us at webinars@legalitlexicon.com
Iridium reports record half year as law firms turn to BI under pressure

Iridium Technology has turned out the strongest half-year revenue results in the firm’s history despite a widespread downturn in legal tech spend among law firms post COVID-19, we can reveal. It was a record year for all three of the company’s product families: Iridium BI, Intellistat, and Steere, which is said to reflect a recognition among law firms that in a tough economic environment, it is even more important to have strong business intelligence and financial analysis capabilities.

Iridium merged with BI technology and consulting services company Data Fusion Technologies (DFT) in 2019 but speaking to Legal IT Insider, Iridium’s founder and CEO Tom Jones said that the record numbers are as a result of comparing pre-merger figures, like for like. “It’s definitely a record half year across all three products, which I put down to two factors. Number one is that we now have 16 products not four, and that gives us an ability to cross sell. Number two is that while it may be seen as counter-intuitive, a lot of law firms, instead of pulling back on investment, are seeing that they need BI to manage towards profitability.”

He added: “Firms are coming to us and saying, ‘we don’t have good control of profitability and reporting’. That will come through BI and they are increasingly focused on collections, where our dashboard shows who they need to call today. It’s giving them that financial analysis capability across their different offices and businesses.”

Ten new clients signed up in the first six months of 2020, with wins in all three products. There were also numerous cross-sell wins, with existing clients who use modules in one product family signing up for modules in others.

Iridium, which is itself an entirely remote working company, has taken advantage of the revenue increase by investing back into product development, adding nine new developers since January 1. All three product families are under active development, and updated product roadmaps will be released shortly for all products in all three families.

Iridium took investment from Polaris Growth Fund two years ago – as we exclusively revealed at ILTA 2018 – and now has 70 employees. Polaris was able to get the funding to acquire DFT and Jones said: “Their insight has been tremendous.”
Paul Hastings dominates in 2020 ILTA Distinguished Peer Awards

ILTA in July announced its Distinguished Peer Awards finalists, with Paul Hastings up for four awards across three categories, including two in the Transformative Projects of the Year category.

The Awards recognize ILTA peers who have delivered great business value and transformational impact through their innovations and implementations or have been champions in specific areas of focus for their organizations.

NetDocuments’ CTO Alvin Tedjamulia is notably up for the lifetime achievement award once again.

Winners will be announced throughout ILTA’s virtual conference ILTA>ON (August 24 – 28, 2020).

The 2020 finalists are:

Lifetime Achievement Award
Judith Flourney, Chief Information Officer, Kelley Drye & Warren LLP
Alvin Tedjamulia, Chief Technology Officer, NetDocuments
Ray Zwiefelhofer, President, Worldox

Innovative Leader of the Year Award
Katie DeBord, Chief Innovation Officer, Bryan Cave Leighton Palsner LLP
David Greetham, Vice President of eDiscovery, Ricoh USA, Inc.
Nicola Shaver, Director of Knowledge Management, Paul Hastings LLP

ILTA Contributor of the Year
Shannon Bales, Litigation Support Team Lead, Munger, Tolles & Olson LLP

Obelisk Support wins £50k from Innovate UK to deliver productivity tool

Obelisk Support has won almost £50,000 of funding from Innovate UK, the UK’s innovation agency, to develop a productivity tool that will help SMEs manage the shift to remote working caused by Covid-19.

Obelisk’s plan is to develop the capabilities of the system it has built to manage a distributed workforce of over 2,000 lawyers with variable levels of flexibility in terms of location and hours.

The tool will allow businesses to have an overview of the skills, availability and workload of staff so that they can match incoming work to the right people, and then track the progress and time spent on completing the task.

It will be built on the two apps Obelisk has already created: ‘Buzz’, which allows administrators to manage and match workers and tasks according to availability and patterns of flexible work, alongside time logging and invoicing; and ‘Profile’, a worker-facing web/mobile app, through which they manage their contact information, preferences, availability, background, work offers and time logging.

The award comes from a government competition which encourages innovation in response to the global disruption caused by Covid-19. The maximum award is £50,000. The agency received 20,000 applications, the largest number ever.

The competition’s aim is to support businesses to focus on emerging or increasing needs of society and industries during and following the Covid-19 pandemic.

Obelisk CEO Dana Denis-Smith says: “While there has been a lot of talk about Zoom, Microsoft Teams and the like because of Covid-19, the challenge of scaling up remote working presents a fundamental challenge to businesses: the need to define, organise, schedule, negotiate and track work being done by a team. Trust and transparency are key ingredients to success.”
Julie Brown, Director of Practice Technology, Vorys, Sater, Seymour and Pease LLP

Gillian Power, Chief Information Officer, Lathrop GPM LLP

**Transformative Project of the Year**

Paul Hastings LLP, Michael Ertel, Xavier Paredes, David Chen: Keyword Relevancy Report Tool

Paul Hastings LLP, Amy Wegener, Serena Granger, Joanne Pacewicz, Glen Hoxie, Jennifer Ash, Alan Emerich: Pushing the AI Frontier

Perkins Coie, Gwyn McAlpine, Amy Monaghan: New Matter Intake and Tracking Process and Portal

WilmerHale, Miranda Perkins, Mara Goldsmith: Automated Audit Response Letters

**Innovators of the Year**

Eversheds Sutherland

Norton Rose Fulbright

Paul Hastings LLP

**Solution Provider of the Year**

eBrevia

Foundation Software Group

Kira

**Consultant of the Year**

Jim Priz, iManage

Olenick Professional Services Team, Olenick

Kenny Leckie, Traveling Coaches

Last year the winners were:

**Lifetime Achievement Award** - Donna Payne, CEO, PayGroup

**Thought Leader of the Year** - Katherine Lowry, director of practice services, BakerHostetler

**Business partner of the year** - Gina Buser, CEO and founder, Traveling Coaches

**Transformation Project of the Year (organisation of any size)** - Flyn Flsh, knowledge management counsel, supervisor, Ogletree Deakins

**Transformation project of the year (organisations of under 100)** - Justin Hectus, CIO/CSO, Keasal Young Logan

**Young professionals to watch:**

https://awards.iltanet.org/winners?ssopc=1
LegalTech Scale up Clarilis raises £6m to fuel expansion

UK-headquartered document automation vendor Clarilis has raised £6m in a Series B round of funding. The co-investment has come from Mercia Asset Management, Northern VCTs (£2.5m), an existing investor and Gresham House Ventures (£3.5m) investing on behalf of the Baronsmead VCTs.

The funding raised in this round will be used to support Clarilis’ ongoing growth and international expansion. Gresham House Ventures, a growth equity investor specialised in scaling companies with business models driven by technology, customer insight or service excellence, has invested £3.5m and existing investors Mercia Asset Management, Northern VCTs has invested £2.5m. The investment round which completed on 31st July, is designed to assist in the company’s continued growth internationally, and fund its sales, marketing and product development functions.

Clarilis was co-founded by brothers James Quinn, a former solicitor, and Kevin Quinn, the technical architect of the CLARILIS platform and former lead developer. Since launching to the market in 2015 Clarilis has experienced consistently strong growth. The business now boasts an impressive blue-chip client base with an exceptionally high level of customer satisfaction.

Henry Alty, Investment Director at Gresham House Ventures, said: “We have spent a long time looking at automation within professional and financial services. While the legal world has arguably been a late adopter of technology, firms are realising that automation is essential to driving both cost efficiency and resilience across distributed workforces.

“In Clarilis we have found an ambitious business with a market-leading solution and exceptional customer satisfaction as a result of its fully managed service. It exemplifies the type of technology-driven and scalable business model that our investment team look for. We’ve been impressed by the impact that Clarilis has already had in the market and as the business expands, particularly into the South East Asian market, we are excited to be bringing our experience to bear and to help facilitate its growth.”

 Orbital Witness raises £3.3m seed funding

UK-based startup Orbital Witness has closed a £3.3m seed funding round led by LocalGlobe and Outward VC with participation from previous investors, including Seedcamp and JLL Spark. With its new investment, Orbital Witness aims to create a universal risk rating for property and land similar to a credit check to provide a high-level view of property risk to all parties.

Launched in 2018, Orbital Witness helps lawyers to more easily identify risks in property transactions via its platform, through which you can access and organise property information from HM Land Registry and local authorities and facilitate document review.

Among its clients are four of the five Magic Circle law firms and in-house legal teams from M&S and TFL. Orbital Witness was founded by CEO Edmond Boulle and COO Will Pearce in 2017, who previously worked in the space sector but crystallised their vision for Orbital Witness during a stint at Mishcon de Reya’s legal startup incubator MDR Labs. Today, Orbital Witness employs fifteen people based in London.

Pearce said: “We’ve built a system for clients to access documents from numerous important sources and provide an easy way to provide risk assessment and insights quickly. Now, we’re using that expertise and technology to reimagine property and land risk for today, to make transacting real estate less time-consuming, arduous and inefficient.”

The new risk rating is described as being similar to a credit check to provide a high-level view of property risk to all parties. Using machine learning technology and reinforcement learning techniques, Orbital Witness has developed a sophisticated understanding of real estate and property risk that it is now applying across commercial real estate properties in the UK.

Boulle added: “Orbital Witness imagines a world where real estate and property issues are no longer hidden behind mounds of deeds and documents. Our goal is to simplify the complexities of the current process and bring greater transparency to the world’s largest asset class. With this new funding, we’re able to accelerate towards our vision of a universal risk rating, similar to a credit check, that provides an early warning system for property professionals.”
Remote Working and Digitisation

CPA Global’s 3,300 staff to transition to remote working post-COVID-19

IP technology leader CPA Global is to move to an entirely remote working model post COVID-19.

The company, which has 3,300 staff across 29 offices worldwide, said on 2 July that it will set up hubs in key geographies and group chief executive officer Simon Webster commented: “The implications of recent months have created a rapid and extremely important change for the IP industry. We believe the ‘new normal’ is not something we just arrive into; it isn’t predetermined or preordained. As restrictions fall away, the new normal has to be something we shape, we can control and which we will own in the future. Prior to the pandemic we were already 3 years into a 5-year investment programme into our operating technology, both collaboration infrastructure and business applications, and this meant that the transition of

UK’s first electronically signed deeds filed with HM Land Registry

The UK’s first electronically signed deeds have been submitted to HM Land Registry by The Partnership, using SignIT from InfoTrack.

In July, HM Land Registry announced its historic decision to accept witnessed electronic signatures on deeds, provided they follow certain rules, in effect removing the last strict requirement to print and sign a paper document in a home buying or other property transaction.

The rules are (see Gowling WLG’s useful note here):

- The parties have agreed to use electronic signatures
- All parties have a conveyancer acting for them
- A specific process is followed when setting up the document
Indeed, the shift to virtual, remote working in response to the Covid-19 lockdown has challenged assumptions and sped up the process of digital transformation in the wider IP industry, confirming just what can be achieved when you combine the best technology with the best people to drive productivity, efficiency and innovation as well as bolstering health and wellbeing.

"Today, therefore we are announcing our intention to become a digital-first organisation, to complete the journey that the pandemic has accelerated – and to capture the long term benefits for our people, customers and shareholders that we can see from fully embracing digital. We are setting out on our journey and taking ownership of our new normal – a digital CPA Global."

He added: "Location should no longer be a restriction on talent. We want to maximise our collective talent, retaining the best and brightest and creating new opportunities for people around the world. Our teams will work remotely but will never be isolated – putting the wellbeing of our people first and helping them to thrive in the new world is essential to our success. To support our ambitions our offices will also transition from fixed workplaces into dynamic hubs based in our key geographies. We will invest in these hubs to increase our collaboration, culture and agility."

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**New Tech Updates**

**GPT-3 and another chat about the end of lawyers**

So, thank goodness the world has something other than COVID-19 to talk about and it’s called GPT-3, a machine learning system that has eaten the Internet and about which we can say two things, or perhaps three: 1) The long-term possibilities for legal are big but, spoiler alert, it is nowhere near capable of ‘taking over’ from lawyers. 2) GPT-3 will nonetheless no doubt start another wave of ‘end of lawyers’ debates, snore. 3) A legal tech

In June, a heavyweight group of AI experts from the likes of Google and Microsoft plus researchers and academics urged against the publication of a new study that claims to identify or predict criminality based on biometric or criminal legal data, saying that such studies are inherently racially biased and naturalise discriminatory outcomes.

The publication in question is A Deep Neural Network Model to Predict Criminality Using Image Processing planned for publication by Springer Publishing. But in a letter dated 22 June to Springer Editorial Committee, the group of around 1,700 expert researchers and practitioners said: "We urge the review..."
author could probably use GPT-3 to write their next book without anybody being able to tell the difference.

The million-dollar question is, given the off-the-scale excitement around GPT-3, precisely where and how next gen AI program will impact the legal sector, and, to a certain extent, where it is an opportunity or a threat.

In a long form article in July, Legal IT Insider spoke to a number of senior people in the industry, particular those who have already played around with this new software, and you can read that article here: [https://legaltechnology.com/gpt-3-and-another-chat-about-the-end-of-lawyers/](https://legaltechnology.com/gpt-3-and-another-chat-about-the-end-of-lawyers/)

New Zealand government algorithm charter leads the way

The New Zealand government claims to have become the first in the world to outline a set of standards to guide the use of algorithms by public agencies, once again shining a light on what governments around the world are doing to ensure scrutiny of tools that are increasingly being relied on in crucial areas such as criminal assessment and sentencing.

New Zealand’s Minister for Statistics, James Shaw, on 28 July launched the Algorithm Charter for Aotearoa New Zealand, commenting: “We live in a data rich world where algorithms play a crucial role in helping us to make connections, and identify relationships and patterns across vast quantities of information. This helps to improve decision-making and leads to benefits such as the faster delivery of targeted public services.

“However, using algorithms to analyse data and inform decisions does not come without its risks. It is important, therefore, that people have confidence that these algorithms are being used in a fair, ethical, and transparent way. And that’s what this Charter is all about.”

Where algorithms are being employed by government agencies in a way that can significantly impact on the wellbeing of people, or there is a high likelihood many people will suffer an unintended adverse impact, it is appropriate to apply the Charter.

The commitment includes a need to clearly explain how decisions are informed by algorithms, including publishing information about how data is collected, secured and stored. There is also a commitment to make sure that data is fit for purpose by understanding its limitations and managing bias.

The Charter has been signed by 21 agencies, including the Ministry for the Environment, Ministry of Education, the Department of Internal Affairs, Ministry of Justice, and Inland Revenue. The Charter commits these agencies to a range of measures, including explaining how decisions are informed by algorithms and embedding a Te Ao Māori perspective in the development and use of algorithms.

“Most New Zealanders recognise the important role algorithms play in supporting government decision-making and policy delivery, however they also want to know that these systems are committees to publicly rescind the offer for publication of this specific study, along with an explanation of the criteria used to evaluate it.” The group further says they want: “Springer to issue a statement condemning the use of criminal justice statistics to predict criminality, and acknowledging their role in incentivising such harmful scholarship in the past.” Also that: “All publishers refrain from publishing similar studies in the future.”

Ryerson launches free online legaltech startup incubator

Ryerson University’s Legal Innovation Zone has launched its latest legal tech startup programme, which starts online in September. Sprint Studio is a free, 12-week intensive program to help early-stage startups around the world to develop innovative legaltech products, in particular to develop their proof of concept into a market-ready product. It focuses on initial customer development and building a marketable minimum viable product (MVP).

Participants will be working on the incremental development of their MVP to create a strong feedback loop with potential users.

The cohort will engage with online content developed by industry experts, while working closely with various LIZ mentors to progress through program milestones.

Sign up here: [http://www.legalinnovationzone.ca/sprint-studio/](http://www.legalinnovationzone.ca/sprint-studio/)

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

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

LIZ supports start-ups, R&D for law firms and businesses and practical reform initiatives. It can house 15-20 start-ups at any one time. It is free to them, funded by the university and also paid for by projects underway at the incubator. LIZ doesn’t take any equity or interest in the start-ups.

When Legal IT Insider editor Caroline Hill met Bentley during a trip to Toronto in 2019, he said: “We are trying to create change and help to build better solutions. We want to give consumers better access to justice”.

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

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

You can read more about that conversation and Toronto’s legal tech scene here: [https://legaltechnology.com/toronto-part-one-the-incubator-scene/](https://legaltechnology.com/toronto-part-one-the-incubator-scene/)
being used safely and responsibly,” said Shaw. “The Charter will give people that confidence. It will help to build public trust over the long term, meaning that we can unlock the full potential of data to improve people’s lives.

“Today we have set a world-leading example of how government can work with diverse groups of people, communities and organisations to improve transparency and accountability in the use of data. It is an example that we hope others will follow.”

Government agencies do not write their own algorithms and have limited insight into how the software makes decisions. However, they are increasingly relying on areas such as facial recognition and criminal sentencing, and in cases such as Wisconsin v. Loomis, the judge gave Eric Loomis a long sentence for a drive by shooting on the basis of risk assessment tool Compas, disallowing a challenge to assess the algorithm.

Commenting on the news of the new Algorithm Charter, Stevie Ghiassi, CEO of Legaler, said on LinkedIn: “In light of all the hype, hopes and concerns around OpenAI’s GPT-3 #artificialintelligence, here’s a timely world-first from the New Zealand government (why do they always have to shame everyone else?)

“They are the first in the world to outline a set of standards to guide the use of algorithms by public agencies. Will this lay the foundation for other jurisdictions and maybe even the private sector?”

Virtual Hearings

Florida’s first virtual jury trial

Zoom was still all over the news in July, including creating one or two major milestones for the legal sector. Cole, Scott & Kissane in mid-July participated in Florida’s first ever virtual jury selection and trial, with the entire process conducted and streamed live on Zoom, as in Australia, the Queensland Courts conducted a six-day hearing entirely online.

The historic one-day Florida trial was a dispute heard in the Eleventh Judicial Circuit of Florida between People’s Trust Insurance Company and Yusem Corchero et al. – an insurance

Cole, Scott & Kissane says Zoom has helped avoid pay cuts and lay offs

Florida-headquartered law firm Cole, Scott & Kissane (CSK) has attributed its ability to weather the COVID-19 pandemic without layoffs or pay cuts to its use of Zoom, which now largely replaces WebEx and LifeSize as its main video meeting and webinar tool.
dispute with a homeowner. Eight jurors were selected while at home, but attended the court in person, wearing masks and sitting at a distance from one another. CSK represented the insurer and Vargas Gonzalez Hevia Baldwin the homeowner.

The trial was heard by Judge Beatrice Butchko, who said at the end of the trial: “This is the first case of its kind in Florida under these conditions, and a historic trial. All the professionals and citizens of this county are anxious to get our justice system flowing in terms of getting trials back up and running.” With a very personal touch she said: “I’ve been a judge for 15 years and I’ve never had to do anything like this.” Handing each juror a certificate to honour their participation, Judge Butchko added: “I really appreciate the opportunity to work with you and I know the lawyers do to.” You can watch that here: https://www.youtube.com/watch?v=7VR9kfbQVW0

The trial happened as cases in Florida continue to surge and the state looks at risk of becoming the epicentre of the virus in the US.

Miami-Dade County Court is one of five trial courts in Florida selected to conduct remote jury trials using remote technology as part of a pilot program.

Elsewhere, The Law Court of Queensland reports that it recently conducted a six-day mining objection hearing (Pembroke Olive Downs Pty Ltd v Sunland Cattle Co Pty Ltd & Ors) completely online. All documents were sent to the Court electronically and filed using the Court’s document management system.

The hearing itself was conducted via Pexip videoconferencing software, and, at its peak, up to 14 external participants were in the conference. Four counsel appeared. A combination of Pexip and the Court’s eTrial software was used to display and share documents, as well as manage exhibits. All parties uploaded documents to the site and the Court Registry and Associate managed the site.

There were 450 exhibits. Ordinarily, the Court would conduct a site inspection on the first day of the hearing, however due to restrictions on travel, the parties conducted a “virtual” site inspection using a helicopter to take footage of the site. On the first day of hearing, the Court and everyone in the videoconference watched flyover videos, which were accompanied by images showing the flight paths plotted over the mining lease application areas. During the videos, counsel for the applicant gave some commentary and noted points of particular interest which could also be seen on the images. “This was a great alternative, particularly in this case, where the flyover allowed the Court to see more of the site than would have been possible if we had conducted the inspection in person, simply due to the large area of the mining lease application area,” the court report says.

There was a concurrent evidence session involving five experts, all in different locations. The concurrent evidence session lasted three days.

The report, which you can find on www.remotecourts.org, concludes: “Given the nature of the issues and the number of participants, the potential for technical difficulties and delays was high. However, the Court encountered very few difficulties since March, CSK has used Zoom daily to conduct legal proceedings including depositions, hearings, and mediations. In April, the firm participated in the very first Zoom oral argument in Florida, hosted by the Fourth District Court of Appeal (DCA). Subsequently, CSK also participated in oral arguments in Florida’s Third DCA and First DCA. Last week, on July 13, 2020, CSK became the first law firm in Florida to do a virtual trial by jury. Additionally, during the coronavirus pandemic, CSK utilized Zoom Video Webinars to host client marketing and training events with more than a thousand attendees. CSK was even able to continue hiring during the pandemic, interviewing applicants over Zoom.

“Zoom has been an essential part of keeping our business running,” said Jason Thomas, chief information officer at CSK. “We needed to quickly pivot and change the way we work and Zoom fit our need for an intuitive and secure solution that our attorneys could start using right away. Zoom has the most robust security features outside of any platform that we’ve used, and our users found it much easier than our legacy system—adoption and usage just skyrocketed.”

Zoom has become the darling of the post-COVID-19 world and is the latest extraordinary example of two things - how fast cloud technology can evolve, and how user experience triumphs all when it comes to tech adoption, even the many of the most tech-adverse law firm partners reportedly now conducting a large amount of their daily business on Zoom.

“We are proud that our technology is able to help CSK’s more than 500 attorneys and thousands of team members and clients maintain business continuity during the pandemic,” said Mitch Tarica, head of North America sales at Zoom. “We are grateful to provide a frictionless, secure, and reliable platform to keep people connected and keep business going during this uncertain time.”

**Twitter hack hearing hit by Zoombombers**

And last but not least, the virtual bond hearing of the 17-year-old boy accused of hacking Twitter was interrupted at the start of August by Zoombombers who reportedly played loud music and a pornographic video, with independent security journalist Brian Krebs, who attended the hearing, saying: “Judges holding hearings over Zoom need to get a clue.”

Given the subject of the hearing, hosted over Zoom by the Thirteenth Judicial Circuit Court of Florida, it should undoubtedly have been assessed as high risk but Krebs said on Twitter: “Predictably, the Zoom hearing for the 17-year-old alleged Twitter hacker in Fla. was bombed multiple times, with the final bombing of a pornhub clip ending the zoom portion of the proceedings.”

He added: “How the judge in charge of the proceeding didn’t think to enable settings that would prevent people from taking over the screen is beyond me. My guess is he didn’t know he could.”

Fortune Magazine writer Jen Wieczner, also in attendance, said: “Well perhaps unsurprisingly the accused Twitter hacker-Bitcoin scammer had a laugh.”

**Twitter hack hearing hit by Zoombombers**
and the entire hearing ran smoothly.’

Comment: Let’s not forget how much progress has been made culturally and technologically since the start of COVID-19. While Opus 2 was already making strides in making trials paperless, the lengths that courts are currently going to continue to deliver justice in extremely difficult scenarios is astonishing. The website above was launched by Richard Susskind to chart other progress and successes and is well worth a look.

Thaler’s first (virtual) hearing was shut down within 25 minutes due to relentless Zoombombing. (It ended a minute after this when someone screenshared a Porn Hub video.)

Showing a video of her screen, Wieczner said: “Here was the zillionth interruption that finally resulted in the Judge announcing they will do a password protected in the future!”

Zoom has in recent months introduced a raft of additional free security measures including the ability to password protect meetings to ensure that only recipients of an invite are able to enter the room.

Florida was also the setting for the first Zoom trial in July. The historic and uninterrupted one-day Florida trial was a dispute heard in the Eleventh Judicial Circuit of Florida between People’s Trust Insurance Company and Yusem Corchero et al.

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Wins and Deals!

EMEA

Shepherd and Wedderburn First to Go Live with Prosperoware – Microsoft Teams Integration

Leading Scottish headquartered, full-service UK law firm, Shepherd and Wedderburn, has successfully deployed and integrated Microsoft Teams with its enterprise privacy management platform for content systems, CAM, to enable secure communication and collaboration firm-wide.

Employees at Shepherd and Wedderburn are able to collaborate easily with colleagues, secure in the knowledge that the Teams solution is aligned with Shepherd and Wedderburn’s data governance policies as well as privacy and cybersecurity laws and regulations.

Steve Dalgleish, head of technology at Shepherd and Wedderburn, said: “With the entire firm suddenly working from

The partnership was brokered by SJP’s founder and CEO Samuel Clague and Morae’s head of UK managed services, Patrick Kellermann. Kellermann told Legal IT Insider: “In person document review wasn’t going well in Corona times so we created a solution to perform document review remotely using a team that is located in their own homes and other locations, whereas traditionally they are in one location.” He adds: “A few things struck us as essential: the document review process needed to be secure and also have the same element of team oversight and engagement. So much of what makes document review run well is close collaboration with the lawyers supervising the document review. The emphasis is on security and a level of engagement, so we were able to go purely virtual without compromising security.”

Morae uses a virtual desktop, Zero Trust environment to give authorised parties access to documents including secure access to RelativityOne. Kellermann said: “Authorised parties are given access through a virtual tunnel in an environment that is highly locked down so they can’t copy or take screenshots.”
home. Teams was an obvious choice for a communication and collaboration tool – our clients were familiar with it and we already had Microsoft licensing in place. However, from a security standpoint, it was imperative that we did not have a proliferation of Teams in the firm and that governance was in place. Right at the start of the lockdown, Ascertus, as our longstanding technology partner, advised and supported us in implementing the Teams integration with our Prosperoware CAM solution. This integrated solution has been superb during lockdown. More crucially, it has given us great flexibility to adapt as the current work environment evolves.”

**JMW to move to the iManage Cloud**

Leading UK national full-service law firm JMW Solicitors has selected Tiger Eye to manage their move to the iManage Cloud across their three UK offices in Manchester, London and Liverpool. According to the Legal IT Insider UK top 200, JMW previously used Eclipse Proclaim for document management.

Continuing their cloud strategy, JMW has engaged with Tiger Eye to develop a comprehensive cloud-based document management system incorporating iManage Cloud as well as a number of custom Tiger Eye tools and integrations, in order to design a comprehensive solution to support JMW’s growth.

Ged Chadwick, director of IT and Communications at JMW commented: “Given our breadth of work, we needed to design a unique document management solution to support all of our specialist legal departments and increase productivity across the entire firm. We chose to work with Tiger Eye because of their range of iManage bolt-on tools, as well as their expertise in data migration and development. Their depth of understanding of the iManage system is clear, and through partnering with Tiger Eye, we have assembled the advanced solution we need to support our continuous growth.”

The firm aims to launch their cloud-based system to all employees later this year.

**South East UK firm Birkett Long selects NetDocuments**

In a South East UK win for NetDocuments, leading Essex law firm Birkett Long has selected its document management platform as part of an ongoing digital transformation programme.

Birkett Long is a 185-person firm with offices in Chelmsford, Colchester and Basildon. The firm has 11 separate legal practices covering intellectual property through to agricultural law. In addition, Birkett Long also provides independent financial advice and HR services. As part of Birkett Long’s digital transformation programme, the firm was looking for a document management platform that would support its legal, financial and HR businesses.

Mark Davidson, director of IT at Birkett Long, commented: “We have been undergoing an extensive IT transformation over the

**DocsCorp unveils DocuSign integration with Wiersholm among early adopters**

DocsCorps announced in July that its PDF editing and bundling application pdfDocs now integrates with DocuSign, with Norway’s Wiersholm among the first firms to take advantage of the integration.

DocuSign’s leading eSignature solution is part of the DocuSign Agreement Cloud. This is pdfDocs’ first integration with a third-party electronic signature provider.

“We’re excited to be working closely with DocsCorp to deliver this integration,” commented Lisa Munnings, DocuSign AVP global partner ecosystem for Asia Pacific & Japan. “It will benefit any business wanting to provide an efficient and completely electronic signing experience for staff and clients.”

pdfDocs users will enjoy integration that supports an entirely electronic signature workflow, eliminating the need for printed documents. It will enhance collaboration for virtual teams and remote workers.

Norway’s highest-ranking Legal 500 firm, Wiersholm, will be among the first to benefit from the integration. “DocsCorp and DocuSign applications are important tools for us as a business law firm,” said Navid Behrouz, the firm’s CIO. “This integration will streamline our processes even further, saving valuable staff time and improving turnaround times for our clients. We’re looking forward to using it at our firm.”

**Portland firm Farleigh Wada Witt switches to compareDocs**

Full-service business UK law firm, Farleigh Wada Witt (FWW), is now using compareDocs for document comparison.

“More and more firms in the U.S. are switching to third-party comparison applications like compareDocs,” explained Bob Moore, DocsCorp VP for the Americas, “because they realize the importance of being absolutely precise when reviewing legal documents. compareDocs has outperformed Microsoft Word’s basic compare tool since we released it 13 years ago. And, since then, added smarts like native PowerPoint comparison and easy-to-use reports, have made it the go-to for some of the world’s largest firms.”

**Taylor Vinters swaps back from Workshare Compare to DocsCorp compareDocs**

And there’s more good news for DocsCorp as UK top 100 law firm Taylor Vinters swaps back from Workshare Compare to DocsCorp compareDocs for smart document comparison and
last 18 months, with moving away from traditional paper-based ways of working being a big focus. As a diverse and highly regulated business, it is imperative that we have an agile and customisable document management platform that meets our digital ambitions, which have been accelerated as a result of COVID-19. NetDocuments ticks all the boxes in terms of industry expertise combined with a secure and flexible cloud-based platform that requires very little IT management."

Nikec, a global legal services and consulting provider, will lead the implementation and deployment project as one of NetDocuments Certified Services Partners.

Top European bank Nordea to manage all deals using Litera Transact

Nordea is to manage all of its legal deals using Litera Transact in partnership with leading Norwegian law firm Arntzen deBesche. The firm is using Transact to help digitise the loan documentation process and drive down costs for Nordea, which is one of Europe’s largest banks.

Lars Bjørn Christiansen, the head of corporate advisory at Nordea, said, "Litera Transact is a huge step forward in digitalizing the loan documentation process and [is] instrumental to drive down cost, improve efficiency, and increase speed. Communicating with our counsel on deals is much easier with Litera’s transaction management solution. As a result, we attain more competitive rates from our legal advisor, which is an important contributor to winning new deals. Especially during closing, with high stress and short deadlines, Litera Transact is a solid platform that ensures an efficient document process. We are encouraging the use of Litera Transact to promote more efficiency across all of our deals."

Arntzen deBesche reports that their teams are working with greater transparency and can deliver higher-quality customer service. Trond Kildal, a partner in Arntzen deBesche’s banking and finance department, said, "Everyone has a clear picture into the status of the deals we’re managing, we’re saving a lot of time, and our clients are appreciative of our commitment to deliver innovative legal services."

Litera Transact is using the platform acquired from Doxly, which was founded and sold to Litera by founder Haley Altman last year.

Clyde & Co selects DISCO for eDiscovery

Global law firm Clyde & Co has entered into a global arrangement with legal technology leader DISCO to assist its lawyers in the eDiscovery process.

Following a successful pilot, disputes practices in the UK and U.S. are using AWS hosted DISCO Ediscovery, which is designed to process, analyse, review and produce client documents required for contentious legal work.

review. It joins several other firms that have selected compareDocs in recent months, including Fladgate, Fondia, and Beiten Burkhardt.

Taylor Vinters IT director Steve Sumner told Legal IT Insider: "It’s fairly straightforward: we were using compareDocs and pdfDocs, swapped to Workshare for compare, and have now gone back to compareDocs." He said in a statement: "We asked our staff what was important in terms of features for comparison and compareDocs checked every box. Now, our lawyers have access to easy to use, full-featured and accurate comparison for any document type or work – from due diligence to multi-author complex agreements – integrated with the iManage DMS."

compareDocs is being deployed across the firm’s offices in London, Cambridge, and Oxford. Legal staff will benefit from time-saving workflows that make document comparison and review more efficient and precise. Users can compare multiple file types and view the changes in an easy-to-read, interactive Comparison Report. Because compareDocs doesn’t use proprietary viewing technology, users can interact with the Comparison Report directly or share it with collaborators as a Microsoft Word document with Track Changes.

“An opportunity to bring AI to profitability”: ZERØ and Fireman team up

Email management disruptor ZERØ and leading legal management consulting firm Fireman & Company have entered a strategic partnership in order to help deliver productivity, compliance, and profitability solutions to large law firms. The partnership will leverage Fireman’s deep knowledge management and change management expertise with ZERØ’s modernized email management productivity technology.

ZERØ automates the administrative processes of email management and filing into document management systems for iOS mobile devices and desktop. Using ZERØ, lawyers can improve their billing hygiene and increase their time capture by ensuring that emails are filed and that time spent on emails, particularly on the move, is accounted for.

Ryan Steadman, chief revenue officer at ZERØ said: “ZERØ’s solutions are important for law firms in this new world-from anywhere reality. ZERØ helps law firms maximize profitability and productivity at this critical juncture by minimizing the wasted time lawyers spend on low-value tasks, by fostering self-sufficiency in the face of the imperative to do more with less, and by engendering compliance with email and time capture policies. This partnership with Fireman & Company will create another layer of modernization to a business process that hasn’t changed much in over a decade.”

“Fireman & Company has deep experience in helping law firms move beyond traditional practices to improve law firm business performance,” said Joshua Fireman, Fireman & Company’s founder and president. “ZERØ’s technology provides us with the opportunity to bring AI to one of the critical issues facing firms today—profitability.”
North America

Levine & Levine Attorney’s
Choose Microsoft Office 365

BigHand Now allows tasks to be sent to a central workflow, where they are automatically routed to the right skilled resource, at the right cost to the firm. The centralized view of work can be accessed by desktop or mobile devices to allow lawyers to...
and Epona Solutions

Levine and Levine is in full production of their ‘new’ SharePoint DMS since February of 2020 having migrated from their old SharePoint DMS which they had for over 10 years.

Having made the transition just before the CV-19 stay-at-home orders went into effect, the firm was able to remain productive and continue to remain billable.

Sharan Levine, Managing Partner, had this to say about Epona: “The Epona solutions are cost effective, time saving, and greatly enhance internal communications among staff and increase productivity. We are the first to admit our team isn’t the most tech savvy, but Epona’s trainer Stacy Dotson was incredibly patient, and taught us so much about how to get the most out of Teams, the DMS, Email Management, the suite of Microsoft applications and muchmore. We really enjoy working with Stacey and the entire staff at Epona. We are a smaller firm; we needed to to lower our overall operational technology spend, but increase our technological skill sets to enable us to be more flexible, not only for remote work, but also for ease in managing the data base, reducing email, and organizing workload. I recommend you call Epona.”

Clark Hill chooses BigHand Now to optimize support service and remote working

Am Law 200 firm, Clark Hill, has chosen BigHand Now workflow technology to ensure support service excellence and strengthened business continuity.

When enforced remote working came into place in March of 2020, Clark Hill was quick to action its business continuity plans so that all staff, across its 25 offices, were able to effectively work from home. Once the initial home working arrangements were made, the firm turned its attention to optimizing support services for lawyers and clients by adopting BigHand Now.

APAC

Rajah & Tann launches white label client contracts platform ReadyDocs

Rajah & Tann Asia, a leading full-service legal network in Southeast Asia, announced in July the beta launch of ReadyDocs, a platform that enables clients to remotely create, edit, digitally sign and manage contracts from any device at any time.

Abdul Jabbar, Head of Corporate and Transactional Group of Rajah & Tann Singapore said: “Rajah & Tann is excited to launch this platform as a much-needed solution, especially during this time when remote interactions are becoming the norm and clients need to be able to access their documents on the go.”

Rajesh Sreenivasan, head of the TMT Practice at Rajah & Tann Singapore adds: “As a firm, we are looking beyond providing legal solutions. We are offering business solutions to help our clients better manage their legal costs by integrating technology with our services. ReadyDocs is one such solution.

Schiff Hardin automates court notice workflow with ECFX

US national firm Schiff Hardin has gone live on ECFX Notice, which automates the electronic court notice workflow. The 250-lawyer firm, which practices across many federal and state jurisdictions, says it was looking to ECFX to help manage the challenges arising from the differences between court systems, as well as to create efficiencies more generally.

ECFX Notice connects each case to an internal client and matter number and downloads each document associated with the notice. It profiles each document to the firm’s DMS and determines the relevant parties to notify based on information in the financial and case management systems.

Michael King, Schiff Hardin’s director of loss prevention and office support services said, “We are always looking to use the right resource and the right expertise on internal and client facing issues. With that as a guiding principle, we wanted to use technology more efficiently where we were using highly skilled, highly paid individuals to do a lot of data entry. ECFX Notice provided us that opportunity.”

He adds: “ECFX eliminates the need for cross training for court notices in the different jurisdictions. The solution also provides a dashboard of customizable analytics, allowing legal professionals to gain visibility into notice management, review progress and manage staff resources as needed.

At the start of July, the company announced that Ted Kukorowski has joined as director of sales. Prior to ECFX, Kukorowski spent 14 years as the director of sales for DocsCorp.
ReadyDocs is powered by LegalZoom competitor Zegal – formerly Dragon Law – which has over 1200 documents customised for the legal systems in Hong Kong, Singapore, New Zealand, Australia, and the UK. Law firms are given a branded portal and clients can use the platform to generate commercial contracts; entire suites of contracts built as easy-to-follow workflows; or automate their existing contracts and processes.

The ReadyDocs platform will target the Singapore market first with plans to quickly roll out to all jurisdictions being served by Rajah & Tann.

Rajah & Tann is one of the three founder firms of matter synchronisation platform Lupl, which launched in May and is currently in beta: https://legaltechnology.com/lupl-what-it-is-what-it-does-and-what-its-not/

Movers and Shakers!

EMEA

BT’s former head of legal vendor management joins Kalexius

BT’s former head of legal vendor management, Neil Willson, has joined global managed legal service provider Kalexius as head of consulting. Willson, who ran BT’s most recent panel selection under which the telecoms company cut its panel law firms from 40 to 15, is based in the UK and will help Kalexius grow its UK presence.

Kalexius is headquartered in Geneva and currently serves clients in Europe, the United States and the GCC countries from offices in five countries: Switzerland, New York, France, the UK (where it has a small office in Holborn) and an offshore centre in Mauritius. Founded in 2011 by managing director Nicolas Leroux, Kalexius has around eighty staff and focuses on employing permanent teams of lawyers, consultants and project managers across its locations. It was given its first ranking by Chambers and Partners in May this year, when it was recognised as a top ALSP.

Speaking to Legal IT Insider, Willson said: “Kalexius are very much a mix between qualified lawyers and lower cost resource depending on what the client needs and they have the ability to bespoke the offering to the clients’ needs as appropriate.”

Haveron Jones, who is based in the UK, says he will be helping Epiq’s clients to explore new ways of working. Describing his role on LinkedIn he said: “A revolution is underway in the legal industry, as the previously separate disciplines of law, technology and business process converge to create new models for the sourcing and delivery of legal services.

“At Epiq, my role is to help our clients navigate these choppy waters, exploring the practical steps that in-house legal leaders can take to benefit from new ways of working – and ultimately deliver strategic business impact.

“I work closely with General Counsel, Heads of Legal Operations and other senior law department leaders – as well as CFOs, CPOs, Heads of Risk and Compliance – to understand their needs and develop corresponding solutions.”

Haveron Jones was previously vice president of enterprise legal services at UnitedLex, where he was also responsible for developing relationships with GCs, senior legal leaders and corporate C-Suite.

David Fazakerley joins CTS

David Fazakerley has joined cloud provider CTS as in-house legal chief information officer. He is said to be responsible for assisting CTS in further driving alignment of their service
Tim Haveron Jones appointed as global client development director at Epiq

Tim Haveron Jones has been appointed as global client development director at Epiq.

Litera hires Manoj Goyal as CTO

Litara announced in July that Manoj Goyal will join the company as chief technology officer, effective immediately. Goyal brings more than 30 years of enterprise SaaS and cloud services experience to the position at Hewlett Packard. n, having previously served as chief product officer and chief technology officer at Marketo, group vice president at Oracle, and executive director.

Avaneesh Marwaha, Litara CEO said: “Our trajectory as a company, and our increased focus on providing firms with workspaces where their teams can work, make it imperative that we secure the very best talent available. In some cases, that means looking outside the industry. Bringing in Manoj is a significant statement of intent. His track record delivering enterprise-level solutions for some of the world’s largest tech companies fits perfectly with our commitment to owning the space.”

As CTO, Goyal will be responsible for the direction of the company’s engineering and development teams, as well as the integration of newly procured solutions through the recent acquisitions of Bestpracticx and Best Authority.

Wilson Allen hires Mary Jo and TJ Gerrity

And there’s another hire this month for Wilson Allen, which has taken on Mary Jo Gerrity and TJ Gerrity from Syndet Business Technologies LC to its consulting services practice.

For many who work in or make use of legal technology, the Gerritys and Syndet are synonymous with quality technical expertise on the Thomson Reuters Elite platform for installations, upgrades, disaster recovery, hosting, and support.

Mary Jo Gerrity joins Wilson Allen’s customer operations team as a project coordinator focusing primarily on resource allocation. In her prior role with Syndet, she managed all of the firm’s administrative work including scheduling, billing, and collections.

TJ Gerrity joins Wilson Allen as a senior systems consultant in the company’s Systems and Information Security practice. He brings nearly ten years of experience specializing in Elite Enterprise, 3E Image Connect, WebView, and DocStudio software. He’ll support clients running Elite software as well as help firms streamline and securely migrate and run Elite 3E and Aderant software in his new role.

“We are thrilled to have Mary Jo and TJ bring their knowledge and work ethic to Wilson Allen,” says Shishir Shetty, COO, Wilson Allen. “Their skills and track record for success fit right in with Wilson Allen as a whole. Plus, their years of involvement and goodwill in the Elite Enterprise market are real assets to our clients and us. We’re extremely excited to welcome them to the Wilson family.”

Both Gerritys are based in Kansas City, Missouri, and will be working remotely for Wilson Allen.
ambitions for growth as clients seek to address complex new legal challenges."

“We are thrilled to welcome Ed to Factor as we continue to assemble a top leadership team that embodies our culture as we aim to be the industry’s leading New Law company,” said Varun Mehta, CEO at Factor. “As large enterprises and legal departments navigate massive new burdens related to the COVID crisis—particularly in contracting—the need for meaningful innovation and advanced technology has never been greater and the stakes have never been higher. Ed is uniquely grounded in product management for the legal services and technology space, and he has the vision and passion to take our company and our clients to the next level.”

This is a big hire for Factor. During Sohn’s tenure with EY Law, he served as managing director and global innovation and technology leader of the firm’s legal practice. He created and advanced EY Law’s agenda for technology enablement and implementation, and he consulted directly with key clients on their legal transformation initiatives. Prior to joining EY Law, Sohn was a VP of product and partner management at Thomson Reuters Legal, where he managed product lifecycles for the company’s Legal Managed Services (formerly Pangea3) business, including product definition and evaluation, requirements, roadmap, and maintenance. Sohn first joined Thomson Reuters/Pangea3 as a director/assistant VP of litigation solutions in New Delhi, India, scaling up and innovating in the earliest days of legal managed services. Sohn, who earned a J.D. from the University of Pennsylvania, started his career as a litigator at King & Spalding in Atlanta.

Lexicon hires John Chwarfinski as Business Insight & Analytics Manager

Lexicon has hired John Chwarfinski as the company’s first-ever business insight & analytics manager. Chwarfinski will be responsible for leading a team of analysts with a focus on transforming and modeling data into actionable insights for its customers.

The addition of Chwarfinski in this newly created position is an expansion of the company’s data and quality team, thereby adding an expert to focus on each of those practice areas.

“John’s addition to our management team highlights Lexicon’s strong commitment to utilizing data and analytics to benefit our law firm clients,” said Steve Short, Chief Marketing Officer, Lexicon. “John’s extensive experience will provide thought leadership to increase the efficiency, speed, and quality of business insights and recommendations.”

Chwarfinski joins Lexicon after a 10-year stint at Health Capital Consultants.

Anaqua hires Dominic Leo to head new legal unit

Anaqua in July announced the launch of a new global law firm business unit. As part of this expansion, Anaqua is making additional investments in its leadership and law firm platforms, AQL Law Firm and PATTSY WAVE. Leading the business unit is Domenic Leo, who joins Anaqua as vice president & general manager for law firms. Leo will assume overall responsibility for Anaqua’s global law firm offering and will oversee the newly acquired IP management software and practice automation business, OP Solutions.

“With over 30 years’ experience in the IP Management industry, Domenic will deepen Anaqua’s law firm DNA and focus on how we can better serve and deliver solutions that help the law firm community,” said Bob Romeo, CEO of Anaqua. “We are thrilled to welcome Domenic to the team.”

Joining Leo and Anaqua’s existing law firm dedicated staff are recent hires Jayne Durden and Joe Bichanich, as well as Mike Frechtman and Ethan Waters, who both became part of Anaqua with the acquisition of OP Solutions.
Thomson Reuters unveils Westlaw Edge UK

Thomson Reuters on 22 July unveiled Westlaw Edge UK, which now runs on the same platform as Westlaw in the United States and offers new features and functionality such as direct legislation comparison, case analytics, and a UK-EU divergence tracker to help end users navigate the legislative fallout from Brexit.

TR has worked with around 150 end users and a 50-strong panel on the project over the past year. Speaking to Legal IT Insider, Thomson Reuters vice president of research and commentary in the UK and Ireland, Andrew Buckley, said: “We’ve wanted to take Westlaw UK to the next level for a number of years but first we needed to get onto Thomson Reuters Legal’s strategic technology platform that Westlaw US has been on and we have looked covetously at. At the end of 2018 we launched Westlaw UK on that platform, and it gave us the opportunity to build a new version of Westlaw UK.”

Funding for the project was approved 15 months ago and Buckley says: “We started committing code around 12 months ago. We set ourselves an ambitious timeline to come to market in a year and if you’d said we were going to have to develop in the last four months with all your development team and customers working from home I wouldn’t have believed you, but we have achieved it.”

The development process has been iterative and of the 150 end users and panel, Buckley said: “We checked in with them at

Microsoft unveils raft of new features in Teams

In July Microsoft unveiled a raft of new features in Microsoft Teams including Together mode, which that uses AI segmentation technology to digitally place participants in a shared background, combating virtual meeting fatigue.

At a time when people are conducting more virtual meetings than ever, Microsoft’s research has shown that many of us feel less connected since moving to remote work, and experience more fatigue during video meetings than during in-person collaboration. Together mode, Microsoft says, makes it feel like you’re sitting in the same room with everyone else in the meeting or class, helping you focus on other people’s faces and body language and making it easier to pick up on the non-verbal cues that are so important to human interaction. “It’s great for meetings in which multiple people will speak, such as brainstorm or roundtable discussions, because it makes it easier for participants to understand who is talking. Together mode with auditorium view is rolling out now and will be generally available in August. And we’ll bring more views to Together mode in the future,” Jared Spataro, Corporate Vice President for Microsoft 365 said yesterday (9 July).

Dynamic view — Together mode isn’t intended for every meeting and Microsoft has also unveiled a set of enhancements they call dynamic view, to give users more control over how you see shared content and other participants in a meeting. New controls—including the ability to show shared content and specific participants side-by-side—let you personalize the view
regular intervals and did deeper dives. A good example of that is the graphical presentation of case analytics. We had a lot of advice from customers, who work very differently. Some enjoy interacting with a list of content and picking out relevant cases, and some enjoy it graphically. We had a lively and informative debate about graphical v list for citing cases. We also worked closely with our customers on the divergence of UK and EU law. UK legislation has been an Act or Statutory Instrument but the way the UK government has decided to legislate as part of its deal with Brexit is that there is a body of EU law that has application now but come exit day it won’t. Overnight we have statutory instruments but also a brand new type of legislation to deal with, and we wanted to make sure that customers can pull out the this type of legislation out from the EU body of law from which it is derived.”

Features of Westlaw Edge UK include:

- Legislation Compare helps users understand how a law may affect a client, organisation or industry at various points in time and allows customers to easily compare versions of historical, current and prospective legislation across UK, English, Welsh, Northern Ireland and Scottish jurisdictions with the key differences marked. Additionally, Legislation Compare provides a view into what the law may look like in the future to help users anticipate what its impact may be.

- UK-EU Divergence Tracker enhances the capabilities of Legislation Compare and provides a side-by-side comparison of EU and UK content to help users understand how legislation diverges and deviates, ensuring clients and legal organisations remain compliant. UK-EU Divergence Tracker will be available in September 2020.

- Case Analytics transforms case research through data visualisation and is invaluable in classifying, digesting and summarising each judgment and law report, along with Westlaw UK’s treatment flags and links to legislation, journals and texts. The precedent map in Case Analytics provides a view into how the case has been cited and enables tracing back lines of authority to ensure customers are relying on good law and that no line of argument has been missed. Its Citations in Context feature provides a review of relevant extracts of case text where a case is mentioned in relation to the user’s issue.

- Westlaw Questions allows users to find commonly asked questions and return succinct results with key paragraphs highlighted. Based on content curated by Thomson Reuters editorial teams, Westlaw Questions allows users to find up-to-date and authoritative information quickly and easily, with suggested relevant research and resources tailored to the legal researcher’s needs.

- Legislation Alerts allows users to anticipate the likely impact of legislative change so they can deliver the best advice. By sending notifications of changes to legislation to a user’s inbox, they can move away from manual checking and focus on the work that matters most. With additional notifications for citing references, a user can be sure that if anything changes, they’ll be instantly notified and can pre-empt demands.

Reflect messaging extension—Microsoft’s research shows that employee well-being is more important to productivity than ever. A new Reflect messaging extension gives managers, leaders and teachers an easy way to check in with how their team or students are feeling — either in general, or about a specific topic like work-life balance, the status of a project, current events, or a change within the organization. IT administrators will be able to install the Reflect extension from GitHub, and then make it available to employees in their organization in the message extension menu. Once installed, the extension provides suggested check-in questions and the ability to add custom questions that team members can respond to in a poll-like experience. Managers or teachers can also choose to make poll results anonymous. The Reflect messaging extension will be available in the coming weeks.

Live reactions—Non-verbal cues like smiles and head nods can be difficult to notice in online meetings, making it challenging for presenters to gauge audience reactions and for participants in large meetings to share a sentiment without interrupting the meeting flow. Soon, you will be able to react during a meeting using emojis that will appear to all participants. Live reactions is a shared feature with PowerPoint Live Presentations, which allows audience members to provide instant feedback to the presenter. We are also bringing PowerPoint Live Presentations to Teams in the future, further enabling audience engagement right from Teams.

Chat bubbles—During meetings, chat has become a lively space for conversation and idea-sharing, and offers an option for people to participate in the discussion without having to jump in verbally. But it can be challenging to pay attention to video feeds, presentations, and chats all at the same time. Currently, Teams users need to manually open a chat window to view the chat screen. Soon, however, chats sent during a Teams meeting will surface on the screens of all meeting participants, making the chat more central to the conversation.

Speaker attribution for live captions and transcripts—While Teams already provides live captions as a way to follow along with what is being said in a meeting, soon Microsoft will add speaker attribution to captions so that everyone knows who is speaking. Live transcripts, coming later this year, provide another way to follow along with what has been said and who said it. After a meeting, the transcript file is automatically saved in a tab as a part of the meeting.

Interactive meetings for 1,000 participants and overflow—There
PMS product news: TRE launches 3E 2.9.1 and Aderant embeds iTimekeep in Outlook

Thomson Reuters Elite has launched 3E 2.9.1, where one of the key updates is enhanced eBillingHub integration. The integration now allows users to submit a proforma directly from 3E to eBillingHub to validate and correct errors before submitting the final invoice. In addition, a number of key time entry feature enhancements will help make time entry quick and efficient while providing users more control over their daily experience.

Another enhancement includes the Firm Field Configuration process which will eliminate the need to customize 3E using the integrated development environment. Instead, users can add new fields directly through the 3E user interface, reducing the time, cost, and effort needed for a basic configuration change. Additional updates include fixed fee bundles, a more streamlined 3E Paperless Proforma process, and improved out-of-the-box stock templates which add configurability to 3E Templates.

Earlier this month Aderant announced updated to iTimekeep in its latest release, in which iTimekeep is now embedded within Microsoft Outlook.

Research has shown that 40% of workers’ time is spent checking and working on email. Lawyers typically spend most of their time using email as well as calendar, documents, and tracking time. The increased volume of email sent and received by lawyers today, coupled with clients’ scrutiny of invoices for compliance, have caused attorneys to procrastinate and delay entering time — time that might not even be accurate or compliant. Since 99% of law firms use Outlook for email, the iTimekeep integration is a natural progression as users will now be able to convert email and calendar events into compliant timesheets, minimizing the effort required to track time, while increasing accurate, billable time capture. iTimekeep for Outlook works on both mobile and desktop, further enabling lawyers to work whenever and wherever they are.

“At iTimekeep, we believe timekeeping should be easy, accurate, and it should work the way lawyers work — anywhere they are and from any application they are utilizing,” said Marie Burgess, senior director of product management. “We created iTimekeep for Outlook to help law firms avoid procrastination, reduce revenue leakage and ensure time entered is always in compliance with the client’s guidelines.”

are times when it’s important to bring large groups together for meetings or classes. For more interactive meetings — where attendees can chat, unmute to talk, and turn on their videos for real-time collaboration — Teams meetings are growing to support up to 1,000 participants, sticking, in effect, two fingers up at Zoom. When you want to bring more people together to watch a presentation or discussion, Teams can support a view-only meeting experience for up to 20,000 participants.

Microsoft Whiteboard updates — Visual collaboration tools can make meetings and teaching environments more effective and inclusive. Whiteboard in Teams will soon be updated with new features including faster load times, sticky notes, text, and drag and drop capabilities. These features enable team members who don’t have access to a touchscreen or Surface Hub to participate in whiteboarding sessions during Teams meetings.

Tasks app — The Tasks app in Teams, rolling out this month, provides a new unified view of tasks from across Microsoft To Do, Planner, and Outlook. Smart lists like "Assigned to me" bring tasks together across different shared plans, whether you’re on desktop, web, or mobile. Add Tasks as a tab in a channel and get your familiar Planner tab experience with the new list view.

Cortana in Teams — Coming soon to the Teams mobile app, Cortana uses AI and the Microsoft Graph to provide voice assistance in Teams. You can ask Cortana to make a call, join a meeting, send chat messages, share files, and more. These voice assistance experiences are delivered using Cortana enterprise-grade services that meet Microsoft 365 privacy, security, and compliance commitments. Cortana will be available in the Teams mobile app on iOS and Android in the coming weeks for Microsoft 365 Enterprise users in the U.S. in English.


Touchless meeting experiences — Today, Teams enables people to join meetings and share content to meeting room devices from their own mobile device or PC. Later this year, Microsoft will enable these capabilities on Surface Hub as well. It’s building on these capabilities with a new room remote in the Teams mobile app, which will provide additional meeting controls such as the ability to leave the meeting, mute and unmute the room, adjust audio volume, and turn cameras on and off. Beginning later this year, voice assistance will be enabled for Microsoft Teams Room devices, allowing in-room participants to ask Cortana to join and leave a meeting, add a participant from the address book to a meeting using their name or phone number, and more. It’s also introducing the ability to wirelessly cast to any Teams Room, collaboration bar, or Surface Hub device.
Aderant acquired ITimekeep at the end of last year as part of its acquisition of Bellefield Systems.

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