The October Orange Rag

Welcome to the October Orange Rag, where the biggest story as we go to press are the results of ILTA's 2020 technology survey. There are lots of fascinating results, although I'm not sure all that many surprises, with the statistics evidencing the flight to cloud video conferencing and collaboration. Make sure you read that top story below.

- October has seen an uptick in deal activity and our Wins and Deals section is once again looking fairly robust. Of those many are in the knowledge management space – with people taking a (largely) more sensible approach to AI, the smart money is on curating your content and delivering it where your fee-earners are working.
- Make sure you take a look at our #TalkingTech section – our webinar series continues to grow and we have some really interesting ones coming up. It’s been great to help the community conduct product demos and interactive chats en masse.
- We’ve launched a new video editorial series called ‘The Inside View’, where I interview some of the sector’s biggest names on the latest news.

Please keep in touch with all your news! caroline.hill@legalitlexicon.com

As usual, if you would like to navigate to different sections, click on the three horizontal lines in the top right hand corner of your screen.
ILTA’s 2020 Technology Survey – The results!

The International Legal Technology Association (ILTA) has published the results of its 2020 annual tech survey, in which there has been an unsurprising and COVID induced or accelerated flight to online collaboration tools and Microsoft 365.

Some of the big trends this year include:

- Zoom has (obviously) taken the world by storm – in 2017, 5% of respondents said they use Zoom for video conferencing and this year that figure was 71%.
- There is a marked jump in firms embracing Office 365 and Exchange Online (As an example, among firms of 700+ attorneys, 6% said they currently use Microsoft 365 or Exchange Online. Asked which email do they expect to be on in 12 months’ time, that figure jumps to 55%.
- DMS: The number of law firms planning an upgrade doubled from 15-30%. The vast majority of those who say they plan to migrate in the next 12 months said they will select iManage. However, NetDocuments says that comes down in large part to the survey demographic.

As asked what the top three technology issues or annoyances are within the firm, the top one (and growing) was (you could have predicted it) change, and users’ acceptance (or lack of) change.

Video conferencing

There are clear and predictable winners here. Microsoft Teams has seen a massive jump from 12% to 48%. Zoom is up from 5% to 71%. Cisco is up from 24% to 30%.

In the executive summary, Todd Corham, CIO at Saul Ewing Arnstein & Lehr and James Colley, manager of security compliance at Dykema Gossett, say:
Some apps are born great, some achieve greatness, and some have greatness thrust upon them, (apologies to Churchill again!) and Zoom was well positioned to take advantage of the business imperative. Just as remarkable is the rise of Microsoft Teams. Across all firm sizes, Teams is being embraced as much for its collaboration features as for its promise (as a multi-faceted tool that could prove to become a firm’s Unified Communications solution.) Figuring out the information governance implications will be a heavy lift, but for many firms, the benefits outweigh the risks when so much is being asked of so many. (Not Winston, but it sounds like him.)

Office Applications

In 2020 60% of respondents say that they expect Microsoft 365 Business to be their primary office application 12 months from now.

Document Management

The number of law firms planning an upgrade doubled from 15-30%. Both iManage and NetDocuments have seen an increase this year — iManage from 53-54% and NetDocuments from 15-18%. However, asked which DMS/ECM your firm plans to upgrade or migrate to within the next 12 months 64% said iManage and 7% said NetDocuments, 14% said ‘other’ and 13% ‘to be determined’, and 1% ‘not applicable.’

The results may in part be explained by the survey demographic: it had 469 respondents, 307 under 150 lawyers. 67% of those said that they will stay on premises or in a data center.

These are just a few of the many findings in the report. To purchase the survey in full click [here](#).
Baker McKenzie partners with SparkBeyond on horizontal AI project: Is it always wrong to put tech before a use case?

We incorporate updates and some of the latest social media reaction to this story that was posted online in October.

Baker McKenzie in October entered into partnership with AI research engine SparkBeyond in a bid, ultimately, to automate legal processes, vastly expand productised client offerings, and if the ‘holy grail’ is achieved, create what is described as “a problem solving operating system that sits with knowledge workers.”

SparkBeyond, which has been championed by Microsoft CEO Satya Nadella, crawls client and public data to test millions of ideas and generate millions of hypotheses to identify patterns with the most actionable impact. It works with companies including MetLife, Anheuser-Busch, and McKinsey & Company, and says it has had a $1bn impact on the companies it has worked with.

The partnership is being run out of Bakers’ global innovation arm Reinvent, which is headed by partner and head of R&D, Ben Allgrove. Allgrove told us: “Like other law firms we have deployed, to the extent that it’s out there, machine learning to improve some fairly narrow applications based tasks and machine learning is getting better but it doesn’t change the job or business model or how we work for clients.”

About a year ago Bakers started speaking to SparkBeyond, which was founded in 2013 in Israel by Sagie Davidovich and Ron Karidi, and Allgrove says: “We were interested because they are taking a significantly different tech approach with their hypothesis engine and using humans to test their hypotheses at scale. It gives you options not answers, which we thought was more scalable.”

SparkBeyond uses data to come up with suggestions that may be beyond the human brain. Its AI engine can build millions of features that a human analyst would never consider or never have time to hard code into a model. And, contrary to the enormous number of times you’ll have been told to cleanse and structure your data, it captures insights and reveals hidden patterns buried deep in messy data.

Allgrove says: “SparkBeyond don’t spend a lot of the time structuring the date. They will take data from all our internal systems, from financial to knowledge, all GDPR compliant, and they will combine our data with what is publicly available to generate answers to the questions you are trying to solve.”

There are four stages to the partnership, although Allgrove candidly says: “Whether we get to the fourth I’ve no idea.”

Stage zero was finding the right partner. Stage one is to prove that the tech can work in the legal space, and here Allgrove...
says: “Our initial project is internal facing quite deliberately.”

Allgrove needs to convince his stakeholders that this project is worth the investment.

On the basis that it is, stage two will bring in clients and involve a significant allocation of resource. Allgrove says: “The second stage will be client facing apps, where we say, ‘here is what we can see, do you want to plug in your data?’” Baker McKenzie could, for example, look at clients’ risk from antitrust investigations because of signals in the market. SparkBeyond’s platform could also be used to identify non-legal risk in M&A to assist the due diligence process. Or it could be used to, in Allgrove’s words, “turbo charge trademark searches.” To do that properly Baker McKenzie will need to, no pun intended, bake in client data.

If stage two is successful, stage three will be to productise those client offerings. Allgrove says: “We will take the learning and see which can be made into a horizontal platform. If we discover that something worked for one, two, three clients, can you build a platform for 1000 and productise it?”

Stage four, the most ambitious, is to build a problem-solving operating system; in effect an environment for knowledge workers that sits with them. This, Allgrove describes as the ‘holy grail’ and says: “Stage four is about putting the technology where the humans are and you won’t be seeing an announcement about that for the next three years.”

What will be happening in the background during that time is perhaps one of the most interesting plans of this partnership.

The issue with RPA or ‘law at scale’ when it comes to high value legal advice is that everyone works in different ways. There has been very little success in automating anything but high-volume legal processes because it’s expensive and timing consuming and change management is incredibly hard. Allgrove says of the new partnership: “We will start with one practice where the machine is in the background and says ‘I’m watching Caroline, Jane and John. We want an environment where the machine says ‘both of these are the same but done in a different way and I can understand how they can be the same.’ It can take a piece of what you’re doing and make it better over time.”

Reaction to this news has been mixed, and on social media one of the big questions posed is whether it is right to put tech before use case - @thetickablehour said: “But what are they trying to do...better pricing models? Label contracts? Build experience databases? They are putting the tech first before the outcome they want. Seems odd and destined to fail.”

Unlike some of the big legal tech AI projects of 2017 where putting the tech first was because the firm didn’t know better, here it’s deliberately exploratory. Ron Friedmann, now working for Gartner, said: “Out of college, I was an econometrician doing two type of work: hypothesis driven plus exploratory data analysis. The latter often preceded the former. I read @chillmedia’s interview as describing an explicitly exploratory data analysis project – ideas to explore without a certain outcome.”

The project has certainly got people talking, and one legal tech vendor commented privately: “It feels like a 2013 Big Data/Data Lake sell. ‘If you can put all your data here, it will be found. My experience of data lakes isn’t great, but it depends on the

The company will argue that it is unlike other growth funds and Burch said: “Private equity is a commodity; it offers value but is more of a business transaction. I’ve worked with private equity firms and they are good firms but we thought why don’t we create a brand new model: operators for operators, where we come in from the beginning saying ‘What do you want your exit to be? Do you want $100m, or a better society? Then we decide if it’s a five-year hold, or ten-year hold, or we don’t sell at all. It’s a different strategy.

“A VC will put a little money in and try to get as much equity as they can. Private Equity looks at above $10m revenue but we’ll look after the company and when we hand it over to private equity they will be more prepared. We will coach and guide them.”

He adds: “We have credibility and connections, and we know the market. We know we need to automate desperately.”

Bryce is banking on targeted companies growing, in part, due to the disruption caused by the current global economy, COVID-19 and the opportunity to accelerate digital transformation.

In the small print investors are told that until they make 120% of what they invest Bryce Capital takes nothing and Burch says: “We make more money the more successful the investors are.”

He adds: “Our goal is to create value and make companies enduring and strategically valuable. The legacy is that the founders may then not sell but build the company. Many founders would have diversified but the journey became exhausting.”

There is a significant overlap between cyber, regtech and legaltech and Burch says the fund already has an investment pipeline. Bryce Cyber is run by Jessica Burch, who is an ethical hacker.

Female entrepreneur incubator

While we will have more details in the weeks to come on this, it’s exciting to note that Istariz has started a non-profit initiative to help female entrepreneurs grow their businesses and is joining forces with Bryce in order to take the incubator global. Istariz said: “In the US 40% of companies are created by women out of which the average revenue is just $140k and only 1.4% of female founded businesses make it to a million dollars. I want to work with Bryce to help early stage female led companies with funding and to get ready for the next level.”

She adds: “If you are a good business, you’re well run, you have a founder who can pitch properly and you are solving a problem and adding value, there is no gender. Don’t let perfection be the enemy of pretty awesome and that is trainable and coachable.”

Next level AI? Travers Smith launches open source contract labelling tool (and why legal AI vendors will probably hate it)

Travers Smith has announced the launch of contract labelling tool Etatonna, which looks set to help law firms to take control of their own data and potentially build joint venture AI models.

The starting point is that Etatonna allows firms to label contracts and store the data in a structured format in order to train AI models. Head of technology Shawn Curran says:
Another similar vendor commented: “This reads a little like a press release of yonder year about AI – it’s going to do this AI magical thing and predict what customers want. Very holy grail-esque. Light on the details and big on the promises.”

Not everyone is critical by any means, as observed at the time of publication online, Hyperscale Group and LITIG founder Derek Southall said: “This looks like a really interesting move. Admittedly this is only the start of the process but partnering with a well-regarded player like this in this area rather than trying to do it themselves could deliver a step change in the professionalism of outputs – Hogan Lovells have been open about partnering in the past and many larger firms do this with ALSPs. Baker McKenzie will obviously have domain experience in spades to bring to this too.”

He added: “What I really like is two things – first the fact there is no specific agenda. They seem willing to initially experiment and explore as opposed to needing an immediate ROI which is a positive. Secondly Baker McKenzie are obviously one of the truly international firms. If their global outlook and footprint is properly leveraged we may see some very different products emerge. One to watch.”

And respected legal consultant Tony Williams, principal of Jomati Consultants and former managing partner of Clifford Chance added: “The Bakers move is interesting as it involves non-legal sector technology being used in the legal market. Much legal tech appears to be relatively introspective of solving a specific legal issue rather than reimagining the issue from the clients perspective.”

Much is riding on the partnership with SparkBeyond living up to its expectations. The company has strong ambitions for its technology to be used as a force for good, which Allgrove says resonates with the firm and is a big reason why their values align. He says: “At my first meeting we talked about social impact and the founders at SparkBeyond are very keen that their technology has a good social impact. The opportunity to deploy it to increase access to justice appeals to them and resonated with me. One of the big reasons for going with them is that our values align.”

Regardless of what you think, Southall is right that it’s one to watch.

“Instead of the firm partnering with all the different AI vendors to put data into their platform and then train the machine learning in their platform, with no ability for us to then export and retain the data when the relationship comes to an end, it makes much more sense to build and structure our data internally. So, for example, if it’s labelled ‘force majeure’ in our database, we can take a bundle of data to a provider to train their model and ask them to delete it at the end.”

Curran adds: “If I’m a big corporate and I have a secret sauce, I buy in eg water, add my recipe, and push out the finished product. Right now, law firms are licensing their recipe to the water company. We’re consuming the water and providing the secret sauce. With Etatonna, we’re shifting things so that so that use of our data is more on our own terms.”

Data in Etatonna can be used to generate and regenerate machine learning models for any purpose. It potentially provides a solution to one of the biggest problems in the legal industry: ownership of the IP of trained data models.

It will also help law firms to understand exactly what data went into a model and Curran says: “There’s growing research outside of the industry around the ability to reverse engineer machine learning models and it’s important to know what data is in that model.” He adds: “Our concern is that inside that model is lots of data and nobody can attribute what was fed in.”

In a statement out last week Sam Lansley, a software engineer at Travers, put it well when he said: “The lack of transparency with machine learning models is a big concern for most industries. Models are simply a combination of “learned” algorithms and at the moment, this makes it extremely difficult to track them back to their source data. Etatonna completely solves this problem by linking the model back to the training data, and then linking that back to the original documents.”

Travers didn’t have to open source Etatonna but, if things go as Curran and his team plan, it has the potential to help take legal AI to the next level. Curran envisages that it will help law firms to share datasets to build joint venture-type AI models and optimise model training. He says: “If I’m a corporate lawyer, what is the point of Travers labelling a change of control clause and you at another firm labelling the same change of control clause? We need to train it so the AI is good enough for the industry as a whole.”

He adds: “The problem is not that AI is rubbish, it’s that it needs to be optimised and it’s hard to do that independently.”

Outside of legal, labelling startups are big business and in an article in February Fortune quoted Alexandr Wang, the 23-year-old founder and CEO of Scale AI, which has worked with a number of self-driving car companies, saying that the “dirty secret” of artificial intelligence is that getting the software to work well in the real world requires a large amount of high-quality data. He said: “Where the rubber hits the road is what does the data these A.I. systems are trained on look like? Is that data biased? Is that data high quality? Does that data have noise? Is that data comprehensive?” This is precisely where Travers is going with Etatonna. AI is really still in its infancy in legal but could this tool help the industry to get to the next level?

You can watch my interview with Shawn re Etatonna on Litera
Organisations that would like to access the open source code for Etatonna can register by emailing Curran at shawn.curran@traverssmith.com. Etatonna is licenced under the GNU GPL v3 licence and is shared through the existing Travers Smith Open Source environment on Azure DevOps.

#TalkingTech

AI for Contracts with Lionbridge and Gravity Stack

Upcoming Webinars

Advanced legal data loss prevention with Egress - Thursday 5th November, 4pm GMT / 11am CT

Spear phishing: Defence strategies of the future with Tessian - Thursday 12th November, 4pm GMT / 11am CT

If you would like to be part of our webinar series, we would love to hear from you! Please email Lucy at lucy.cheesewright@legalitlexicon.com
Knowledge Management

Tiger Eye announces major updates to Blueprint

It’s been a big month for knowledge management announcements and product launches, and in fact other stories in the October Rag could also have fallen within this category. First up from the UK, Tiger Eye has rolled out a raft of new or enhanced features to its knowledge management platform Blueprint, including a new Blueprint knowledge portal, plus the ability to collate search bundles that can be shared as hyperlinks with colleagues. Advanced search tracking also helps KM teams to identify gaps in their libraries.

Blueprint for iManage was officially launched in 2018 – when we revealed that AL Tamimi & Company had become one its very early adopters – and has been gaining traction and attention since. Last year Tiger Eye reported that its inaugural user community meeting was hosted by BLM and saw representatives attend from firms including Slaughter and May, BLM, BDB Pitmans and AL Tamimi.

Working in partnership with the Blueprint user community for the last 12 months, many of the updates included in the latest

Walder Wyss leverages iManage Knowledge Unlocked to inform KM strategy

Leading Swiss law firm Walder Wyss has rolled out iManage Knowledge Unlocked, meaning it now has a better understanding of how members of the firm are using its knowledge management system, what searches they are carrying out, and where the gaps are in their library, which looks set to inform the firm’s knowledge management strategy.

Knowledge Unlocked was made available by iManage this summer and productises RAVN AI, which Walder Wyss has been using in various forms since the beginning of 2019. Speaking to Legal IT Insider, legal engineer and head of KM Urs Bracher said: “What’s new to us is the analytics module and we can see how the user numbers are; who are the most active users; what content is looked for most often; and even what content is missing, where searches do not lead to results.”

Walder Wyss uses knowledge management plugin T3 from LexSoft, which allows firms to classify their iManage documents by multiple taxonomies, ensuring that data is cleaned up and
The first major update to RAVN or the updated interface in the latest release were nominated and verified by Blueprint users and ambassadors, before being added to Blueprint’s core release version and made more widely available.

Speaking to Legal IT Insider, managing director Dave Wilson said that it was key that people don’t underestimate the importance of KM during the COVID lockdown, commenting: “Most new features are about helping people to save time and not reinvent the wheel.”

The knowledge portal helps KM teams to raise awareness of their work without relying on intranets. It enables firms to create their own, customisable intranet portal dedicated to knowledge sharing, with landing pages to enable key announcements and documents to be promoted internally. Wilson said: “When you go to Netflix to browse for a film you are looking for knowledge and can subscribe to your knowledge. If there’s changes to the rules you get an update. In the knowledge portal if there is, for example, an update to the law on pub openings you can say ‘This is our advice or our take on it.’”

He added: “You used to just tap someone one the shoulder in the office but now you’re more isolated and don’t know information unless you’re told specifically.”

The next face of the knowledge portal will be a client facing approach.

The new shareable save search functionality means that PSLs can deliver document bundles to fee-earners to support them.

And the advanced search tracking monitors what people are looking for and will help KM managers to identify where searches are unsuccessful and where the gaps are in knowledge libraries.

For the full updates click here

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by ConOps (ConOps), making that data be in ready status and tagged, helping the shift from retrieval search to knowledge search.

Bracher said: “The analytics show that the total number of users are higher than expected. Initially, having worked with a folder system, users didn’t quite know how to navigate the taxonomy-based interface and we were concerned that user adoption might be slow, but the analytics show us that acceptance is high. We can see the terms they are searching for and what they are finding, which helps us to develop our knowledge management strategy.”

Data regarding what documents and knowledge are not being accessed is helping the firm to assess how documents can be refined: rather than relying on anecdotal evidence about what knowledge assets its professionals find most valuable, the knowledge management team at Walder Wyss is now able to use data to determine how people are using the system.

Walder Wyss has around 340 employees, of which 240 are attorneys, spread across six locations (Zurich, Bern, Basel, Lausanne, Geneva and Lugano.) Since going live on Knowledge Unlocked earlier this year, Walder Wyss has rolled it out to all six of its offices. Eventually, there will be nearly 300 users who will use the iManage solution to search and access more than 7,000 knowledge assets within the knowledge management system, and several million documents within iManage Work.

iManage Knowledge Unlocked leverages some of the learning from big RAVN knowledge enterprise projects at Linklaters and Sidley Austin. It is powered by the RAVN Knowledge Graph, which surfaces connections between people, expertise and knowledge and gives users seven ways to search across iManage Work and other systems: search and find; expert locator; matter locator; recommendations; knowledge locator; clause locator; and deal locator.

Walder Wyss is now looking to integrate additional internal and external sources into Knowledge Unlocked, such as expert search, in order to more easily pinpoint legal expertise across the firm.

Other firms to recently announce that they are using iManage RAVN for knowledge management include Womble Bond Dickinson, which is also using LexSoft T3 and has around 13,000 documents indexed at last count.

“Knowledge is only as good as your users’ ability to tap into it,” Nick Thomson, general manager RAVN at iManage said in a statement today (14 October). “Walder Wyss’ usage of Knowledge Unlocked enables them to truly leverage their work product and enhance the effectiveness of their curated knowledge assets, allowing them to continually improve knowledge management processes and outcomes for their users.”

This demo from iManage ConnectLive is a helpful insight into how iManage and T3 are working together on the curation of data and taxonomies.

Here is our write up of the launch of Knowledge Unlocked.
Wilson Allen acquires Capensys to help firms improve and accelerate tech adoption

Wilson Allen in October acquired UK-founded software training services business Capensys to help law firms accelerate and improve user adoption and IT change management. Wilson Allen provides consultancy and implementation services to Thomson Reuters Elite, Intapp and Aderant customers, and Capensys’ training will now be available as a modular offering or integrated part of the services provided. The acquisition follows a strategic alliance that was announced in August at ILTA-ON.

Capensys, which was founded in 2008 by Sue Pasfield, provides technology and security training solutions for law firms and corporate legal departments across the US, Canada, the UK and Australia. It is an iManage, NetDocuments, DocsCorp, and Intapp training partner.

Speaking to Legal IT Insider before the announcement, Pasfield said: “We’ve been in the industry a long time and our team has a strong desire to improve user adoption and how change management is handled. Every time we meet, we think of how to improve training. We’ve come up with a series of training videos on marketing, user adoption, or just in time learning, and we’ve developed training tools to make it more effective. We have really moved training forward.” Capensys helped to establish the Legal Technology Core Competencies Certification Coalition (LTC4), a non-profit group that created and maintains legal technology core competencies that have become the industry standard for law firms.

Pasfield said of the acquisition: “What is great about the Wilson Allen combination is that they have more channels to market. They can replicate what we’re doing and

Deloitte spins out CLM offering Arteria AI and KPMG launches legal ops transformation service

In October Big Four news, Deloitte has spun out its contract lifecycle management (CLM) software offering, Arteria AI, which was formerly known as dTrax, into a standalone business. KPMG, meanwhile, launched a Global Legal Operations Transformation Services offering across its firms.

Shelby Austin, managing partner of growth and investments and Deloitte’s Omnia AI business, has been appointed as CEO of Arteria AI. Austin’s previous company, ATD Legal, was acquired by Deloitte in 2014.

Deloitte says that the move is meant to accelerate Arteria AI’s growth and expansion into new markets and attract third-party investment. Deloitte will continue as Arteria AI’s preferred services partner.

“This is an important moment for us to embody the incredible entrepreneurial spirit that is driving Canada’s prominence as a global centre for innovation and technology and leadership in diversity,” said Austin.

A team will also transition over to Arteria AI; this includes Abrar Huq and Jonathan Wong, who alongside Shelby founded dTrax at Deloitte. Wong will act as the chief technology officer, a role he has played at a number of startups previously, and Huq will fill the position as chief revenue officer, leading Arteria AI’s go-to-market activities. Jas Jaaj has taken on leadership of Omnia AI.

“We believe this move will be instrumental in catapulting this already successful AI solution to new heights, faster” said Anthony Viel, managing partner and CEO of Deloitte Canada. “We’re confident that this is the best direction for
expand it to different clients and applications.” Capensys has around 200 clients and Wilson Allen has around 700.

One of Capensys’ strengths is the network of trainers that it has built up: there are 14 in the core network but another 100 consultants that it can call on.

Pasfield is set to stay during the transition period and told us: “I’m committed to making this work for them.”

She added: “People spend all this money on software and they don’t know how to use it. There is a continual need to make training relevant and get it into people’s minds. We’ve made a lot of training workflow tools so people can make the connection between what they are learning and how to apply it.”

The Inside View - Interview with Eric Laughlin, CEO of Agiloft

In October, we spoke with Eric Laughlin about the contract lifecycle management company’s recent $45m investment, including a deep dive into the funding and what we can expect to see on Agiloft’s roadmap. Laughlin most recently served as global leader of legal managed services at EY, where he managed the Pangea3 and Riverview Law teams. Prior to EY he was managing director of the corporate segment within Thomson Reuters. Bootstrapped since its inception in 1990 and profitable, Agiloft’s investment from FTV is the company’s first round of external funding and will be used to accelerate its product development and expand its vertical and geographic market presence.

At KPMG, the new Global Legal Operations Transformation Services offering is designed to provide clients with a wide range of global strategies and cross-border capabilities to help meet the challenges they face.

“KPMG’s Global Legal Operations Transformation Services teams are ‘global,’ both in terms of the geographic coverage but also the strategies offered,” says Stuart Fuller, Head of Global Legal Services, KPMG International. “Practice leaders are senior, experienced, and work together in KPMG firms across Europe, the Americas and the Asia Pacific region. They have a laser focus on results, and they are delivering significant and measurable improvement for legal functions across KPIs, such as productivity, customer satisfaction and quality measures—results that are crucial for organizations in the current climate.”

The KPMG Legal Operations Transformation Services practice leadership team includes Andreas Bong, Nicola Brooks, Philipp Glock, Eric Gorman, Kimberly Tan Majure and David Murray, and, KPMG says, with an imminent announcement of a significant further partner hire.

“We draw on all of the strengths of KPMG professionals across our firms, not just in legal and technology, but also Lean Six Sigma, Human-Centred Design and Systems Thinking. Together, our organization has achieved a substantial track record of implementing and running the transformation opportunities that we identify,” says Fuller. “KPMG Law is a combination of skills and approaches: we have over 2,700 lawyers in 81 jurisdictions advising on complex advisory and regulatory matters, and large transactions; we also provide global solutions such as business reorganization, global entity management and mass claims, offering an integrated service and advice. The new Legal Operations Transformation Service enables KPMG firms to handle large-scale business in a more efficient and technologically-enabled way and is only the first in a number of capabilities and services that we plan to provide in this space.”
Yes, Teams is big enough news to have its own section of the Orange Rag, so make of that what you will!

Netrix & Prosperoware enter strategic partnership

Prosperoware has entered into partnership with Netrix LLC, an IT consulting managed services, and digital workplace solutions company. The partnership will enable organizations to automatically provision content and enable governance for collaboration systems, such as Office 365 (Microsoft Teams, SharePoint Online, OneNote, OneDrive, Planner, etc.), iManage, and more, through Prosperoware CAM. Due to Netrix’s deep experience across the Office 365 platform, Netrix will be able to deliver best in class solutions around collaboration and governance.

Microsoft Teams has become a foundational technology for collaboration. The risk with organizations using Teams and other systems is that without strict governance there is a high risk of data sprawl. Users find it challenging to locate content, while risk professionals struggle to understand the context so they can ensure data is properly secured and disposed.

CAM enables organizations to leverage their content & collaboration systems for digital transformation to enable governance. It empowers organizations to set processes around automatic provisioning of projects across systems resulting in an organization-wide digital transformation to enable governance.

“Knowing the Prosperoware family for over 10 years, I’m happy to see this partnership established with Netrix. As we deploy Office 365, in particular Microsoft Teams and SharePoint Online, it is important for our customers to have proper governance with automation in place.” says Jay Parekh, Netrix Partner & Director. “Our customers in the legal field have been looking for further integration with Microsoft Teams and their Document Management Systems (DMS). Our partnership with Prosperoware, allows us to offer a complete solution.”

New Kim AddIn Accelerator makes self-serve forms easily available within MS Teams

No-code document automation-as-a-service platform Kim in October formally unveiled the Kim AddIn Accelerator, which makes self-serve forms available in Microsoft Teams, Word, Outlook and other enterprise tools “in minutes.”

The latest in a series of product releases from Kim’s strategic R&D programme (Project InsideOut), documents that you can self-serve in Teams include everything from a NDA to an expense form to a travel form.

Giving a demonstration of the new capability, Kim director Karl Chapman says: “Today (20 October) we are announcing that you can in minutes effectively self-serve any document that your organisation wants to self-serve by configuring once in Kim and will be available in Microsoft Teams and indeed of the tools.

“Let’s assume we wanted to create a one-way NDA. What would you do? Well the configuration that has been established in Kim automatically posts it through into Microsoft Teams. The request wizard asks for the appropriate information that is going to drive the automation of the document and whether you are eg a salesperson or a finance person – whoever it happens to be that wants the NDA. The legal function has control of the template in the back office and all the user needs to do is add the appropriate information.”

Once that request form is complete, all you have to do is submit the request which will generate a preview of the document based on the template. Once the document has been previewed you can email it out of Teams. It means, potentially, that documents can be created and agreed within a meeting in Teams.

You can watch that video demo here

Karl Chapman was previously CEO of Riverview Law, which was acquired by EY in August 2018. Riverview’s technology platform, Kim was not part of the sale.

Microsoft Teams phishing warning – again

Microsoft Teams email is reportedly again being used to deliver a phishing campaign, in which users are sent what appears to be an automated message from Teams but in
Security

Fragomen declares data breach affecting "limited number" of Google employees

New York law firm Fragomen Del Rey, Bernsen & Loewry has filed a data breach notification with the California attorney general’s office after an unauthorised party gained access to a single file containing the personal information of a “limited number” of ‘Googlers’ and ‘former Googlers’.

The breach is understood to have taken place between 1 July and 16 July. The firm says in a sample letter to those affected, filed with the AG today (26 October): “We recently became aware of suspicious activity within our computer network. While our investigation is ongoing, we discovered that an unauthorized third party gained access to a single file containing personal information relating to 1-9 employment verification services. This file contained personal information for a discrete number of Googlers (and former Googlers), including you.”

It adds: “We promptly commenced an investigation upon notification of the breach.”

UK Crown Prosecution Service records over 1,500 data breaches in 2019/20

The UK Crown Prosecution Service recorded 1,627 data breaches over the entirety of the 2019-20 financial year, up from 1,378 in the previous financial year, according to a new report out on 8 October.

The data, contained in the annual CPS report and analysed by UK litigation practice Griffin Law, also revealed that 59 incidents were serious enough to be reported to the Information Commissioner’s Office (ICO).

Griffin Law says that the period from January to March saw by far the largest quantity of severe personal data incidents, with 21 data handling incidents leading to loss of ABE and media discs, as well as an additional 18 incidents of unauthorised disclosure of case information, impacting 1,233 people in total.

By comparison, just 11 incidents of unauthorised disclosures of case information affecting 56 people were
learning of this activity and engaged a digital forensic investigation firm to assist with this investigation. While we have no evidence at this point in time that your information has been viewed, we wanted to notify you of this incident and assure you that we take it very seriously. We have taken steps in response to this incident, including implementing enhancements to our IT Security infrastructure and detection capabilities.”

It is not known what information has been accessed or how many people are affected, but the documents that are suitable for I-9 employee verification include passports, resident cards, and driving licenses.

A Fragomen spokesman told Legal IT Insider: “Fragomen can confirm an unauthorized third party accessed a data file containing personal information from a group of current and former Google employees. All of the employees involved have been notified and we are offering complimentary identity theft protection and credit monitoring services where possible. While we have no evidence of any further misuse, we have taken steps to remediate the incident and have verified it was an isolated incident that did not involve our general client data systems. This isolated incident is in no way indicative of the robust cyber security guidelines and practices Fragomen has long had in place.”

Google has yet to return our request for comment. reported in the period of October to December 2019, 12 data handling incidents and unauthorised disclosures of case information impacted 34 people in January to March, and 23 people were impacted in April to June 2019 by 15 total personal data incidents. According to the CPS this in part reflects better staff training and more incidents being reported.

In total, 1,463 of the total data breaches recorded over the entire financial year, were due to unauthorised disclosure of information, with 78 being considered ‘severe’. A further 143 of the total incidents were due to loss of electronic media and paper, and in 22 of these instances, the data was never recovered. Finally, the final 21 reported cases were due to loss of devices, including laptops, tablets and mobile phones, although only one of these devices was not eventually recovered, and no CPS data was compromised as a result.

Donal Blaney, principal at Griffin Law, said: “The Government’s nonchalance over these persistent threats to the UK’s national cyber security is troubling. In the light of international concerns surrounding hacking and ransoms, not to mention the missing ‘papers’ included in this report from the ICO, can we be sure there aren’t more incidents that go unreported or undetected? These charts reveal very little follow-up action is ever taken and that every faith is placed in the encryption software installed on government-issued devices. To state that, ‘no CPS data has been compromised’ is a very bold claim and one which, in my opinion, requires further clarity.”
whilst also being scalable as the firm grows. After what is described as a lengthy search, Omnia chose to equip its team with NetDocuments. The system went live in the first week of October.

Omnia Strategy specialises in dispute prevention and resolution and business human rights around the globe.

Nick Davis, chief operating officer at Omnia Strategy, said: “Before selecting NetDocuments, we were using a combination of in-house shared drives and Outlook to store our documents and emails. This meant as the firm, team numbers and caseload grew we were not able to manage our files and emails as efficiently or collaborate as effectively as we would wish. NetDocuments not only solves these problems, but also has an intuitive user interface that allows employees to work in the programmes that they are used to using, whilst benefiting from the NetDocuments solution. It will greatly enhance our efficiency and at the heart of what we do, our client experience.”

Foot Anstey has selected Peppermint Technology in a major UK win. The top 100 UK law firm will roll out Peppermint’s Client Engagement and Enterprise Portal solutions to underpin its strategic initiatives around client experience and business development.

With a team of over 500 staff, Foot Anstey has experienced a period of significant organic growth, achieved through a successful sector strategy and a singular focus on being an enabler of client ambition.

As a next step in delivering on its objectives, the firm will implement Peppermint’s CRM module to build a true 360-degree view of its clients - creating a cornerstone for insights-driven marketing and business development activities. The portal capabilities will play an integral role in making information accessible for clients to empower collaboration and transparency.

Dave Bloor, CTO at Foot Anstey comments: “The Peppermint proposition is very convincing – deep legal expertise combined with a powerful technology platform that connects seamlessly with both our core business systems and our lawyers’ productivity tools. This will future-proof our investment.”

Full-service UK law firm Lanyon Bowdler has swapped out its sunsetting mid-tier practice management system Thomson Reuters Elite Envision for one-stop-shop document, case and legal accounting software PracticeEvolve after a comprehensive pitch process. Martyn Wells has been retained as implementation consultant.

Lanyon Bowdler are a full service, 250-person firm operating across Shropshire, Herefordshire and North Wales. Brian Evans, managing partner at the firm comments: “Improving client efficiencies is going to continue to be fundamental to our success in the coming years, so selecting the best long-term partners for our firm is crucial. Having spent significant time investigating various options, we kept returning to PracticeEvolve as they simply offer everything we require for case management and accounts. In fact, there is an enormous amount of functionality within the system and even our own feature requests were quickly built into the product roadmap.”

Matt Fiske-Jackson, strategic lead at PracticeEvolve, said: “I will say this has been a long process but for very good reason – it demonstrates Lanyon Bowdler’s quite unique approach to due diligence and a very in-depth comparison. For PracticeEvolve to be selected really demonstrates our own credentials as a legal tech provider in the market. We cannot wait to get started.”

Leading Ireland firm Arthur Cox has selected Clarilis as their drafting automation partner following what is described as an in-depth selection process. Clarilis is initially working with Arthur Cox on a number of key corporate and banking projects.

Designed for law firms and in-house legal teams, the Clarilis platform saves lawyers a significant amount of time in producing first drafts of all forms of legal documentation. The Clarilis platform was designed from the ground up to automate complex suites of precedents, such as Share Purchase and Facility Agreement suites with many ancillaries, many parties and complex underlying deal structures.

Eileen Burns, Arthur Cox’s head of technology and innovation commented: “We conducted an extensive selection process evaluating the established document automation vendors. We found Clarilis to be the solution that provides the most comprehensive level of automation, combined with guaranteed delivery, the ability to rapidly deploy and the technical security of a SaaS model.”
strongest return on investment and the lowest total cost of ownership. This strategic partnership will enable us to continue to provide outstanding client services and further enhance our competitive position in the legal market.”

And in another win for Clarilis, TLT has launched a contract drafting solution powered by Clarilis, which provides in-house lawyers with accurate, well-drafted contracts quickly and efficiently.

The new solution, known as Intelligent Drafting, was launched at this year’s Legal Geek all-digital conference and offers an off-the-shelf product which automates the most commonly used commercial, technology, data processing, employment and real estate contracts.

James Touzel, partner and head of digital at TLT, says: “Our clients are under increasing pressure to find efficiencies across the in-house legal function, and we’re pleased to share the solutions we use at TLT to help them with that task.

“We have received excellent feedback from clients on our technology driven solutions, noting that as well as providing increased efficiency and time saving in terms of delegation of work, the platform has helped manage and mitigate risk.”

Access Legal, a division of The Access Group which recently acquired Eclipse Legal and DPS Software, has been approved as a supplier on the latest version of the Crown Commercial Services’ (CCS) procurement framework, G-Cloud 12.

G-Cloud 12 is a government initiative designed to make it easier for public sector organisations and departments throughout the UK to locate a suitable supplier. They can seamlessly search for businesses that offer cloud, software and infrastructure services, amongst others.

Access Legal, including Eclipse Legal and DPS, is now an approved supplier. Proclaim, the case and practice management software solution from Eclipse Legal will be made available on the framework.

Doug Sawers, managing director of Access Legal, comments: “We are delighted to have been selected as an approved supplier. We firmly believe our services will enable multiple government departments and public sector organisations to become more efficient and deliver excellent results.

“This selection enhances the Access Legal reputation as a leader in digital solutions and we’re excited to see the benefits of this initiative in the public sector marketplace.”

Quiss Technology has announced a new partnership with dictation solution provider Diktamen.

Quiss delivers a range of technology solutions to many of the UK’s leading mid-market law firms, helping most with their ongoing digital transformation journey, with cloud solutions playing a significant role in introducing greater flexibility, resilience and security.

Head of marketing, David Ricketts commented: “Diktamen have been on our radar for some time, being only a relatively recent entrant to the UK market after developing a solid reputation for innovation overseas.

“It’s important we help our legal sector clients benefit from technology, particularly when it is directly relevant to their business, as was the case with Diktamen’s true-Cloud digital dictation solution, which provides unrivalled flexibility and functionality.”

Walsall based law firm Walker Solicitors in October selected Hubshare as their preferred data room.

“We needed a secure file share solution to use for our developer packs and chose Hubshare having previously used it in another transaction and liking it’s functionality”, explained Jonathan Walker, director of Walker Solicitors.

Walker Solicitors will now look to Hubshare when sharing data with clients and external parties, to ensure every transaction is smooth and secure.

UK law firm, Milnes Legal, is implementing the Compact+ practice management solution from Eclipse Legal Systems.
Milnes Legal sought to replace their incumbent systems with a new single practice management solution. The firm chose Compact+ the securely hosted system from Eclipse which is designed specifically for the needs of smaller firms looking to improve efficiencies and grow.

The firm has chosen to take a range of workflows tailored specifically to the areas of expertise provided, including: family, employment, probate, lasting powers of attorney, court of protections, debt recovery, mediation and conveyancing. The Conveyancing workflow includes an integration with the HM Revenue and Customs Gateway for SDLT submissions directly from Compact+.

Mary Keene, practice manager at Milnes Legal, said: “Compact+ is exactly what we were looking for – a solution that perfectly fits the size of our team, that is comprehensive enough to include all the features that will enable greater efficiency within the firm.

“The wide range of workflows means we can cater for a variety of different clients, both private and commercial, offering each and every one a consistent approach and high level of service, where providing a swift service doesn’t compromise on quality.”

Document automation consultancy company DocGovern, has expanded its technology partner portfolio with Avvoka.

Founded in 2015, Avvoka is a document automation, negotiation and analysis platform designed to help law firms, in-house legal teams and businesses draft documents, negotiate them, and leverage data insights from that process. Their clients include Allen & Overy, Baker McKenzie and WarnerMedia.

Giles Thompson, head of growth at Avvoka said: “Our partnership with DocGovern will enable us not only to expand our client base, but also increase our brand awareness across other industry sectors and show how Avvoka’s technology can help companies automate, negotiate and analyse.”

UK top 150 law firm Lupton Fawcett has chosen Zylpha’s document bundling platform. The software will be used in conjunction with the practice’s Visualfiles case-management system from LexisNexis.

In using Zylpha’s digital document bundling in conjunction with Visualfiles case management software, Zylpha says that Lupton Fawcett can now produce bundles at a fraction of the cost, time and effort that it previously took using manual processes. What previously took hours now takes just minutes. Typically, Zylpha bundling delivers time savings of over 80% when compared to traditional manual alternatives.

Bundles can be accessed from a single-view dashboard-like screen, which streamlines and simplifies the arrangement and pagination of documents, saving a considerable amount of time.

James Hood, head of IT of Lupton Fawcett said: “This is a major change in the way we work. Initial feedback though is overwhelmingly positive. Prior to Zylpha, our process was predominantly manual and very time consuming.

“However, with Zylpha’s ebundling platform for Visualfiles, a bundle can be produced quickly and efficiently in a matter of minutes. The PDF itself looks highly professional and it allows our clients to find what they need easily. In short, it’s brilliant, as Zylpha takes all your documents electronically, from all leading formats, then compiles, indexes and paginated the bundle in minutes, saving a lot of time and making things a lot easier.”

UK firm, Memory Crystal LLP choose pdfDocs from DocsCorp for PDF creation, editing, and management of PDF content.

EMEA

Borenius goes live on iManage Cloud in Finland first

Leading independent Finland law firm Borenius has gone live on the iManage Cloud and according to iManage, Borenius is the first law firm in Finland to adopt the cloud for its work product management.
A long time iManage customer, Borenius, which has offices in New York, London, and St Petersburg, recently upgraded to iManage Work 10 for document and email management. It started the move to the cloud before the summer and the entire group went live in early September.

"The knowledge stored in iManage Cloud is the heart of this business, so it’s essential to have an easy-to-use platform that empowers us to manage and unlock the knowledge from our documents in a way that is stable, scalable, and secure," said Niko Jakobsson, general counsel and development director at Borenius. "iManage understands how law firms work at a deep level. They are constantly making improvements in core products and technology integrations that make our attorneys more productive and improve client service."

Borenius has also adopted document threat detection solution iManage Threat Manager as an extra layer of protection: Threat Manager uses adaptive behavioural modelling and machine learning to continuously safeguard against cyber threats and data loss. "It’s important that our clients have full confidence that we are keeping their data safe. iManage Cloud provides a more secure and robust hosting environment than we could build ourselves, while also providing built in business continuity, so that we can service our clients without interruption," said Jakobsson.

Borenius worked with local iManage partner Ascertus Limited on its move to iManage Cloud. Nearly 230 users spanning four countries, across all five of Borenius’ offices, now have access to the iManage Cloud platform.

**Borenius** also made the headlines in October when we revealed that they have selected Prosperoware’s cloud provisioning, governance and business continuity tool CAM as part of its roll out of the iManage Cloud, becoming the first Nordic law firm to do so.

**CAM** helps to solve many of the challenges that firms face in managing multiple cloud services and Borenius is using it for provisioning of iManage Cloud, Microsoft Teams and HighQ, as well as to provide AWS backup for the DMS.

Speaking to Legal IT Insider, Borenius’ general counsel and development director Niko Jakobsson said: “We had a previous workspace manager that was not compatible with the cloud. CAM was an important part of the whole puzzle in moving to the iManage Cloud.”

Borenius is using CAM for Microsoft Teams, which helps firms to avoid a data sprawl and can apply rules for transferring and deleting documents within files in Teams. This helps to ensure files are correctly filed and that data protection regulations are complied with.

In another iManage Cloud win in Europe, Hamburg, Germany-based boutique corporate law and commercial law firm **Lawentus** has gone live with iManage Cloud for document and email management, within three months of starting the project.

**Ascertus Limited**, as the implementation and support partner, has enabled the firm to smoothly transition from its longstanding on-premises version of the solution to the cloud, migrating more than 90,000 documents.

Explaining the firm’s rationale, Dennis Petersen, Business Lawyer and Head of IT at Lawentus, says, "In the current business environment, with the availability of a sophisticated one-stop-shop platform such as iManage Cloud and the criticality of an advanced document and email management system for our lawyers, there simply isn’t a business rationale for an on-premises solution for this function. As a growing firm, we need easy to use modern technology that will provide a trustworthy environment for our clients and help us attract the best lawyers in the market to our organisation."

He said of Ascertus: "They were great at proactively troubleshooting. There has been negligible business disruption during this implementation. The ongoing support of our solution is in good hands."

And in another win for Tikit and NetDocuments, German law firm **CLARIUS.LEGAL** – which combines legal outsourcing services with legal tech solutions - has chosen Tikit to implement NetDocuments throughout the firm.

CLARIUS.LEGAL will also be taking advantage of NetDocuments’ ndMail feature which uses machine learning.
technology for predictive email filing, allowing users to file emails whilst in Outlook with just one click.

Laura Hofmann, chief legal tech officer at CLARIUS.LEGAL, said: “NetDocuments will be a great addition to our Legal Tech approach to legal outsourcing and give our clients an enhanced experience with us. We were looking for an intuitive Cloud-based document management system and NetDocuments ticks every box. The one-click predictive email filing was a key feature for us as it allows our fee-earners to manage client matters more efficiently and means that those emails aren’t lost if someone were to leave the firm. Having our files stored in a German data centre was important to us as we are governed by strict data protection laws. It gives us, as a firm, and our clients peace of mind knowing that the data is stored in the EU.”

Dutch firm Dommerholt Advocaten N. V. purchased pdfDocs. SIRIUS advokater from Denmark selected cleanDocs from DocsCorp to prevent unintentional data leaks that result from sending emails to the wrong recipient or failing to remove metadata before sending.

### North America

eDiscovery leader DISCO on 15 October announced a $60 million equity financing, valuing the company at $785 million. Georgian Partners led the financing. Existing investors Bessemer Venture Partners, LiveOak Venture Partners, and The Stephens Group all participated, and new investor Breyer Capital also invested.

This latest funding brings total investment in DISCO to $195 million, confirms the company’s status as the leader in enterprise legal technology, and establishes the company as a disruptor in the broader cloud computing industry. With products and services that cover the entire investigation and litigation lifecycle and the market-leader position in cloud ediscovery in an ediscovery market predicted to exceed $20 billion by 2024, DISCO has established itself as a trusted partner for the largest legal departments, law firms, and government agencies in the world.

“We are building the enterprise software system of record for the legal function. Every major company has a legal department and spends money on legal services, but there is very little software built to help legal professionals do their work,” said DISCO Founder and Chief Executive Officer Kiwi Camara. “We want to change that. Legal is a critical business function just like sales or marketing or finance. We believe that software can transform the legal function just as it has transformed every other business function. DISCO is positioned to build for legal the kind of horizontal platform that Salesforce built for sales.”

LexisNexis on 26 October announced a new collaboration between InterAction and Foundation Software Group, bringing together CRM and experience in a completely integrated way. This is a major milestone for Foundation Software, which was founded by the ex-CEO and founder of Interface Software, Nate Fineberg. LexisNexis acquired Interface in 2004 and it’s at the core of InterAction.

Behind the move is an intent by LexisNexis to double down on its network of best of breed systems. It is a concession by LexisNexis that the experience capability within InterAction is no competition for Foundation Software, which also recently signed a partnership agreement with iManage.

Experience management helps users to find out who has worked on what in order to win more business and. Speaking to Legal IT Insider, director of product management Scott Winter said: “InterAction is best of breed for CRM and in experience we want to work with Foundation, which is best of breed.

“What we want to do is help marry that experience data with the CRM, so what matters are taking place today, if you’re going after a new opportunity.”

Users will be able to switch between Foundation and InterAction seamlessly.

It was on 19 October that iManage announced it has entered a strategic partnership and integration with Foundation Software to make it easier for firms to deploy its knowledge management system iManage Knowledge Unlocked and surface curated connections between content, concepts and people.

Nick Thomson, general manager for iManage RAVN, told Legal IT Insider that iManage has built not only a Foundation connector, but also adjusted its implementation process to deploy common best practice methods. He commented: “It’s so much easier to deploy and in effect it’s all coming out of the box preset.”
Foundation helps law firms to present matter profiles for experience and expertise and that data is available to the iManage knowledge graph, which identifies the strengths of connections. Thomson said: “We’re not just federating search we’re pulling Foundation data into the index and combining it with all the other extracted contract information using RAVN. It’s very powerful.”

The integration is expected to enable people to more easily uncover hidden experts, similar matters, and best practice content.

“The integration between iManage and Foundation allows law firms to quickly leverage their data for the practice and business of law,” said Cindy Thurston Bare, VP, customer product management at Foundation Software Group in a release out today (19 October). “Together, we unlock a host of shared knowledge across firms while achieving significant time savings for firm professionals. Our solutions are highly complementary, and we see significant opportunity for deeper integration to deliver actionable intelligence to our joint customers.”

In the same release, Thomson said “Our goal with Knowledge Unlocked is to significantly reduce the complexity and risk traditionally associated with deploying legal knowledge solutions. That sensibility is also reflected in the iManage partnership with Foundation. We go far beyond the development of productised connectors to leverage a shared vision of simplifying the process for mutual clients to integrate Foundation’s rich information into the Knowledge Unlocked solution.”

Thomson says that iManage will continue to build its ecosystem, commenting: “We are applying the best of technology to legal knowledge so firms don’t have to stitch it together themselves.”

He adds: “Enterprise search has moved on from being about connecting different sources to using machine learning to curate that content.”

InOutsource, a leading information governance consulting firm, today announced that it has signed a new partnership agreement with NetDocuments.

The new partnership will benefit NetDocuments customers addressing complex risk, compliance and information lifecycle management challenges, by providing them with access to InOutsource’s expertise in information governance (IG) and law firm risk management.

“A growing number of law firms undertaking digital transformation and information governance projects have been asking us to assist with streamlining how they configure and use NetDocuments from an IG point of view,” said Nancy Beauchemin, president of InOutsource. “Formalizing our working relationship with NetDocuments and leveraging our long-standing relationship as an implementation services partner for FileTrail enable us to optimize integrations between the DMS and the records management system, and help clients apply IG policies to their documents throughout the information lifecycle.”

Dickinson Wright, an Am Law 200 firm with 475+ attorneys across 18 offices, worked with InOutsource on designing and implementing its folder structure across more than 40 practice areas prior to rolling out NetDocuments in February.

DocSolid, the legal technology experts for enterprise scanning, workflow and paper reduction solutions, in October announced that Minneapolis-based, Maslon LLP, has selected Airmail2 as its digital mailroom solution. Airmail2 is designed specifically for law firms and seamlessly integrates with Maslon’s cloud-based document management system (DMS), NetDocuments.

When the pandemic sent the workforce to home offices, most law firms quickly started scanning daily mail to email inboxes. But delivering scanned mail via the email system compromises the security, compliance and the integrity of the process. Scanning legal mail directly to the DMS ensures the most secure and productive process for attorneys and legal team recipients.

Airmail2 enables clerical operators with minimal training and without DMS login access to scan, QC, and directly deliver postal mail in electronic form to the firm’s DMS of choice.

Automated contract markup technology provider BlackBoiler on 14 October announced it has secured $3.2 million in Series A funding from a series of strategic investors including agreement cloud company
DocuSign, which is a material investor. The post-revenue, pre-profit company plans to use the funds to further develop the capabilities of its patented software and accelerate team growth. It has already hired Gabriela Millard as marketing manager and Liam Emmart as software engineer.

BlackBoiler learns from your historically negotiated contracts and your company standard and marks up inbound contracts instantaneously in track changes. One fairly recent change in functionality means it can automatically swap in non-generic details such as the party name.

The Virginia-headquartered company says it addresses a global, $35 billion market in which companies spend $26 billion reviewing and negotiating semantically similar contracts, $7 billion of which is verbatim work. It claims to deliver up to a 70% reduction in review time compared to in-person review.

Speaking to LegalIT Insider editor Caroline Hill, BlackBoiler co-founder Dan Broderick said: “We measure how long people are in our documents when they use the tool and in a POC just last week we got a 70% time saving.” He adds: “We did one yesterday where two thirds of the final edits were suggested by BlackBoiler.”

Broderick suggests that people think of BlackBoiler in the same way they think of spellcheck, rejecting unwanted suggestions and moving on. He said: “Sometimes spell check suggests things and you think ‘why would you suggest that?’ It’s the machine plus human that gives you the best results.”

HSJ Lawyers, one of British Columbia’s largest firms, has switched to DocsCorp pdfDocs for PDF editing and bundling.

The firm will use pdfDocs to create and combine PDFs; OCR image files so they become text-searchable and protect sensitive information with true redaction.

Commenting on the firm’s decision, administrator Ryan Stuckel said, "Our legacy PDF software didn’t work well with Wordox, so we needed to find an alternative. I had heard that pdfDocs did a great job for users and that the Wordox integration was top notch. In the end, it was an easy decision for us."

pdfDocs gives users the tools to create, bundle, edit, redact, and secure PDF content. Profiling documents as PDFs into Wordox is simple, thanks to integrated workflows. And users can create unique Organizer Projects for specific cases, matters, or projects with their own output and security settings.

"DocsCorp is glad to provide a leading B.C firm like HSJ Lawyers, a PDF solution that meets the needs of a wide range of users," said DocsCorp VP for the Americas, Bob Moore. "Our partnership means the skilled legal professionals at HSJ Lawyers are now able to deliver an even more efficient service for their clients."

Elsewhere Armstrong Teasdale purchased compareDocs from DocsCorp to enable its staff to compare different document versions for changes.

Litera announced in October that its document drafting solution, Litera Desktop, has been selected by global law firm Paul Hastings, making it one of three Am Law 100 firms to recently invest in Litera’s drafting suite.

Litera Desktop, already in use by several leading international law firms including Clifford Chance, K&L Gates, and Troutman Pepper, supports legal teams of all sizes as they draft documents, surfacing the technology they need in the places they need it.

Amy Wegener, chief practice innovation officer at Paul Hastings, said, “Litera Desktop provides our lawyers with synchronized, fluid drafting support throughout the matter life cycle. It will be a huge benefit to the firm’s attorneys to have all of the Litera tools available to use from one easily accessible toolbar within Word.”

Avaneesh Marwaha, Litera CEO said, "Paul Hastings is a longstanding customer and we’re excited to see them join the ever-increasing number of firms which recognize Litera Desktop as the logical progression of their investment in Litera’s products. Our customers look to us for ways they can leverage technology, and our focus on workflows and workspaces continues to drive innovation and provide value for firms across the globe."

Howard & Howard, a US full-service law firm with a national and international practice that provides legal services to businesses and business owners, in October announced the adoption of Kira as part of an ongoing commitment to enhance its legal service capabilities.
The foundation of Howard & Howard is its people and their commitment to our strongly held beliefs," said Gregory W. Houck, director of Information Technology at Howard & Howard. "One of those beliefs is also our mission statement and reads, 'we provide high-quality and timely legal services, at a reasonable price.' Kira is helping us realize this strongly held belief within our M&A practice already."

The solution will be used for M&A due diligence, Commercial Real Estate, Bankruptcy, Insolvency and IP - along with custom training being applied for Market Intelligence and M&A Deal Points.

Houck added: "Beyond M&A, we see opportunities in many other practice areas throughout the firm. We’re in the early stages of adoption but recognize the potential for our clients. When considering what clients want from their representation, high-quality, timely, and reasonably priced should be high on their list. By leveraging Kira Systems, we’re looking forward to continuing to exceed those expectations."

Athennian, developers of cloud-based legal entity management software, has acquired the team from Montreal-based tax visualization startup, Redox Technologies to add to Athennian’s ability to visualize complex corporate ownership and tax structures.

"The Redox team has developed deep expertise in automating corporate ownership and tax structures. We are excited to expand Athennian’s org chart capabilities by integrating the talented Redox team," said Adrian Camara, CEO of Athennian. "Athennian stores millions of data points related to corporate ownership transactions; and our customers are looking for increasingly sophisticated ways to analyze and report this data for tax, legal, finance and compliance purposes."

Redox founders Max Lussier and Nic Saudrais are joining Athennian’s engineering team. Lussier said: "Combining Athennian and Redox’s engineering talent creates strong synergies that will continue to help paralegals, law clerks, and corporate secretaries succeed, and we remain focused on accelerating workflow for paralegals and corporate secretaries with consumer grade user experiences."

The transaction follows Athennian’s recent $8 million Series A financing led by Arthur Ventures.

No code automation platform Neota Logic and business have entered a new partnership to help deliver no-code automation to the North American legal market.

Neota’s no-code platform provides digital solutions to legal, risk and compliance professionals through easy-to-use development tools for the intelligent automation of expertise, processes and documentation.

Alexander Ali, founder of The Unicorn Business, commented: "Neota Logic speaks perfectly to our philosophy of delivering practical and rapid value in knowledge- and content-intensive organisations. Our experience in the legal industry allows us to appreciate the low-IT, no-code fast delivery of value to legal end users that makes Neota Logic unique. Enabling the user to refocus their time and expertise on the client by taking advantage of efficient internal processes is our common expressed goal."

FileTrail has acquired OmniRIM Physical Records Management software from Access.

Effective immediately, FileTrail will be providing OmniRIM customers with continued support of their existing software systems, as well as a favorable upgrade path to FileTrail GPS Records Manager.

"Since the beginning, Access has worked closely with OmniRIM Physical Records Management clients to provide them with the best possible solution for their long-term records management needs," says Matthew Hillery, Access chief technology officer. "FileTrail is a leading software solution for physical records management, and we’re confident that our clients will benefit from their expertise in modern records management."

FileTrail GPS Records Manager is a leading records management solution for large and midsize enterprises in heavily regulated industries. FileTrail offers a modern approach to physical records management, providing visibility into both physical and electronic records through a single intuitive web-based system.
Hume Taylor & Co, a leading law firm based in Adelaide and regional South Australia, has ensured support service excellence for its lawyers and clients by converting to BigHand’s full law firm workflow management solution, BigHand Now.

The agile firm has offices in central Adelaide, Millicent and Whyalla, and nine experienced lawyers who were already using BigHand’s voice solutions. Although the firm had previously identified its back-office legal workflow as an area of process improvement before COVID-19, when the pandemic hit and everyone was forced to work from home, the project became top priority.

Scott Herriman, managing partner at Hume Taylor explains, “Prior to the pandemic, we knew there were improvements we could make to streamline the way work was delegated and moved around the firm. Tasks were often emailed to support staff or written down on a paper form, which might then get lost and quite often needed extra clarification of instructions before the task could be completed.”

“When COVID-19 forced everyone to adopt remote working, we knew we needed a robust solution to help gain visibility over the law firm workflows and optimise the service to our lawyers, and in turn, to our clients. We trusted BigHand as providers of reliable legal-specific software from our use of their voice solutions, BigHand Digital Dictation and Speech Recognition, and it was an easy decision to convert to the full workflow suite once we realised the full benefits of BigHand Now. ”

BigHand Now is a legal-specific workflow solution that allows tasks to be sent to a central workflow with all the required instruction upfront. Tasks are then automatically routed to the right skilled resource, at the right cost to the firm. The centralised view of work can be accessed by desktop or mobile devices to allow lawyers to check on the progress of their work at any time.

Check out our webinar with BigHand, including a demo of BigHand Now.

Clifford Chance has completed a proof of concept in Singapore with knowledge management platform Intelllex, which after four and a half years of training its algorithm, automates categorisation and retrieves documents based on context, not just key word search.

Clifford Chance has an innovation lab called Create+65 in Singapore, which it launched at the end of 2018 to work with local startups in partnership with the Singapore Economic Develop Board. Intelllex is one of five startups currently working with the magic circle firm.

While it is not yet clear if or how the proof of concept will be taken forward and how it will fit into Clifford Chance’s global KM strategy (led by director of knowledge Grace Cordell), Intelllex is nonetheless gaining international recognition for its platform, which in June raised $2.1m.
UK

Eigen Technologies continues to build out its C-suite as it looks to scale the business, with the appointment of Spyros Karageorgis as its first chief financial officer and Tony Ehrens as its new chief revenue officer. Karageorgis is based in London and Ehrens in New York.

Karageorgis most recently held the role of CFO & COO of Cortexica Vision Systems, an AI image recognition company. Prior to Cortexica, Karageorgis led the dual track exit and IPO of Venda, an online SaaS e-commerce platform, which resulted in the company’s sale to NetSuite. He also served as the COO of MedicAnimal, a Balderton-backed online animal pharmacy.

Ehrens joins Eigen from robotic process automation business Kryon Systems, where he was general manager and VP sales, Americas. Before that he was SVP global sales for smart process automation SaaS platform WorkFusion and SVP of sales at Sitron.

Eigen uses natural language processing to extract data from documents, include the likes of Libor repapering; verifying that assets qualify for Solvency II; and verifying terms to speed up negotiations.

StructureFlow, a UK-based legal tech start-up that helps people quickly and easily visualise complex legal structures and transactions, in October announced two new hires to its senior leadership team and continued expansion of its international operations and customer roster.

Jean-Paul de Jong joins StructureFlow as its Chief Technology Officer and Chief Security Officer and Owen Oliver as its Head of Product – you will recall that Oliver founded Transact and sold it to Workshare/Litera.

To increase the impact of its product, StructureFlow has joined Fuse, Allen & Overy’s flagship legal tech incubator and Founders Factory’s FinTech accelerator programmes.

StructureFlow was part of Slaughter and May’s tech incubator and says that after running successful pilots with several prestigious international law firms, it is now expanding beyond the legal industry and working with asset management and private fund businesses.

North America

ContractPodAI in October announced two strategic C-Suite appointments to kickstart a new phase of growth.

Edward Chick joins as chief growth officer. One of the most well known names in contract lifecycle management, his previous roles as CLM GM at Apttus and World Wide Leader of Emptoris at IBM have led him to over 3,000 enterprise CLM deployments.

Richard Hollister takes on the role of chief revenue officer. He has 20 years of success leading sales and customer success teams of SaaS and legal industry companies, including SVP sales for Watermark and Reis, and VP sales for Law.com, Lawyers.com, and LexisNexis.
“A key precursor to success for blitzscaling to exponential growth is organizational capacity: hiring the right leaders at the right time,” said Sarvarth Misra, CEO and Co-Founder. “Edward and Rich bring decades of experience in legal and contracting technologies, so they acutely understand ContractPodAI’s customers and what they need. Edward and Rich also bring decades of experience aggressively growing SaaS and legal tech companies like ours by systematizing our shared core values of operational excellence and outsized client impact. Since securing Series B funding in 2019, ContractPodAI has seen hyper growth in unprecedented times. With the onboarding of Edward, Rich, and our CTO Anurag Malik earlier in 2020, we now have the leadership team we need to get into overdrive growth mode and lead digital transformation in the legal tech market.”

Aurora North has hired Adam Kenney as a director within its consulting practice. The Aurora North IP practice provides consulting services including assessments to evaluate law firm IP infrastructure, staffing approach, culture and business processes to identify opportunities to improve operational efficiency, mitigate risk and enhance client service.

Kenney brings more than 30 years of experience in IP operations and legal technology. Most recently he held leadership positions at Clarivate Analytics, including VP and Head of Strategic Business Development and VP and Head of IP Consulting. Before that, he held various roles at Thomson Reuters, most recently leading the commercial strategy for the company’s Intellectual Property research platform.

"Adam has a well-deserved reputation in the industry as a visionary and problem solver who sees the big picture when it comes to managing IP," said Christopher Kave, founder and principal, Aurora North. "Adding Adam to our growing IP consulting organization will create new opportunities to grow the way we serve law firms."

The Inside View - Interview with Josh Becker, CEO of Lex Machina

We asked Josh Becker to reflect on the rise and rise of legal analytics, on the eve before he left legal tech to run for CA State Senate.
Deal analytics: LexisNexis launches Market Standards

LexisNexis has launched new Market Standards in practical guidance, which aggregates and visualises the data from publicly filed transactions to date, to enable attorneys to make more educated decisions on future deals.

Market Standards enables attorneys to search and compare transactions using detailed deal points, precedent language, fees, and transactional trends. At its official launch today (5 October), the new guidance starts with coverage of M&A deals.

It covers over 33,000 deals from the last ten years and allows lawyers to compare transactions using deal data like termination fee triggers, carveouts from control of litigation in third party claims, and knowledge qualifiers in 10b-5 representations.

"Understanding current standards and trends for M&A deal points and easily accessing highly relevant language gives attorneys an edge when drafting and negotiating. Market Standards is a uniquely powerful tool for M&A attorneys," says Sean Fitzpatrick, CEO, LexisNexis North America. "Market Standards provides the detail and analytics that M&A attorneys and research professionals need to make the most informed decisions."

"We believe the future of practical guidance is data-driven. We've started with M&A and will be expanding Market Standards to other practice areas in the coming months," says Daniel Lewis, Vice President of Practical Guidance.

"We’ll also be launching a number of new, exclusive features that advance data-driven practical guidance."

October also saw LexisNexis announce the official commercial launch of Juris 3.0 - the latest generation of its billing, accounting, and financial management software for law firms.

Juris 3.0 upgrades the solution by adding an integration with ClientPay, an award-winning digital payment acceptance solution for legal and other professional services firms, delivering a new collection of reports in Juris Suite Reporting, improving email billing, and adding important usability enhancements that go live on October 5.

The Inside View - Interview with Daniel Lewis, VP of practical guidance at LexisNexis

We spoke with Daniel about the new M&A analytics tool Market Standards and what is on the roadmap.

NetDocuments launch Analytics at Elevate 2020 Conference

NetDocuments at its virtual Elevate conference in October unveiled Analytics, which will help customers to better analyze and understand user behaviour, user activity, and enhance user adoption.

Available at the end of 2020, the new product applies matter analytics to show what is happening inside of workspaces, including who is the most active.

Speaking to Legal IT Insider, chief product officer Dan Hauck said: "As a former practising lawyer I’m most excited about the ‘top documents’ – I can see not just what was edited last but a list of which documents have seen the most edits and saves. I can see who are the top contributors. And I can see a calendar heat map that shows the days that saw the most and least activity so I can drill into that. I can gain answers instantly on one screen that would normally take hours to find."

He adds: “On the admin side what matters to administrators is what utilisation is like; what are the most active workspaces and the least; and should I consider closing workspaces. When you buy Analytics we flip it on – there is no set up delay.”
Important usability enhancements that remove obstacles to daily productivity.

"Juris 3.0 is the next generation of accounting, analytics, and billing software that firms will use to work as efficiently as possible, satisfy clients, and optimize profitability. This upgrade is designed to improve efficiency in the areas that impact firms the most, as well as support data driven decisions for firm leaders," said Scott Wallingford, Vice President and General Manager of LexisNexis Software Solutions.

In addition to ClientPay integration the main changes are a new reporting module that provides firm leaders with real-time view of information and makes it easier and faster to generate reports, plus upgrades to the email template that help firms automate and improve email billing workflows. New features now enable firms to set boilerplate text for email bodies, create custom subject lines, include payment links.

Microsoft announces the winner of the first UK law firm diversity programme

Reed Smith has been awarded both the top performer and most innovative law firm award in Microsoft’s inaugural UK law firm diversity programme (LFDP), an incentive-based programme which it has run in the United States since 2008.

The number of hours that Reed Smith lawyers from diverse backgrounds spent on Microsoft matters in the past year has increased by 12.5 percentage points to 56.9%, while overall diversity on its management committee has increased by 20 percentage points to 100%. Microsoft said that Reed Smith is “making great progress in diverse representation among its partners, with more than 43% diversity. Reed Smith is making critical achievements in diverse representation within its firm, so it was a logical fit for the LFDP”.

Perkins Coie Recognized by Intel and Microsoft as Most Diverse Outside Legal Team in the US

Perkins Coie has been recognized by both Intel Corporation and Microsoft as the most diverse outside legal team of 2019. The annual awards – which are made independently from one another – are aimed at encouraging diversity among outside law firms. The awards come as Microsoft announces that it is launching a version of the scheme in the UK and increasing the diversity bonus incentive from 2% to 3% of annual fees.

Intel and Microsoft are among the corporates that have recently put in place diversity quotas. Under Intel’s initiative, beginning January 1, 2021, Intel will not retain outside law firms in the United States that are average or below average on diversity. Law firms will be eligible to do legal work for Intel only if, as of that date and thereafter, they are on a positive trajectory in at least 85% of their law firm Diversity Quotient categories.
firm and the legal industry.

The international law firm in October won the most innovative UK law firm award by a unanimous vote of the Microsoft strategic firms’ peers.

Microsoft launched the UK awards because despite its own progress in increasing attorney diversity, statistics from the Solicitors Regulation Authority show that while more than half of solicitors in the UK are now women, only 29% are achieving partner in firms with over 50 partners. Similarly, these larger law firms have the lowest proportion of BAME partners: only 8% with no change since 2017 (and the majority of that 8% being Asian, with extremely low Black representation). A Microsoft blog announcing Reed Smith’s win asked: “If the partnership and leadership in larger full service law firms do not reflect society, then how are we to make real progress on fostering diversity in the legal profession where diverse attorneys do not see themselves reflected and included in their organizations’ leadership?” It added: “The more we learn about diversity, the more we understand the vital role that inclusion plays.”

Initiatives that helped Reed Smith to gain this double recognition include:

Women’s Initiative Network

Reed Smith launched a global Women’s Initiative Network that aims to effectively develop, reward, engage and attract female lawyers. The network’s PipelineRS programme helps female lawyers to position themselves for promotion to counsel and partner. Reed Smith also offers advice and information on what it takes to develop and own a practice, and helps women find the tools and resources they need to be successful. Reed Smith has also launched a programme to support parents returning from the birth of a child, called ReturnRS.

Wellbeing and Lifestyle

Reed Smith has also launched numerous other programmes. These include a Mental Health Task Force to offer help and support to staff and promote psychological wellbeing, a vendor programme to identify and quantify the diversity of suppliers who do business for the firm, an inclusion group called PRISM that champions inclusion, diversity and LGBT+ engagement, and a LEADERS group that nurtures talent and celebrates the impact made by staff with disabilities.

The Inside View - Interview with Michael Grupp, CEO of Bryter

Nominations are now closed for the European Women of Legal Tech Awards 2020, for the women who are having a major impact on the digital transformation of the industry. We speak to Michael Grupp, CEO and founder of BRYTER on the process of WOT to find out the latest on the thereafter, they meet two diversity criteria: at least 21% of the firm’s U.S. equity partners are women and at least 10% of the firm’s U.S. equity partners are underrepresented minorities.

In announcing the Intel Rule last year, Steven Rodgers, Intel’s executive vice president and general counsel noted: "Today, we call on corporate law departments to also renew our shared commitments to take concrete steps to develop and hire diverse outside teams."

“We applaud Intel’s leadership in championing diversity and inclusion and holding its outside law firms accountable for having diverse and inclusive teams," said Bill Malley, Perkins Coie’s firmwide managing partner.

“We are honored to be named Intel’s most diverse law firm, which underscores our firm’s long-held commitment to diversity and inclusion as core values—not only because it’s the right thing to do, but because it builds better teams and ensures better solutions and outcomes for our clients.”

Microsoft, meanwhile, launched its Law Firm Diversity Program (LFDP) in 2008 and reports annually on the program’s results, including highlighting top performances among our law firm participants.

This year, both Perkins Coie and Latham & Watkins earned special recognition for their diversity achievements and contributions to our program.

Perkins Coie again achieved “Top Performer” for the firm that made the greatest gains across the diversity focus areas for the program.

In the last five years, Perkins Coie has achieved impressive progress against LFDP program goals, growing diverse attorney hours on Microsoft matters by 12.3 percentage points (from 56.7% to 69%), and a 10.3 point increase in overall diverse partner representation at the firm (from 33.6% to 43.9%). Perkins Coie has also made great progress in diverse representation on its management committee, with over 64% of their committee members identifying as women, minorities, LGBTQ+ people, people with disabilities and veterans.

Perkins Coie’s most recent partner class was 41% women and 22% lawyers of colour. Of the promoted counsel class, 42% are women and 17% are lawyers of colour.

The firm has announced that it will donate $2.5 million dollars over the next five years to groups that promote racial equality through legal representation, policy advocacy, and community-based activities. Perkins Coie is also taking additional actions to further improve racial equality and justice.

Latham was recognised as “Most Innovative” for exceptional innovation in efforts to increase diversity and inclusion at the firm.
How Kelley Drye rolled out DocuSign eSignature firmwide in days

By Judi Flournoy, CIO of Kelley Drye & Warren

Kelley Drye & Warren LLP was founded in 1836, and the firm has endured many natural and man-made disasters over its long history. However, none of our past experiences prepared us for the spontaneous operational transformation we would have to make in response to the COVID-19 pandemic. One of the most important elements of this transformation was the firmwide deployment of DocuSign eSignature, which was accomplished in a matter of weeks.

Initial Assessment

In February 2020, we had our quarterly Kelley Drye technology committee meeting, during which the topic of electronic signature came up. We had been considering it for two years, but we had not found enough interest. The firm was in the middle of a major strategic initiative focused on diversity and inclusion at their firm.

The firm won over its peers with two new initiatives intended to create a culture of allyship at the firm and reward firm timekeepers for investing their time in diversity and inclusion efforts.

While in the last fiscal year, participating firms were eligible to earn a full bonus of up to 2 percent of their annual fees by meeting diversity targets in each of these areas, Microsoft said it is upping that to 3%. One third of the bonus that firms are eligible to earn will be allocated for growth in representation of African American, Black, Hispanic and Latinx peoples within the firms’ partnership ranks.

It is also widening the scheme to 20 additional firms – not just strategic partner firms.
firm already had a simple electronic signature function on the Microsoft Word ribbon—that enabled internal people to sign documents, and that had been sufficient so far.

Since the de facto standard was hard copy signatures, most clients would come into the office to sign documents or the documents would be sent to the client via messenger or FedEx. We were not getting requests from our clients for an electronic option. We tabled the idea of electronic signature at the committee meeting and planned to revisit it at a future date. Little did we know that in March, everything as we knew it would change, practically overnight.

Pandemic Disruption

On March 16, 2020, because of COVID-19 lockdowns, everyone at the firm started to work from home. Suddenly, we needed to facilitate everything being done remotely. Clients were no longer able to come in to sign their documents in person, and our Word signature function did not support obtaining signatures from outside parties. And yet, engagement letters, deals and agreements had to be finalized and executed. We realized that now was the time to reevaluate electronic signatures, and fast.

I brought this up to the firm’s leadership, including managing partner Dana Rosenfeld. The need was easily understood, and I got the green light to bring the decision-making process forward. Collectively, we knew we had to expedite this project to properly support our attorneys and clients and keep business moving.

Due Diligence

Our lawyers researched the legality of electronic signatures for various areas of law practice and jurisdictional issues. This was especially relevant for areas of law like real estate where there are vast differences between electronic signature acceptance, based on jurisdiction.

In evaluating the players in the electronic signature market, DocuSign eSignature was the best product we saw. It had a great user interface and was easy to understand. These factors were incredibly important since we understood that introducing a new technology while everyone was working remotely would require a unique approach.

Another positive was that eSignature would integrate with NetDocuments, our enterprise content management (ECM) system using WordTech DocMinder, a business partner of DocuSign. When documents are signed in eSignature, they come right back into NetDocuments maintaining the integrity of the client file.

Both DocuSign’s sales and technical teams were very responsive and worked incredibly hard.

Impact

Kelley Drye thinks of technology purchases in terms of cost versus benefit. Our main decision driver is the need of audience — what causes them friction and what we can do to relieve it.

Historically, law firms are hesitant to adopt new technology. We were able to overcome this challenge by identifying an excellent product to meet what was a clear need. eSignature did exactly what we needed it to do.

I believe that eSignature has already benefited the firm and our clients by making it possible to sign documents without having to do so in person, thus creating overall efficiency. We anticipate this trend to continue. Any document that requires an enforceable signature can now be signed in a matter of minutes, conveniently and cost effectively.

I doubt we will ever completely go back to manual/in-person signatures, at least not on a large scale. We are continuing to expand the use of eSignature at the firm. It fits well into our overall plan of greater client engagement and transparency enabled by technology. While some practices such as Private Clients continue to require in-person signature and notary, we anticipate that evolving law will make it possible for clients who must sign their estate documents in person to be able to do so electronically.

eSignature was the right solution that came along at precisely the right time, and DocuSign has been an ideal business partner for Kelley Drye. We know that their team prioritizes the needs of our firm, whatever it takes. DocuSign was there when we needed them most, and eSignature provided the technology to help the firm continue its focus on client service at the highest levels.

Judi Flournoy is CIO of Kelley Drye & Warren LLP and is experienced in strategic planning, development, and organizational leadership.
responsive and easy to work with. We had good communication throughout the process. We brought in a systems integrator WordTech to help with the eSignature/NetDocuments integration using DocMinder. They effectively stitched the two products together in record time.

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**Awards**

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**Litara announces winners of The Changing Lawyer Awards**

Litara in October announced the four legal professionals and organizations who are the winners of The Changing Lawyer Awards 2020. The winners are recognized for their willingness to embrace and drive change – through new technology, service models, or behavior.

Out of the nine finalists for The Changing Lawyer Awards 2020, a distinguished panel of judges selected the following law firm, legal tech company and legal professionals in each category. Congratulations to the 2020 winners:

**Legal Innovator of the Year:** Presented to the individual who has driven the most significant change within their firm or legal department.

**Evan J. Shenkman, Senior Director of Knowledge Management at Fisher Phillips**

**Law Firm of the Year:** Presented to the law firm that has most successfully reimagined the way they serve their clients.

**K&L Gates**

**Disruptor of the Year:** Presented to the alternative legal service provider or legal tech supplier that has most successfully disrupted the broader legal profession.

**Digitory Legal**

**The Lifetime Achievement Award:** This award is independently nominated and judged by the panel and honors a visionary in the legal technology space.

**John Alber**

"This year’s winners for The Changing Lawyer Awards demonstrate true innovation, entailing more than just new technology, but better processes and the effective involvement of their people in that process," said Litara CMO, Julian Morgan. "We believe each of these winners has a great understanding of where the legal market is moving and are pursuing solutions to stay ahead of it."
Let us help you amplify your brand

Through our website, newsletter, mailouts, webinars & events we have an unparalleled array of opportunities to aid you in reaching your target audience.

Contact Lucy at lucy.cheesewright@legalitlexicon.com for more information.

The Future is Bright, the Future is the Orange Rag

The next newsletter will be published on Wednesday 25 November

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