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It has been a year like no other, and we'll all be glad to see the back of 2020, which has brought everything from anxiety to tragedy and, for the lucky ones, a whole lot of boredom to boot. But from a tech perspective, for the legal sector, 2020 was just the kick up the arse needed to shift from out of date working practices to true, albeit forced, digitisation. It has accelerated change programmes from month and years to days and weeks, with exhausted IT teams now more than ever before given the credibility they deserve. And despite everything that COVID-19 has thrown at the legal market, the biggest law firms globally are still doing well thanks to either existing agile working practices or their ability to quickly execute on their business continuity plan. It is a huge testament to their resilience, at a time when businesses across the globe struggle to survive.
It has been a year like no other, and we’ll all be glad to see the back of 2020, which has brought everything from anxiety to tragedy and, for the lucky ones, a whole lot of boredom to boot. But from a tech perspective, for the legal sector, 2020 was just the kick up the arse needed to shift from out of date working practices to true, albeit forced, digitisation. It has accelerated change programmes from month and years to days and weeks, with exhausted IT teams now more than ever at the centre of attention. It is now clear that the smartest use of the space firms have and ensuring that people’s time in the office is coordinated and valuable is going to be among the top priorities. Andrew Brammer, IT and shared services director at Allen & Overy tells us: “In the past year the technology has changed, and in the future, so will the way we use real estate. Yes, you’ll come to the office for specific reasons, not just to do your job, and the office will be tailored for whatever those reasons are.”

Andrew Powell, CIO of Macfarlanes adds: “There will inevitably be a move towards hot desksing and smaller office premises across the sector, but knowledge workers have offices for a reason, and we need to look carefully at how tasks, knowledge sharing, and collaboration are carried out in a hybrid environment with far more working from home.”

It will be important to maintain a focus on what the client wants and needs. At Howard Kennedy, IT director Tony McKenna tells us how the ways the firm is helping clients is changing as they support the need for a COVID-compliant workspace. And Abby Ewen, IT director at Browne Jacobson warns against assuming we know what the client wants, commenting: “I was speaking to a client a few weeks ago who completed a deal recently and said if it hadn’t been for lockdown, they wouldn’t have got here this quickly. There was none of the usual ‘I can’t make this week’ or someone’s train got cancelled. It happened seamlessly because it was virtual. It’s really important that we don’t assume we know what they need.”

In terms of the tech-trends and to-do lists for 2021, collaboration is on the top of the pile. At Fieldfisher, IT director Mabel Harvey is rolling out Teams as a managed service and there has been a massive flight over the year to Teams for telephony and chat, with many looking at how to extend that but nervous of opening up the Wild West. Cripps Pemberton Greenish CIO Jo Owen sums it up when she says of Teams: “That’s probably my technology of choice in terms of what we couldn’t have done without – we’re probably all a bit video conferenced out, but I couldn’t have done it without it.”

What is interesting is that video conferencing is opening up far better ways of communicating – having overcome an allergic reaction to the weekly Zoom quiz, lawyers are realising that it is often far easier to speak to clients and groups in a video chat. Francesc Muñoz, CIO at Cuatrecasas says: “What was amazing and is my tool of the year is Zoom. Digital signatures also saved a lot of issues but Zoom connected us to the teams, clients and families. Senior partners say they are seeing their clients more than ever before.”

We hope you enjoy the issue, and we look forward to seeing you in person next year!

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Caroline Hill, Editor-in-Chief
Andrew Brammer, IT and shared services director, Allen & Overy

What was the biggest challenge of 2020?

The biggest challenge for us was realising that not only did we have to deploy iManage globally in the first half of the year but also deal with the pandemic – all the training had to be recast in days not weeks.

We started running rolling 24/7 training sessions with follow the sun trainers around the world. We were training people digitally at the same time as getting people equipped to work from home.

It has been easier than expected because people just realised that because of the changing circumstances, they had to engage in training in a way they wouldn’t if they had been in the office. One of the trends of the past year is people’s willingness to engage is increasing – there is no doubt that we are a much more tech-savvy organisation now.

I was very glad not to rely on the firm’s old document management system and iManage is working well. Are there things we can improve, of course. But it’s one of the largest implementations they have done and to do it in the midst of a pandemic, it went better than we thought and has served us well during the course of this year.

What other changes have you made during the year?

This year we rolled out 3,000 laptops to those who didn’t have one and that was done in short order. We deployed Teams alongside WebEx and Jabber, all our telephony was already digitised and that was very helpful. Like a lot of firms, we were in that constant game of catch up as each video provider offered different features and we were running along to keep up with that.

The other interesting thing we saw come in was a big acceptance of eSignatures. Users of eSignatures were in the minority at the beginning of the year and now they are used significantly. You see a lot of work being done around “is this document able to be signed with eSignatures?” There has been a tension all year between the need to adopt cloud-based solutions and regulatory, cyber and client considerations.

Were you already set up for paperless billing and collections?

Yes, we were already set up for that and one of the easiest offices to move was our shared service office in Northern Ireland, which had already moved to agile the previous year. Our entire support services centre has been working at home all year and will be until Easter: billing, collections, and payroll can all be done from home.

What has surprised you most about 2020?

The things that surprised us and everyone is how sustainable the shift has been. We went into it as business
continuity crisis management and nobody expected in March that we would still be working this way. What we’ve managed to do, and every other firm has been able to do, is a really positive thing – that to me will be the overriding good thing that’s come out of it. While on a personal level no one wants to work five days from home, we probably also don’t want to work five days from the office and this year will open up opportunities for some flexibility.

Are you looking at what changes you make to your premises for 2021?

That’s a piece of work being led by Edward Mackaness along with a group of partners and others and it’s a really live question – what is it that will make a successful workplace in the future? Some decisions are being driven by lease renewals and others not.

In the past year the technology has changed, and in the future, so will the way we use real estate. Yes, you’ll come to the office for specific reasons, not just to do your job, and the office will be tailored for whatever those reasons are. One of the things you’ll be coming to do is meet colleagues and to see clients and develop strategy – are you coming in to do your emails? I wouldn’t have thought so.

What is your tech product of the year?

VPN really is the unsung hero of 2020. If you can’t manage your network, it really doesn’t matter what other technology or arrangements you have in place!

What is at the top of your to-do list for 2021?

Our three focus areas over the next little while are 1) simplification: understanding how we can deliver our services with a lighter footprint from an infrastructure and applications perspective; 2) data: you’ll see us make more use of data to solve business problems, using the likes of Microsoft Dynamics and Power BI; and 3) Services: building legal tech solutions for our clients and fee earners.

Abby Ewen, IT director, Browne Jacobson

What were your challenges and highlights of 2020?

One of the challenges that I have had is that in February, I took on the operations role as well, after the previous director of change left the firm. It happened just before lockdown and I took on responsibility for printing, post, facilities, catering and secretaries: all of which were significantly affected, and we had to worry about things like who is going to open the post – that was harder than the tech side.

On the tech front, we have a thousand people and a thousand laptops, and we haven’t had desk phones for many years. We use all Dell laptops and Skype for telephony. We implemented Microsoft Teams during lockdown and are transitioning away from Skype, which we’ll get rid of in a couple of months. I think that one of the hardest things for a lot of firms to achieve during lockdown was getting the telephony right but we didn’t have desktop phones so that has made things much easier.

Much like everyone else we have effectuated 15 years of digital transformation within months. People who couldn’t cope with eSignatures have been using them regularly and it’s been fine.

There have been some interesting times: there has been a massive run on wills, which you can’t use eSignatures for, and we have had people from the private client team in the car park arranging socially
distanced signing of wills.

From a tech perspective it’s been fine and the hardest point was July and August when we were planning to get people back to the office, creating one way systems and hand sanitising. It was a massive learning curve but because the firm has a supportive and inclusive culture, they are very good at keeping people informed. We implemented the Fliplet app for bringing people back – it’s really easy.

What continues to be one of the biggest challenges in a senior leadership role is the pastoral care side: making sure that everyone is ok and noticing just as much the people that don’t turn up to the social things as those that do. My sense is that everyone is over 2020 and that people are exhausted. It’s important to make sure that everyone is ok while making sure you are ok as well and can look after other people. That’s the sort of thing I would do anyway but it’s much more intense than ever before.

What new tech have you brought in during the year?

At the beginning of lockdown we had to finish a Windows 10 and Office 365 rollout, bring Exchange online and move to Teams. The power of Teams is that everything integrates with it and if you create a Team, that creates a group in Outlook. But we have a very strict process to get a Team approved – we will work out whether it’s a valid request and also have a matrix of what goes where so that we don’t start to fragment or lose control of our data.

Perhaps not surprisingly my product of the year is Teams.

What are your plans for 2021?

We’ve started to have conversations with people about what happens next year. We’re still in pandemic mode, so people’s attitudes around traveling are mixed and our standpoint is that we will give people the freedom to work where they are most productive: some might be five days in the office and some five days at home. People are not in any position to make decisions right now but beyond Easter, we will have a better idea of what it looks like. The struggle is how to line up business support when you don’t know what that looks like. We will need to apply better understanding of how people work: if you have half the people in the meeting and half on Teams it’s often a bad experience. The future is hybrid, and we are all going to have to re-jig our tech to make it work better.

There are plus sides of this new way of working. I was speaking to a client a few weeks ago who completed a deal recently and said if it hadn’t been for lockdown, they wouldn’t have got here this quickly. There was none of the usual ‘I can’t make this week’ or someone’s train got cancelled. It happened seamlessly because it was virtual. It’s really important that we don’t assume we have to go back to the office because the clients want it.

Jo Owen, CIO, Cripps Pemberton Greenish

What were the challenges and highlights of 2020?

We’re a Citrix house and we were already up and running so that was straightforward. Like most firms, we got in gear a couple of weeks before lockdown and I was surprised by the number of people who didn’t have access to a computer at home. The challenge was making sure everyone had the right equipment, but we did it. We got a lot of respect in terms of the support we provided – I can’t think of many occasions over the years where people have said to IT teams ‘thank and we really appreciate what you do,’ so that was great.

Another high was that we got Microsoft Teams rolled out overnight – we’d done some testing pre-Covid but we rolled it out over the first weekend we were in lockdown. That’s probably my technology of choice in terms of what we couldn’t have done without – we’re probably all a bit video conferenced out, but I couldn’t have done it without it.

What collaboration tools are you using?
We’re using Teams video conferencing and chat currently and it’s been really well adopted. We’ve used it for collaboration for a couple of projects but because we have Citrix there are integration challenges and we’re looking at what next for bringing Teams into our Citrix desktop.

For clients, we’ve expanded the use of HighQ – our transaction services team are leading the way on that. We also started thinking about DocuSign for eSignatures at the start of the year and are now using that quite heavily.

**Were you already set up for paperless billing?**

Peppermint, our practice management and client relationship management system, is live and includes billing, so it takes care of our onboarding and finance process. We now have automated bill drafting, saving us many man hours and we’re just launching a new onboarding hub with Peppermint.

**What is top of your agenda for 2021?**

The next step is embarking on an initiative to review our operating model and how to put the client at the heart of service delivery and delivering the solutions that the clients want. We have four key objectives: providing a consistently outstanding service; putting the client at the heart of what we do; unburdening the fee-earner; and embracing digital. It’s embracing digital that will help us to set the roadmap for where we focus next in terms of IT.

A lot of people want human engagement – a recent internal survey revealed that 80% of our people want to work flexibly and 20% want to come back permanently. The challenge is to make sure that we can keep the teams together wherever they are, and we’ll be looking at how that works.

Big City firms are able to drive their costs down by using teams of paralegals or using technology to drive efficiencies. This year has taught us that we can do this too and our size means we can be extremely agile. We were able to quickly ramp up tech such as Teams and DocuSign and now the internal appetite for more technology is huge: the challenge is to prioritise those demands using a client-centric approach.

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**Francesc Muñoz, CIO, Cuatrecasas**

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**What have been the highlights of 2020?**

One of the main points is that we were quite ready for the situation because three years ago, we decided to move to become a complete laptop firm: from collections to assistants to IT to lawyers, everyone has a laptop. We decided three years ago that we wanted to engage in this collaboration model. So, when the pandemic hit, we moved home on March 12th on a global basis. The plan was to deploy Zoom team by team, but no, it ended up being the fastest change management ever for 1,800 people!

What was amazing and is my tool of the year is Zoom. Digital signatures also saved a lot of issues but Zoom connected us to the teams, clients and families. Senior partners say they are seeing their clients more than ever before. We were using Skype for Business but more for chat. The performance and quality and ease of use of Zoom has been great. We weren’t using it at all before COVID but tested and deployed it very quickly.
The use of Zoom has been great. We hadn’t used it at all before COVID but tested and deployed it very quickly. It’s a top tool that you can use from your smart phone, iPad and laptop. Without Zoom we would have deployed Teams, but it would be the difference between just surviving and improving on what you were doing before.

We are expecting to move to a hybrid world in the summer of next year, so this technology will stay, and we are becoming a hybrid firm: we are thinking of moving to a 60/40 model because interaction is key, and people need to see people in the corridor.

**What tools do you use for digital collaboration?**

We have Yammer, a SharePoint intranet, and NetDocuments and its collaboration spaces, which enables us to connect with the client. We have also new technology; French transaction completion platform Closd, which we have been testing and now are starting to use. Lawyers have realised that they can work without paper – we kept printing facilities open in case it is needed for court, but they haven’t really printed at all.

We have always had eSignatures in place and been pushing lawyers to use them, but it didn’t happen. Then suddenly they said, ‘what is that technology?!’ It’s a Spanish startup called vIDsigner and it is working well.

NetDocuments is great for working with clients and we can share documents and files. We went live with NetDocuments in January 2017 we already had the culture to store and save everything in the cloud. We were laptop users and had all the VPN in place so we can work from every place and in that respect NetDocuments hasn’t been a change from that way of working. But what is really interesting we made a big effort two years ago pushing IT training and have a team of six: they haven’t worked the floor during these months but had a campaign online with Zoom – they have trained on anything from digital signatures to CompareDocs – we switched from Workshare to CompareDocs without pain.

**What have been the biggest challenges of 2020?**

The challenge was to say ‘this is going to work’ because we’ve never been the whole firm out of the office - this was business continuity planned but we have never done it. Security was a key thing: how were we going to patch all the laptops when out of the company? Previously when people came to the office and connected, we would deploy the patch in maximum one week but now it could have been months. We had to change the architecture to be able to deploy patches to every single computer outside of the network without affecting the performance of the others.

Then it’s about the people and teams and how to connect with them and help them – people who are working with kids or in shared spaces. These are difficult situations to get involved with and we have had new employees during COVID and the onboarding process is not easy to do fully digitally. But we have improved our processes and have in mind to be really connected to people.

**What are your strategic priorities for 2021?**

Our main strategic drivers are:

1. Digital Workplace
2. Data Analytics and AI
3. Cybersecurity
4. Agile working (we’re leading an internal initiative, and this is beyond the classic IT role)
5. Digital training

I believe there are going to be two biggest trends. The first one is because the pandemic has changed the ways of working, so remote working is going to be the top trend for most firms. The second biggest trend, is data analytics.

Mabel Harvey, IT director, Fieldfisher
What were the biggest highlights and challenges of 2020?

I can’t believe what we’ve been through this year with the pandemic, but from an IT perspective it’s been business as usual. When we went into lockdown, we were so lucky being able to pick up our laptops and work from home. After all the years of investment in IT this year really has been the test.

We’ve had Skype for Business since 2014 and have been working in an agile way, so everyone could take their laptops and headsets home and work as normal. The majority of people in the firm had laptops, both the Fee Earners and business support as it gave flexibility when working in different parts of the office or in other locations. Trainees move seats multiple times and year and we found it was a much more efficient process if they had laptops. There were just a few people in the document processing team that didn’t so we had to get a few laptops out to their homes. One challenge we had related to the Intel microchip issue which made buying laptops problematic, so we were fortunate that we didn’t have many to buy.

It has been so rewarding: a partner wrote to me to say, ‘I don’t like working from home, but I’d like to thank your team for making it so easy.’ People have really started to understand what we do and why the investment in IT is necessary.

The other piece is around data centres and cloud technology: we’ve had infrastructure as a service for about nine years and knowing that it is centrally managed was reassuring as during lockdown, I didn’t have to send my team on site to undertake maintenance. If you could write your IT continuity playbook for the pandemic, this was it. Of course, there have been nervous moments: we’ve never had 1,500 people working remotely on the VPN at the same time and we’ve had a few moments with that.

In 2019 we upgraded our multi-factor authentication toolset so people working remotely can use an app to authenticate, it meant that people were familiar with it, so the timing couldn’t have been better.

The challenge for us was around equipment: as the initial spell of working from home was longer than had been expected we had to get people the right equipment so they could be productive – so monitors and chairs for a home office setup. We had to quickly find a solution to this logistical challenge. We worked with a supplier called Probrand who set up an online marketplace so people could go and select items up to a budget and add their own address, so we didn’t need to worry about GDPR. My PA who does procurement spent time setting this up and it was worthwhile. Similarly collecting equipment from leavers was something we worked with HR and facilities on.

What is your product of the year?

I have two: for video conferencing we had used Bluejeans for years, but primarily in meeting rooms, so we had to roll that out on our desktops as we found it more stable than Skype for large meetings. The deployment was efficient, and we ran remote training sessions which gave everyone the information they needed to use this new tool.

The other one is DocuSign – we had it before the pandemic and it wasn’t widely used, but adoption increased as people have limited or no access to printers and/or scanners and were unable to physically sign documents - it is used more widely now. Before COVID people would print, sign, scan and send – now we wonder why we didn’t make more use of DocuSign sooner. Electronic signing is not yet acceptable for all types of legal documents so we do have to be clear how and when it can be used.

And what is top of your agenda for 2021?
We’ve just undertaken a procurement, which is for Teams as a Managed Service – for us Teams will be the first steppingstone into O365. I am looking forward to implementing a collaboration tool in the firm, as well as upgrading our DMS. Email is overused and Teams brings opportunities to collaborate more effectively with our practice groups, who are often working across multiple sites.

With Skype for Business, we use telephony, instant messenger, document sharing and video conferencing – but I don’t want Teams to be seen as just a replacement for Skype. In the collaboration space we will have an opportunity to engage with the business on projects and let them have an input into the design of their desktop: we are moving to iManage Work 10 and in terms of how we configure it I want our user base to share their innovative ideas - the way people do on social media. Moving to O365 is interesting, however – we need to do some analysis around our security requirements, as once you open that Pandora’s Box the governance framework has to be watertight.

Tony McKenna, IT director, Howard Kennedy (having joined from GowlingWLG in June)

What are your highlights of 2020?

The personal highlight for me of the past year was being home and enjoying the fruits of my labour over the past 35 years, although I feel quite selfish because I know some are having a real hard time. The last four years I’ve spent a few nights a week in a Birmingham flat, whereas now I’m home with my family all the time, which has been great.

I’ve never been a great worker from home – maybe once a month – I’m a verbal communicator and you don’t get that constant people engagement remotely. What’s different now is that because everybody is at home, meeting etiquette on the virtual platforms has been enforced. Everyone recognises that when one person talks the others listen. Virtual roundtables have been brilliant and are easy to chair. Colleagues seem to be more engaged, possibly because you’re on camera – people feel they have to pay attention more than in a physical meeting where they can drift off to email on their phone.

For me at GowlingWLG, we already had Zoom enterprise, laptops for everyone and a well-established firm wide agile strategy, so the transition was quite smooth and there was no panic. We saw a significant increase in the use of DocuSign and digital ways of working went through the roof – Zoom and DocuSign are up there with Microsoft Teams for me as vendor of the year.

Of significant benefit to GowlingWLG was that we had went enterprise Zoom early 2017 – everyone had it, used it for years for video and voice conferencing and knew how to keep it secure. What COVID did was forced Zoom to really look at security and expand its product. Talk about elastic capability to go from 10 million to over 200 million users in a matter of week, and most importantly, Zoom demonstrated absolute transparency over their challenges and the roadmap to overcome them.

My most developed platform of the year is Microsoft Teams – it went from something that Microsoft were just doing to a top priority for them and what would normally have been a slow burner really now is the most developed platform of 2020.
By the time I arrived at Howard Kennedy in June, everyone had already been given laptops and the firm had created a working from home pack of a monitor, mouse, keyboard, laptop and support.

The Howard Kennedy IT team had enabled Microsoft Teams video before I arrived, and following my arrival we enabled chat for our Business Service quickly, and for the legal teams more recently. We enabled softphones last month, achieving all voice, chat and video through Microsoft Teams unified platform. We’re now adding video capability to a number of meeting rooms, readying desks for laptop users and removing desk phones to ensure a smooth return to the office for colleagues when they are ready. We haven’t enabled file sharing yet as it’s quite a change in working practice and needs education on working practices before we can enable the platform.

We’re currently upgrading Windows10 and taking the opportunity to migrate to O365 and moving to Exchange online. It’s like a domino effect. And early in the new year we are moving to inTune mobile phone management - another product by Microsoft – and rolling out new mobile phones.

**How has 2020 impacted how you help clients?**

Colleagues want stability, reliability and security and what 2020 has showed is that we need to use the technology we already have to deliver improved ways of working for colleagues and to help clients solve their problems. Where clients can’t get into the office or don’t have the technology, we have been able to help. Some clients have used our facility, which is really COVID compliant and been open since August. We have conduct virtual hearings, facilitated client meetings and closings.

**Will the way premises are used change in future?**

Premises is one of the biggest areas of focus and going forward it will be a hybrid environment. As I see it, there will be three types of worker: 1) work delivery predominantly in the office; 2) work delivery predominantly at home; 2) work delivery both in the office and at home. What we’re looking at now is how do we make the office a place that colleagues want to go to, because we feel that face to face collaboration is an important part of our culture.

We’re discussing it now but I’m pretty confident it will mean change to the layout. Not like a few years ago when it was all about cool booths and jazzy colours, but more fundamental changes.

**What is your forecast for 2021?**

Certainly, the office space – what is everyone doing with the space once we get to the situation where people can make choices about traveling and the office needs to be a place that everyone wants to go to, not are forced to go.

The focus will also be stability and reliability in the way we work, in optimising the new way of working and how we do business with the client and making sure what we’re doing is safe, reliable and secure.

Our top priorities are:
1. Stability and reliability. A general upgrade of our technology stack to current versions.
2. Cyber security. A programme of improvements and strengthening the team.
3. Move to and exploit O365 and MS Teams.
4. Review and refresh matter lifecycle tools supporting the core value chain of the firm.

**Andrew Powell, CIO, Macfarlanes**

What were the challenges and highlights of 2020?

The thing that surprised us - in common with a lot of firms, because I’ve had this chat with other ILTA people - was having to explain to people in the first week of lockdown how to use remote access when it’s been in place for years. Things like how to connect a Surface Pro to WiFi or log in to Zoom.
Part of that is because we’re a single site firm and that allows a way of working that’s a luxury to many – if you need to speak to someone, you just go and do it. Almost everyone comes into the office every day, most work long hours and if they work from home as well, that might be by iPhone rather than taking a Surface home. COVID has comprehensively changed the way that our people work.

There was a great Harvard Business Review article on the different phases that people have gone through during COVID: emergency; regression; and recovery. We run on adrenaline during the emergency phase, then slump, then pick up when we know we’re near the finish line - but we don’t know where the finish line is with this, and that can make people tired and nervous.

People struggled for the first week because they were suddenly doing things on their own when they were used to having a team around them - but one of the benefits that we will hopefully retain is that people’s self-sufficiency has gone up and they have gained hours a day from not commuting.

From an IT point of view we’ve realised that most of the team can do most tasks from anywhere, but we have struggled with collaboration and communication. Video chat doesn’t replace the ability to go and chat to someone in person, even less so a group.

The challenges where we have needed people on site have mostly revolved around projects that involved bits of kit that people touch. We had already started projects to replace all our iPhones and Surface Pros, but the logistics of that are harder in lockdown. Not all roles had Surface Pros initially - we ended up sending training room laptops home to secretaries. This time we’ve rolled them out to everyone.

Other than that, the teams don’t need to be in; our infrastructure and service desk are not on site any more so there is no need for those teams to be there, the same is true for apps and dev - though they all benefit from face to face contact for collaboration and knowledge sharing.

We have had some surprising wins too - Training sessions over Zoom have worked really well, and we’ve done our ISO27001 audit entirely remotely using Zoom and Facetime, including a remote physical security audit.

2020 has brought home that work is something you do it’s not somewhere you go and it depends on the task as to whether it makes sense to be in office or not. If it is going to help to be aware of body language, you need to be in. But to sit and review a contract I’d rather be at home with the phone switched off than sitting in an open plan office.

How is it working out implementing Aderant remotely?

A year ago, people might have questioned my sanity if I said we were going to do a remote practice management implementation and I’d have some sympathy with that view. But the project is working out really well and we have a project team that are based in several UK locations as well as the US.

Often PMS project workshops are a day long when they happen in person, but we’ve cut them to half a day and spread them out. You can’t concentrate in the same way for six or eight hours over Zoom – but it also raises the question as to whether it was effective to have all day meetings anyway.

I’ve had a few discussions with firms who have postponed their PMS selection process during lockdown and I have sympathy with that, but for us it was important to continue and I’m glad that we did.

What is your top tech of 2020?

Our highlight product of 2020 is Zoom. We put it in in October 2019 but had hardly had any usage in the first three months, but by April, we were using it for around 8,000 meetings a month.

We support both Teams and Zoom but favour Zoom because our meeting rooms are Zoom equipped and it makes sense to have a consistent platform.

The summary for me is that there are such huge opportunities arising from the last nine months and we must try to retain some of that amazing progress and not revert completely to the way things were a year ago.

What are your priorities for 2021?
The expected priority for 2021 is our PMS and everything that goes with it, including the workflow around the various business processes that have the PMS at their centre.

The unexpected priority is agile working: it’s all well and good giving someone a laptop but we need to make sure we are providing the very best client service. Once we are past the limitations of social distancing, what should an office look like? There will inevitably be a move towards hot desking and smaller office premises across the sector, but knowledge workers have offices for a reason and we need to look carefully at how tasks, knowledge sharing and collaboration are carried out in a hybrid environment with far more working from home.

Agile is about setting out what you do in an office and what is coming out loud and clear is that if you are a trainee or a new recruit, it’s harder to learn over Zoom than being sat in an office with your colleagues. The flip side is that some people absolutely thrive on working from home.

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**The Vendor View**

*We asked a handful of vendors for their view of the highlights and challenges of 2020 from a law firm perspective, as well as where the gaps in technology were and how firms can capitalise on 2020 to effect transformation going forward.*

*On our vendor panel was:* Peter Groucutt, Managing Director, Databarracks; Keith Lipman, CEO & Co-Founder, Prospereware; Derek Southall, Founder & CEO, Hyperscale Group; Michael Warren, Vice President, Client Development & Intake, Wilson Allen; Greg Murphy, VP, Innovation, Wilson Allen; and Sheila Gormley, Executive VP Legal Solutions, Repstor.

**What was the biggest tech highlight or achievement of 2020 from a law firm perspective? [And also, corporate counsel if you work with in-house teams?]**

**Peter:** When we look back at 2020, we'll say it was the year that changed how firms operated. The technology wasn’t new but 2020 forced change. A small number of firms already had progressive remote working policies and the technology to support it but in 2020 it became a necessity.

Business Continuity Practitioners have been advocating cloud computing and remote working for a long time because it significantly reduces two of your major risks – the premises and your IT.

One positive we can take from this year is that the changes firms made have benefits far beyond the pandemic and any lockdowns. They’re more flexible and more resilient.

**Keith:** The accomplishment of the year is the support of long-term remote working. The impact of the accomplishment leads to the highlight of the year that firms need to learn to deliver their services differently from a technological perspective. This is also better known as digital transformation. For many partners, the need to work differently was crystalized with the realization that they could deliver matters without an assistant outside their door or associates in the next office.

Microsoft Teams and Office 365 provide a new technology infrastructure that supports firm-wide digital transformation. As we end the year,
many firms are working to understand how this new and rapidly evolving platform will impact their firm and facilitate remote work.

Derek: We have been working with a global corporate in completely enhancing and transforming the way they contract. Goes straight to top and bottom line. Really exciting with huge returns.

Sheila: The pace with which firms have adapted to a new norm of online meetings and online service delivery has been very impressive. They have achieved two years’ worth of digital transformation in just 2 months through having to enable their fee earners to work remotely. The market and suppliers rose to this unprecedented challenge. Here at Repstor we are hugely proud that we’ve been able to continue to implement our solutions for Clients remotely and have seen a number of successful go lives with law firms and corporate legal clients alike.

Where were the biggest gaps in technology? How much progress have law firms made in filling the gaps? Provide examples if you can even if on a no-name basis.

Sheila: Law firms typically have a lot of legacy technology, point solutions. Making these systems accessible remotely and during the pandemic was difficult for many firms. So system consolidation became key to address this. Conversely, the speed and adoption of Cloud technology, such as Microsoft Teams highlighted gaps around the need to apply appropriate governance and control to these types of solutions. That’s where we come in!

Derek: The innovation market despite being more mature has gaps. People still seem to still be struggling in making innovation (and business transformation) happen. There is still too much focus on product rather than capability. Too much emphasis on rolling out generic products than innovating. Too many small teams working on isolated products rather than sustainable innovation. A small group of firms are making real progress though.

We are increasingly working client side and are helping in house teams with tenders. There is a real step change in how some firms are presenting themselves. Their offerings are very solutions led delivered by multiskilled terms – much more like how the big 4 present themselves. The days of people simply cutting and pasting stock answers have gone.

Keith: Understanding and leveraging Microsoft Teams is the biggest gap that firms need to solve. MS Teams is not just about chat and sharing documents; it also includes task management, no-code/low code databases, lists, and lots of third party add-ins.

For firms deploying MS Teams for matters, they will need to solve some basic gaps:
- Map Teams to client-matter numbers
- Enforce ethical walls
- Manage external user access with appropriate permissions
- Ability to save important conversation threads as separate documents
- Archive the entire Teams when the matter is over
- Integrate with the DMS
- Support matter file transfer, legal hold and disposition policies.

Michael: The biggest technology gap we see is around how firms use data to make business decisions. We are operating in a world of increasing and increasingly diverse competition so now it’s more important than ever for firms to get it right. Particularly around marketing and business development, law firms have relied on hospitality and in-person interaction to build and maintain relationships. Going forward, it’s likely that firms will continue practices developed during lockdown. Therefore, they’ll need to rely more on technology to make and maintain connections. Outreach efforts and operational decisions need to be based on data derived from key points throughout the client engagement life cycle.

Having a system where they can quickly and easily find out “who knows whom” is critical. To that end, a CRM system has so much potential; but collectively, firms need to understand that maintaining contacts is only one part of it. If we’re ever to derive real value from CRM, we have to capture information about the people we know, the meetings we have, the work we do best, who our best clients are, and the most valuable information about those clients that can help us grow our business. Therefore, in 2021 analytics around client relationship management, fueled with data from multiple rich sources, will come to the forefront and be more important than ever.

How has COVID impacted law firm IT budgets and do
you see that changing?

Keith: The start of the pandemic had many firms pull back their IT spending. However, we see now that many of those firms have started spending again with a focus on technological solutions to address their remote work and governance needs.

Sheila: Some firms have been cautious with their budgets given the uncertainty they are facing while others have increased them to respond to the compelling need to transition to Cloud and to consolidate systems. Some firms have diverted budget from Real Estate to IT to fund this.

Peter: Our experience has been that budgets haven’t significantly changed. At the beginning of the year, when the first lockdown was introduced, inevitably projects were put on hold as firms waited to see what the impact would be. Quite quickly, those projects started again. We might see that change next year when the knock-on effect begins to flow though the supply chain affecting more clients.

Derek: The right answer is that more should be spent on tech and KM at the expense of other areas like real estate. This is happening but sadly not as much as I would like to see as some are still reporting static or reduced budget – in fairness though we are still very much in the thick of the covid storm albeit many firms have performed better than anticipated. We are working with some firms though who are really looking to remodel how they deliver and their operating platform. Some of this is being driven by management which is great to see.

Will the elevation in the status of tech and IT teams we have seen this year stay for good? If not, why not?

Derek: IT teams have really performed – as has the software market. I would very much like to see this continue and for this role to morph into changing organisational design. This is happening for some but sadly not across the Board. Equally some innovation people have been seen as real heroes in the pandemic but for others their contribution has been seen as more questionable.

Keith: IT teams that support transformation will always be highly respected.

Peter: This should be an objective for IT teams next year, to maintain that status. It was odd that so many were surprised by a pandemic, despite it being at the top of the UK, London and community Risk Registers and in the World Economic Forum’s Global Risk Reports. That blind-spot highlighted the recency-bias we are all susceptible to. We have short memories and tend to underestimate the risks we haven’t experienced recently.

Unfortunately, some will forget that the people who kept firms productive (or more productive) were the tech teams.

IT teams proved that when they have the will and intent of a firm behind them, they can make changes and adopt new technologies in a remarkably short space of time. We’ve seen this year what IT can do when unencumbered by some of the organisational barriers usually in place. IT needs to remind the firms of just how much they can achieve when given the resource and scope to lead.

Sheila: Many firms have surprised themselves at how much they have achieved in digital transformation terms in a very short period. Once the immediate pressure is off we expect firms to draw breath, ensure that all the changes they carried out are in pace, conform to their risk, governance and compliance standards before planning the next stage in their IT transformation but I also hope that we don’t regress into a world where change takes years!

What changes would you like to see legal organisations undertake in order to effect meaningful transformation?

Michael: Law firms have an unparalleled opportunity to redefine how they measure client engagement and how they use data to make strategic decisions. Artificial intelligence, machine learning, and other technologies are available to law firms to study data that was once inaccessible and help them to make better decisions. It’s time for the legal sector to seize this opportunity and drive innovation in the way they work.
Best practice in the past was to push all client engagement data to the CRM system. But by combining data science with master data strategies, that is no longer necessary. You can build a Power BI dashboard using Excel, for example, without having to create a massive data warehouse before you can deliver a meaningful output.

Keith: Firms today need to focus on business process design. This will help drive firm-wide transformation, all while having the necessary processes in place to support such efforts.

Derek: I think there are several and have recently written a piece on it - 2021 Business Planning: The 10 “Must Haves” for a Digitally Savvy Law Firm — Hyperscale Group Limited. For me the biggest three would be: 1) Sort out your MS365 strategy; 2) Fix your operating platform and the “missing middle” 3) Focus and understand what your lawyers actually do. Start looking at actual legal tech rather than operational tech with no legal in it. The latter has had far too much focus over the last few years.

Sheila: We would like firms to recognise that this past year has shown how quickly we can effect change and how adaptable our users are to it. We also see that firms are challenging the legacy vendors to ask more questions like – “Can I achieve this with Microsoft 365?”. We hope to see these trends continue. Our other aspiration is that firms will continue in their willingness to explore the innovation/value for money offered by smaller, more agile vendors in the SME technology community.

What will or should be the hottest trend in 2021?

Sheila: For us, how Law Firms can best leverage Microsoft Teams is the hottest topic on the agenda for 2021. Almost every firm we talk to (in Legal and wider professional services) is putting Teams Governance and external collaboration into their 21 budget. Consolidation and transition to cloud first tech will continue at pace.

Greg: To counter economic fallout from the pandemic, now is when a data-backed business strategy is critical. However, many practitioners rely on antiquated data models that only factor in practice management system (PMS) data to inform strategic decisions. Performing analytics only on a limited data set can obscure full visibility of strengths, weaknesses, opportunities, and risks. This limited visibility fails to provide information related to the root cause of outcomes for clients and matters in financial performance and client satisfaction. There are newer and much better options available using data, and likely software, firms already own.

Prominent technology vendors have made tremendous leaps forward when it comes to innovating the use of analytics and information captured from intake and time entry among others, to augment the very rich data available in the firm’s PMS. This data can be combined and visualized more easily using AI and machine learning to support strategic business decisions. Doing so can be less complicated than firms may think, especially for those trained in data science.

Derek: This has to be the year of MS365 in legal (plus the suite of capability behind it like AI, Digital Dictation, Power Automate etc). We work a lot with corporates. Generally they have been quicker to embrace MS365 than law firms who have perhaps had more legacy to deal with. The capability is huge and in practice this tends to lead to a real change in outlook and a massive diminution of your tech stack. You need a clear strategy though – what products will this replace too? Firms need to have the answer.

Keith: To facilitate remote work this year, we have witnessed an unprecedented rise of 400% in daily users for Microsoft Teams. Based on that, Microsoft Teams will continue to remain the trend for 2021 too.
ROSS to shut down PLUS issues counterclaim against TR

Legal research challenger ROSS Intelligence announced on 11 December that it is to shut down its operations as of 31 January in the wake of a ‘David v Goliath’ lawsuit by Thomson Reuters alleging copyright infringement. In a follow up announcement on 14 December, ROSS announced that it has filed its own counterclaim against TR.

The statement issued on 11 December said: “We have made the difficult decision to shut down operations at ROSS Intelligence. As of Monday of this week, we have no longer been accepting new customers. As of January 31, 2021, the ROSS platform will no longer be available. Between now and then, our priority is to help our current customers transition to other services.”

ROSS was founded six years ago by Andrew Arruda and Jimoh Ovbiagele and set about democratising legal research.

However, in the spring of this year, Thomson Reuters and Westlaw brought a law suit against ROSS alleging breach of copyright, a claim which ROSS has consistently denied. Thomson Reuters’ case revolves in part around the fact that ROSS accessed Westlaw via a third party, Legalease, which has settled with TR in an earlier case. As a competitor ROSS is prohibited from accessing TR’s content. However, ROSS says it contracted with Legalease to provide legal research to train its AI and was not aware of where the raw data came from.

The ROSS statement on 11 December said: “When the news broke, we were grateful to receive so much community support. However, just as Westlaw devised it to be, this ongoing suit has been heavy for ROSS to bear. Litigation is expensive — no matter how speculative the claims against you nor how worthy your position. With our company ensnared by this legal battle, we have been unable to raise another round of funding to fuel our development and marketing efforts. Our bank account is running out, and we must cease operations in the New Year.

“ROSS will continue to be available until January 31, 2021. Each customer will be able to export their personal data, including all data from their saved folders, beginning in January. We will be working with our customers to transition them to other services — including platforms by our friends at Fastcase, vLex and Casetext.”

Despite shutting down its operations, ROSS said immediately that it would continue to fight Thomson Reuters’s claim, commenting: “Although we are out of funds for our operations, ROSS has insurance for our litigation costs. The company will continue as a going concern so that the facts at the heart of this lawsuit are brought to light and so that Westlaw’s tactics — using litigation as a weapon and stifling competing — do not go unchallenged.”

Tech

Qualter says that the managed services team is entirely agnostic about the technology that it uses and has a team in India whose role is to continuously review new technology. While the team often uses iManage RAVN, Relativity; Brainspace; Thomson Reuters Contract Express and HighQ, Qualter says: “We work with all the names you’d think of — where we come at it from a different angle is that we can spin up on any platform and are constantly scanning and testing technology, so we know what the best tools are.”

In the results statement yesterday, the DWF board referenced its recent selection of peppermint technology’s case and matter management platform and Qualter said: “We’re looking at it and seeing where we go with it — so far things are looking good. Our vision is to get to a system that will work for all the different types of business — if we can get onto one system that does everything great, although we have very different businesses, such as commercial and insurance, so we may not. We chose peppermint because it has the capability to flex.”

IT and Ventures falls within managed services

Part of DWJ’s strategy is to create a holistic, joined up business services culture and it is no coincidence that DWJ’s legal technology function now sits within managed services, as does its innovation arm DWJ Ventures.

Qualter says: “We decided that because managed services is client facing and we can listen to and pull in what the clients need, let’s put the other functions within it.”

He adds: “We’ve spent a lot of time making Mindcrest one holistic division — our view is that technology is a capability. We can use any legal platform or tool that out there, so we’re technology agnostic, but doesn’t mean we’re not proactive.”

The future growth of managed services

Familiar to other firms with alternative legal services captives, the managed service team disaggregates a project or deal into component parts and builds a playbook around it, using historical data to work out optimal processes.

While DWJ has long been run in a more corporate way than most laws firms and floated on the London Stock Exchange in March 2019, use of managed services is nonetheless optional as in other firms. Qualter said: “I have a great appreciation not just about saying ‘thou shalt do this’ — you have to win hearts and mind and we’re investing a lot of time speaking to partners.”

Heavyweight hires such as Craig Chaplin, now director of managed services and formerly DWJ’s UK head of commercial and competition, are helping to make sure that the team speaks the same language as its lawyers to drive change.

However, what is also in play is a transformation programme signed off by the executive that agrees over time what sort of work will come to the managed services division.

The growth in Pune is definitely one to watch: DWJ has a hybrid site and will be early adopter to GDP — in terms in
Using litigation as a weapon and stirring competition — do not succeed.”

On 14 December, ROSS filed its own counterclaim, meaning that TR may not be able to withdraw from proceedings even if it were minded to. The counterclaim is based on the fact that case law is publicly available in the United States and that TR has not contributed copyrightable content to Westlaw.

Thomson Reuters has yet to return a request for comment.

DWF credits alternative services for 15.4% revenue growth

UK-listed law firm DWF has seen its HY21 revenue increase by 15.4% to £167.6m and its profit rise by 17.1% to £24.7m, crediting in large part the growth of its managed services division and tech-led ‘connected services’ for the results.

DWF acquired long-established managed legal services firm Mindcrest in March 2020 and Spanish law firm Rouaud Costas Duran in December 2019, with both contributing significantly to non-organic and organic growth. Mindcrest was founded in 2001 in Chicago and has around 500 staff in Pune, India. DWF said in its results statement on 10 December it will double that figure to 1,000. Connected services, which are client-facing, tech-led services, grew by 19% over the last half year.

Speaking to Legal IT Insider about the growth, DWF managed services CEO Mark Qualter, who joined in June 2019 from RBS, said: “Managed services is becoming more a part of what the partners in the business talk to their clients about. We have fully functioning capability.

Work comes from partner referrals as well as work won directly from going to market, and Qualter said: “What we’ve done is segregate the legal workflow into advice and process. We don’t do advice; we pick up what effectively is process and our job is to optimise that.”

He adds: “The underlying essence of what we do is people, process, and technology. General counsel face a new suite of challenges: how do they measure performance? How do they restructure their business? How do they keep up with legal technology? What’s all this about data analytics? All those things are part of the value we bring on top of the high-quality advice provided by DWF’s lawyers.”

Client wins

While corporates are still proving reluctant to shine a light on their managed services deals, one of DWF’s biggest and best-known wins is BT, a strategic partnership that Qualter fairly describes as “progressive.” Announced in July last year, the five-year deal has seen around 40 lawyers from BT’s in-house legal team transfer to DWF, which is providing BT’s insurance and real estate legal services through its managed services arm. Qualter says: “That project is live and has been running over 12 months now, and we’re moving to year two, out of ‘integration and change’ and into ‘BAU’.

The managed services team has otherwise won chunky

Five UK lawtechs chosen to join first Lawtech Sandbox Pilot

LawtechUK, the government-backed initiative within Tech Nation to help transform the UK legal sector through technology, on 8 December announced the five applicants selected to join the first group of participants of the Lawtech Sandbox R&D initiative. Notably two are in the smart contract space.

The cohort joining the Lawtech Sandbox Pilot are:

- Amplified Global – Amplifi uses machine learning to make complex information such as terms and conditions and regulatory updates easier to understand. Consumer facing, it helps customers navigate information based on a profile of their understanding and provides an intelligent audit trail.

- Clause – Smart document provider headquartered in New York with teams in San Francisco and the UK. Clause’s strapline is that it is on a mission to move digital business beyond eSignature and incorporate and automate all business processes. Clause founder Peter Hunn is also founder of the Accord Project, which is a non-profit developing an ecosystem and open-source tools for smart legal contracts. Tech Nation says the sandbox has the potential to demonstrate the future for commercial documents, legislation and digital assets in the industry.

- ClauseMatch – A fintech company that leverages a SaaS smart document platform to help transform regulation into digital, machine-readable form, making compliance easier. The Lawtech Sandbox Pilot will connect ClauseMatch to regulators as well as facilitating access to materials such as impact assessments and risk taxonomies, to further develop their AI.

- Deep Tech Dispute Resolution Lab - The Deep Tech Dispute Resolution Lab is developing a dispute and risk avoidance tool based on advanced machine learning techniques. The tool sorts and analyses a range of data within organisations to automatically detect early warning signs of an emerging dispute or issue with customers, suppliers and/or others. The Lawtech Sandbox will provide access to in-house teams and organisational data to further test and train their product.

- Legal Utopia – Aims to make legal services affordable and accessible. It identifies the legal dispute and recommends services and support, as well as providing legal guidance. The Lawtech Sandbox Pilot will help Legal Utopia get expert advice and data input plus regulator support.

Jennifer Swallow LawtechUK Director at Tech Nation, said: “Access to data, cross-sector regulator engagement, and timely input from decision-makers represent shared barriers to growth,
document reviews and eDiscovery work, with many of its new wins are coming from the Middle East.

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UK/EMEA

BigHand has acquired resource management specialists Mason & Cook, in a move that adds fee-earner resource management technology and consultancy to a stable of products that already includes back office support workflow solution BigHand Now and pricing and BI tools Quantum and Evaluate (formerly DW Reporting.)

The acquisition, which is the first under BigHand’s new ownership, will see the London-headquartered company help firms to sew up their back office and lawyer delegation, and James Kippenberger, chief product officer at BigHand, told Legal IT Insider: “For customers building a budget in a pricing tool and adding fee earners to that budget, resource managers currently have to do it ‘blind’; they don’t know who is free, they don’t know who is the most suitable resource, nor do they know who has the optimum skills or experience. Having access to that information will significantly improve the robustness of any resulting budget.

“Equally, our current workflow solution focuses on task delegation from lawyers to support teams but we are frequently asked by customers who implement it about lawyer-to-lawyer delegation which is a roadmap item currently in detailed research phase. Our vision is that by having a legal resource management platform integrated with an extended workflow tool, customers will have a truly unique end-to-end solution. In addition, as we continue to broaden our legal business intelligence solution well beyond offering historical financial insight, being able to layer in future-looking capacity management data will be a very welcome addition for clients.”

Mason & Cook was founded in 2013 and focusses entirely on law firm resource management. Speaking to Legal IT Insider, CEO and founder Dave Cook said: “We were the business that brought resource management to the legal sector and that has been our core focus ever since.”

Cloud provider CTS has acquired two legal specialist MSPs, Sprout IT and City Business Solutions (CBS) in its bid to become a “legal sector powerhouse.”

Founded in 2006, CTS (formerly Converge TS) provides managed cloud, security and support to the UK and Irish legal sector. Sprout IT, which specialises in IT support, consultancy and strategic advice to the legal sector and is currently based in Temple Chambers, will give it far greater access to the Bar. It has a service
sector and is currently based in Shropshire Chambers, the group is looking to extend the multi sector partnership with the Bar Council under which it is given a preferred vendor status. City Business Solutions provides specialist IT managed services to the legal sector and both will enable CTS to scale.

"These acquisitions underline our commitment to the sector and to our mission to become a legal sector powerhouse. What drives us is a relentless focus on the legal sector, enabling our team to deliver a level of expertise and understanding that our competitors cannot match, from which clients derive clear, transformative value. We have lots of exciting services designed for the legal sector in the pipeline, which we hope to bring to market in 2021, together with plans to further invest in our business to the benefit of our clients" said Nigel Wright, CEO of CTS.

Integration is planned for 2021, combining teams, platforms and resources under the CTS brand. We’re told that this will be managed by an experienced team, with the objective of achieving the highest quality service for law firm and barristers’ chamber clients.

In July CTS hired David Fazakerley as in-house legal chief information officer. Fazakerley was formerly CIO at MW Solicitors.

Burgess Salmon – a UK top 50 law firm with more than 445 lawyers across three UK offices – has migrated its on-premises implementation of iManage Work to iManage Cloud, working with implementation partner Morae Global (which acquired Phoenix Business Solutions in 2019.)

This is the first phase of a two-year cloud programme that will see it migrate its entire IT architecture and application portfolio to the cloud.

"Part of our proposition to lawyers is that they will be working with modern technology that helps them to meet the changing needs of our clients – and providing a state-of-the-art document and email management platform like iManage Cloud is central to that," said Eddie Twemlow, head of IT and Operations, Burgess Salmon. "Our business is built around documents and iManage Cloud helps us to facilitate client collaboration."

Technology consultancy Pinnacle has announced a partner and reseller agreement with FileTrail in the UK. FileTrail provides next-generation information governance and records management software for law firms and highly regulated industries.

Pinnacle will be expanding the scope of its risk management practice to bring in a complementary information governance consulting offering alongside its new business intake expertise.

"Managing information in compliance with the GDPR and other regulations, as well as clients’ outside counsel guidelines, is an increasing concern for risk and IT teams at leading UK law firms," says Christopher Young, risk practice lead at Pinnacle. "We’re very excited about the opportunity to work with FileTrail, which will help the law firms that we work with significantly reduce their ongoing costs related to physical records management, while also reducing regulatory risks related to their electronic information assets," he adds.

Pinnacle is a long-term strategic partner of software vendors including Thomson Reuters, Intapp and iManage and has extensive technical experience in data migration and data cleansing. Pinnacle’s law firm clients include a quarter of the UK Top 100, including three Magic Circle firms."

And UK firm Gherson Solicitors has selected pdfDocs from DocsCorp for PDF management and the ability to create court bundles and eBinders. Swiss firm Froipe announced they had selected compareDocs to compare document versions more accurately and efficiently.

EMEA

Leading European firm Cuatrecasas has purchased several DocsCorp desktop productivity applications including compareDocs for document comparison and review, which is a Workshare swapout. Cuatrecasas has bought cleanDocs for email security, and pdfDocs for PDF editing and bundling. The applications will be relied on firmwide and incorporated into NetDocuments for more streamlined workflows.

Cuatrecasas has a presence in 14 countries, the strongest of which is in Spain, Portugal, and Latin America. It
has a team of over 1,000 lawyers and received numerous awards, including Forbes’ Spanish Law Firm of the Year 2019.

Cuatrecasas has used contentCrawler since 2012 to ensure its NetDocuments repository is 100% searchable. In switching to DocsCorp for several other core document applications, the firm will benefit from streamlined product support and simpler vendor management.

“We have enjoyed a rewarding relationship with DocsCorp, having had contentCrawler for many years,” said Francesc Muñoz, CIO. “We decided to make the switch to its desktop productivity applications because we saw they would deliver efficiencies to the firm across a range of teams and departments.”

Cederquist, a top-ranked independent business law firm becomes the first firm in the Nordics and Sweden to partner with StructureFlow, a visualisation tool that helps professionals easily visualise legal structures and transactions.

As one of the leading law firms in Sweden, the move to invest in visualisation technology presents a significant opportunity for Cederquist to provide technically advanced, more efficient, visualisation capabilities to its clients.

StructureFlow is specifically designed for modelling complex legal structures and transactions and is more efficient compared to existing general-purpose drawing software. The software is tailor-made for legal structure visualisation and removes the frustration and time-consuming nature of producing and amending structure charts. Diagrams in StructureFlow act as a visual data map, providing a visual interface into the deal for clients and stakeholders to surface information and documentation more easily.

Israeli law firm Herzog Fox & Neeman will transition to Thomson Reuters 3E. As part of the multi-product deal, the firm also will be adopting eBillingHub, Budgeting & Forecasting from Thomson Reuters, and 3E Data Insights.

Founded nearly 50 years ago, Herzog is one of Israel’s leading law firms. With more than 150 partners and 400 lawyers, the firm has six core practice areas, including Corporate, Banking & Finance, Tax, Sector Expertise, Regulatory/Government, and Litigation/Dispute Resolution. Its top-ranked team is particularly renowned for its expertise regarding technological advances and disruptive emerging industries, and it was the first Israeli law firm to establish a Silicon Valley representative office.

The customizable 3E platform will provide support for Hebrew, therefore localizing the solution to fit the firm’s requirements.

North America

Enterprise workflow solutions provider Onit has acquired New Zealand-founded contract lifecycle management provider McCarthyFinch, with plans to make the technology an integral component of its new legal intelligence platform Precedent. The first release will be ReviewAI.

ReviewAI focuses on pre-signature contract review. It will help corporate legal teams to, in effect, triage incoming work based on a pre-defined playbook. Onit claims that this first-pass review by ReviewAI will save contract teams up to 70% of review time, increase compliance and lower company risk. Other providers in this space include ThoughtRiver, Seal Software (now DocuSign) and LawGeex.

This deal follows Onit’s acquisition last year of SimpleLegal, a US-based provider of spend, matter and vendor management software that is now Onit’s legal operations management software subsidiary.

“Our vision is to build AI into our workflow platform and every product across the Onit and SimpleLegal product portfolios,” said Eric M. Elfman, Onit’s CEO and co-founder. “AI will have an active role in everything from enterprise legal management to legal spend management and contract lifecycle management, resulting in continuous efficiencies and cost savings for corporate legal departments. Historically, legal departments have been thought of as black boxes where requests go in and information, decisions or contracts come out with no real transparency. AI has the potential to enhance transparency and contribute to stronger enterprise wide business collaboration in a way that conserves a lawyer’s valuable time.”
eDiscovery leader Exterro Inc has acquired digital forensic investigation technology provider AccessData in a nine figure deal, citing converging market forces in DFIR, eDiscovery, privacy and information governance. The combined organisation will have 500 global employees and 3,000 customers, as it looks to an IPO in 2021.

The acquisition means that Exterro can now provide companies, government agencies, law enforcement, law firms and legal service providers with a solution that addresses all Legal GRC and digital investigation needs in one integrated platform.

“Converging market forces in DFIR, e-discovery, privacy and information governance are the driving factors behind this acquisition,” said Bobby Balachandran, CEO at Exterro. “To effectively address these critical challenges requires the ability to identify, preserve, analyze and present data in a contextual manner, quickly and inexpensively. It also requires a consistent, defensible process. Ensuring the integrity of the data supply chain is of the utmost importance. With the acquisition of AccessData, Exterro combines all of these capabilities in a single, integrated platform to give organizations a holistic framework for addressing their Legal GRC challenges and obligations.”

The acquisition follows Exterro’s fundraise in 2018 of $100m by Leeds Equity Partners.

In further geographic expansion, Reynen Court in December announced that Borden Ladner Gervais LLP (BLG) will become the first Canadian law firm to deploy its platform.

The announcement follows recent news from Japan where Nishimura & Asahi agreed to a broad cooperation as well as an equity investment in the Reynen Court business.

Founded in 2018, Reynen Court provides a platform that is akin to an app store for legal technology. The Amsterdam based company is supported by a consortium of twenty leading global law firms. More than 200 third-party application vendors are actively engaged with Reynen Court, with more than a hundred already under contract and currently present or working towards participation in company’s Solution Store.

“BLG is the largest firm in Canada and one of the most innovative globally,” commented Reynen Court founder and CEO Andrew D. Klein. “We are honored and excited to secure their trust and we look forward to working together to accelerate digital transformation.”

Information governance and records management software leader FileTrail this week announced that Nelson Mullins, an 800-attorney Am Law 100 firm, has successfully completed disposition of 1.5 million electronic documents using FileTrail GPSi(Governance Policy Suite). Nelson Mullins, a NetDocuments user since 2010, used FileTrail GPS Policy Manager to conduct a thorough review of its electronic documents.

“Timely disposition of electronic records is a critical task that many firms haven’t prioritized enough, in part because of the effort required. At Nelson Mullins, we decided to take disposition of information assets in our DMS head-on, with an eye to reducing ongoing costs and risks associated with keeping records longer than needed,” says David Worth, CIO, Nelson Mullins.

Automated workflows managed via FileTrail GPS Policy Manager made the review, approval and disposition process fast and efficient.

“Our partners appreciated how easy it was for them to review and approve documents for disposition and escalate decisions requiring further consideration,” adds Worth. “The transparency and intuitiveness of FileTrail GPS, the visibility it provides across all electronic and physical information repositories and the fact that it automatically captures a record of all activity and approvals make it an extremely valuable tool for any organization that is serious about information governance, compliance and long-term cost control.”

Morae Global Corporation has entered into a technology partnership with experience management law firm intelligence provider Foundation Software Group, which was unforgettably described to us by a would-be partner as ‘so hot right now – like Hansel in Zoolander.’

This is the first international technology partnership for Foundation – Morae will provide implementation and support services for Foundation’s Firm Intelligence platform.
The Foundation platform provides a better way for law firms to find and manage knowledge about clients, matters, people, and parties for greater responsiveness to client and prospect needs. Foundation works by passively collecting information from critical internal and external systems – intelligently transforming and normalizing data along the way, while also adding contextual information – to provide the firm with an actionable source of firm intelligence to achieve business objectives and drive revenue growth.

"Law firms have large amounts of data critical for winning and serving clients. But this data is typically scattered among numerous data silos, including time and billing, HR, and CRM systems, and lacks the contextual information necessary to make it meaningful. Our Foundation Firm Intelligence Platform enables firms to aggregate, synthesize, and transform their information into usable and actionable firm intelligence to better serve clients and lawyers while helping to drive the firm’s revenue," said Barry Solomon, Executive Vice President at Foundation Software Group.

Email management vendor ZERO has entered into a strategic partnership with ROOX, Portugal’s leading technology consulting firm for professional services organizations.

The partnership will provide ROOX law firm and corporate clients with IT consulting expertise designed to ‘humanize technology’, coupled with advanced email management productivity. ZERO seamlessly automates the administrative processes of email management and filing into document management systems for iOS mobile devices and desktop.

European law firms are increasingly seeking to innovate business processes, drive profit and reduce revenue leakage. The plan is to combine ZERO’s automated email management and time capture technology with ROOX’s experience in delivering complex projects.

"ROOX has earned their reputation as the most trusted technology consulting partner among professional services firms in Portugal, including each of the ten largest law firms in the country. ZERO offers industry leading technology for mobile email management and we are a natural fit with ROOX solutions for legal professionals," said Ryan Steadman, Chief Revenue Officer at ZERO.

The Law Society of Alberta, which regulates the legal profession in the province of Alberta in Canada, has implemented the Microsoft 365 Epona Matter Center and Epona DMSforLegal. The document management system is being used in key departments that manage lawyer information and will be rolled out across the remainder of the organization during 2020 and 2021.

"Epona was the right solution to help us more efficiently manage lawyer information because it could be configured to work seamlessly with our pre-existing technical infrastructure," says Andrew Norton, chief information officer and director of business operations for the Law Society. "Being able to integrate Epona with our other third-party applications to develop a custom design was essential to meet the document management needs of our staff.”

Keith Vallette, Vice-President of Epona USA, said: "Canada is a high growth market for Epona and we continue to add firms, companies, and institutions, much like the Law Society, to our expanding client list.”

Meanwhile Perley-Robertson, Hill & McDougall, one of the premier independent Ottawa law firms with an international footprint chose Microsoft Office 365, and SharePoint Online has also opted to replace their legacy DMS, which we understand was OpenText eDOCS.

Perley-Robertson, Hill & McDougall chose Epona Solutions for email and document management, which has been in full production use since January of 2020.

TCDI, a leading provider of legal services, software and cybersecurity, has acquired Cicayda LLC. The deal expands TCDI’s existing capabilities in eDiscovery, cybersecurity, and managed document review, adding Cicayda’s proprietary software to the TCDI technology suite.

TCDI will integrate Cicayda’s software, iDiscovery, into its own proprietary technology and services, including augmenting its eDiscovery platform, CVLynx, with legal hold automation capabilities developed by Cicayda. TCDI will also expand its existing cybersecurity toolkit with Cicayda’s social media collections tool, Novara, which recently won the Viewer’s Choice Award at the 2020 Clio Conference.
For 30 years, we've steadily built upon our innovative, client driven technology, and this move supports our strategy to meet our clients’ growing needs,” said TCDI Founder and CEO Bill Johnson. “Both companies share very similar cultures and philosophies which ensures our clients will continue to get the same high-quality service they expect.”

Kiesel Law LLP (CA) and New York City Department of Investigation, (NY) purchased contentCrawler from DocsCorp to ensure all image-based documents in their document management systems, Worldox and Open Text eDOCS respectively, are 100% searchable and accessible. Jackson Walker LLP (TX) went with cleanDocs Enterprise from DocsCorp to protect the firm from unintentional data leaks that might result from misaddressed emails, improperly redacted documents, or failing to remove metadata from attachments.

APAC

Leading Australian law firm Gilbert + Tobin has announced the sale of its in-house proprietary verification software to Litera, in an unusual acquisition, reminiscent of NetDocuments acquisition of Closing Room from Chapman and Cutler.

The Gilbert + Tobin tool digitally verifies disclosure document statements, provides real-time data on the verification status, and syncs verification changes into a master document. It creates efficiencies through the automation of the verification process making it less labour-intensive. The result is faster, more efficient and accurate verification of documents.

Gilbert + Tobin’s Legal Service Innovation and Technology teams, in collaboration with its market-leading Corporate Advisory and Intellectual Property teams, took an entrepreneurial approach to creating and protecting the verification tool to improve both lawyer and client experience of the verification process and generate significant time savings. In developing the tool, Gilbert + Tobin has demonstrated its continued commitment to harnessing technological innovation to meet internal and client needs in a streamlined, timely and more efficient way.

Commenting on the sale, partner + chief knowledge and innovation officer Caryn Sandler said, “It has been a rewarding experience to see this tool evolve from an original idea into a sophisticated technological product. With our team’s dedication and expertise, the tool is now ready for the next stage in its journey, in the capable hands of a leading global legal technology company.”

It is unusual to see a law firm sell a technology product to a vendor. It happened in 2018 when Chapman and Cutler sold deal management application Closing Room to NetDocuments. That product was launched by the practice innovations group, leading practice innovations and technology partner Eric Wood to tell Legal IT Insider that the firm was considering forming a software subsidiary.

WRMK Lawyers from New Zealand and Gilbert + Tobin selected pdfDocs from DocsCorp to create and manage PDF content more easily. Melbourne firm Cornwall chose compareDocs Enterprise to compare document versions quickly and accurately for changes.

Nishimura & Asahi, the largest law firm in Japan, has joined Clifford Chance, Latham & Watkins and Orrick as an investor in Reynen Court. The investment is an extension of the recently completed $4.5 million funding round led by global venture capital firm Ventechn which followed the company's initial $10 million financing secured in 2019.

Founded in 2018 with wide support from a consortium of nineteen leading global law firms, Reynen Court has built and launched a platform - akin to an app store for legal technology - that makes it fast, easy and secure for law firms and in-house legal departments to discover, test, adopt and manage Artificial Intelligence, Smart Contracts and other new technologies. Latham & Watkins and Clifford Chance serve as co-chairs of the consortium. Nearly two hundred third-party application vendors are actively engaged with Reynen Court, with more than a hundred already under contract and currently present or working towards participation in the Reynen Court solution store.

“We are extremely proud to announce that Nishimura & Asahi is participating in our current round of funding and as a new member of our consortium,” commented Reynen Court founder and CEO Andrew D. Klein. “This
Phi Finney McDonald, one of Australia’s most successful class action law firms, has selected Aderant Expert Sierra.

“As a boutique litigation law firm, we have quite unique challenges in billing and time management,” said Ben Phi, Managing Director at Phi Finney McDonald. “Expert Sierra gives us the platform able to meet these challenges. With our growth in Australia and our expansion into the U.K. market, we needed a secure but cloud-based system that could grow with us. Aderant has a proven track record internationally to be able to deliver this, and their service has been impeccable.”

Phi Finney McDonald had outgrown their existing practice management system and were looking for a solution that could deal with complex time recoding and billing requirements of their clients.

For their two Australian offices, and their recent expansion into the United Kingdom, all three locations are fully implemented and live on Expert Sierra. “We were able to implement Sierra on time and on budget during the pandemic, which added another level of complexity, and shows just how impressive and dedicated the Aderant implementation team are,” said Danielle Dale, Business Analyst at Phi Finney

We are engaging with the market to find out what stage you are at in deploying Teams. Please complete this short survey.
trial courts

Trellis, a state trial court legal research and analytics platform, has expanded coverage to trial courts throughout Delaware and Cook County, Illinois. Trellis provides an instantly searchable database of state trial court records, including detailed analysis of judges’ decisions and ruling history. Trellis describes itself as the “Google” of state trial court records for the industry’s fiercest litigators to gain insights on judges, opposing counsel, motions, and their most complex legal issues.

“As part of our mission to improve access to state trial court records, we’re onboarding new courts in Delaware and Cook County, Illinois” said Nicole Clark, CEO and Co-Founder of Trellis. “Central to our ethos as a business is democratizing access to court records and the law.”

“We’re committed to bringing data-driven decision making to the practice of law by making state trial court data in Delaware and Cook County, Illinois accessible and effortlessly digestible for the first time, says Alon Shwartz, Co-Founder and CPO of Trellis.

Jack M. Rubin, an associate at Newmeyer & Dillion focusing his practice on civil litigation, real estate, land use and construction litigation, agrees with Clark and Shwartz. "I have a moment with Trellis almost every day finding results I wouldn't have been able to find anywhere else," says Rubin. "The information in Trellis changed my cases from being on defense to offense. Trellis is an essential tool for litigators."

Trellis clients can now access a wide-range of case types for Delaware and Cook County, Illinois court records, including negligence, insurance, contract, property, personal injury, product liability and so much more. As with other cases included in the Trellis system, Trellis clients in Delaware and Cook County, Illinois can also get the basic case information they need on the docket, parties, and attorneys involved in litigation. Trellis clients in those jurisdictions can now begin leveraging their favourite Trellis features to do strategic multi-state research on opposing counsel and other parties.

Reynen Court Launches One-Click Test Drives

Reynen Court in December unveiled the debut of new functionality that makes it easier for law firms and law departments to test third-party legal technology solutions. The new facility is called Test Drives and is included without additional charges for licensed users of the Reynen Court platform.

Founded in 2018, Reynen Court provides a platform - akin to a showroom for legal technology vendors, including law firm software and legal databases - to help law firms make more informed purchase decisions without adding cost to their legal budgets.

management to G Suite within Slack

Hanzo Hold, which applies legal hold to Enterprise data within Slack, now allows customers to extend their matter management to G Suite (Google Workspace) data.

Starting with “Follow-the-Link,” customers can identify critical Google data nested within Slack threads, messages, and groups, retrieve that data, and combine both Enterprise data sets into a single, surgical export for import into today’s industry-standard review platforms.

Following this initial launch, Hanzo will be adding support for Google Drive, Gmail, and other Google Workspace data sources — with the roadmap accelerating quickly from there. In 2021, Hanzo Hold will be the authoritative source for internal investigations, security checks, legal holds, and compliance archiving across all dynamic, complex content types.

“Our customers have come to rely on Hanzo Hold’s comprehensive Slack preservation, early case assessment, and review capabilities,” said Brad Harris, VP of Product at Hanzo. “Now, with the addition of G Suite and our roadmap for Google Workspace, we anticipate efficiencies well beyond initial expectations. We listen intently to the market and rely on our close partnership with our customers to ensure the software is built the way it is supposed to be built - with the customer in mind.”

Wolters Kluwer Integrates Legislative Tracking into Cheetah

Wolters Kluwer Legal & Regulatory U.S., has announced the integration of its Federal Developments Knowledge Center (FDKC) within its Cheetah platform.

The FDKC platform has been enhanced with a range of new features and is now available on 18 practice area dashboards on Cheetah. The integration will help users monitor all newly issued executive actions, proposed bills and rules, enacted laws and final rules in real time across more than 800 agencies and sub-agencies of the federal government.

“...the volume of executive, legislative and regulatory information created at the federal level continues to increase, and with a change in administration on the horizon, monitoring relevant government activity will become an even more time consuming and challenging task for legal professionals,” said Ken Crutchfield, Vice President and General Manager of Legal Markets at Wolters Kluwer Legal & Regulatory U.S.
to an app store for legal technology - that combines a Solution Store featuring curated content about application vendors and their products together with a software system that enables firms to run cloud-based applications either on-premise or within virtual private clouds under their own control.

The Amsterdam based company is supported by a consortium of twenty leading global law firms. More than 200 third-party application vendors are actively engaged with Reynen Court, with more than a hundred already under contract and currently present or working towards participation in company’s Solution Store.

"From our inception we have worked relentlessly to reduce to minutes from months the time it takes for law firms and legal departments to discover, evaluate and test third-party software, and so it is with great pride we are today announcing the debut of One-Click Test Drives," said Reynen Court founder and CEO Andrew Klein. "Test Drives literally deliver secure environments and pre-configured software applications fully loaded with dummy data and transaction or case materials that innovation teams can launch in one-click - without requiring even a moment of support from their internal technology departments."

**Worldox Rolls Out Teams Integration**

After successful beta testing, Worldox’ Teams integration is now available for early release.

Interested Worldox users can find the implementation information and requirements in the Worldox Knowledgebase. World Software Corporation encourages interested firms to contact their Worldox Reseller for assistance with the implementation. While not yet available for the Enterprise or Cloud versions of Worldox, it will be in general release with the release of the new update to Worldox, WDU18, due out in the first quarter of 2021.

This integration provides two-way communication between Worldox and Teams to enable easy collaboration with outside parties, making incorporating changes back into Worldox as a new version a snap.

Features that are included:

- Create new Teams directly from Worldox based on client and matter.
- Send documents to the new Team along with comments.
- Collaborate with people within the Teams ecosystem.
- Easily save documents back into Worldox as new

Wotters Klauer Legal & Regulatory U.S. "The newly integrated legislative tracking capabilities now available at a practice area level in Cheetah provides legal professionals with tools to cut through hundreds of updates, and get exactly the information they need to effectively advise their clients about the potential impact of changes to laws and regulations."

**Appurity soft launches iOS app**

In December, Legal IT Insider attended the soft launch of Appurity’s Rubus for iOS mobile app, which integrates with iManage and helps fee-earners to send and file and open NRLs from their iPhone.

The new functionality will help to save billable hours by enabling fee-earners to file off line (arguably on journeys, although those are few and far between at the moment) and it syncs to iManage directly.

To date Appurity has provided a native android app for iManage but during the launch, Appurity director Steve Whiter said: "We started out with BlackBerry 10 and helping firms to send and file and we moved to Android Enterprise. We now have an iOS app – it’s always an area that we wanted to get into." Appurity is working with network security vendor NetMotion on the app.

For more info see Appurity’s website

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FIND OUT MORE
Legal IT Insider editor in chief Caroline Hill speaks to Verbit founder and CEO Tom Livne about the hybrid AI and human-based transcription company’s $60 million Series C fundraising. We find out what Verbit’s growth plans are now and how it will expand the work it is doing in both transcribing and providing analytics on court depositions.
Ron Friedmann is one of the best-known names in the legal sector, particularly in the United States. Formerly chief knowledge and information officer at LAC Group and before that a partner at legal IT consultancy firm Fireman & Company, Ron talks to Legal IT Insider editor Caroline Hill about his new role of senior director analyst in the legal and compliance team at Gartner.

Ron’s experience in the legal IT sector goes back to 1989 at WilmerHale, where he was head of practice support – the first non-practicing lawyer hired by a large law firm to manage the use and development of technology to improve law practice. Unsurprisingly one area of his remit at Gartner will be legal technology. Instead of working with law firms as he has done before, Ron’s clients are now corporate counsel and the general counsel looking for research and analysis to help deliver mission critical services, including manage outside counsel. He will also be focusing on alternative legal services providers.

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