Err, hello 2021

Well, welcome to 2021, which, let’s face it, if you were expecting an immediately and markedly different experience to 2020, you will have been disappointed. Just come to us every time you need a motivational pep talk.

BUT in this issue we do focus on many of the silver linings. The legal sector as a whole is doing remarkably well. The legal tech recruitment market is livening up again and it’s worth taking a look at our movers and shakers section.

Many legal tech vendors are reporting great year ends. Take a look at our video chat with Peppermint Technology’s chief sales officer Tony Cox, and NetDocuments’ CEO Josh Baxter: both companies talk to us about their record year.

And Microsoft is getting serious about the legal sector (again): take a look at our top story and sign up for the first webinar of the new Microsoft 365 and Teams taskforce. Yes, Microsoft loves us! (again)

Last but actually pretty much first, if you thought HSO had bought sa.global think again! We help to clear up some of the confusion surrounding HSO’s acquisition of 360
Solutions Group, as well as find out more about what that acquisition means for customers.

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

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

Caroline Hill, Editor-in-Chief

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Microsoft launches Microsoft 365 for Legal

After many years of watching the legal sector dance around a move to the cloud, Microsoft has launched a Microsoft 365 and Teams Deployment for Legal initiative that includes a four-phase plan to help law firms overcome privacy barriers and a dedicated team to support and accelerate law firms’ 365 journey.

The initiative, which is being led by Microsoft senior modern work solution specialist Jon Kefaloukos, has been put in place to enable law firms to get around enduring concerns over putting client-matter data in the Microsoft Cloud, given that – in rare and extreme cases - Microsoft can be subpoenaed by the US government to provide client data.

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HSO acquires majority of sa.global’s US business

And Global Microsoft cloud business applications partner HSO has acquired the majority of sa.global’s US business with immediate effect. The acquired group - sa.global inc, which includes the 360 Solutions Group - will do business as HSO ProServ.

Legal practice management system evergreen – formerly LexisOne – is not part of the acquisition and remains with sa.global, which contrary to public assumption, has not been acquired and still retains a presence in the US. See below for more on that.

Speaking to Legal IT Insider, former sa.global CEO for the Americas, Whit McIsaac, said: “We have separated
customer data without reverting to a customer first.

While this new initiative is not a legal vertical, Microsoft is introducing a dedicated four-phase deployment plan that can include turning off OneDrive and SharePoint and connecting to a document management system, in order to get Teams off the ground.

A series of Microsoft briefings are to be hosted by ILTA led by CEO Joy Heath Rush. The first is on 17 February at 11am ET and will include a technical demonstration of how the Microsoft 365 Legal Vision works.

Subject matter experts from across Teams, Office 365/SharePoint/OneDrive, Security, Compliance, and Windows 10, will present this proposed vision.

The core Microsoft for Legal team are:

- Jon Kefaloukos – M365 Deployment for Legal V-Team Lead (Sr. Solution Specialist supporting law firms in Chicago)
- Iris Childress – Corporate Escalation Manager for M365 Deployment for Legal
- Michelle Gilbert – M365 Deployment for Legal Office 365 Collaboration Lead, Sr. Teams Technical Specialist (former SharePoint and Office Admin at Minneapolis law firm and heavily involved in MSP SharePoint Community & ILTA fan)
- Rahul Varrier – Sr. Teams Engineer for M365 Deployment for Legal
- Corey Buzzell – M365 Deployment for Legal MTC Co-Leads, Microsoft Technology Center (MTC) Sr. Architects – Corey has built the legal environment

Speaking to Legal IT Insider, ILTA’s CEO Joy Heath Rush said: “Two reasons we are particularly excited about this Legal Deployment Initiative are that law firms can configure – rather than customize – their Microsoft products to address some of their specific concerns and that Microsoft is embracing the legal technology ecosystem of both products and services in which they operate.”

Peppermint Technology announces record year

On the subject of Microsoft, CX365 vendor Peppermint Technology has reported a record sales performance in 2020. Despite the challenge of Covid-19 it reports 10 significant new engagements with UK Top 200 law firms and corporate legal teams – including Birketts, DWF and Foot Anstey.

Peppermint provides cloud-based case and matter

Denial and confusion as sa.global says: ‘We haven’t been acquired!’

The past week has seen sa.global’s founder and CEO

Status quo as well as European sales director Nick
Peppermint provides cloud-based case and matter management, client engagement (CRM), document management and financial management solutions to top law firms and other legal services organisations.

The past year to 18 months has seen the size of Peppermint’s typical client grow, and Tony Cox, chief sales officer at Peppermint, says: “Peppermint wrapped up 2020 on a high note, with six significant new multi-year contracts, two proof of concept engagements and two pilot projects. All but one are with a top 100 law firm or large in-house legal team. This is a very positive outcome and materially increases the number of new users on the Peppermint CX365 platform.”

What is also cool and worth a shout out is that when the pandemic first hit, Peppermint took a vote on whether to make redundancies or payout. Staff voted unanimously for payouts, and Peppermint has now repaid the shortfall in full.

We spoke to Cox in this short video, in which he talks about some of the drivers behind the growth.

Stephen James as well as European sales director Nick Meredith take to the social media wires to announce that they have not been acquired by HSO, after a press release announced ‘HSO acquires SAGlobal Inc and their 360 Solutions Group.’

What has been acquired is a majority share in sa.global’s US business - it is correct that HSO has acquired sa.global Inc. However very many people assumed that HSO had acquired sa.global outright.

sa.global says that last year it made the decision to divest the shares of its legacy US business and legacy products, but it has not yet been announced because the company is in a contractual quiet period.

On LinkedIn on 27 January, James said: "An announcement last week from HSO that we had been acquired was, well, simply not true. The confusion around the announcement caused a flurry of emails, phone calls and social media posts to be exchanged around the world as our clients, partners and employees reached out to ask ‘huh??’ Our truly independent, client-driven, global community of professionals has not been acquired."

In a statement, sa.global said: "We were thrilled to find ourselves in the news recently – even if the news was untrue and misleading."

It adds: "We are extremely flattered that they used our brand in their announcement of their acquisition of 360 Solutions Group (this is the business that we divested in November 2020 with the legacy IP). sa.global has been around for over 30 years and is not planning on going away anytime soon.”

HSO maintains that the press release is accurate and factual, commenting: "SAGlobal Holdings Limited remained a shareholder of SAGlobal, Inc until November 2020. The entity that HSO acquired, SAGlobal, Inc. was previously recognised as sa.global's US business."

Within HSO, the 360 Solutions business will trade as HSO ProServ and former sa.global CEO for the Americas, Whit McIsaac, told Legal IT Insider: "We have separated amicably. The businesses were always separate, which is tough for someone outside of legal to understand.

He added: "The split was driven from a business standpoint. Their business is more horizontal and very successful. Ours is focussed on professional services and very vertically orientated. They are different businesses.”

sa.global said in a press release: “HSO ProServ relies on sa.global’s capabilities and depth to support many of their clients and product development. We also sell and support their products. For our part, we are ready to collaborate with HSO ProServ, after all ‘compete and collaborate’ is normal practice in our industry. Our priority is always our client.”
Video: NetDocuments announces unprecedented growth in 2020

NetDocuments in January announced unprecedented growth in 2020, including over 40% year-on-year growth within the medium law firm segment and over 150% spike in new corporate accounts.

Editor Caroline Hill spoke with NetDocuments chief executive officer Josh Baxter about what is driving the growth, and you can watch that video here: https://legaltechnology.com/video-netdocuments-announces-unprecedented-growth-in-2020-we-take-a-look-at-the-stats-with-ceo-josh-baxter/

Video: A portal for every client? We speak to Aderant about Levenfeld Pearlstein’s use of Drive

Levenfeld Pearlstein has achieved a goal of providing a customized portal to every new client at intake. The firm has chosen Aderant Drive to deliver on that goal, and will provide on-demand collaboration portals to virtually every client, regardless of size. Legal IT Insider editor Caroline Hill spoke to Derek Schutz, product manager for knowledge management at Aderant, about whether the age of portals at scale has finally arrived and how that fits with the wide-scale shift to Microsoft Teams. You can watch the video here: https://legaltechnology.com/lucy-cheesewrightlegalitlexicon-com-2/
Upcoming Webinars

Webinar with Pagefreezer: Advances in social media evidence collection for eDiscovery and investigations, 25 February, 4pm GMT/11am CT

If you would like to be part of our webinar series, we would love to hear from you! Please email Caroline at caroline.hill@legalitlexicon.com

Knowledge Management

SKILLS 2021: At last, a virtual conference format that works (and is FUN?!)

Virtual conferences are like buses: you jump on them every now and then, often when you don’t have a choice. But the chances of you actually ‘going’ to a virtual conference and staying at it? Unlikely. Enjoying it? Don’t make me laugh. Until SKILLS 2021.

SKILLS is a knowledge management conference that has traditionally fallen within the Legalweek tech conference in New York. The event itself was hosted on Zoom, where all the attendees were visible throughout as they would be in an auditorium. This did mean using a different link to the breakfast session, but given that the information was all in one calendar invite is was simple to go from one platform to the other and, let’s face it, we’re all pretty used to this platform hopping now.

Benamram says: “Shindig was great for day one, when we wanted a lot of intimate opportunities for people to connect one-on-one or in small groups. Zoom was better for day two, since we had many more invitees (200 vs 80) and a fast-paced day. It gave us better control in putting people into breakout rooms and getting them back quickly. It allowed for surveys. And it allowed anyone to jump in and speak in Shindig you...
York. It is led by Oz Benamram, who in 2020 joined Simpson Thacher and Ron Friedmann, who also last year joined Gartner. Despite demand, SKILLS is a closed and fairly exclusive event by necessity, so as not to become too big and unwieldy. Of course, that means it is the place to be.

Cue COVID, and this year, for the first time, the SKILLS team decided that, while it will retain closed sessions on 21 January, it would throw the virtual doors open on 22 January. Speakers had to pitch their ideas to the SKILLS committee, and, well in advance of the conference, record their talk on Gather Voices in case of tech issues on the day. You were given an option whether to present live or use the recording on the day.

As the event got closer, we started to receive emails about a platform called Shindig – Benamram sent out emails warning that the platform takes some getting used to, and Simpson Thacher provided familiarisation sessions in advance of the event.

Shindig was used for the closed session on 21 January and on the morning of 22 January, the breakfast networking was hosted on Shindig, which shows thumbnail photos of attendees that you can click on to join in a video chat. You can gather in groups of up to six, creating a live and spontaneous networking group. Unlike in person, you can also lock the group if you are having a private conversation, although that arguably defeats the object. Another fun feature (as Ab Saraswat from Litera found out by testing on me), is you can double click someone’s picture and eject them from the group. You can also raise your hand to stand on the virtual podium and make an announcement to all the attendees. How we will all behave in real life networking experiences after this is anyone’s guess.

And it allowed anyone to volunteer and speak (it’s really you have to be invited to the stage, which only has six podiums.) Zoom also has better UI and is known by all.

The day-two showcase sessions were divided into segments: a 15-minute speaker, followed by a ‘shark tank’ of three seven-minute product-focussed talks; followed by break out rooms in which you discussed the sessions you had just seen (or just chatted). Once back in the main ‘room’ you voted on which of the three shark tank demos you would be most likely to implement yourself.

I spoke about tech developments and innovation in 2020 and you can watch that video here:

The entire conference is available using this link and it’s pretty easy to find the talk you’re looking for by looking at the agenda.

The after-conference drinks were hosted on Shindig, and - glass of wine in hand - I actually looked forward to seeing people and catching up. I did some conversation hopping and ended up, as usual, being among the last to leave.

At last, this is a format that provides genuine networking and (in the case of vendors) lead gen potential. I spoke to a consultant after the event who says he has three viable new leads. Surely this has to be a better format than those awful, static exhibitor halls that everyone avoids like the plague?

In any event, congratulations and thank you to the SKILLS team, you made my week.

Litera acquires Foundation Software

In an acquisition that has the potential to bring about the much-needed centralisation of experience management, Litera in January acquired law firm intelligence supplier Foundation Software Group: a move that sees Litera widen its platform from the practice of law to the business of law.

The acquisition sees Litera launch a new intelligence business unit, and the Chicago-headquartered company says that it will invest heavily in the development and support of Foundation’s data platform. Litera is owned by private equity fund Hg and this is the latest - albeit arguably one of the most impressive - in a run of recent acquisitions.

Litera’s CEO Avaneesh Marwaha said: “If you do a transaction it gives you a lot of metadata and right now it takes a lot of manual work to reuse it, but we hope in the coming years we can start tying to toggle it together.”

Litera is active in transaction management (Transact) and litigation management (Litigate) and global director of business development and strategy Haley Altman, who sold transaction management platform Doxly to Litera last year, added: "The nice thing about Foundation is that it can take data from the end of a transaction or piece of litigation and use it for the next one, so you have actionable data. It will tell you what the key data points are for a deal."

Read the article in full here: https://www.liteware.com/
Bryce Catalyst invests $1.75m seed funding in dealcloser

New ‘operators for operators’ fund Bryce Catalyst has announced its first deal since launching in October 2020, investing a $1.75m seed round in legal transaction management hub dealcloser, we can reveal.

Founded in 2017, dealcloser brings online and automates the deal closing process, which, as any transactional lawyer will attest, is a very manual, laborious and error-prone process.

Speaking to Legal IT Insider, dealcloser co-founder and CEO Amir Reshef, who is based in Canada and qualified as an associate at Dentons in 2015, said: “Working on my very first deal, I was surprised that people were doing things in a manual way. There were lots of bits of paper and different versions, and the only way to make sure there were no mistakes was to check them over and over again.”

He adds: "I’ve always been interested in technology and love reading about it. I’m always looking for ways to do things better and it makes sense to use a tool if there is one.”

Reshef also took the view that as a junior lawyer, there must be far more valuable ways to spend your time.

Cue the launch of dealcloser, which was achieved with the help of CTO for hire Mike O’Connor, who very quickly came on board as co-founder and CTO. Chief product officer Darren Yuhar, who also started out as a contractor in the early days, is now one of the full-time leadership team. Shane Gordon, COO, who completes the leadership line-up, is ex BDO and KPMG.

Dealcloser integrates with Clio, and earlier this year announced that Clio’s CEO and co-founder Jack Newton has joined its advisory board. It already integrates with Microsoft Word Online and is in the process of integrating with the major DMS providers.

From Bryce Catalyst’s point of view, the reason they are investing in dealcloser comes down almost as much to the team as the product. Co-founder and president Cary Burch told Legal IT Insider: “When we met the dealcloser team we really liked them; they are young, humble and hungry and looking for a perfect fit. We focus on mentoring and building teams and we liked dealcloser because we can have an impact. We talked to
He adds: "So many systems are too complex, but dealcloser focuses on very narrow pinpoints. We used the platform from day one – we are using it for the other companies we’re working with. You don’t want a complex platform and simplicity is our best friend, which is why we chose them."

Online transaction management is a rapidly evolving area and dealcloser will be competing with the likes of Litera Transact, iManage Closing Folders, and NetDocuments Closing Room. Deal management platform thedocyard floated on the Australian stock exchange in 2019.

However, Reshef says: "This space is getting a lot of attention but whereas there are hundreds of different practice management systems, there are only four or five transaction management platforms.

"Our biggest competition is the status quo."

Arguably, after the huge shift among law firms last year to Microsoft Teams, that is the biggest competition, if law firms work out its collaboration functionality.

However Reshef says: "dealcloser is purpose built for legal document exchange with built in version control."

Customers can choose where their data is stored and he adds: "Data residency is critical. We offer an on premises solution too."

This new investment will help dealcloser to increase its business development, sales and marketing.

The $1.75m will not be drawn down all at once, but has KPIs built in for both dealcloser and Bryce Catalyst, and Burch says: "Accountability is a good thing – everyone is accountable."

Bryce Catalyst, which is managed by Bryce Partners, was co-founded by Erik Baklid and focuses on fast-growth companies in cyber security, legal technology and regulation technology.

In addition to the financial investment in dealcloser, Burch and Baklid are also joining dealcloser’s board of directors.

See also: https://legaltechnology.com/exclusive-cary-burch-and-erik-baklid-spearhead-launch-of-new-100m-growth-capital-fund-bryce-catalyst/

**Lupl secures $14m funding and new CEO as it prepares for 2021 launch**

Lupl in January completed a $14m funding round as it builds momentum for a 2021 formal launch. The legal matter management platform has also hired Jeff Green from Ankura Management Consulting, who has taken on the role of CEO, and former King & Spalding legal tech solutions director Cheryl Wilson Griffin as chief customer officer.

Lupl is being incubated through its development by a trio of international law firms, CMS, Cooley and Rajah & Tann Asia, working with input from an advisory board of 16 leading in-house lawyers from blue chip multinationals. The wider testing group includes Slaughter and May, Corrs Chambers Westgarth, Khaitan & Co and One Essex Court.

This latest funding round is in addition to the circa USD $10m raised prior to Lupl’s beta launch, taking its overall funding to in excess of USD $25m and making it among the
most well-backed legal technology start-ups at its stage of development. The suggestion is, however, that its informal launch in June last year somewhat jumped the gun.

Lupl has been in worldwide private beta testing since March 2020, and we’re told that during the beta, more than 30 development sprints have been completed and several hundred new product features have been added in response to user feedback from participating law firms and legal departments. Among others, these features include a “Knowledge Hub” which provides a global repository of matter and workflow templates, designed to help users operationalise legal knowledge and repeatable process, and a data and analytics dashboard surfacing real-time analytics about legal matters.

Lupl says it is on track for a wider public release commencing from the beginning of April 2021. The initial focus will be accelerating the rollout of Lupl within participating organisations followed by a phased onboarding of legal departments and law firms.

The ‘bring your own system’ platform has strengthened its management team with the hire of Green and legal tech veteran Wilson Griffin, who latterly headed the programme management office at King & Spalding. By the end of 2021, Lupl says that it expects to have a team of more than 75 people around the world.

Chief commercial officer Matt Pollins said: “During our beta phase, we’ve been blown away by the interest in our open industry platform amongst legal departments, law firms, technology and knowledge providers. This is a pivotal year for Lupl and I’m excited to be joined by Jeff and Cheryl as we start to scale up our global team to launch the platform in 2021.”

Partnerships

Lupl has signed a Memorandum of Understanding with Singapore’s Ministry of Law to leverage the platform to advance the digitalisation of the legal sector in Singapore. This collaboration will begin with a series of industry engagement sessions in the first quarter of 2021.

We’re told that over 100 other industry partnerships are in progress. These partnerships span enterprise communication and collaboration tools, document management systems, pricing and scoping tools, data and analytics tools and standards, and industry knowledge libraries. Further details of current and future partnerships will be announced in the coming months.


No-code chatbot builder Landbot raises $8m Series A

Barcelona-based no-code chatbot builder Landbot has raised $8m Series A led by Spanish-Israeli firm Swanlaab and Spanish innovation agency CDTI, plus previous investors Nauta Capital, Fundacion BKT and Encomenda.

Landbot, which last raised funds in 2018, works with corporates including Uber, LG, T-Systems and L’Oreal, but also law firms.

At Laux Lawyers, which is an IT law firm in Zurich and Basel, a Landbot bot helps triage and direct questions, providing fairly limited but helpful details on the firm’s areas of expertise and contact details. At sprintlaw, which is an online law firm, Landbot provides an easily accessible drop-down menu of answers that it doesn’t attempt to personalise in the way that many are tempted to do.
Landbot told TechCrunch that the coronavirus pandemic has supercharged demand for conversational landing pages, as businesses look to automate higher volumes of digitally inbound customer comms. The new funding will be used to double Landbot’s team (currently 40), with hires planned across sales, marketing and engineering. 90% of Landbot’s customers are international, with 60% coming from the U.S., U.K. and Germany.

Interestingly in a Trust Radius side-by-side comparison of Landbot and Smith.ai both fare well (over 9/10 overall) but it is Smith.ai that is favoured by the lawyers who have submitted reviews.

Sonia Lakhany, a trademark attorney at Lakhany Law, gives it 10/10 and comments: “Smith.ai Live Website Chat is used by every member of my team to communicate with our clients. It handles our incoming calls and outbound calls with ease and in a timely manner. They also manage our online chat function.”

Commenting on the Series A in a statement, Juan Revuelta, general partner of Swanlaab, said: “The beauty of Landbot is in the drag and drop solution of the product. The simplicity is critical to making this product accessible to everyone across many different types of business. If you’re a small company you don’t have the luxury of time or money to solve issues in customer service or run lavish marketing campaigns.

“Landbot helps all businesses to have truly frictionless conversations with customers and exchange the data they need to make smarter decisions and scale. The team has had a remarkable 2020, and we’re excited to support them in helping more businesses this year.”

**Digital contracting platform Precisely raises €1.8m seed funding**

Scandinavian digital contracting platform Precisely has raised €1.8 million in seed funding led by Peak Capital, marking the fund's first Nordic investment.

Founder and CEO Nils-Erik Jansson is a former lawyer. In a blog-post on Peak Capital’s website, he says: “That’s why we built Precisely: to help legal teams decrease their time spent on the contract lifecycle by 80%. Precisely improves their full contract workflow: from drafting to negotiating, to signing and managing contracts.”

Precisely serves over 200 clients worldwide. Jansson added: “We focus primarily on legal teams, not on law firms. Our clients use our software to manage contract workflows for HR, sales, and procurement, to name a few examples.” According to Jansson the product is built for enterprise clients but has also seen adoption by smaller companies that operate digital-first.

Peak Capital’s principal David Zwagemaker is also no stranger to the legal world. “Since I worked in law over ten years ago, there has been relatively little innovation in the legal market”, he said. A decade has passed, but lawyers still operate the same way using paper or - at best - sending Word documents back and forth. There is a massive opportunity to improve process efficiency and Precisely is well-positioned to capitalize on this.”

The €1.8M investment will be used for international expansion and further product development. “There is a long way to go in the journey to automate more legal processes”, Zwagemaker adds. “Precisely’s product is ready for a bigger audience. We are ready to help them take the next step.”
Prosperoware launches data protection as a services for M365

Prosperoware in January unveiled new data protection features for Microsoft 365 including OneDrive, SharePoint Online and Teams as part of its CAM platform. CAM is a SaaS enterprise digital transformation and governance platform that help firms to govern and reduce the risks associated with multiple collaboration systems.

CAM enables organizations to store a copy of their documents in their own AWS or Azure tenant with metadata and security stored in CAM. In case of any outage, organizations can quickly access content through a One-Time Password (OTP) and download essential documents, so business operations continue as usual.

"Protecting your data is more important than ever," says Keith Lipman, CEO & Co-founder of Prosperoware. "When the bad cybersecurity day happens, having rapid access to an archive may allow organizations to recover faster without any data loss."

Key CAM Data Protection features:

- End user interface that provides for access to the CAM document archive
- Rapid access through one-time password (OTP)
- Configurable profile forms to search documents for selected criteria (clients, projects, names, etc.)
- Effortless profile search and document download
- Ability to sync documents metadata and security from on-premises (iManage 10.2 server or above) and cloud (NetDocuments and iManage cloud, Teams, SharePoint Online, and OneDrive) to CAM
- Selection of document storage location for either Azure or AWS

Teams in particular has seen an exponential increase in adoption following COVID19 social distancing and lockdown mandates and is the fastest growing application in Microsoft’s history.

Prosperoware in April last year entered into a strategic partnership with Morae Global Corporation to sell CAM. President of the technology consulting business, Matt Crocker said at the time: "Our clients using Microsoft Teams are quickly realising they need the same level of control and governance they already have with the DMS."
UK and EMEA

RPC is to implement Iridium BI revenue and profit modules. The UK top 50 firm is headquartered in London, with offices in Hong Kong, Bristol, and Singapore, and has approximately 480 timekeepers.

The firm made the selection to roll out Iridium BI firmwide following a successful pilot. The system’s integration with Aderant Expert was key and will enable RPC to easily move its data to Iridium’s cubes.

RPC says it was looking for a business intelligence partner who could help transform its approach to reporting and help the firm make better decisions.

“We were specifically looking for a solution that not only reduces the time spent by members of our accounting team in producing information, but also one that would enable a shift to a self-service for our Partners and lawyers” says David Gilmour, Head Of Business Architecture & Design at RPC. “Iridium is intuitive and easy to use so our lawyers can quickly query information on the fly.” Iridium also has team members on the ground in London who have years of experience working with U.K. based firms which significantly accelerated the implementation.

Iridium this month acquired Smart Time Apps, having merged with DFTech last year to create a now a 75+ person company. Iridium in 2018 received strategic investment from Polaris.

In further significant consolidation within the UK practice and case management sector, Solicitors Own Software (SOS) has been acquired by PracticeEvolve Group, which this year also acquired SOS rival Linetime as the market shifts heavily towards demanding SaaS solutions.

SOS has delivered practice and case management software and services to law firms across the UK since 1987 and has over 17,000 users. Graham Colbourne, managing director, said: “SOS is a wonderful business and to continue to scale and offer what the market requires, it was clear the time is right to come together with the partner who clearly have their sights on the future for the mid-tier market and the cloud.”

He added: “We have witnessed the recent successes of Linetime and observed the changing dynamics of the market. Cloud solutions, support, service, usability and simple payment models are being demanded by clients ushering in a new era of technology. With PracticeEvolve having a clear pathway to the cloud, exceptional success in Australia and the UK and a committed focus in service and support, it is clearly a winning combination for us, but more importantly, our client base. We are delighted to now be part of the PracticeEvolve group who are simply delivering what the market is demanding.”

Galway based Manifold Solicitors has chosen market leading bundling software from Zypha. The practice will use the software in conjunction with its LEAP case management systems. By using Zypha, it is estimated that the time taken to produce document bundles is reduced by up to 80%.

Zypha’s digital software can be accessed from a single-view dashboard-like screen, which makes it easy to use when creating even the largest most detailed bundles. Commenting on the news, Brid Manifold of Manifold Solicitors noted: “We provide our family law clients with the highest levels of service. An important element of that is maintaining the best document management systems internally. Previously, processes such as document bundling was a highly labour intensive process. However, by using Zypha’s software, in conjunction with our LEAP case management system, the process that once took days now takes just a few minutes, and the bundle quality is great too. All in all, the transformation is amazing and it benefits both our staff whilst freeing up more time to spend with clients.”

Matters.Cloud, a provider of cloud based practice management software to the legal industry, today announced a new partnership with Sage to make Matters.Cloud available via the Sage Marketplace.
Matters.Cloud enables legal professionals to track time and expenses, manage clients and matters, raise invoices, develop opportunities and keep up to date with tasks all within a single cloud based platform.

The newly announced integration allows existing customers of Sage Business Cloud Accounting to take advantage of the benefits of Matters.Cloud including:

Details of clients, invoices, credit notes, receipts and write-offs will automatically synchronise with Sage’s online accounting software.

This approach allows small and mid-sized law firms to take advantage of Sage Business Cloud Accounting capabilities including integration with online banking platforms, payroll, VAT and corporation tax.

“We are excited to be the first provider of legal practice management software via the Sage Marketplace. Sage Business Cloud Accounting provides the capabilities needed for small and mid-sized law firms to take control of their business finances”, said Donna Flanagan, Client Engagement Manager at Matters.Cloud.

The legal department of Rochdale Borough Council is deploying legal workflow and case management solution, Lexis Visualfiles.

The legal teams will gain a digital and uniform business environment, facilitating a ‘paper lite’ office. Staff will be able to work efficiently and productively from anywhere and at any time. Pauline Tarrant, Project Manager at Rochdale Borough Council, explains, "These are key operational requirements for the department, moving forward."

The legal department at Rochdale comprises 22 lawyers and administrative staff across two teams, who deal with a broad spectrum of cases – from property sale and purchase, regulatory crime to employment tribunal matters.

“Visualfiles ticks all the boxes,” Tarrant, says. “This will allow us to adapt and evolve the solution to meet our changing business needs. This initial deployment is only the start of our digital journey.”

Intapp, the leader in connected firm management solutions, in January announced PLMJ, a leading Portuguese law firm, as the latest addition to its growing portfolio of Intapp Time clients.

Recently recognized for its innovation by The Financial Times, PLMJ, the largest law firm in Portugal, selected Intapp Time and its trusted partner, ROOX — the Portuguese provider of IT products and services to professional services companies — to assist with deployment to support the firm’s strategic growth and innovation objectives. PLMJ has begun utilizing the service across a range of practice groups and industry sectors.

DocsCorp EMEA wins include Dutch firm Brinkhof Services B.V., which went with contentCrawler from DocsCorp to automatically search and convert all image documents in its iManage document management system to text-searchable documents. Finnish firm Merilampi Attorneys Ltd. selected cleanDocs Professional from DocsCorp to protect against unintentional data leaks caused by human error, i.e. sending emails to the wrong person. Barcan + Kirby LLP from the U.K. and Van Benthem & Keulen B.V. from Holland purchased pdfDocs from DocsCorp to manage their PDF creation and editing requirements.

US

Litera has acquired law firm intelligence supplier Foundation Software Group: a move that sees Litera widen its platform from the practice of law to the business of law.

The acquisition sees Litera launch a new intelligence business unit, and the Chicago-headquartered company says that it will invest heavily in the development and support of Foundation’s data platform. Litera is owned by private equity fund Hg and this is the latest - albeit arguably one of the most impressive - in a run of recent acquisitions.

Foundation enables law firms to pull together disparate data about clients, matters, people, and parties into usable intelligence. It has recently entered into a number of partnerships with the likes of LexisNexis and Morae Global; partnerships that Litera tells us it intends to maintain.
Speaking to Legal IT Insider, Litera’s CEO Avaneesh Marwaha said: “The business will run as it is, but what it means for the broader brand is that we’re getting ourselves into matter lifecycle. We’ve done well in document creation but sat back and asked where can we advance in knowledge management and business development: it’s time that they worked more closely together.”

eDiscovery leader Reveal has joined forces with Brainspace, backed by $200m of investment from K1.

“Backed by K1, Reveal’s merger with Brainspace has set into motion the next phase of AI innovation in the practice of law. Fueled by some of the world’s most powerful AI technology and underpinned by the Reveal review platform, we are ushering in a new era of automation in legal technology,” said Wendell Jisa, founder & CEO of Reveal.

In less than six months, Reveal has acquired NexLP and merged with Brainspace to combine the two leading eDiscovery AI solutions and create a “single pane of glass” platform for their customers’ eDiscovery needs. Clients can manage data, control costs, and extract key insights all in one place.

“Reveal is helping our customers gain insight and foresight in a rapidly evolving space by leveraging augmented intelligence models,” said Dave Deppe, president of UnitedLex.

K1’s investment will be used to fuel growth, including expanding the sales and marketing teams, building additional functionality within the products, and hiring within R&D, data science and customer success to augment the client experience.

“The eDiscovery market is undergoing rapid change and K1 is excited to partner with the Reveal and Brainspace teams to create the category leader in the industry,” said Tarun Jain, vice president at K1. “We look forward to accelerating investment into both companies’ technologies to create a world-class software platform that allows customers to streamline all their eDiscovery requirements.”

Bennett Jones LLP – a top Canadian law firm with more than 500 lawyers and 7 offices across Canada and the United States – has extended its deployment of iManage Work by adopting iManage Knowledge Unlocked, which turns iManage Work into a fully-fledged knowledge management system.

Bennett Jones selected Knowledge Unlocked as a replacement for Recommind. The Knowledge Unlocked index powers the iManage knowledge graph, which enhances critical connections and builds relationships across its data to deliver search results with increased relevancy, contextual accuracy, and speed.

The Knowledge Unlocked solution has been branded internally by the firm as ‘Insight Search’. The solution enables Bennett Jones to surface key information from the firm’s most valuable systems like their iManage document management system (DMS), knowledge bank, collection of closing books, and intranet, creating a more streamlined and effective user experience.

“At Bennett Jones, we’re thinking long term,” said Kate Simpson, National Director of Knowledge & Practice Innovation at Bennett Jones. “We’re asking: How do we create a tech stack that allows Bennett Jones to be the best it can be, and to know what it knows? The iManage platform plays a prominent role in providing that foundation and Knowledge Unlocked only strengthens and expands what we’re able to do. Knowledge Unlocked is the first step in an ongoing journey of how we connect and unlock insights across the organisation; the opportunities are multifold.”

You can read our interview with Swiss firm Walder Wyss, which implemented Knowledge Unlocked last year, here: https://legaltechnology.com/walder-wyss-leverages-imanage-knowledge-unlocked-to-inform-km-strategy/

Intapp, the leader in connected firm management solutions for professional and financial services firms, has announced Fisher Phillips, a national labor and employment law firm representing employers, as the latest addition to its growing portfolio of OnePlace Marketing & Business Development clients.

The firm will utilize Intapp’s connected client lifecycle management suite to better integrate people, processes, and data across its 36 United States offices.

“This unprecedented year has crystallized the deep value of strategic business development to our firm, as we work to maintain our relationship with our clients and help them navigate the ever-changing legal landscape,” said Ken DeNise, CEO of Fisher Phillips.
well as the importance of building the right technology infrastructure required to support new ways of working,” says Ann Meyer, Fisher Phillips’ director of marketing technology. “OnePlace Marketing & Business Development provides a centralized, proactive, and purpose-built solution designed for the legal industry that will meet our needs and help us connect, manage, and automate all of our firm’s data.”

DocsCorp wins include McCorriston Miller Mukai MacKinnon LLP, which purchased contentCrawler from DocsCorp to ensure all image-based documents in its iManage document management system are 100% searchable. Jackson Walker LLP went with cleanDocs Enterprise from DocsCorp to help the firm prevent data breaches that might result from misdirected emails, attachments not cleaned of metadata, or documents redacted improperly. cleanDocs Enterprise uses artificial intelligence to learn a person’s email behaviour and patterns, alerting them to any deviation and thus preventing a potential breach. Ball Janik LLP purchased multiple products from DocsCorp: cleanDocs Professional for metadata cleaning and email recipient checking, compareDocs Enterprise to see changes between document versions, and veroDocs for document creation and assembly.

Iridium Technology has acquired automated time entry provider Smart Time Apps, which becomes the fourth limb of Iridium’s business after business intelligence, budgeting (Intellistat), and paperless billing (Steere).

Iridium received significant investment from Polaris Growth Fund in 2018 and last year bought Data Fusion Technologies (DFTech), which accounts for the Intellistat and Steere products. That acquisition/merger saw Iridium grow to 70 employees and 250 law firm clients.

Iridium won 24 new law firm clients last year and founder and CEO Tom Jones told Legal IT Insider: “With Smart Time we have over 300 clients. They have a great product set and help to get your billable hours up.” Smart Time is made up of five people and has been bootstrapped until now. CEO Todd Gerstein told Legal IT Insider: “We have always been product driven and think we have the best product in the market but are at a point where the product needed to be amplified. The choice was to take private equity money or find a partner. Tom’s team has marketing, sales and support plus a development group, so we think it’s rocket ship time.”

Bryan Cave Leighton Paisner has selected SeeUnity’s Echo Automate product to further streamline workflow between BCLP’s Microsoft Teams and iManage applications.

“In order to offer clients our full range of practice capabilities, we’re committed to providing a seamless and efficient collaboration experience for our lawyers and colleagues around the world. Echo Automate will allow us to optimize end-to-end management and content governance for our ever-growing number of Teams sites,” said Connie Hoffman, chief information officer with Bryan Cave Leighton Paisner.

Echo Automate is a no-code, large quantity, content synchronization rule manager that eliminates manual processes. BCLP’s IT administrators will benefit from the ability to create reusable templates that define content and metadata synchronization rules to run between their iManage workspaces and corresponding Teams sites. An ongoing bi-directional sync will be set up automatically, ensuring real-time collaboration with reliable data governance.

Relativity has acquired VerQu, a data management software company that helps organizations migrate and capture communication data for record retention and compliance purposes.

The integration of VerQu into Relativity’s SaaS products will transform how organizations handle collaboration and chat data, and massively accelerate the ability to collect, analyze, monitor and review all types of unstructured data seamlessly and securely.

“It’s imperative that the legal and compliance industries stay ahead of and evolve with the changing nature of work in organizations globally,” said Mike Gamson, CEO at Relativity. “Enterprise communications will continue to shift rapidly and scale from traditional channels like email toward chat and collaboration platforms. That’s why Relativity is committed to investing in technology that connects directly to native cloud data sources for surveillance and e-discovery workflows, evolving the data paradigm from documents to include conversations.”
Morae Global Corporation has expanded the company's Asia-Pacific operations and business with the acquisition of Sydney-based information management provider and iManage reseller Trinogy Systems. Trinogy has long been a rival of Phoenix Business Solutions, which was acquired by Morae in May 2019.

Trinogy’s team of consulting, implementation and support professionals for technology solutions – along with key members of the Trinogy leadership team Allan Rees-Bevan, David Nola and David Tai – will integrate with Morae’s existing teams in Sydney, London, and Bangalore. Director Robert Fraser is retiring.

The Trinogy team will sit within the digital transformation team headed by president David Boswell, who at Phoenix was a senior managing director. Morae’s business is split into two: digital transformation and business transformation, which includes people and managed services.

Speaking to Legal IT Insider, Boswell said: “This has been a fair while in the making. For us the APAC region is a great region, full of forward-thinking law firms and corporate legal teams. We’re seeing demand for our services growing and we’re very much in a position to bring together two market leaders, which gives us a better platform to grow in Australia, where Trinogy is focussed but also New Zealand and Asia.” Trinogy has a lot of its own products and IP and Boswell added: “This gives us more depth and breadth and Trinogy has built a fantastic platform. They have done a great job in growing their IP and developing their own products, not just in the areas that we serve but also around workflow and eSignatures.”

DocsCorp wins in APAC include Adelaide firm, Lipman Karas Pty Ltd, and Melbourne firm, Holding Redlich, which both chose cleanDocs Professional from DocsCorp to alert users to potential email data breaches such as sending an email to the wrong person, failing to clean attachments of harmful metadata, or improperly redacting a Word or PDF attachment.

Movers and Shakers!

UK & EMEA

Ex-Thomson Reuters Contract Express head Andy Wishart has joined Agiloft as chief product officer. Wishart is one of the best-known names in the legal contract automation sector, having co-founded Contract Express developer Business Integrity, which was acquired by Thomson Reuters in 2015. At TR he started out as global head of Contract Express but rose up the ranks to become VP of drafting and productivity solutions.

Agiloft is an end to end contract lifecycle management platform that last year secured $45m in funding and launched a new AI engine for contract automation on a no-code platform. While no-code in many cases is just the latest buzz word, Wishart tells us that the strength of the platform and this growth last year have led to him joining the company that counts EMC, Chevron and Doosan among its clients. At TR Wishart has been working towards creating a contract lifecycle platform and was instrumental in the acquisition of HighQ in 2019.

Wishart told us: “Customers are using contract lifecycle management to solve a lot of their procurement, sales and contracting needs. Agiloft is a hugely flexible platform. Our founder Colin Earl had a vision for no-code before it became sexy and cool and customers can extend the platform with their own custom solutions. We can build customer modules on the platform to solve custom needs, so it’s a true platform and
really exciting product.”

We interviewed Agiloft’s new CEO Eric Laughtlin in September, which you can watch here. The video with Andy is below.

In a high profile hire for UK legal engineering firm SYKE, Jonathan Badrock has joined from DWF to head data services.

At DWF Badrock was head of research and development for the London Stock Exchange-listed firm’s innovation arm, DWF Ventures. In his last role, he was responsible for leading the research and development team, helping DWF’s clients and its own lawyers identify, design and test new ideas or services.

At SYKE his primary focus will be on helping SYKE’s customers to leverage their data.

Badrock said: “It’s a real privilege to be joining SYKE at this stage of its growth and development. I’ve watched Alistair transform the business into a world-leading legal tech consultancy and I look forward to helping it accelerate to the next level.

“Having led on a whole range of projects in my previous roles, including process improvement innovation which saved over 20,000 lawyer hours, I understand the pain points and challenges of implementing legal technology, particularly within a law firm. But I’m also a firm believer in harnessing data to enable insight-driven decision making.”

January saw SYKE continue its run of big name hires with the appointment of former Royal Mail legal procurement head Sarah Barrett-Vane as its head of legal procurement, spend management & eBilling.

A former lawyer, Barrett-Vane transitioned into legal procurement, then legal operations and legal technology implementation. She was director of legal operations at Royal Mail for five years where she worked with Syke founder and CEO Alistair Maiden on automating the NDA process. She has been consulting since 2018, including carrying out a number of legal panel reviews and implementing multiple ebilling solutions for clients.

Barrett-Vane said: “It’s great to join forces with Alistair again and I’m looking forward to leading the charge on legal procurement, spend management & ebilling. Together when I was at Royal Mail we automated the NDA process, running a pilot with Contract Express, and helping save the company £50k a year in external legal fees, while saving the in-house team time and hassle. It reinforced my view that legal technology can help revolutionise how complex organisations function, driving operational efficiencies that deliver strategic benefits.”

German-headquartered legal spend vendor BusyLamp has hired Rob MacAdam as VP of product and Jo Guy as senior customer success manager. MacAdam was previously head of digital products for EMEA at Ashurst and prior to that at HighQ. He joins the corporate legal spend and matter management software vendor to oversee the development of the newly launched platform solution, Legal.Ops.Space.

In a statement MacAdam said: “BusyLamp has a fantastic reputation in the corporate legal market. It’s an ambitious company with great leadership and an awesome team. In-house legal departments face ever growing challenges, and I’m delighted to be joining BusyLamp as VP of product to help tackle those challenges head on and enable our customers and users to work efficiently, collaboratively and transparently to deliver real value for their organisations.”

Guy was previously with Lloyds Banking Group, where she was part of the legal team that implemented BusyLamp. She has hands-on experience using the legal spend management software, eBilling.Space. Guy will focus on supporting BusyLamp customers in the UK and Ireland.

Commenting on her new role, Guy says: “Having worked with BusyLamp and as a user of its software for five years, the natural next step was working for BusyLamp! From day one, I was impressed by the simplicity and clean look of the system, the can-do attitude and positive energy of all the team, and the roadmap for development. I’m really looking forward to being part of the onward journey.”

Drafting automation platform Clarilis has appointed Elizabeth Basten as chief marketing officer.
As CMO, Basten will oversee overall marketing strategy at Clarilis including brand engagement, growth, product marketing and digital.

Before joining Clarilis, Basten was CMO for Wealth Wizards, a UK top 100 Fintech who were the first to automate the financial advice process in the UK. Liz also led the regulated business arm of Wealth Wizards as they launched the UK’s first digital financial adviser for the UK employer sector, which won a Schroders award for innovation within the first six months of launch.

Basten said: “I have been lucky to work with Fintech pioneers that have led the way when it comes to automating complexity within regulated professional services environments... LegalTech is transforming the legal industry for the better and we are all focused on accelerating the pace of change!”

Peppermint Technology has strengthened its executive team with the appointment of Niki Redwood as Chief Financial Officer – not to be confused (as we were initially, it doesn’t take much) with former CFO Nicki Grundy. Peppermint’s innovative CX365 platform, built on leading Microsoft technology, provides cloud-based case and matter management, client engagement (CRM), document management and financial management solutions to top law firms and other legal services organisations.

In her new role, Redwood will leverage her extensive experience leading financial strategy and operations, including fundraising and managing investor relations, in growing technology organisations. She joins Peppermint from her role as CFO at Microsoft partner Nasstar, a leading provider of managed IT and cloud services to a range of industries, including many UK law firms.

Redwood commented: “The commercial proposition of a SaaS business has long-term, strategic customer partnerships at its core – something that aligns very much with my background and strengths.”

Legal tech scale-up Apperio has appointed a high-growth technology entrepreneur and a leading private equity specialist to its board to help drive its growth and geographical expansion.

David Eldridge joins the SaaS-based legal spend analytics and matter tracking platform as chairman: he has more than 25 years’ experience in the technology industry. He co-founded and led marketing technology company Alterian, listing on the London Stock Exchange in 2000 and overseeing five acquisitions in the UK and US before selling the company to SDL plc. Since 2011, David has held advisory and board positions with high growth technology and data businesses.

Joining as a non-executive director, Neil MacDougall has spent 20 years at mid-market buyout firm Silverfleet, leading the buyout of the company from Prudential in 2007. Neil was Silverfleet’s Managing Partner between 2004 and 2019 and became Chairman in 2019. In 2020 Neil was appointed as Chair of the British Private Equity and Venture Capital Association, the industry body for the private equity and venture capital industry in the UK.

“Apperio has enjoyed a phenomenal period of growth in the last two years. The legal spend we manage on behalf of clients now exceeds over £1bn, our revenues are up 150% and we’ve successfully launched into the US,” says Apperio founder and CEO Nicholas d’Athyemar. “David and Neil bring the experience, expertise and calibre Apperio needs to both expand our presence in private equity and drive our broader growth and development. We’re delighted to welcome them both to our team.”

In the UK Morae Global is starting the year with a bang. Joining the strategic advisory group as associate director is Sally Senior, who was previously business process manager at Norton Rose Fulbright and before that workflow product manager at Pinsent Masons. Also joining is senior associate Joshua Lyons, who was previously at Deloitte Legal.

In July 2020 Morae acquired Janders Dean to give it a UK-based legal advisory practice group with a particular eye on the large law private practice and corporate legal market. According to Janders Dean founder Justin North, the group is growing thanks to increasing client demand. You can read that article here: https://legaltechnology.com/morae-global-ramps-up-uk-advisory-capability-with-acquisition-of-janders-dean/
Simpson Thacher & Bartlett’s chief knowledge and innovation officer, Oz Benamram has made a raft of senior hires including Tanisha Little as director of KM; Kay Kim as director of practice innovation; Andrew Baker, who joined as director of data analytics; Moshe Azoulai as director of practice technology; Sheila Sterling as library director; and Brian Roe as MCO attorney. Having joined Simpson Thacher in March with the aim of significantly growing KM, Benamram tells us his dream team is coming together nicely despite COVID. Oh yes, and he is still hiring.

eDiscovery veteran Dan Bellopede - best-known for his roles at RecomInd and OmniVere - has joined AdvoloGix as chief revenue officer. AdvoloGix is a Salesforce-based legal case and matter management system provider.

In this newly created role, Bellopede will oversee customer success, revenue and marketing.

In addition to Omnivere and RecomInd Bellopede has worked at Vertical Discovery Corp. Most recently, he worked at Litify, which is built on the Salesforce platform.

"I was drawn to AdvoloGix because of the strength and power of the platform," Bellopede says. "After meeting the team and evaluating the software, I believe there is tremendous opportunity for legal professionals in law firms, corporate legal departments and government entities to improve operational efficiencies and increase productivity though the expanded use of AdvoloGix. I'm excited to be on this team and look forward to working with both existing and new clients and partners."

Eigen has appointed Stephanie Lightman as its new CMO. She joins Eigen’s executive team, to lead the global marketing function from the company’s New York Office. Lightman succeeds Emily Ochoa, who has taken on the role of Eigen’s chief of staff.

Eigen uses natural language processing technology to extract, classify and analyse data from documents. The London and New York-based company says that it has its most successful ever year in 2020 by more than doubling the number of enterprise customers it serves. In October, Eigen announced the appointment of Spyros Karageorgis as its first Chief Financial Officer and Tony Ehrens as its new Chief Revenue Officer.

Lightman most recently led product marketing and portfolio strategy for Limeade, an employee experience company offering software solutions for employee communications, engagement, and well-being. She also has marketing leadership experience with several SaaS companies including Sitrix, where she led the company’s marketing function through to its acquisition by Limeade.

Elsewhere ContractPodAi has hired former Amelia (Ipsoft) global GC and corporate secretary Jerry Levine as chief evangelist. Levine, who is based in New York, was a ContractPodAi customer and advocate and we spoke to him about the selection of ContractPodAi in April 2020.

Levine said: "I believe ContractPodAi brings immense value to organizations. As general counsel we need to ask ourselves how we can spend less time buried in administrative tasks and become what I like to call ‘awesome lawyers’ – a lawyer who acts as a strategic lead in an organization. With ContractPodAi, I have seen first-hand how this works for legal departments and how using the system makes legal departments work efficiently."

Prior to joining ContractPodAi, Levine held leadership and consulting positions at both public and privately held companies, including Axiom and LexisNexis. He also founded a start-up focused law firm.

Baker McKenzie has appointed Kate Stonestreet as its new global chief operating officer, taking over from Jason Marty, who joins Bryan Cave Leighton Palsner as COO on 1 March. Stonestreet, who heads Baker’s business services transformation project underpinned by ServiceNow, will oversee all of the business services functions of the firm.

Stonestreet will take up her new position with effect from 1 February 2021 and will remain based in London. Since 2017 she has been the firm’s global director of operations with responsibility for the strategic oversight of centers in Manila, Belfast, Buenos Aires and Tampa, and as part of the leadership team overseeing the development and implementation of the Firm’s business services transformation program.

The business services transformation project sees everything from documents production to billing to...
"Coming from a small village in Yorkshire in the North of England and joining the firm in a relatively junior role in Hong Kong, I am a story of what is possible at Baker McKenzie," Stonestreet said. "As a firm we are in a strong position as we emerge from the pandemic - with loyal clients, connected global teams, and the drive to excel. This is an exciting time, and we face both opportunities and challenges as we emerge from the crisis, but I believe we are strongly positioned for the future and I look forward to playing a central role in ensuring our future success."

**MyCase, Inc.** , a leading provider of cloud-based legal practice management software and payment services to law firms, announced today that **Jim McGinnis** has been appointed as the company’s new CEO, effectively immediately.

McGinnis most recently served as EVP/GM of Wolters Kluwer’s Tax and Accounting North America Professional Segment. Over the past three years, he helped extend CCH Axcess as the leading SaaS solution in the Accounting profession. Prior to that, Jim served as Vice President at Intuit where he led Marketing and Product Management for the Professional Division and led the Accountant Segment as part of Intuit’s QuickBooks business. He has held senior leadership positions at Activision, Pepsico, and Proctor and Gamble.

"Jim is an exceptional leader, with a deep product management background and a strong track record of growing SaaS businesses," said Umang Kajaria, Partner at Apax Partners. "He is especially adept at leading businesses that serve professionals, having spent more than a decade helping Accountants. We welcome Jim to MyCase and look forward to partnering with him to accelerate innovation for our law firm customers."

**Lexicon**, a legal technology and services provider, has hired **Lori Moser** as its first vice president of strategy, mergers & acquisitions. Moser will have direct accountability for identifying targets for M&A and strategic partnerships, structuring deals, managing the transaction process, business insights and data analytics, conducting negotiations, and leading due diligence.

The selection of Ms. Moser for this newly created position reflects an expansion of the company's executive team by adding an executive leader to focus on its future growth.

"Lori has a proven track record of driving key strategic initiatives through detailed execution resulting in exceptional sales and operational results," Lexicon chief executive officer Scott Brennan said. "Lori’s addition to the executive team will allow us to elevate service offerings to our clients while identifying essential growth opportunities."

Online disputes platform **Opus 2** has appointed **Martin Coen** as CEO, taking over from founder **Graham Smith Bernal**, who is taking on the chairman role. Coen, who comes from the fintech sector and was previously CEO of payments software vendor Dovetail, has long been a board member of Opus 2.

Speaking to Legal IT Insider, Coen said the strategy would be "more of the same", given the rapid growth that Opus 2 is enjoying, as trials by necessity become paperless thanks to the COVID19 pandemic. Last year's filed UK turnover saw growth of 23% and that figure is on course to be higher in this financial year, with Opus 2 increasingly seeing its customers use the platform for collaboration and case preparation at an earlier stage.


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**A view from the recruitment market**

*We asked Sean Kiff, a consultant at La Fosse Associates, to share what he is seeing in the legal recruitment market*
"Like many other businesses and sectors, the majority of 2020 saw widespread hiring freezes across the legal landscape. As we moved into Q4 2020, many of these freezes were lifted as businesses realised remote hiring and onboarding was effective and had enough trust in the market that investing in hiring/programmes of work was the right move. This has been one of the many benefits which 2020 will be remembered for in the hiring process...yes you can hire someone remotely. In our opinion this is here to stay!

"Fortunately, the professional services market has been resilient towards redundancies, with many taking advantage of the furlough scheme but not in huge numbers. This has provided businesses with a unique opportunity to bring these people back at a minute's notice and have no financial costs to rehire.

"The start of 2021 has seen a surge in the demand for a variety of skillsets, specifically in the interim market around: cloud, data, business analysis and project/programme management. With many large law firms looking at significant investment in costly IT/Finance systems they must not forget to implement a solid strategy around change management otherwise significant value will be lost.

"2021 and 2022 will see a dramatic change in the legal landscape with many radically evolving business services as a way to gain a competitive edge."

Are people more confident in moving to a new role in 2021? Let me know your thoughts. Caroline.hill@legalitlexicon.com

Watch our video chat with Andy Wishart about his move to Agiloft here:
Buying an ‘AI’ company? MathLabs will tell you what it’s [not] worth

Legal IT Insider editor Caroline Hill meets the company that can tell you whether the tech at the centre of your latest M&A deal is scaleable AI comprising valuable IP, or standard technology with a pretty window dressing. We speak to Fujitsu about how MathLabs has become indispensable during the due diligence process. Could this be a white-labelled law firm differentiator?

We’re all familiar with unsubstantiated brags about all-singing-all-dancing AI technology (aka ‘my AI is better than yours.’) But what happens when you are tasked with investing substantial amounts of money to buy the company that develops that AI? How do you – particularly given the constraints of COVID19 – work out if the company is really worth what it says it is? After all, just the top 10 enterprise M&A deals in 2020 were worth a staggering $165.2bn, according to TechCrunch.

Enter 20-strong London-based computational mathematics and AI lab MathLabs, which is now relied on heavily by global companies including Fujitsu to, speaking frankly, cut through the BS and assess the value of a company’s tech stack, including any IP. Not only that, but it can help the purchasing company to work out how to best leverage the tech going forward.

Fujitsu has moved from a historical hardware and services business to a digital business – a strategy that its CEO has been vocal about. As part of that strategy, the Japanese-headquartered global IT equipment and services company is growing organically and inorganically, with corporate executive officer Nicholas Fraser brought in to spearhead that growth.

Speaking to Legal IT Insider, Fraser, who is also ex-McKinsey and joined Fujitsu in March 2020, said: "The tech companies we look at are typically in emerging areas. Quite often people position their company as digital and having a wonderful platform or IP, and it all sounds great, but what is the reality? What are the skillsets of the people? Do they own the IP? We need to be able to work with a specialist partner to do a technical assessment, especially in COVID times when traveling is difficult. If we do decide to acquire a company, then there is the question of how to get the most value from the acquisition. MathLabs provides support in both the assessment of a company’s technical capabilities..."
and also in how to integrate and operate the acquired company post-acquisition. We’ve used them a number of times in the past and plan to use them in the future.

MathLabs’ valuation has on at least one occasion led to Fujitsu changing the amount offered for a company, which, incidentally, it ended up not acquiring. Fraser says: “You’ve got to be skilled to be able to make these technical assessments and give a reliable opinion. We were looking at one company, for example, and MathLabs said ‘what they have isn’t as good as they make out, it’s very standard – we advise you to think about the valuation.’ This caused us to temper our valuation range to reflect this more balanced view of the target company’s technology solutions and skillsets.”

MathLabs is filling a skills gap that in many cases has led companies to buy assets that are worth less than anticipated. It speaks to a wider trend observed within everything from the court system to government regulation, where the development of AI far outpaces an understanding of how it works.

Fraser says: “I have worked at good companies and it would be nice to say that mistakes don’t happen but there are inevitably transactions where you find out that what is being considered as a great acquisition target is actually not as good as first thought.” He adds: “Part of the problem has to do with the definition of digital. Today it is used very broadly almost becoming ubiquitous in how a company describes themselves.”

So, who are MathLabs?

It’s probably relevant to mention at the outset that the senior team are McKinsey alumni. Director Erez Raanan was global head of analytics ventures at McKinsey Ventures; chief scientist Pradip Binay Ghosh was lead AI scientist at McKinsey.

Raanan says: “We saw at McKinsey that the amount of transactions with AI at the core is increasing, making it hard even for a company like McKinsey to understand the value of it. Around 10% of transactions now have AI at the core. It makes law firm services difficult, where even the acquirer has difficulty understanding the value, and that is what MathLabs is working on.”

The approach

Being completely honest, there’s little point for the majority of us in taking a deep dive into the methodology used by MathLabs (therein lies the problem). But suffice to say; they provide high level insights and hands-on testing to ascertain whether the asset has competitive advantage. In one recent project, MathLabs notably pitched for a deal alongside McKinsey.

The potential for law firms is huge and Raanan says: “If a law firm offers this as a white labelling service in partnership with MathLabs, it becomes a differentiator.”

Types of deal

MathLabs works on any deal where there is enterprise software. Raanan says: “Whenever you have enterprise software, half are going to involve AI. If I’m a big company, I probably already have a fund to invest in fintech companies, most of which are powered by AI.

Case Studies

MathLabs case studies could also be called cautionary tales. Ghosh says: “In one case we worked on, the target company had a quantum mathematics and AI powered platform to shorten the drug discovery process – they had created their own AI. The buyer did their due diligence and weren’t sure of the valuation or what the IP was, and the company claimed massive IP. We found a few things very quickly. All the AI they were doing was open source, and it was none of their own IP. Secondly, there were a lot of claims of AI but what they were doing was using fairly publicly known algorithms and they didn’t have the
team to do AI. The real value of the company was in two or three staff with experience in computational computing, but there were no provisions to prevent those guys from leaving.”

The acquiring company ended up not going through with the deal.

In another instance, the company was marketing itself as an AI platform with a hefty price tag, but Ghosh says: “The deal wasn’t just about IP but a platform that was transferrable. We discovered the IP was a thin wrapper around off the shelf machine learning services. It had a high-quality interface, but the knowledge wasn’t there.”

The company ended up with a significantly lower valuation.

A truly valuable company will comprise a combination of IP and talent, and both Raanan and Ghosh stress the need to think about how scaleable the platform is. How easy is it to replicate? How defensible is it?

The honest and slightly concerning conclusion – and a conversation to be pursued further another day – is that the majority of people working in the corporate sector do not and will not have a clue. For now, it’s very much MathLabs time in the sun. Fraser concludes: “There are many consulting firms that provide technical opinions, but they are not as specialist as MathLabs with the same level of talent. We’ve used them a number of times in the past and plan to use them in the future.”

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**Startup Corner: Summize**

*Founded in 2018, Summize assists legal teams and SMEs throughout the contract lifecycle. The platform enables users to understand, manage, and review their contracts, and in a short space of time has evolved from summarising the key points of a contract to a more holistic approach. Here we ask the Summize team to tell us more about the Manchester-based company and its strategy.*

**How would you describe Summize to a friend?**

Summize is a lightweight assistant for the contract lifecycle. It’s not about replacing the work of a lawyer, but rather enabling lawyers and other users to work more efficiently; ultimately, saving them both time and money. Our key message has simplicity at its core.

**And to a techy?**

What is your growth strategy?

We have a phased growth strategy, which will initially include an increased headcount within sales in 2021, while continuing to grow our UK client base. Our next phase will concentrate on geographical expansion, and beyond that, we will focus on hyper-growth. All of these phases will run alongside product development and expansion.
Summarize originated as a tool to quickly and intelligently summarise contracts, given that this was the issue faced by our CEO & Founder, Tom Dunlop. However, we've since evolved to cover even more of the contract lifecycle, with capabilities for both pre and post signature contracts.

Pre-signature contracts benefit from our Microsoft Word Add-In, which allows the user to quickly understand and navigate through key clauses. Key features include identification of defined terms throughout the contract and tight integration into our web platform for live summaries and access to playbooks.

Post-signature makes use of our web app, which provides a lightweight and easy-to-use management system, alongside quick and powerful contract summaries.

We use a unique combination of extensive legal experience and the latest machine learning techniques to review and summarise contracts. Our features also include but are not limited to: Contract Insights (allows the user to ask questions against the contract repository), customisable exports, and shareable links. Architecturally, our portal exists as a Cloud native SAAS platform which can be used from any location.

All of our designs and features are developed within the context of our core business philosophy, i.e., that Legal Tech should be easy to use, slot easily into existing processes and provide instant value. We aim to be the glue between Legal and Tech.

**When were you founded?**

2018, but we didn’t fully launch the platform to market with our new team until 2020.

**By who?**

Tom Dunlop, CEO, who is a former lawyer and Legal Director, and David Smith, CDO, who has over 25 years’ experience within the IT sector.

**Who are your key managers/senior execs?**

Aside from our co-founders, we have Richard Somerfield, CTO; Daniel Williams, Revenue Director; and Zoe Peterkin, Head of Marketing. Additional board members include our Chairman, Charles Sharland; Gail Hazley, CFO; and Jeremy Thompson, Board Advisor.

With regard to product development and expansion, led by client feedback.

We now run a Customer Advisory Council, which ensures that our roadmap is always aligned with our users’ needs.

**Have you received investment?**

Yes, we have received investment from NPIF (Northern Powerhouse Initiative Fund) Maven, Private Investors, and from the Government Future Fund.

**Who are your target clients?**

Our target clients encompass law firms, in-house legal teams and SMEs.

**Have there been any key changes in direction since you were founded?**

We began with a really lightweight and easy-to-use product but found ourselves pitching for volume and due diligence work. This inevitably led to comparisons with large enterprise software, when in reality, we focus on many other use cases and often different departments.

Ultimately, our product was designed to be easy to implement, easy to use and easy to buy. This led to a change in direction for our sales strategy. For example, we introduced a trial of our platform, allowing users to sign up for free via our website and get a sense of how our product worked for themselves.

**What are the key challenges in your market?**

Legal tech is still a relatively new market, which means that it can be viewed as fragmented. This, in turn, can make engagement a challenge.

The contact automation space is generally viewed as saturated, so, once again, it can be difficult to get your voice heard in a crowded market.

**Tell us something people don’t already know about the company?**

Our founder, Tom, played badminton at national and international level, and so has brought a lot of learning from the world of competitive sports to the business. Our thinking and vision are therefore founded in the concept of Kai Zen - a Japanese term meaning “change for the better” or “continuous improvement”.
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Contact Jeremy at jeremy.hill@legalitlexicon.com for more information.

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