

# Briefing

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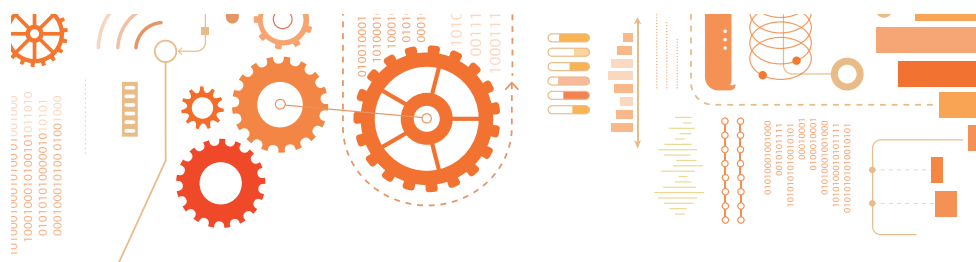
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# Need to process that?

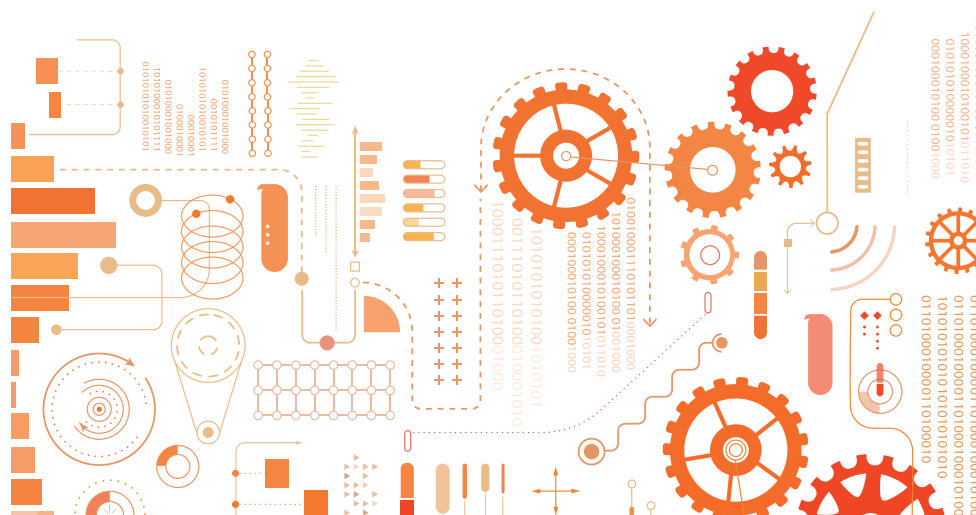
At one of our recent **Briefing** Frontiers half-day events, delegates brainstormed where they should try to apply automation to any area of the business in search of a compelling saving or a great gain. I'm not sure that I've ever seen one of these energetic interactive sessions we love to run bubbling away with brio so brilliantly.

So, it appears the 'automation gap' that we discerned a few years ago in our annual Legal IT landscapes research – hampering productivity and efficiency at work – is still quite the stretch. But firms we speak to in this **Briefing** spotlight sure are busy working on it – from more efficient assessment of client risk for onboarding, to seamlessly setting up systems as a better experience for their new employees; and even project-managing some of the legal work itself it seems. Robotic process automation (RPA) is just getting in on the action too – so if you'd like a little inspiration for your own journey toward extracting maximum juice, please do read on.

RICHARD BRENT EDITOR-IN-CHIEF

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# On repeat

How are law firms faring with automation? Which internal processes are they choosing to automate in 2019? Jem Sandhu talks to law firms about their successes, frustrations and hopes for the future

**G**reater efficiency. More accuracy. Productivity gains. It's the end of 2019 and we don't need to be selling the benefits of automation to anyone at this point. On the efficiency factor, our 2019 **Briefing** Legal IT landscapes report saw the technology scoring higher than even AI.

What's happening now is that law firms are expanding and refining how they automate key processes. They're getting serious about resolving the 'lack of integration' problem; about using automation outside of HR and finance; about applying it to client-focused processes. They are

also starting to identify areas for robotic process automation (RPA).

## Automation successes

Burness Paull is perhaps representative of the extent to which law firms are automating in 2019. Most of its processes – billing, client onboarding, matter creation, staff management, document production – are (successfully) automated to some degree, according to Billy Kirkwood, the firm's IT director.

In general, on the business services side, firms tend to focus on automating finance and HR

processes; the legal delivery side leans most toward document automation.

Andrew McManus, IT director at Eversheds Sutherland, cites finance as the biggest area of automation for the firm: “Most finance teams have been using operative finance systems for many years. There are a lot of repetitive tasks involved in processing bills and invoices. It’s routine, low-level work.” And over at Womble Bond Dickinson, time capture is one area that is now much more automated than it has been. “We have software now that helps fee earners work out what they’ve done throughout the day in terms of emails looked at, or documents worked on. It does that by monitoring things such as screens and calendars,” says Sam Dixon, a managing associate and a member of the firm’s innovation group.

On the HR front, Christopher Tart-Roberts, Macfarlanes’ head of knowledge, innovation and legal technology, notes that the firm uses automation a lot – including for new-joiner offering and onboarding. Similarly, Eversheds Sutherland’s new joiner onboarding process emerged as a leading area for automation over the past few years. “Automation reduced the amount of manual work that we historically did around, for example, sending out contracts, and making sure that people have been given the right information,” says McManus.

Tart-Roberts’ observations about the realised benefits of automation for Macfarlanes – significant improvements in speed and efficiency, robustness of output, error reduction, improved consistency, enabling people to focus on higher value, more stimulating, work – were echoed, with little variation, by most of the leaders we spoke to. For Burness Paull, automation in business services, largely driven by compliance and governance, has also “helped standardise processes, improve data integrity, and provide an audit trail”, according to Kirkwood.

### Automation hopes

When, in our 2019 **Briefing** Legal IT landscapes report, we singled out automation as the year’s

**“A scaleup can’t necessarily afford the right legal advice at regular rates. Through document automation and other support, WBD Accelerate helps them get set up without too much legal cost.”**

*Sam Dixon, managing associate,  
Womble Bond Dickinson*

“brightest rising star”, we speculated that firms may be “sweating” this particular investment. We weren’t wrong. This year has definitely seen an appetite for getting the most out of the technology.

Of course, there’s still work to be done around automating basic HR and finance processes. Macfarlanes uses automation successfully across various business services teams and practice areas, and Tart-Roberts says that the firm is looking at different ways to introduce elements of automation into tasks that are performed regularly, including billing, client reporting and time-recording. He also hopes that its new HR system will be “used to increase automation of common tasks”. And over at Burness Paull, Kirkwood figures that at least 90% of the firm’s cumbersome starters and leavers process could be automated: “New staff details are passed from HR to IT and facilities, who set up access to systems such as email. They then pass that information back to HR again.”

However, 2019 is also about exploring “more” automation, whether working toward fuller automation (for example, Womble Bond Dickinson’s automation of time capture certainly makes a fee earner’s life easier, but it’s by no means fully automated, says Dixon), using it in areas beyond HR and finance, or looking at how it can enhance client service delivery. On these latter two points, for example, one firm we spoke to is using automation to ensure smoother





booking of meeting rooms for clients – a seemingly minor point, but critical when a transaction is about to complete.

This goes hand in hand with what looks to be a renewed sense of excitement around automation. Gemma Mainland, senior legal technologist at Ashurst and part of Ashurst Advance (the firm's 'NewLaw' division, comprising cutting-edge technology, process and project management experts, and alternative resourcing) has seen more interest in automation this year compared to when the unit was launched three years ago, along with an upsurge in clients asking for the latest legal technology.

### More document automation

"Good old document automation," exclaims McManus, noting that the legal industry has only scratched the surface of the technology. He sees a lot of demand for it at Eversheds Sutherland, in business services as well as practice areas: "In business services, a large amount of document creation is still done manually. There's a real focus on automating that."

Macfarlanes, a heavy user of tools such as Contract Express from Thomson Reuters, also wants to widen its use of document automation. "There's scope for us to use it even more extensively, and in increasingly sophisticated ways," says Tart-Roberts.

When Dixon looks at document automation (already Womble Bond Dickinson's most automated area), he foresees that most growth will be in client-facing documents. And the firm's new WBD Accelerate product – which includes an online portal providing scaleups with access to out-of-the-box document automation tools – does just that. "A scaleup can't necessarily afford the right legal advice at regular rates. Through document automation and other support, WBD Accelerate helps them get set up without too much legal cost. One of the sectors we go to market in is the tech sector. WBD Accelerate is our way of supporting it," he says.

"More" document automation can also mean increasing the number of documents generated. Mainland at Ashurst has seen advances in bulk-generation documents over the past year. "Instead



of generating five or 10 documents and inserting the data semi-manually, you can, for example, insert a format with thousands of data files and quickly generate thousands of documents to pull up for e-signature. A lot of clients are amazed that they can create all these letters and contracts in minutes,” she says.

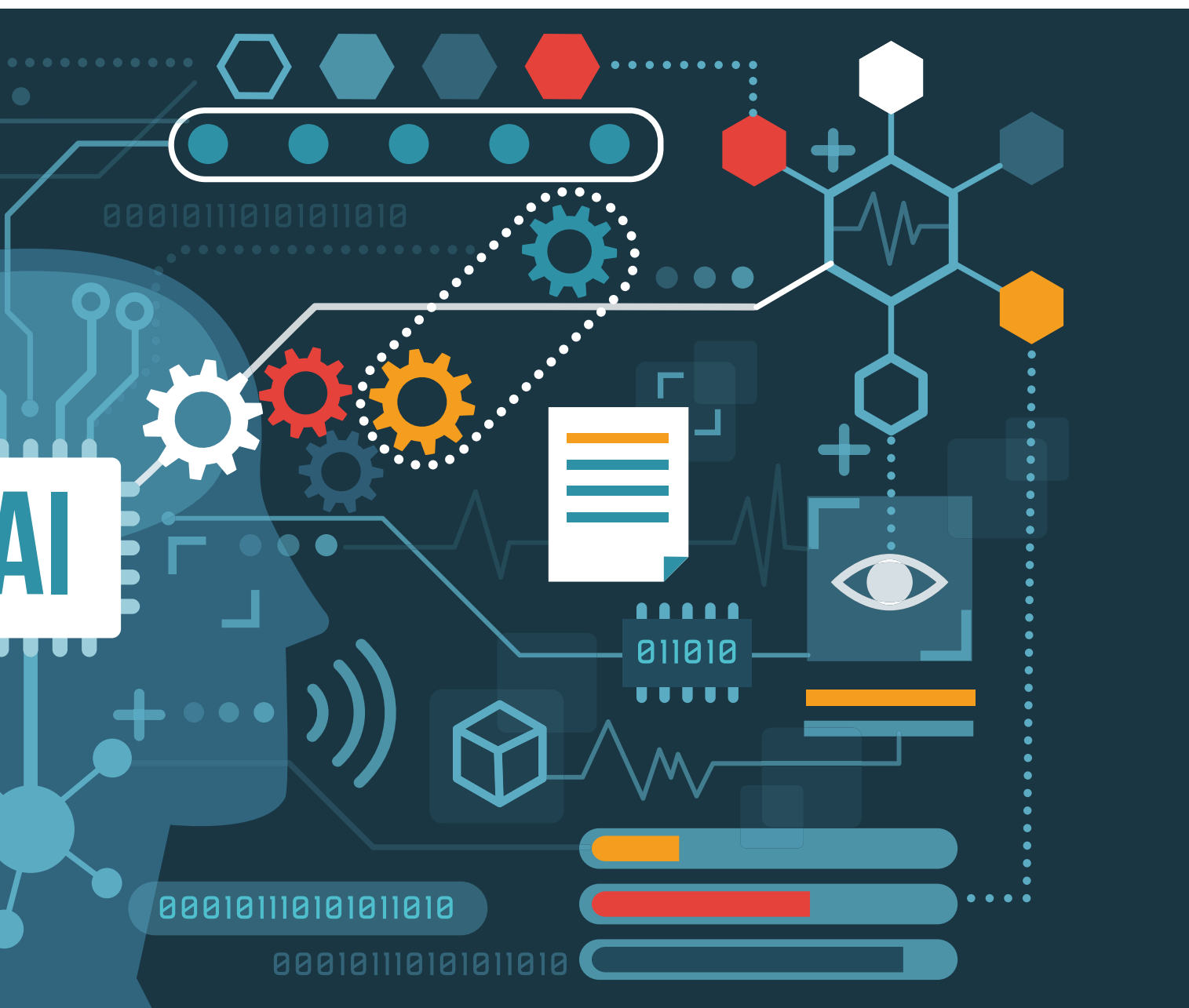
### Onboard with automation

Client onboarding has always been a fraught balancing act. Firms must take on clients quickly, but comply with increasingly onerous regulations around conflicts and money laundering. It’s a clear case for more sophisticated use of automation.

One individual we spoke to is keen to automate client onboarding further – noting the partial nature of the automation in this area. “My secretary puts new client details in our systems. These details then go to our support functions,

who do a mix of manual and automated checks around AML and credit checking. You can’t just push a button and pull everything through,” says the lawyer.

One solution to this challenge is to develop your own solution. Client onboarding is such a focus for Eversheds Sutherland that it decided to develop its own bespoke workflow to replace its legacy digital process automation platform; it wanted a system that could link to a range of systems. According to McManus, the driver for the change was not so much internal efficiency as providing clients with a service, “quickly onboarding clients with all necessary due diligence and conflict checking.” The firm wanted to be able to work faster for global clients operating in multiple jurisdictions. “Now, new instructions are put in a portal and automatically go to our finance and conflict system for checks,” he says. Eversheds will also be linking



the platform back into the firm's matter management system. "Once we finish the bespoke element, we will probably grow it by buying another solution," adds McManus.

### Robots emerging

2019 marked the first year that robotic process automation was mentioned separately from automation in the **Briefing** Legal IT landscapes report. Its high efficiency ranking is well deserved: RPA tools not only learn a task and do it automatically, they do it much more quickly. Tart-Roberts thinks that firms will increasingly use RPA. "They have spent a significant amount of time mapping and refining processes over the last few years," he observes.

Last year, **Briefing** noted that one barrier to RPA adoption was management attention to how the technology could best be used. This year,

**"A lot of clients are amazed that they can create all these letters and contracts in minutes."**

*Gemma Mainland, senior legal technologist, Ashurst*

management is starting to turn its attention to this question. McManus is enthusiastic about the potential of RPA. "It has only just become affordable," he says. Evershed Sutherland's offshore development team uses UiPath to automate tasks normally processed manually. Far from being only about big systems, such RPA can also be performed by individual process owners – the ease of which he finds particularly exciting:

**“If we get an instruction from a US client for work happening in France, the sending of the email from the US partner to a particular associate in France could be automated.”**

*Andrew McManus, IT director,  
Eversheds Sutherland*

“A lot of it can be automated by just recording repetitive tasks and putting this into the RPA system. And you can see it running – it does look like a robot.” Not only do finance and HR, with their many repetitive tasks, stand to benefit, but he also sees RPA used increasingly in IT departments for tasks such as service desk calls and security alerts.

It’s not only internal efficiency, though. Tart-Roberts describes “exciting potential for process automation to be applied to client-facing legal processes.” McManus is seeing moves in this direction, giving the example of managing the transition of a lease to a new party. “You look at which steps a lawyer needs to get involved in, and where they send it next. You can set it so that if the value is above a certain level, it will go to a partner, or to a particular country. So, if we get an instruction from a US client for work happening in France, the sending of the email from the US partner to a particular associate in France could be automated,” he says.

And RPA does seem best suited to such (relatively) simple tasks. Ashurst is currently analysing different RPA software providers, according to Abilash Unny, a legal process improvement manager with the firm. Mainland envisions that RPA can help legal analysts with emails relating to, for example, automating a tenant break notice. “There will be seven or eight data points. The analyst goes into our automation platform, puts that data point into the questionnaire to generate the document, puts it into an email, and sends it back to the client. RPA can pick up that email and do all of that – including

emailing the document back,” she says. Unny is excited about RPA developments in this area as well – as long as the processes are right. “If the task I’m doing is low-complexity, repetitive work, then RPA tools can help us save time and add value to a process,” he says. He thinks that RPA will be a good tool to have on your side – in 2020.

### **Start with the processes**

Tart-Roberts singles out lack of integration as still posing one of the biggest problems when implementing automation. “For automation to be valuable, it requires data to flow between different systems. Different data formats and lack of robust integrations can make that a challenge,” he says.

When it comes to dealing with these formats, Ashurst is working to increase the interoperability between platforms. “Have strict processes and protocols when working with additional platforms,” says Tilak Jagatia, a legal technologist manager with the firm. “A large organisation with different internal partnerships can have different operating systems. Streamlining how you work can be a solution,” he says. Mainland points out that Ashurst’s automation software is now fully integrated with different platforms, observing that the past three years have seen software providers taking the lead in creating API integrations with other software. “If a software provider won’t do these integrations, our development team will connect up the APIs,” she says.

Mapping out processes beforehand is crucial, according to Tart-Roberts, given that users increasingly expect processes to be frictionless: “Understand the variables, the dependencies and the systems that they touch. How will you deal with divergences from the standard? Will that divert back to a manual process?”

But mapping and defining these processes is not easy. Kirkwood sees it as the biggest challenge around automation. “Pockets of the firm will do things slightly differently or have a client who prefers something to be done in a particular way. Accommodating these nuances or agreeing a new process can be a challenge,” he says. In addition to mapping out the process, Unny recommends first





measuring what the product is actually delivering. “With automation, people are after ROI, which requires understanding what they are currently doing with regard to process,” he says. “Automating a bad process gives you the same bad results, but faster.” He also advises that firms do a time and motion study. “This exercise looks at what someone is doing manually, giving you data to measure against when you implement automation software.”

### Casting a cloud

All of Eversheds Sutherland’s automation systems are hosted in a cloud. “We are a 24/7 business. You can’t expect someone to wait until they get into the office to check a conflict,” McManus points out.

Of course, there are the usual security questions with cloud-based tools, particularly with client-facing automation. Womble Bond Dickinson’s machine-learning tool requires documents to be uploaded to the cloud – a requirement that applies to cloud-based automation tools in general. “We use a private cloud for maximum protection. There are still clients who are nervous and that limits what you can use the tool for,” says Dixon. But he is confident that, as cloud services become ubiquitous, client expectations will shift. In the meantime, the firm will educate its clients. “We speak with our providers to understand the different security risks and benefits of hosting in the cloud or us hosting on our own servers, and we

communicate that to clients,” he says.

Jagatia at Ashurst understands why clients would hesitate to put data in cloud-based tools. “Clients’ data is valuable,” he says. Ashurst has a hybrid system in place: “If a client prefers cloud, we are happy to provide it because our cloud solution will have the security and backup to support it.” They also provide as many use cases as they can to make reluctant clients feel comfortable. Unny is confident that the buy-in will come in, but not for a couple of years.

### Beyond automation

But perhaps the biggest barrier of all to the semi-magical state of full (or fuller) automation is knowing exactly what solutions are available. Womble Bond Dickinson, like most firms, regularly requests information on various solutions, says Dixon. “We also have a team keeping an eye on the market generally, in addition to working groups that focus on areas such as document automation, machine learning and deal rooms.”

And the recent emergence of RPA as a separate field underlines the fact that firms’ excitement about automation is not around ‘automating’ processes in general, but specific processes. So, any stated benefits and obstacles to ‘automation’ depend entirely on where it is being used and the processes that surround it. In 2020, will we see more such tools coming out from under the crowded ‘automation’ umbrella? ▀

## INDUSTRY ANALYSIS

# Data in the driving seat

Samantha Steer, director of strategy, large and medium law firms, at Thomson Reuters, explains how the business is investing ever further in increasing lawyer productivity and efficient decision-making through both document and process automation

In the UK there are well-established technology solutions for over 16 law firm activity types, combined with over 250 UK and EU legal tech startups, providing a new suite of solutions for both law firm and in-house legal activities.

Often, these well-established technology solutions support the introduction of emerging legal tech. To address the challenges of more efficient working, improving knowledge transfer and innovating around pricing, earlier in 2019 Thomson Reuters launched Panoramic, a new cloud-based legal workflow solution. Panoramic was built on the strong foundation of Elite 3E and Practical Law, and brings the knowledge and resources contained within Practical Law together with real-time budget and matter progress data, managed and delivered through the Elite 3E financial management system.

The Panoramic matter maps created by Practical Law editors present phase and task information and proactively guide lawyers through the sequence of tasks needed to keep matters in scope. Dashboards display progress alongside what has been agreed with the client, with the financial data generated presented in the context of the legal work. Moreover, the data can be retained to support future pricing strategy.

Connecting the lawyer's workflow with the law firm's financial management system, Panoramic enables firms to better manage the pricing, scoping, profitability and execution of a legal matter. That's all in addition to Elite 3E Profitability. Launched in July 2019, 3E Profitability enables cost calculations and reporting by practice, client or fee earner, with a

set of five 3E Data Insight dashboards that tailor metric visualisation by role – executive manager, practice group leader and fee earner.

## Data at the forefront

**Briefing** Legal IT landscapes 2019 asked law firm respondents to name their top-three technologies for efficiency and competitiveness respectively, and combined the two ratings into one score.

Artificial intelligence, as a “broad bucket of capabilities” was out in front. Described as the “very brightest rising star” was document automation, “beating even AI on efficiency and just a touch short of AI for competitiveness”. The report demonstrates that those firms which have made the investment in document automation solutions, such as Thomson Reuters' Contract Express, are seeing the return on their investment, and that AI is still perceived as the next game-changer for the legal sector.

The October 2019 release for Contract Express has brought a mix of automation and data analytics features. Expertise Automation enables self-service guidance via completion of an online questionnaire. Similar to document automation, but where the output is not a document, instead it's a screen providing guidance based on the answers given to the questionnaire. Data analytics introduces new custom dashboards that can be populated with data from datasheets, the Template Markup wizard speeds up the creation of a new Contract Express template, and there are document management system and SharePoint Online integration enhancements.

**Briefing** Legal IT landscapes 2019 also reported that interest continues to grow in client



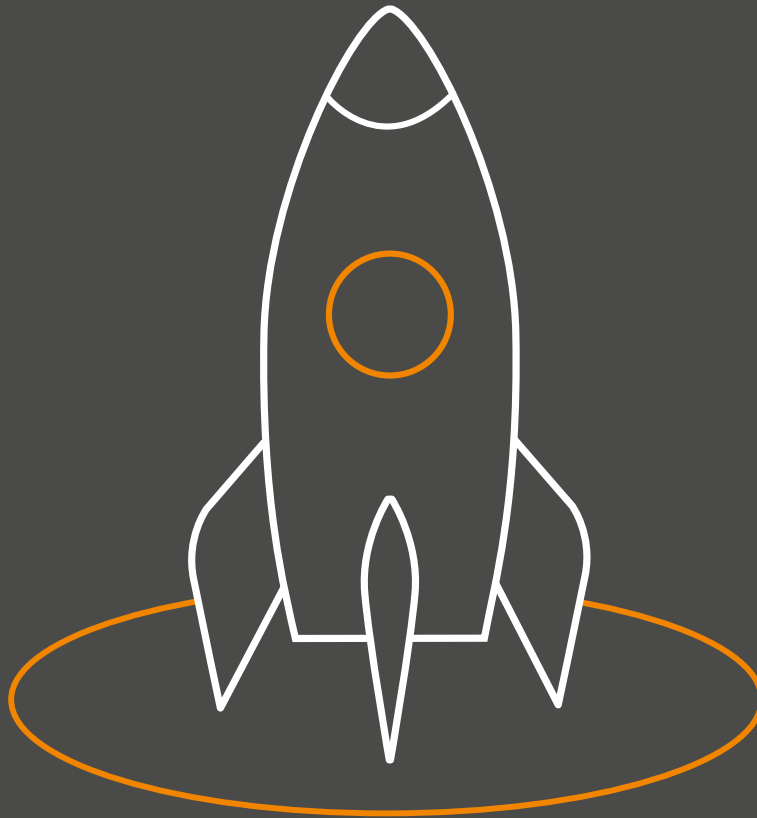
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collaboration tools. The October 2019 release of HighQ introduces solutions templating, providing for repeatable site solutions. Document bundling for transactional and litigation use cases will be available. AI Hub will be enhanced with more granular control, identification of additional clauses and enhanced reporting/status tracking. The client capabilities portal in Publisher will also be enhanced.

With AI, data visualisation and robotic process automation leading the pack of technologies that the largest law firms are piloting, developing and evaluating (as reported in **Briefing** Legal IT landscapes 2019), Thomson Reuters has been engaging with law firms, in-house lawyers and other technology vendors across the UK, US, Canada and Europe, to understand current workflows and tasks, the current use of technology and data, and users' areas of frustration. With the growth in legal tech that solves individual use cases, for the lawyer there is a poor user experience and a suboptimal process. For the legal

tech and operational teams, there are issues with onboarding, low levels of adoption and how to demonstrate ROI flowing from legal tech. Thomson Reuters believes there's an opportunity to transform the current disconnected, point-solution experience into a unifying platform, with a simplified user experience that meets the needs of those doing the work and those providing onboarding. This platform could be open to allow integration with solutions from other tech vendors, in addition to integrating with Thomson Reuters' own solutions such as Westlaw UK and Practical Law – solutions that are being further enhanced with AI capabilities to speed up legal research and the practice of law.

In the great automation race, data delivered in the right place and at the right time is often the biggest driver of change. From document automation and collaboration, to financial management, process and project management, Thomson Reuters is helping to transform the legal sector. ▀



# Contract Express 8.5 has landed

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